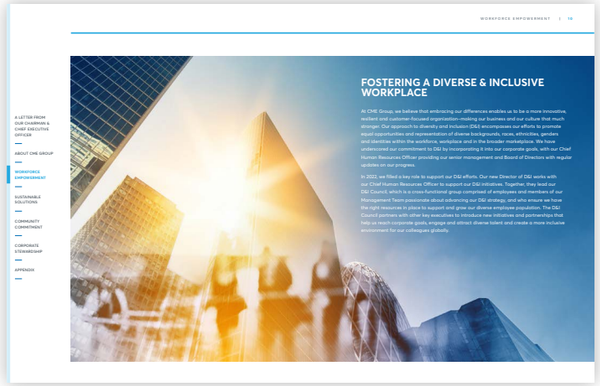
nancy@haraszdesign.com

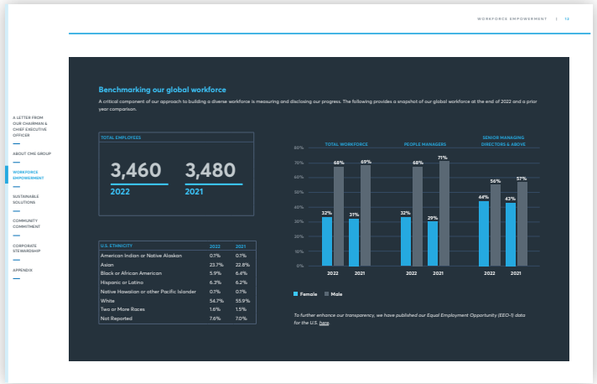
818 731 9039

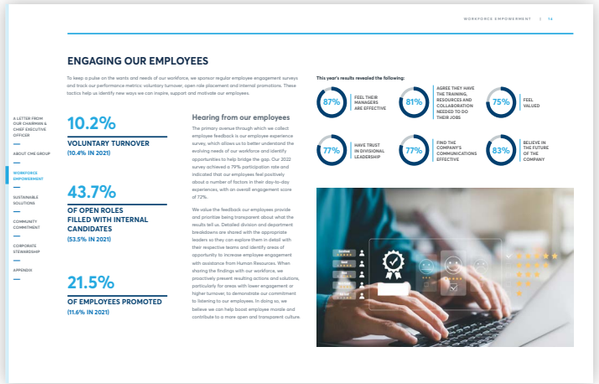
ENTER

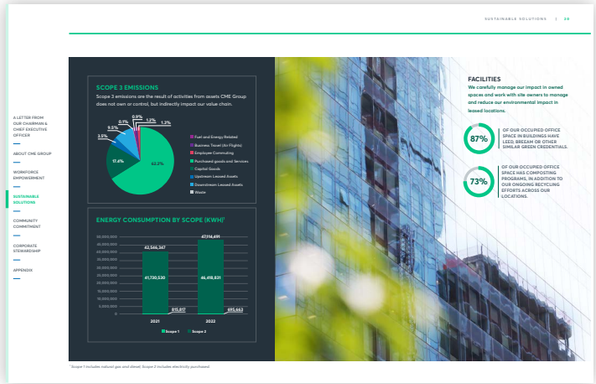
Interactive PDF brochures, print brochures, sustainability reports, annual reports, marketing materials, packaging, proposals, newsletters, branding and info graphics.

Client list: Activision/Blizzard, AECOM, American Golf, Aramark, Allergan, Alpine Broadcasting, Amgen, Arbonne, BJ's Restaurants, Chalice Recording Studios, Children's Hospital Los Angeles, CME Group, County of San Diego, Disney, Edison Mission Energy, Electronic Arts, Globant, Health Net, IndyMac, Lucky Brand, MCA Records, Mead Paper, Mercer, Neurocrine, NextGen, Okta, Pasadena Play House, Securitas Security Services, SpaceX, Toyota, The Cheesecake Factory, The Writer's Guild, The Zentih Company, Wedbush, Western Center on Law & Poverty, Zimmer Dental and many more.





