

OREGON RETIREMENT SAVINGS PLAN – OUTREACH INTERAGENCY WORK PLAN 2016 / 2017 *EVERGREEN, AS OF DECEMBER 2015*

Successful launch of the Oregon Retirement Savings Plan requires a robust awareness and communication campaign, ensuring stakeholders know about the Plan, are able to see its progression to and through the launch phase, and understand how the Plan may impact them.

This outreach work plan outlines key messages, methods, and timing, focusing first on the existing infrastructure available through ORSP staff and five agencies that consistently engage with employers and employees today. Those agencies are the Bureau of Labor and Industries (BOLI), the Department of Consumer & Business Services (DCBS), the Employment Department (ED), the Department of Revenue (DOR), and the Oregon Secretary of State (SOS).

Additional engagement and messaging opportunities through other agencies and organizations will be included as identified.

Note – plans identified here are draft as of a point in time and may be changed at any time to reflect changes in opportunities, needs, and resourcing.

First Quarter – 2016

Activities in the first quarter will focus on establishing print material and online presence to facilitate introductory conversations and to serve as simple point of reference for the plan.

Proposed to include:

- Printed Card – 4x8½ introductory card, similar to the *Employer’s Guide for Doing Business in Oregon*
- Public Web Site – providing for Welcome / Introductory / FAQ / Progress Report information
- Identity to support – name, URL, logo and style reference information
- Initial content for the web site

Outreach Activity

Following completion of the above, begin to action Agency engagement. First quarter opportunities include:

- BOLI – Technical Assistance for Employers – introduce TA team to the ORSP and reference material. Prepare to provide quarterly updates, becoming increasingly more specific about expectations of employers.

Non-agency activity should include regular public messaging through the press and other avenues, keeping the plan and its progress visible to the public, and promoting its beneficial impact on the state and Oregonians.

Key Message/s

The Oregon Retirement Savings Plan is targeted to come online in July 2017. Communicate purpose and characteristics of the plan. When asked, refer employers and interested parties to the plan web site.

Second Quarter – 2016

Activities in the second quarter will focus on establishing business community awareness of the plan, its purpose and target participants, and launch timeline. Opportunistically, ORSP staff will also engage to get feedback on the ORSP to guide implementation efforts.

To include refreshed content and messaging on the web site over the course of the quarter.

Outreach Activity

Initiate outreach and early messaging through a variety of avenues, including:

- Public seminars – provide printed information and serve as a speaking resource: BOLI
- Web sites – create links to ORSP site – BOLI
- Messaging
 - introduce ORSP messaging to the GovDelivery notification system – DCBS¹
 - introduce ORSP messaging to the Payroll Tax News listserv – DOR

Non-agency activity should include regular public messaging through the press and other avenues, keeping the plan and its progress visible to the public, and promoting its beneficial impact on the state and Oregonians.

¹ Important note in regards to this outreach – sign up is voluntary by individual and does not identify organizational affiliation, so employer reach will be less than 100% and will include employers with both plan-eligible and non-eligible employees.

Key Message/s

The Oregon Retirement Savings Plan is targeted to come online in July 2017. Purpose, characteristics, and target participants of the plan. Refer recipients and interested parties to the plan web site.

Third Quarter – 2016

At this point, the plan will be within its 12-month launch window. Activities in the third quarter will focus on increasing business community awareness of the plan and initiating workforce-level awareness of the plan on an ‘it’s coming’ basis. ORSP staff will continue to engage with organizations in person and online to get feedback on the ORSP to guide implementation efforts.

To include refreshed content and messaging on the web site over the course of the quarter.

Outreach Activity

Continue previous outreach activities and initiate these new points of contact:

- ‘Train the Trainer’ introductions to the ORSP and reference material
 - Apprenticeship and Training division – BOLI
- Public seminars – provide printed information and serve as a speaking resource
 - DOR – seminars and outreach to employers and service providers
 - ED – topical seminars and presentations to employer groups
 - Oregon OSHA – seminars and regional conferences throughout the year²
- Web sites – create links to ORSP site
 - Quarterly Tax Report filing site – ED
 - New Employer Payroll Tax registration / Oregon site – SOS
 - Business Xpress portal – SOS
 - Oregon Business Wizard - SOS
- Messaging
 - Include ORSP messaging with New Employer Registrations – ED
 - Include ORSP messaging with Business Renewal Notices – SOS
 - Wage & Hour construction contractor survey – BOLI/ED
- Engage department’s consumer outreach liaisons – DCBS

Non-agency activity should include regular public messaging through the press and other avenues, keeping the plan and its progress visible to the public, and promoting its beneficial impact on the state and Oregonians. Activity will begin to ramp up during this period.

