A Future Glimpse

Five Pension Systems That Are Leading the Way in Online Member Experiences

WEBINAR SERIES
Welcome

Rocky Martin, VP Partnerships, Digital Deployment

Mac Clemmens, CEO, Digital Deployment
Experience

CalSTRS
New York City ERS
ERS Georgia
Maryland SRPS
Los Angeles City
Los Angeles FPP

Alameda CERA
Contra Costa CERA
Orange County CERS
Sacramento CERS
San Mateo CERA
San Bernardino CERA
Venture CERA
Member Engagement: The Holy Grail

- Enrollment
- Visits
- Only 5-10% use online portals per year
Leading the Way Webinar Series

Week 1
Member portal and app enhancements
Pension portals are a big time saver and resource for members. How SamCERA and the NFL are leading the way.

Week 2
Improved website design and information architecture
How systems like ACERA and NYCERS are using data to elevate the member experience.

Week 3
Website accessibility
With Section 508 in effect, the bar is set for ADA-compliance and websites. See how CalSTRS kept up and met all requirements.
Week 1.
Member portal and app enhancements

How do you modernize your member portals and apps without having to deploy a new membership management system?
The challenges

- Hard to engage early career members.
- Demographics are changing. Younger members have different expectations of technology.
- Pension modernization projects can take years and cost millions of dollars. You are already behind the curve when you launch.
Self-Service Portal/App Approaches

**Self Managed**
Managed by IT, connects directly to database.

**Commercial Product**
Waiting for pension modernization. With fingers crossed.
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Alternative User Interfaces
- People want apple and are getting DOS
- Separate the portal and evolve it
- NFL, PensionX, NYCERS, Salesforce
NFL Players Pension

- Developed its own self-service portal using a third-party to enhance its commercial product and improve overall UX/UI
- Using 2-Factor Authentication
- 401k integration, annuities
Your Retirement at Your Fingertips

Sign up

Log in
Welcome back, Dave!

Active Member
Tier 1, vested

Years of service: 18.25

- Your Plan: Manage & Review
- Estimate: Your Future Payout
- Support: Video, Chat, Appt
- Resources: Guides & How-Tos
Welcome back, Dave!

Status: Active Member
Years of service: 18.25
Beneficiaries: 2

Recent Downloads

- **Address Change Form**
  This form is for Tier 1 members only

- **Beneficiary Designation Form**
  This form is for active members only

- **Direct Deposit Form**
  For all online accounts

Saved Estimates

- **Retiring at 43 - myself/spouse**
  07/04/2019

Recent Updates From SamCERA

- **2019 SamCERA Board of Retirement Election Results**
  45 minutes ago
  The nomination period for the 2019 Board of Retirement election closed on May 6, 2019 at 5:00 p.m. Each incumbent

- **2019 - 2020 Contribution Rates**
  3 hours ago
  Read the December 2018 issue of the Performance Pulse, a semi-annual summary of SamCERA’s investment performance.

- **2020 COLA Increase**
  4 hours ago
  At its January 29, 2019 meeting, the Board of Retirement approved a cost-of-living adjustment (COLA) for most retirees and

- **Important information for retirees in 2019**
  4 hours ago
  Changes to taxes and health plan premiums in 2019 could mean that you see a change in your monthly pension benefit in January.
Week 2.
Improved website design and IA
How systems like ACERA & NYCERS are using data to elevate the member experience.
The design challenge

- 90% of users access less than 10% of your stuff
- Less than 5% use search, if site is designed correctly
- Site problems lead to more call center volume
- Discovery / analytics needed
New York CERS
Most common questions

1. “When is my pension payment coming?”
2. “How do I activate my member account?”
3. “How do I report a death?”
How can we help?

Forms and Publications
Report a Death
Sign Up for Direct Deposit

MyNYCERS
Access your pension account anytime, anywhere, on any device.

Log In / Activate MyNYCERS

Video - Activation Instructions

World Trade Center
Filing Deadline now 9/11/2022

Updates & Alerts

September 2019 COLA
The 2019 Cost-of-Living Adjustment (COLA) for eligible retirees and beneficiaries is 1%. The annual COLA letter was mailed on September 25, 2019.

Serving those who serve our city

Contact Us

Chat with us
Consider each device

Don’t forget about direct deposit
Life Events

- New hire
- Marriage
- Change in employment
- Ready to retire
- Death
BE PREPARED FOR

LIFE EVENTS

SEE ALL

- READY TO RETIRE
- NEW EMPLOYEES
- MARRIAGE / DIVORCE
- DISABILITY / ILLNESS
- DEATH
New Employees

Welcome to SCERS!

The New Member Presentation has general information for new members.

If you have not submitted your Member’s Affidavit, please do so as soon as possible.

Reciprocity

Reciprocity refers to a legal relationship between SCERS and other California public retirement systems intended to encourage careers in public service and to connect retirement benefits earned by employees under two or more systems.