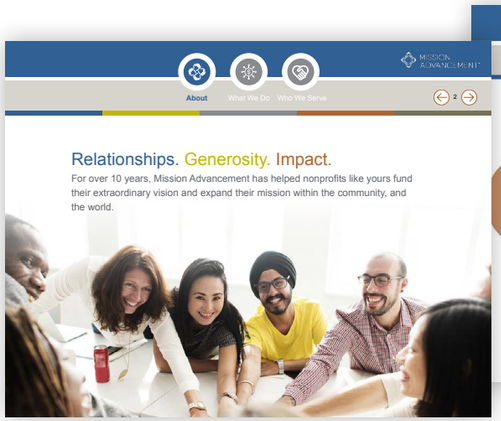


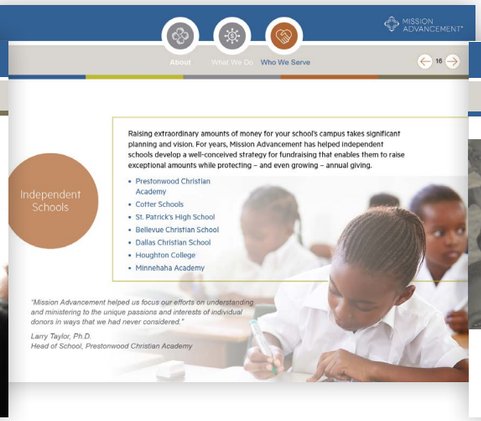


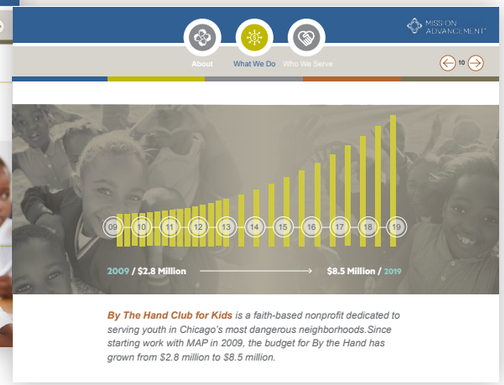
nancy@haraszdesign.com 818 731 9039

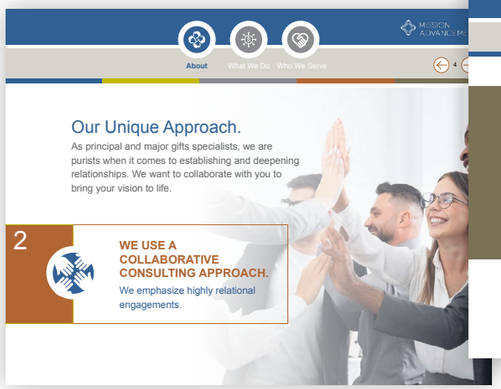
CME Group

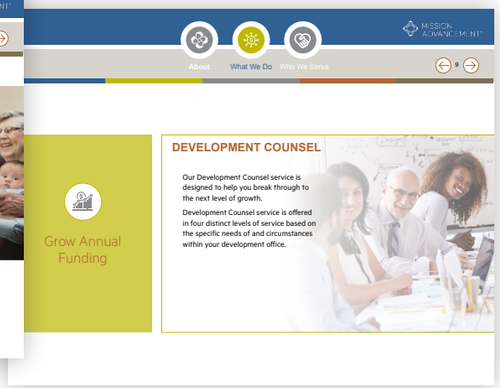
Sustainability Report – Interactive PDF



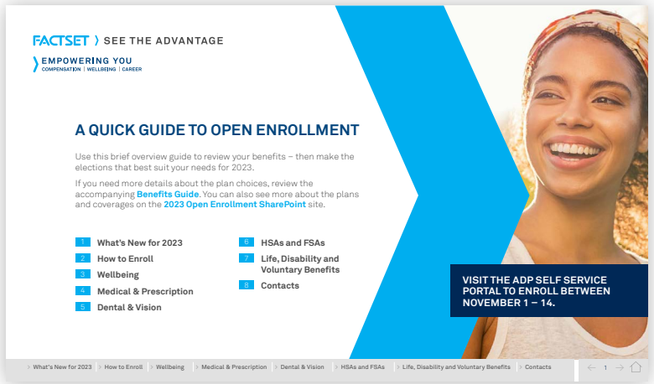


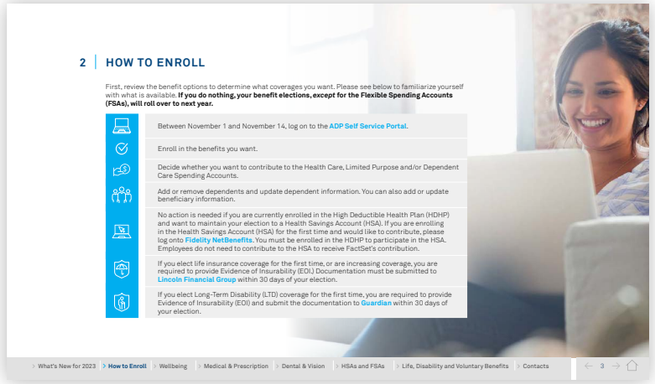


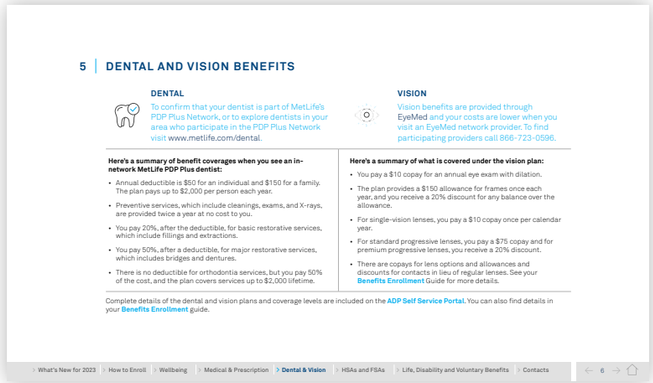


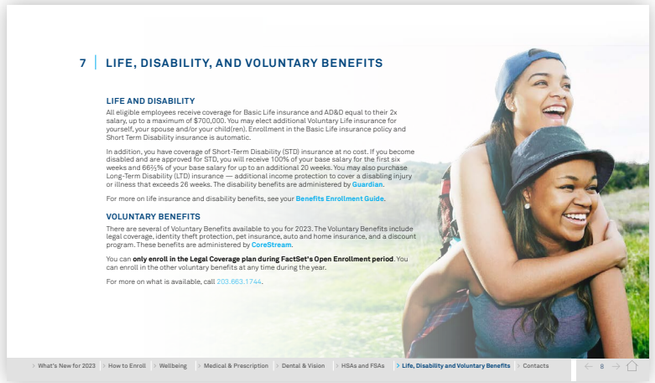


nancy@haraszdesign.com 818 731 9039





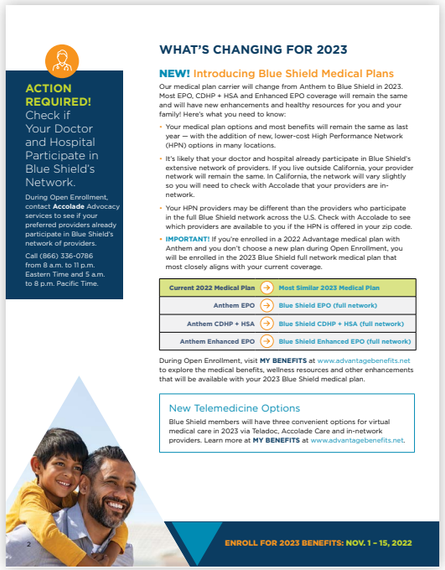


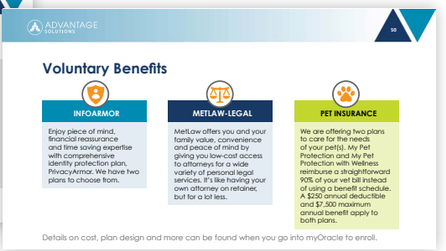


nancy@haraszdesign.com 818 731 9039

FactSet

Interactive PDFs



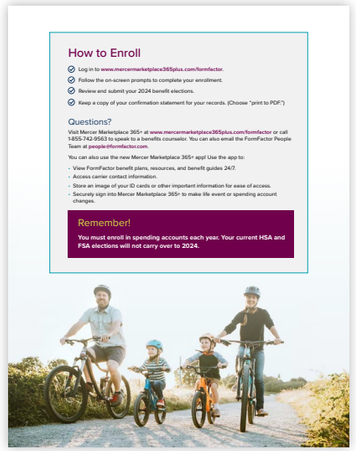


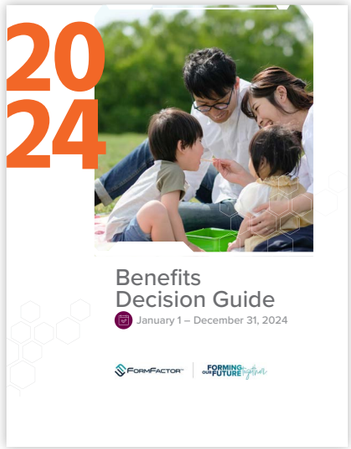
nancy@haraszdesign.com 818 731 9039

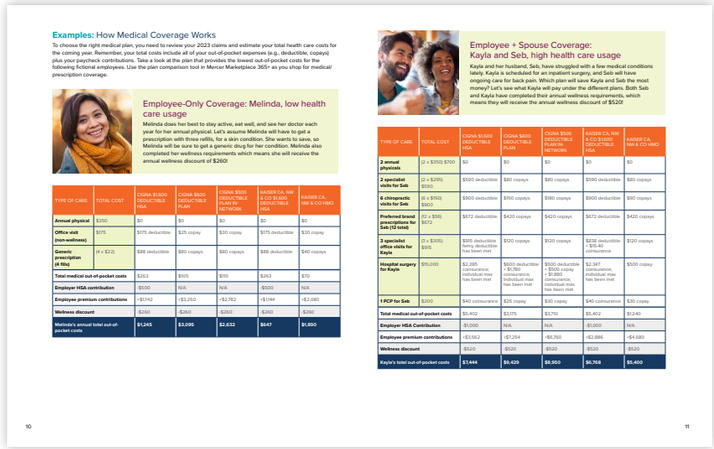
Advantage Solutions

Newsletters, Brochures, PowerPoint Presentations, Postcards, Mailers

Shown: Newsletter, Brochure, PowerPoint Presentation





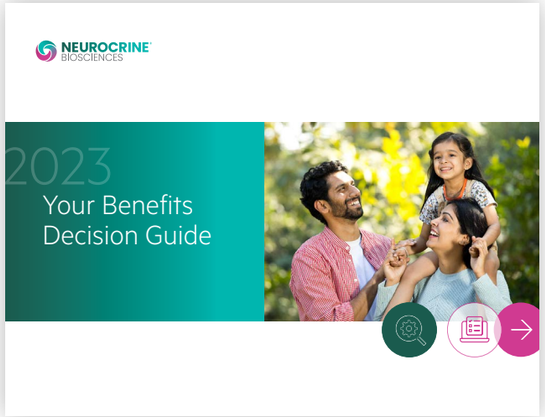


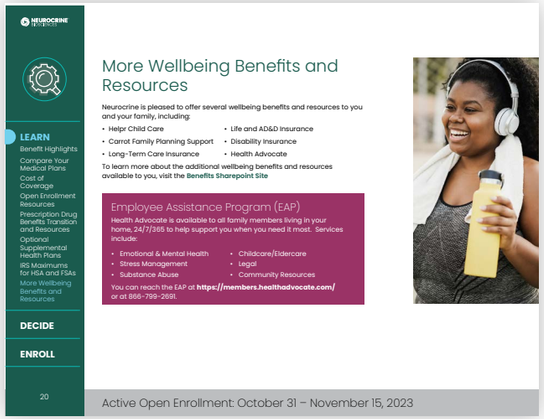
nancy@haraszdesign.com 818 731 9039

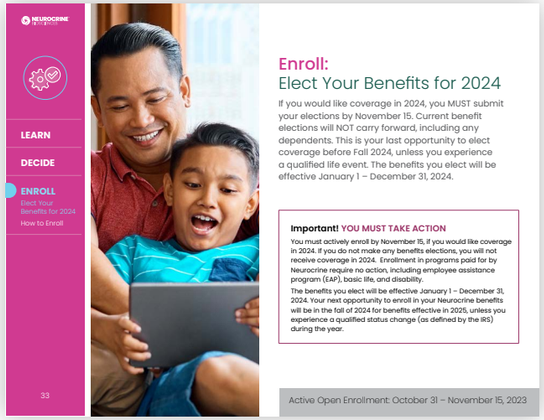
FormFactor

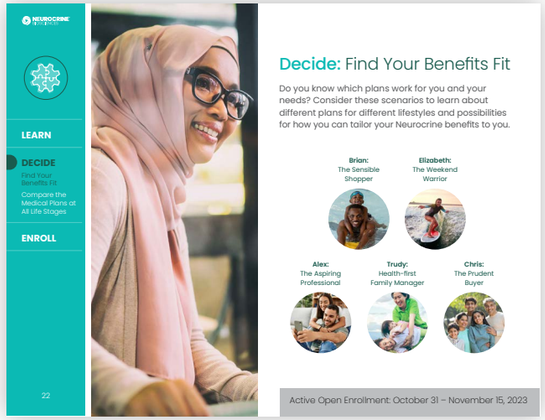
Brochures, Newsletters, Postcards, Mailers

Shown: Newsletter, Brochure, Mailer









nancy@haraszdesign.com 818 731 9039

Neurocrine

Interactive PDF

1 Executive Summary

During the summer and fall, the Arizona Board of Regents (ABOR), together with Arizona State University (ASU), Northern Arizona University (NAU), the University of Arizona (U of A) (collectively, the Arizona State University System, or AZUS), introduced several significant enhancements to the Arizona University System Optional Retirement Plan (ORP), effective October. For a number of reasons, the communication effort was not as successful as ABOR and the AZUS had hoped. Consequently, in May, Mercer was engaged to draft a communication strategy to rebuild participants' trust and confidence and to help faculty and staff take charge of their financial health and, in so doing, become financially fit.

The communication strategy that follows is a detailed roadmap designed to help ABOR and the AZUS realize these objectives, as well as those identified during the May 8 strategy session (Section 3, Goals and Objective).

Before ABOR and the AZUS can move forward, we recommend that you reconnect with ORP participants. The first phase of our strategy does just that. Only then can you look forward.

As to looking forward . . . we believe that focusing on educating participants about the ORP is just the first step in achieving your true objective — engaging and empowering participants so they can become financially fit and make their dreams come true. To help ABOR and the AZUS accomplish this broader goal, we took a holistic approach to this initiative, addressing not just the ORP, but the other retirement programs available to faculty and staff.

Our communication sets the vision. All you need to do is turn the pages to

LEARN.
PLAN.
ACHIEVE.

1

2 Communication Strategy Context

rategic Principles

d on our meeting with ABOR and the AZUS, as well as our audit of the print and online munications, we developed the following communication principles to help you achieve desired future state.

Take back the communication of the ORP, which was co-opted by the investment providers and then hijacked by unhappy participants.

