

2015 ASPIRE AWARD:

**Honoring Innovative Leadership
in Promoting County Employee
Retirement Savings**



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is on your side



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We all have something in common – we hope, that one day, we will be able to retire with adequate financial resources. With that thought, the NACo Deferred Compensation Program offers county employees a way to save for their retirement – to supplement the pension payment that many anticipate. Given that financial demands may be high – mortgage, family expenses, credit card debt, college loans, etc. – convincing someone to save is a difficult task.

Some counties, as employers and plan sponsors of the NACo Deferred Compensation Program, have developed and implemented innovative approaches to help create opportunities for their employees to be retirement ready. NACo, and its Program administrator, Nationwide Retirement Solutions, have created the Aspire Award to recognize two plan sponsors that have gone above and beyond in empowering their employees for retirement success.

The First Annual “Aspire Award: Honoring Innovative Leadership in Promoting County Employee Retirement Savings” will be presented during NACo’s Annual Conference, July 10-13, 2015 in Mecklenburg County (Charlotte), North Carolina.

Two awards will be presented and consideration will be given to the plan sponsors who present measurable outcomes that result from unique, unusual, original efforts to successfully engage county employees in their retirement futures. Applicants must offer a deferred compensation plan that uses Nationwide Retirement Solutions as the recordkeeper.

Please review the guidelines below for further information. Please address questions to Lisa Cole at NACo at lcole@naco.org or 202/942-4270.



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Application Guidelines

Time Frame

The program/project must have been completed between 2012 and 2014. It may have taken three years to achieve or a few months.

Application Process

Please attach to your application form, a description of the activity/program you are submitting. Please make sure to identify the period of time (number of years, i.e., 2012-2014) for which these achievements are measured.

In addition to this description, please include appropriate measurements of success such as (the following are examples and not meant to be all-inclusive):

- Innovative approaches
- Increased participation rate—new participants and/or increased deferrals
- Increasing assets
- Offer “make it easy” products and services:
 - » Automatic enrollment/automatic escalation
 - » Roth 457
 - » Managed accounts
 - » Fiduciary services
 - » Financial planning
 - » Employer match
- Substantial participation (or increase in participation) at educational sessions, benefits fairs, etc.



2015 ASPIRE AWARD

Submission of Applications

Aspire Award applications are limited to one per plan sponsor/county. The application should include the attached form and an overview of the program (limited to two typed pages) that details and includes the following:

- Program/project objectives
- Implementation including the time frame and identification of offices/ departments involved
- Program/project results including success metrics as referenced above
- Benefits to employees and county/plan sponsor
- Supporting materials, such as copies of communications and marketing materials that led to your activity's success should be provided.
- Also include brief testimonials of one or more of the beneficiaries of the program/project.

Deadline for Applications:

The applications must be received by 5:00 pm Eastern time, Friday, May 15, 2015.

Applications may be submitted electronically to: plansponsor2015@naco.org or mailed to:

Aspire Award
NACo
25 Massachusetts Ave, NW Suite 500
Washington, DC 20001

Evaluation of Applications:

Applications will be evaluated by a subcommittee of NACo's Defined Contribution and Retirement Advisory Committee. Emphasis will be on the measurable outcomes of the projects.

Notification of Award Winners

Winners will be notified during the first week of June 2015.

The awards will be presented during the NACo Annual Conference July 10-13, 2015 in Mecklenburg County (Charlotte), North Carolina.



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ENTRY FORM

NAME OF COUNTY/PLAN SPONSOR: _____

CONTACT NAME: _____

CONTACT PHONE NUMBER: _____

CONTACT EMAIL ADDRESS: _____

TITLE AND BRIEF DESCRIPTION OF ENTRY: _____

Attach complete description of your submission (limit of two type written pages), along with any supporting documents such as marketing materials by May 15, 2015.

As between NACo and the Applicant, the Applicant retains ownership of all intellectual property rights in and to their Aspire Award entry. As a condition of entry, Applicant grants NACo a perpetual, irrevocable, worldwide, transferable, royalty-free, and non-exclusive license to use, reproduce, adapt, modify, publish, distribute, create a derivative work from, and publicly display the Application and the work depicted therein for any purpose, including display on the NACo website or inclusion in promotional materials, without any attribution or compensation to Applicant. Applications will not be returned. NACo retains all rights in the NACo products and services and entry into the Aspire Award program will in no case serve to transfer any NACo intellectual property rights to the Applicant.



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