² The level of participation by the ORSP (materials, informational booth and/or speaker) for each seminar and conferences will be determined as logistics are finalized.

Key Message/s

The Oregon Retirement Savings Plan is targeted to come online in July 2017. Purpose, characteristics, and target participants of the plan. What Employers and Service Providers should expect. What participants can expect. Details on the plan web site.

Fourth Quarter – 2016

During this period, the plan will be 6-9 months from launch for Phase 1. Activities in the fourth quarter will focus on increasing business community and workforce-level awareness of the plan on an ‘it’s coming/what to expect’ basis. Efforts will focus on ensuring service providers are organized and ready to support implementation of the plan for employers. ORSP staff will continue to engage with organizations in person and online to get feedback on the ORSP to guide implementation efforts.

To include refreshed content and messaging on the web site over the course of the quarter.

Outreach Activity

Continue previous outreach activities and initiate these new points of contact:

- ‘Train the Trainer’ information on the ORSP with reference material
 - Workers Compensation Ombudsman for Small Business – DCBS
 - Office of Small Business Assistance, Ombudsman - SOS
 - Work Source Center staff – ED
- Public seminars – provide printed information and serve as a speaking resource
 - Annual Employment Law Conference – Technical Assistance team – BOLI
 - Annual Conference – Oregon OSHA – DCBS
 - Annual workers’ compensation educational conference - DCBS³
 - Job Fairs and related opportunities on a continuous schedule - ED
- Web sites – create links to ORSP site
 - Unemployment Insurance site, worker engagement – ED
 - New Business Formation section, Oregon Business Registry – SOS
 - Oregon How to Start a Business – Online Guide, English and Spanish currently – SOS
 - Employers Guide to Doing Business in Oregon – Online Guide, English and Spanish currently – SOS
- Messaging
 - Annual Notice of Unemployment Insurance Tax Rates – ED
 - Oregon Combined Payroll Booklet (print) – DOR
 - Workers’ Compensation Premium Assessment Notice - DCBS
 - Scheduled messaging on social media platforms – ED

³ The level of involvement by the ORSP will be determined as logistics are finalized. Given that the conference is sponsored by a national entity, there may be restrictions on presentation topics outside the scope of workers’ compensation.

- Oregon Tax Coupon / New and Noteworthy – DOR
- Collateral for Employers
 - Employer Posters for 2017 – BOLI

Non-agency activity should include regular public messaging through the press and other avenues, keeping the plan and its progress visible to the public, and promoting its beneficial impact on the state and Oregonians. Activity will continue to ramp up during this period.

Key Message/s

The Oregon Retirement Savings Plan is coming online in 2017. Purpose, characteristics, and target participants of the plan. What you need to know now to be ready. Details on the plan web site.

2017 and Launch

In the first half of the year, messaging and information will become more specific and detailed, and non-agency promotional and readiness activity will increase significantly. In the second half of the year, messaging will focus on reporting out wins and preparing more participants to enter the plan.

Outreach Activity

Repeat impactful cyclical activities such as engagement in public seminars and continuous education of and promotion to state-based and organization-based employer and employee support entities. Continue previous outreach activities and initiate these new points of contact:

- Information and Response
 - Wage and Hour Civil Rights team complaint routing information - BOLI
- Messaging
 - Registration letters – 1500 businesses monthly – DOR
 - Work Source Centers – information for job seekers - ED
- Additional Opportunities
 - Mail Campaigns can be executed using state employer databases if determined to provide strong cost/benefit
 - Other state agencies/boards/commissions may also participate in outreach utilizing their existing resources, similar to what the five agencies are proposing to do in this work plan. For instance, there are a number of licensing boards who will likely have employers/employees that will be participating in the ORSP (e.g., the Construction Contractors Board, Oregon Medical Board and Landscape Contractors Board).

Key Message/s

The Oregon Retirement Savings Plan is coming online in 2017. Purpose, characteristics and target participants of the plan. What you need to know now to be ready. Details on the plan web site.

The Oregon Retirement Savings Plan is here. How you can benefit, what you want to know about the plan, and where you can get more information.

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