Re-establish your credibility, as well as your connection with ORP participants, by rebuilding their trust and confidence

- Begin by acknowledging past short-comings in the enhancement communications
- Map out a plan for the upcoming financial fitness initiative

Reconnect with Arizona State Retirement System (ASRS) participants and demonstrate investment in their financial health by launching a financial fitness initiative

Develop and implement a multi-dimensional strategy that respects the unique needs of the university environment (e.g., leadership structure, diversity, timing)

Create a common brand that articulates universal messages across all three universities and that is visually recognizable

- Ensure that the brand is reflected in investment provider materials
- Reflect the fact that one size doesn't fit all

- **Obtain** the support and endorsement of senior leadership
- **Offer** participants and new hires, as well as family members, a mix of media to account for different learning styles and generational preferences: print, in-person meetings, and technology solutions, including portals, flipbooks, tutorials and games and widgets.

Our strategic principles specifically address the four most significant shortcomings of the rollout:

- **The initiative lacked a comprehensive change management strategy**
- **The body of work did not reflect shared messaging and branding**
- **The investment providers' outreach was not coordinated**
- **Deliverables were distributed off-season.**

3

3 Goals and Project Objectives

uring our May 8 meeting, ABOR and the AZUS identified the following communication bjectives for the next 18 months:

General

Promote the perception by faculty and staff that the AZUS cares about their financial fitness and is invested in providing them with the requisite tools and resources to help them achieve it.

Take a holistic approach to financial education around budget management, investor education and overall financial fitness.

Establish clear brand and ownership of the retirement program and the financial education initiative.

Adopt a centralized repository for content and tools which is easily accessible to all members of the AZUS community.

Maximize investment provider resources and tools, and ensure that investment provider materials reflect consistent program messaging and branding.

4

4 Stakeholder Analysis

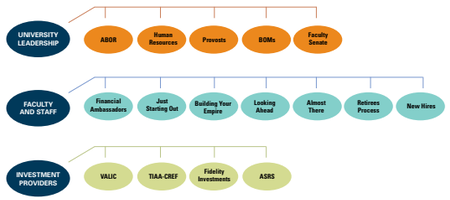
Based on our earlier discussion, we identified three main stakeholder groups:

- University leadership
- Faculty and staff
- Investment providers.

Each stakeholder group comprises a number of discrete audiences.

Financial Ambassadors

An audience included in Faculty and Staff is that of financial ambassadors. Financial ambassadors play a role similar to the role played by champions in a wellness initiative. For details, see Appendix A.

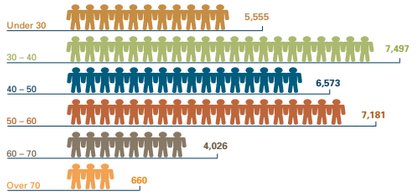


6

4 Stakeholder Analysis

Connecting with Your Different Audiences

ased on the demographics we received from e AZUS, your overall population looks like this:



Insight

It's interesting that your overall population comprises a large number of younger employees. This audience typically has broader financial issues than saving for retirement. A holistic approach to financial fitness will resonate well with them.

7

7 Communication Workplan

e workplan has o clear and parate phases. ch phase has its n objectives, tended audiences, liverables and commended stribution dates.