Reciprocal retirement systems include:

- County retirement systems governed by the County Employees Retirement Law of 1937 (1937 Act)
- California Public Employees’ Retirement System (CalPERS)
- California State Teachers’ Retirement System (CalSTRS)
- Judges Retirement System (JRS)
- Public retirement systems that have full reciprocity agreements with CalPERS

Reciprocity provisions apply to any member entering SCERS from a reciprocal system as
Managing Life’s Milestones

We understand things happen throughout life and circumstances change. We’re here to help every step of the way.

- New Membership
- Reciprocity
- Change Your Address
- Disability
- Divorce
- Employment Changes
- Plan Your Retirement
- Returning to Work
- Survivor Benefits
“If you’re able to meet members with empathy, understanding, and thoughtful guidance, you’ll build trust and create new opportunities to reach them earlier in their careers.

Lindsay Hardy, Pension Strategist, Digital Deployment
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3. Web Accessibility

How CalSTRS completely revamped their website to create an accessible and compliant experience for all users.
Why is accessibility important?

1. Social responsibility: including individuals with disabilities is the right thing to do
2. Good business practice: 15 - 20% of the population has a disability that may affect their ability to get the information they need from your site
3. Increases search engine optimization / findability
4. Legality: government agencies are required by law, to meet website accessibility guidelines
REQUEST FOR ACCOMMODATION

Dear Maria Waldrop;

On 3/18/19 I went to your information site (the website www.itsmymaitland.org) trying to learn about the governmental functioning of Maitland, Florida through the documents you provide within your site.

I am legally blind, so I depend on a screen reader to help me understand electronic documents. My screen reader would not work with your electronic documents. I was specifically interested in documents related to the budget of the City of Maitland, Florida (electronic documents) for 2018, 2017, 2016 and 2015 and all City Commission agendas and back up material for year 2018, 2017 and 2016. Would you please make these documents accessible in your site so that they will work with screen readers?

I have visited www.itsmymaitland.org in the past and I continue to desire to visit www.itsmymaitland.org in order to become an active participant in the Maitland, Florida governmental process and to become informed about the programs, services and activities offered by Maitland, Florida as related to my intended future visits to Maitland, Florida.

Your site has many other electronic documents other than the specific ones which I have asked for above. In addition to the specific documents listed here, can you also make the other electronic documents within your site accessible so that they will work with screen readers so I don’t have to take the steps to ask for each document in a mail request?

I appreciate your reply as soon as possible.

Thank you,

Juan Carlos Gil
AB 434 - CA Accessibility Mandate

Gov. Code Section 7405 & 11135
Code sections referenced by AB434 that outline requirements for equal rights and benefits for people with disabilities, with regards to electronic technology and information.

Section 508
A law referenced by the ADA that more specifically outlines how to meet accessibility standards for electronic content, including websites.

WCAG Guidelines
The international web accessibility guidelines that are referenced (directly and indirectly) by both state and federal laws regarding web accessibility.

ADA Compliance
The Americans with Disabilities Act protects the rights of people with disabilities. Its broad reach extends to websites, but doesn’t reference web accessibility specifically.

AB434 / CA Gov. Code 11546.7
Requires that CA state agencies comply with Gov. Code Section 7405 and 11135 and WCAG 2.1 AA guidelines, and that the agencies post a certification on their website verifying their compliance.
“Website accessibility”?

**Visual:** blindness, low vision, color-blindness

**Hearing:** deafness and hard-of-hearing

**Motor:** Inability to use mouse, limited fine motor control

**Cognitive:** learning disabilities, distractibility, inability to remember or focus on large amounts of information

People with disabilities often rely on assistive technology (AT) - screen readers, browser zoom, text to speech, etc...
What does accessibility cover?

- Font colors and contrast (low vision, color blind)
- Text alternatives for any non-text content so that it can be changed into other forms (braille or screen readers)
- Labels on form fields so a visitor knows what each field is for
- Captions on videos (especially meetings!)
- It also applies to PDFs
Common pitfalls

1. No closed captions on video/audio files
2. Not having accessible PDFs / documents
3. Not having ALT tags for images
4. Lack of labels on form fields
5. Lack of color contrast
6. Not having a mobile-responsive site or semantic HTML
The continuum of accessibility

- Fully accessible
- Passing scans
- Unusable
The continuum of accessibility

- Fully accessible
- Passing scans
- Unusable
Accessibility Solutions

Free Scan Solutions:
- Lighthouse
- achecker.ca
- WAVE

Paid Scan Solutions:
- Monsido
- SiteImprove

Consulting:
- LevelAccess
- CforAT (Center for accessible technology)
- ADA Site Compliance
1. Ensure responsive site design (color contrast, navigation, aria labels, screenreader callouts)
2. Ensure compliance with AB 434
3. External audit by LevelAccess (AMP page scans)
4. Ongoing scanning by Monsido for PDF remediation
5. Ensured closed captioning
How to check

1. www.achecker.ca
2. Google Lighthouse (F12 in Chrome) or digitaldeployment.com/adascan

Scans only test for a handful of accessibility issues, but can be a good place to start to see if you fixable problems.
Thank you!

DigitalDeployment.com/pension