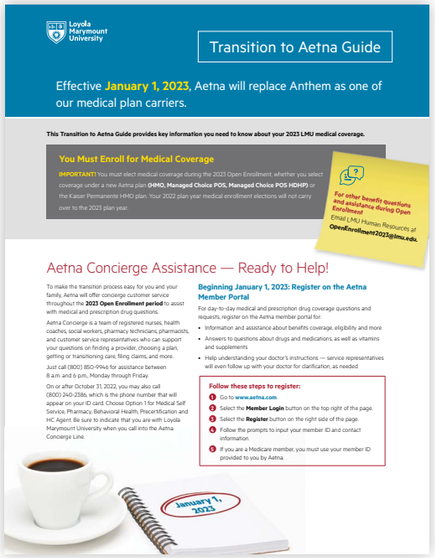
Phase 1:

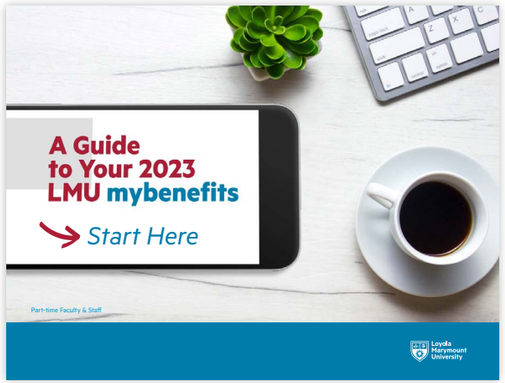
Reconnecting with stakeholders and repairing any loss of participant confidence that may have occurred during the implementation of the enhancements, such as participant confusion/suspicion surrounding the reasons behind the changes.

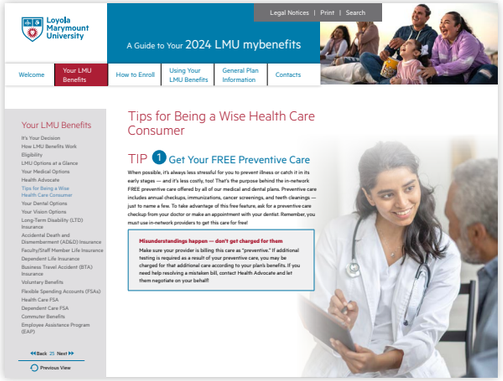
Phase 2:

Engaging — or re-engaging — participants in their financial fitness and well-being. Low levels of financial fitness, such as lack of retirement readiness and continued low participation in the 403(b) Plan, will be addressed with targeted campaigns.

16





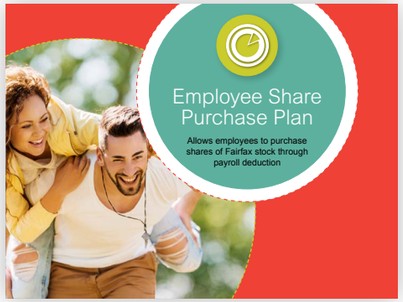


nancy@haraszdesign.com 818 731 9039

Loyola Marymount University

Brochures, Newsletters, Postcards, Mailers, Interactive PDFs

Shown: Interactive PDF, Newsletter, Postcard

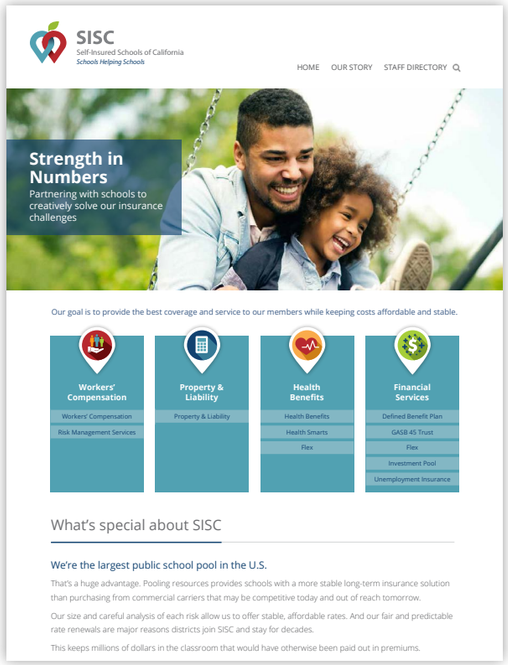


nancy@haraszdesign.com 818 731 9039

The Zenith

Employee Guides, Wellness Guides, Newsletters, Posters, Postcards, Mailers, PowerPoint Presentations, Animated Videos, Online Graphics

Shown: Employee Guide, PowerPoint Presentation, Online Graphics

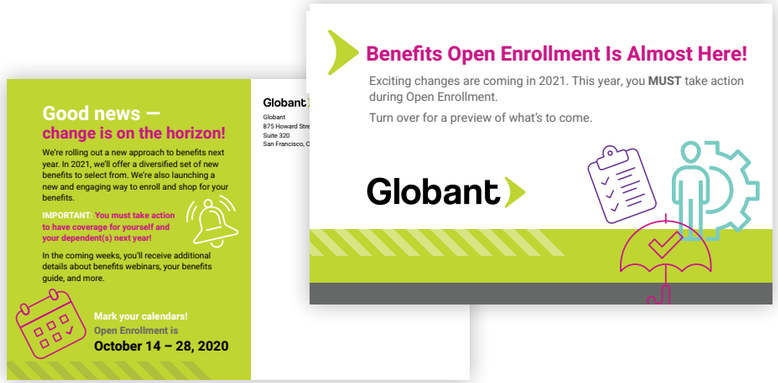


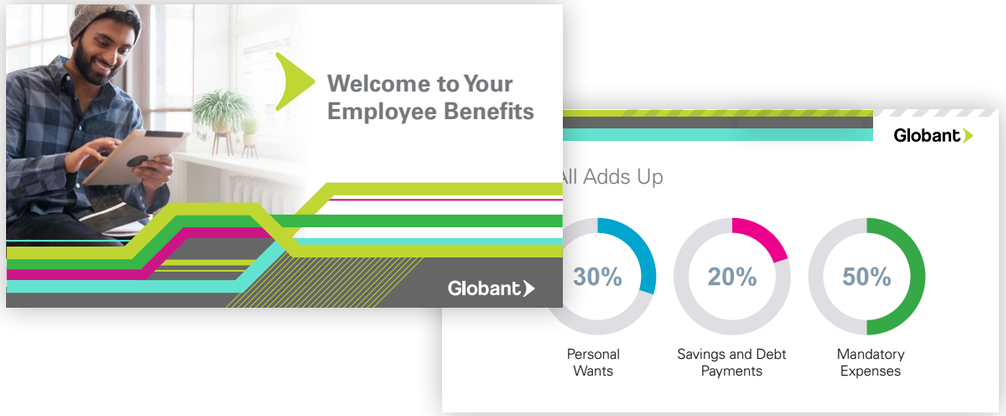
nancy@haraszdesign.com 818 731 9039

SISC | Self-Insured Schools of California

Logo Design, Branding, Website, Interactive PDF, PowerPoint Presentation, Posters, Brochures, Mailers, Ads

Shown: Website, Banner, Advertisements, PowerPoint Presentation



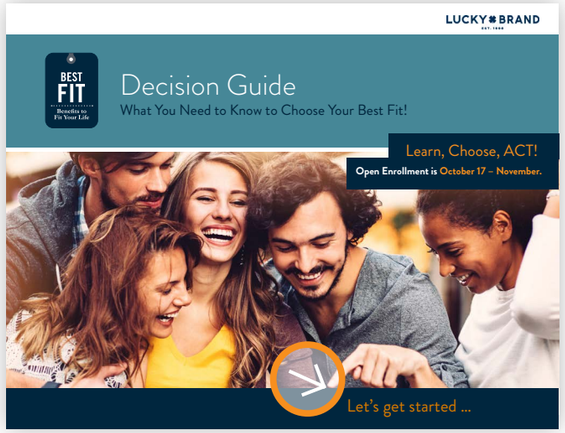


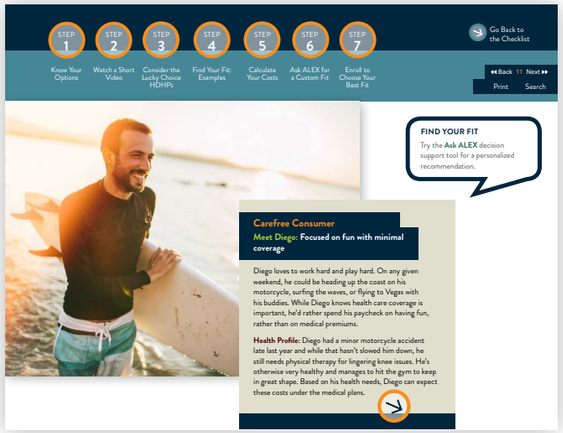
nancy@haraszdesign.com 818 731 9039

Globant

Interactive PDF Guides, PowerPoint Presentation, Online Graphics

Shown: Interactive Guide, Postcard, PowerPoint Presentation Template



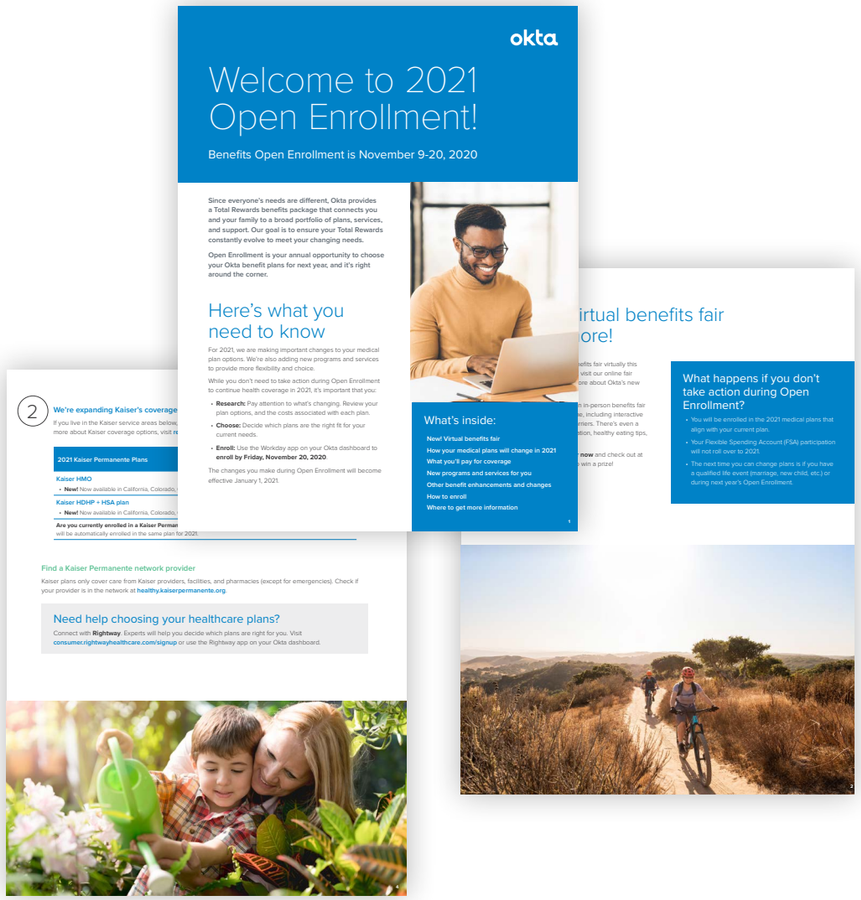


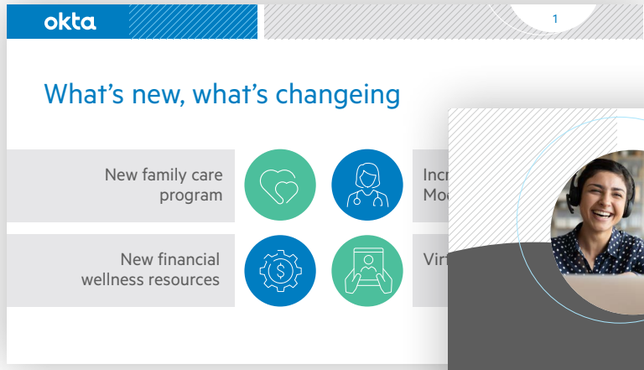
nancy@haraszdesign.com 818 731 9039

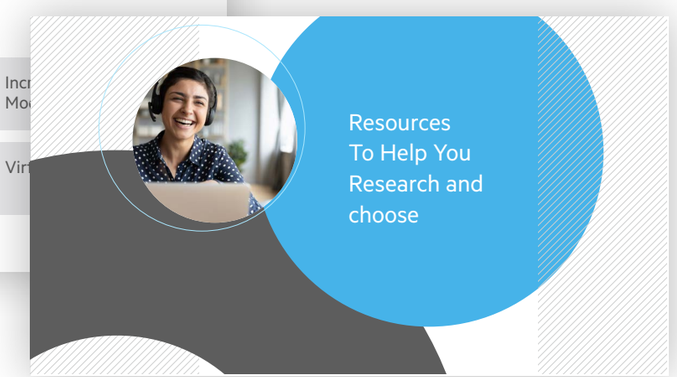
Lucky Brand

Interactive PDF Guides, Poster, Postcards, Brochures, Mailer, Recruitment Flyer, Online Graphics

Shown: Interactive PDF



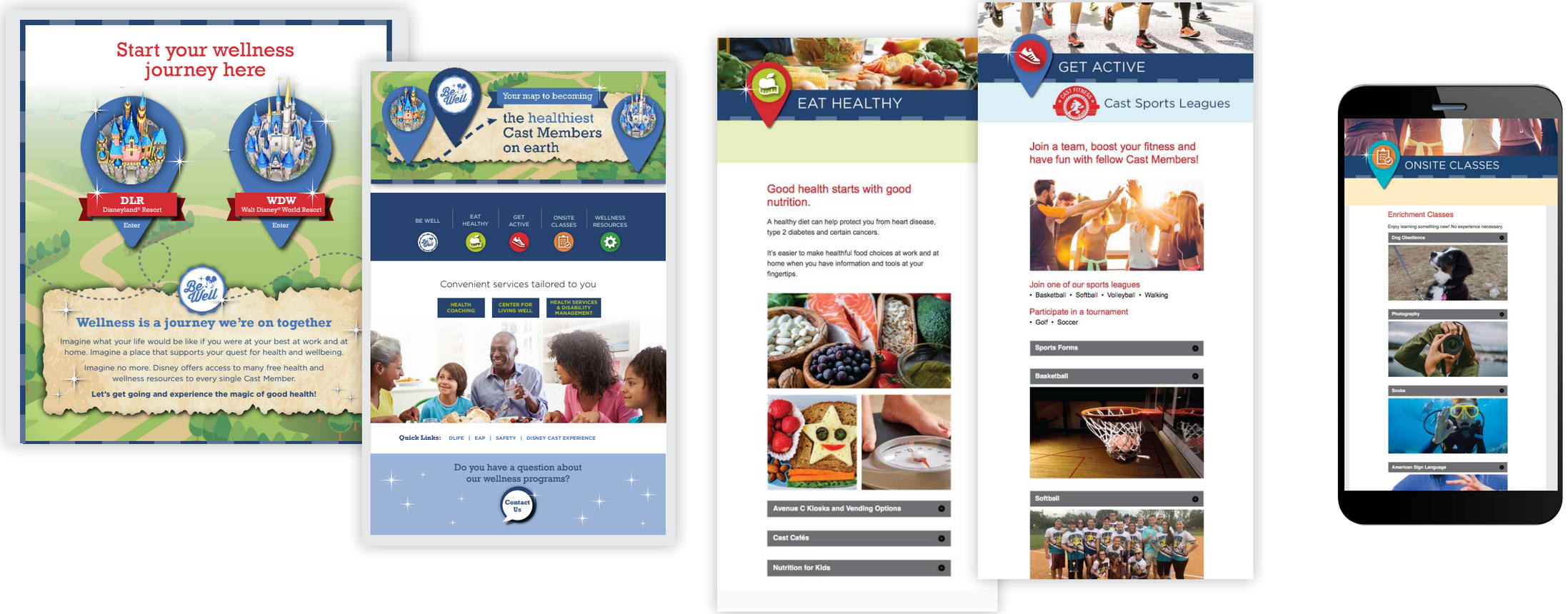




nancy@haraszdesign.com 818 731 9039

Okta

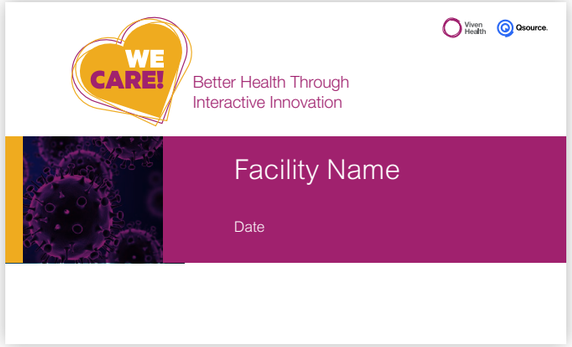
Flyers, PowerPoint Presentation Template

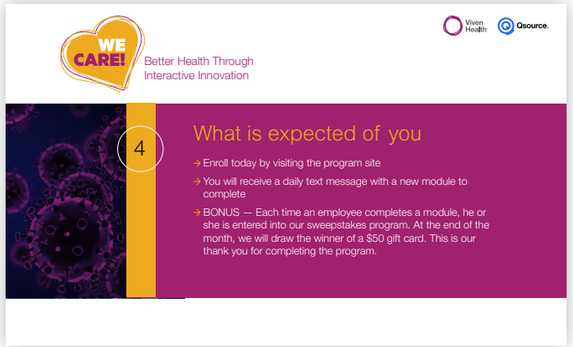


nancy@haraszdesign.com 818 731 9039

Disney

Wellness Website

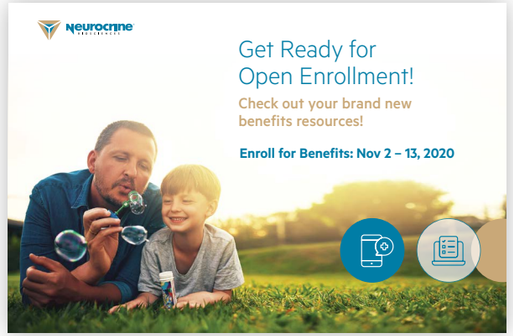




nancy@haraszdesign.com 818 731 9039

Viven Health

PowerPoint Presentation, Postcard, Logo



nancy@haraszdesign.com 818 731 9039

Neurocrine

Interactive PDF, Flyers, Postcard, Online Graphics

nancy@haraszdesign.com 818 731 9039

Art Swagger

Flyers, Poster, Website and Social Media Graphics

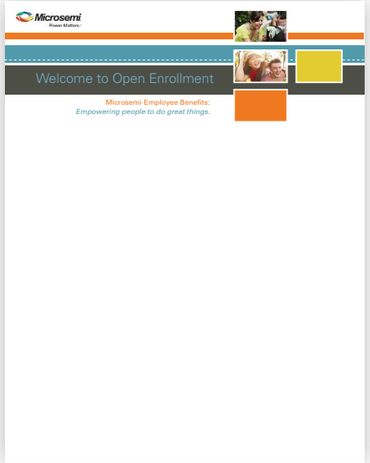
Shown: Poster, Flyers, Instagram, Online Graphics

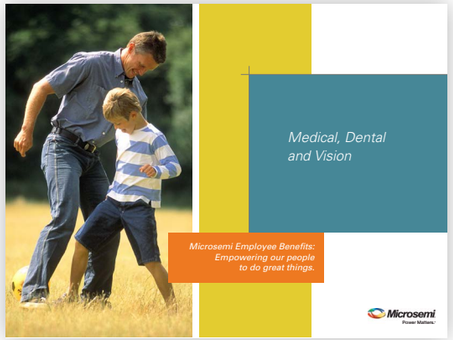
nancy@haraszdesign.com 818 731 9039

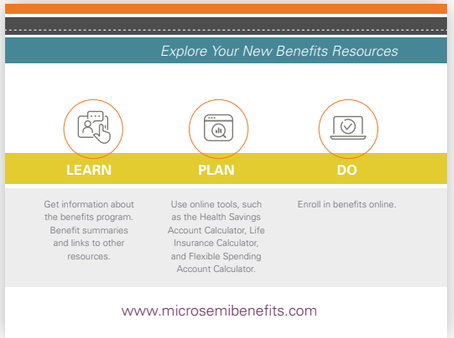
County of San Diego

Employee Guide, Postcards, Mailer, PowerPoint Presentation Template, Web Graphics

Shown: Employee Guide, PowerPoint Presentation Template





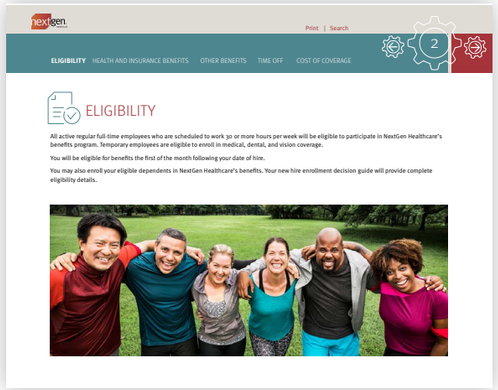


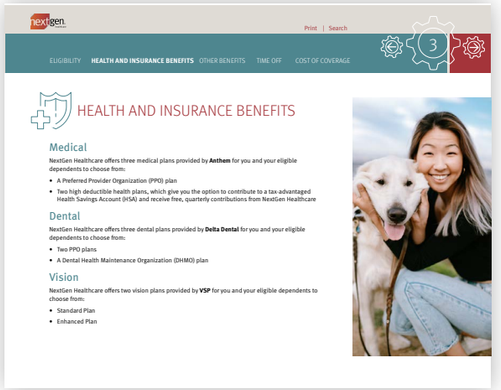
nancy@haraszdesign.com 818 731 9039

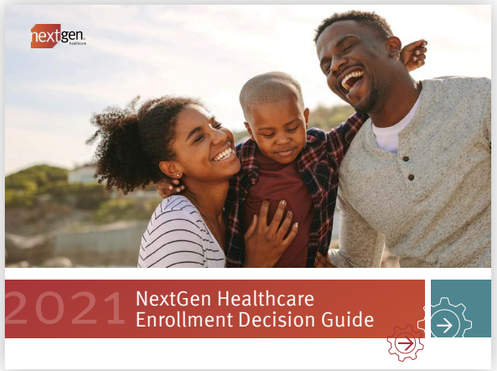
Microsemi

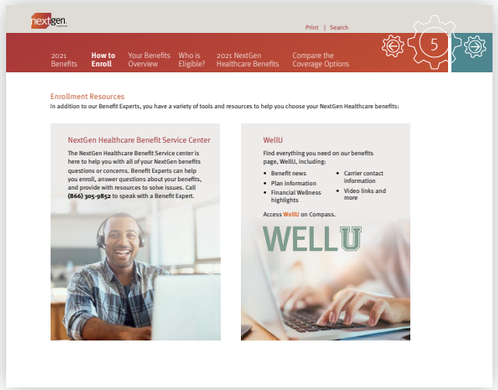
Employee Guide, Poster, Postcards, PowerPoint Presentation, Banner, Web Graphics

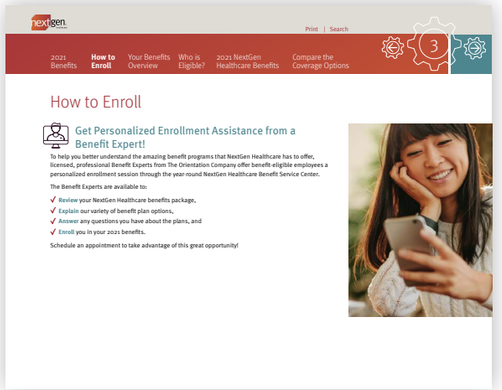
Shown: Employee Guide, PowerPoint Presentation, Banner









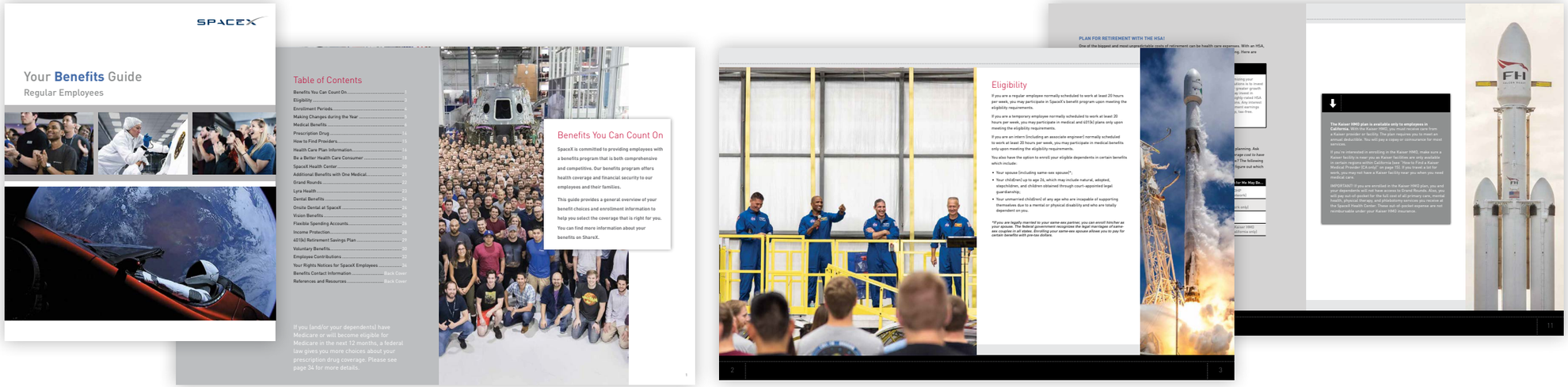


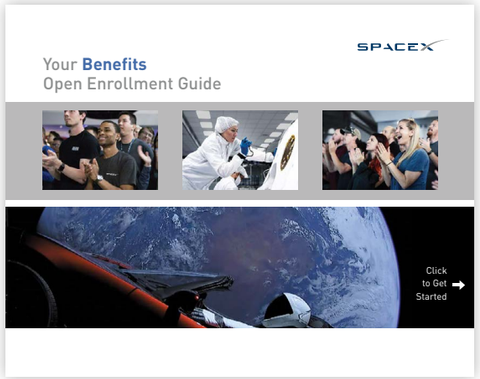
nancy@haraszdesign.com 818 731 9039

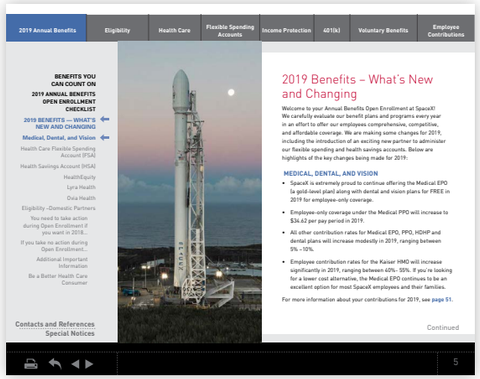
NextGen

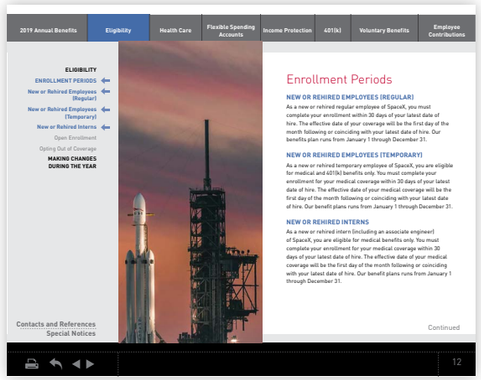
Interactive PDFs, Flyers, Postcard, Online Graphics

Shown: Interactive PDF Guides





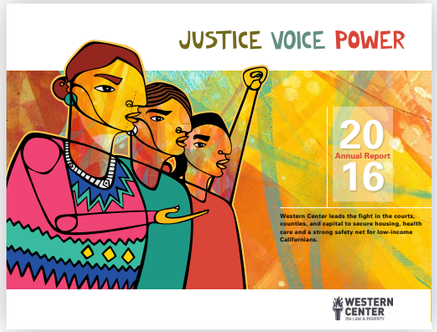


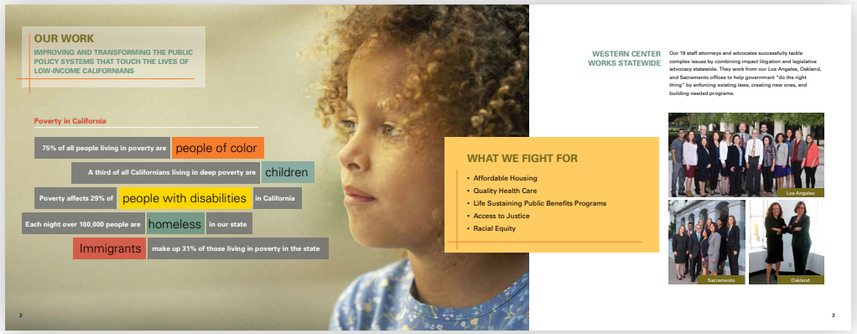


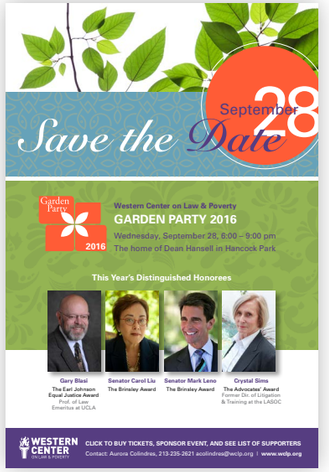
nancy@haraszdesign.com 818 731 9039

SpaceX

Brochures, Interactive PDF





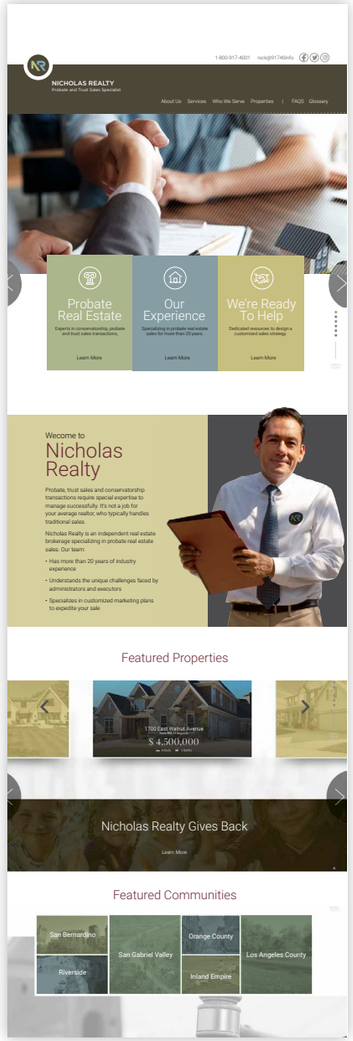


nancy@haraszdesign.com 818 731 9039

Western Center on Law & Poverty

Annual Report, Invites, Mailer, Social Media Graphics

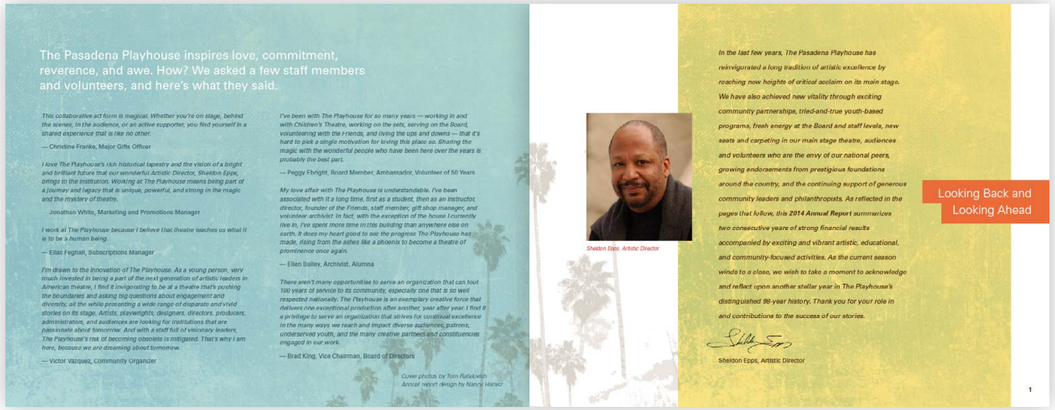
Shown: Annual Report, Invite

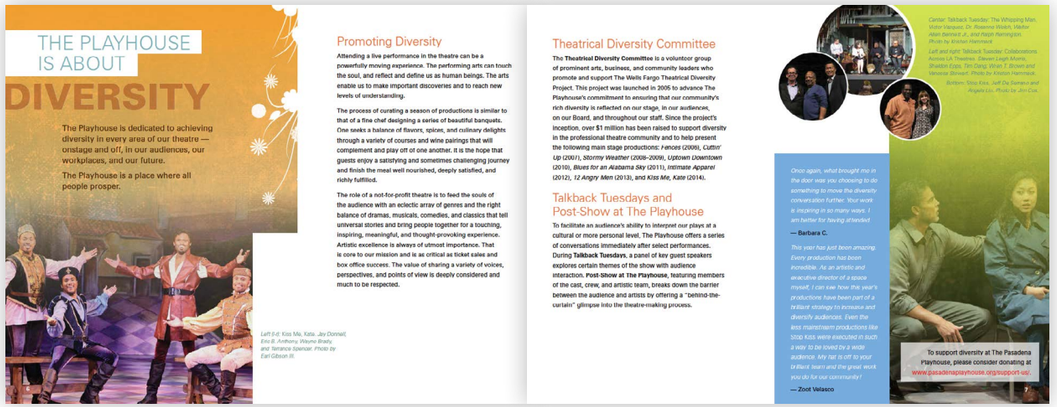


nancy@haraszdesign.com 818 731 9039

Nicholas Realty

Logo and Branding, Website Design, Email, Brochure, Mailer, Stationery, Signage, Binder, Social Media Graphics





nancy@haraszdesign.com 818 731 9039

The Pasadena Playhouse

Annual Report

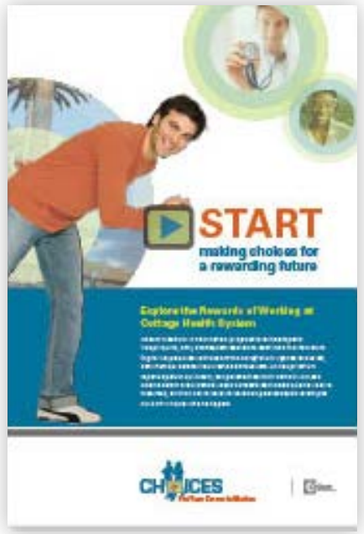
nancy@haraszdesign.com 818 731 9039

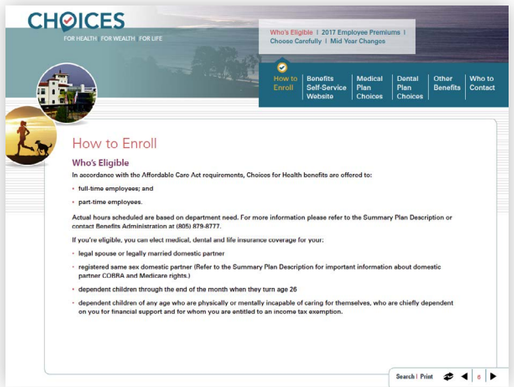
Lowell Thomas

Animated Awards Presentation

SATW Foundation Lowell Thomas Travel Journalism Awards

https://www.youtube.com/watch?v=tdCW1dhypGw





nancy@haraszdesign.com 818 731 9039

Cottage Health

Interactive PDFs, Brochures, Newsletter, Posters, Postcards,
PowerPoint Presentation, Web Graphics, Wellness Guide, Recruiting Posters

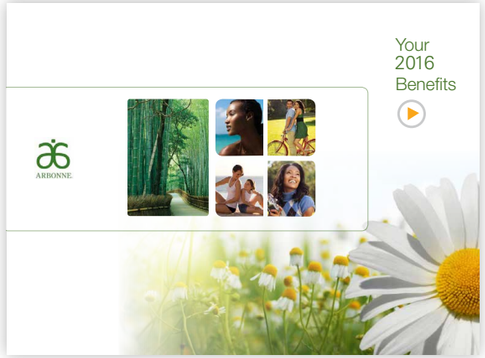
Shown: Recruiting Posters, Interactive PDF Guide

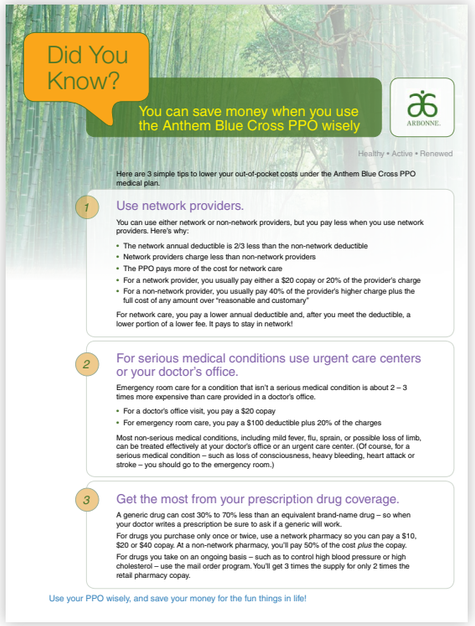
nancy@haraszdesign.com 818 731 9039

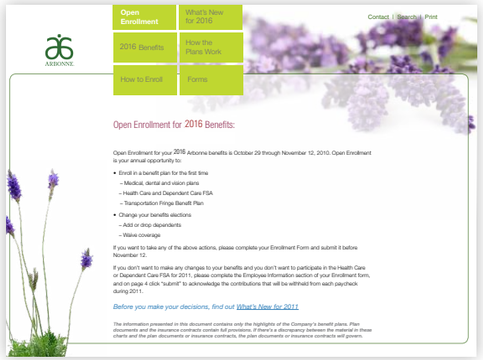
Carl's Jr.

Interactive PDFs, Newsletters, Posters, Micro Site, Postcards, Online Graphics

Shown: Interactive PDF Guide, Brochure







nancy@haraszdesign.com 818 731 9039

Arbonne

Interactive PDFs, Posters, Postcards, Mailers, Flyers, PowerPoint Template

Shown: Interactive PDF, Flyer

nancy@haraszdesign.com 818 731 9039

Left to right:

1. SISC | Self-Insured Schools of California
2. Chalice Recording Studios
3. Nicholas Realty Inc.
4. Zenith Insurance / Wellness Program
5. Claremont University
6. Plum Mobile App
7. Urban Garden
8. World Music
9. Cottage Health
10. Bridge City Brokers
11. Toyota / Wellness Program
12. Daniel Fine Art