

The Employee Benefit Research Institute (EBRI) is a non-profit organization with a forty-year history of producing independent, objective data and research addressing critical issues surrounding employee benefits.

## Features and Benefits of EBRI Membership

EMPLOYEE BENEFIT RESEARCH INSTITUTE

### Protecting What's Most Important

EBRI's programs help professionals evaluate and benchmark programs designed to protect American workers and their families, including retirement, health and financial wellbeing benefits. Our members — comprised of more than 100 leading plan sponsors, associations, providers, asset managers, unions, medical groups, insurers and consultants — rely on our information, which can't be obtained anywhere else. EBRI takes care to retain its well-earned credibility, avoiding hyperbole and partisanship.

#### What We Are

- ✓ Objective
- ✓ Thought Leaders
- ✓ Unbiased
- ✓ Influential
- ✓ Data-driven

### Times have changed, and so has EBRI.

EBRI tracks the latest trends in employee benefits, researching the ever-evolving programs and potential public policy implications. As the pace of change to benefit programs accelerates, EBRI's mission has never been more critical. With benefits being such an essential component of employee compensation and talent strategies, EBRI's value is compelling.

EBRI was created in 1978 as a Nonpartisan, tax-exempt organization.

#### What We Are Not

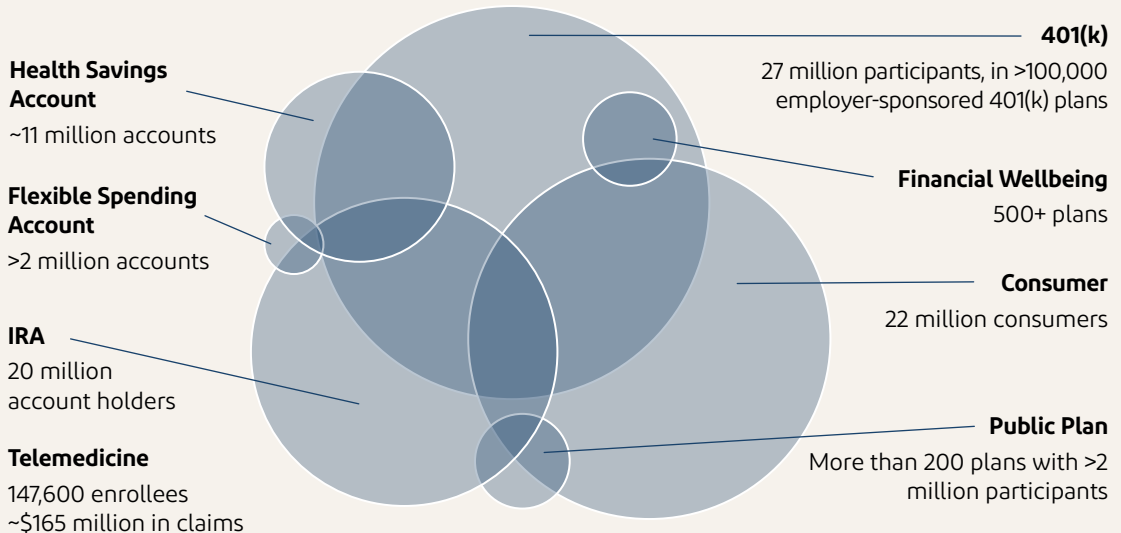
An advocacy, lobbying, or consulting group.

**We produce timely and relevant research and analysis:** Our work supports employers, policymakers, service providers, and others in developing innovative solutions and making policy and design decisions.

[info@ebri.org](mailto:info@ebri.org)

#### EBRI's World Class Databases:

Much of EBRI's research is based on its interconnected participant-level databases.



# Choose your EBRI membership



Our members support and drive our independent, fact-based research mission. And each member can tailor its engagement with EBRI to align with its own priorities.

## Sustaining:

With a seat on EBRI’s Board, your organization will help set our priorities, interact with EBRI leaders, researchers and other Trustees. Sustaining members can nominate individuals from their organizations to, participate in EBRI’s Research Committee. Sustaining members enjoy access to premium EBRI publications at the enterprise level.

## Primary:

Support EBRI’s mission at the most affordable level, receive invitations to EBRI events, and have access to premium EBRI publications, with early access to other EBRI research.

Features and Benefits	Primary	Sustaining
Support EBRI’s mission to provide independent, objective research and information to retirement, health, and financial wellness communities, policymakers, and the public	✓	✓
Stay current on research and trends to help inform decisions at your organization	✓	✓
Access EBRI publications, including Issue Briefs, Fast Facts, Infographics, Interactives and PowerPoints	✓	✓
Showcase your organization’s thought leadership at EBRI’s webinars and Policy Forums	✓	✓
Invitations to EBRI: Policy Forums Regional Research & Policy meetings in various cities in the U.S. Members-Only meetings	✓	✓
Help EBRI set its business priorities		✓
Network with other Board members and leaders in the retirement, health benefits and financial wellbeing community		✓
Nominate individuals to the Research Committee to help set EBRI’s research priorities and have input into EBRI research		✓
Nominate someone from your organization to be on EBRI’s Public Policy Advisory Council (PPAC) to develop the semi-annual policy forum agenda		✓
Discuss ad hoc research questions and projects with EBRI leaders and researchers		✓
<b>Membership Fee Per Organization Per Year*</b>	<b>\$15,750</b>	<b>\$29,750</b>

\*Memberships are at the organizational level.  
Organizations may have participation by multiple employees.

# Research Center Partnerships



## Research Center Partnership Annual Fees

- Retirement Security Research Center — \$26,250
- Center for Research on Health Benefits Innovation — \$26,250
- Financial Wellbeing Research Center — \$26,250

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### Retirement Security Research Center

The RSRC is a separate think tank within EBRI dedicated to understanding retirement savings and spending patterns.

- Uses findings from the EBRI IRA Database and the integrated EBRI DC/IRA Database
- EBRI's *Spending in Retirement Survey*
- Policy proposal evaluations from the EBRI Retirement Security Projection Model®
- EBRI's Consumer Database
- Analysis from the Health and Retirement study

### Center for Research on Health Benefits Innovation

This Center focuses on helping employers assess the impact that plan design with the goal of increasing consumer engagement has on cost, quality, and access to healthcare:

- Policy proposals
- Value-based insurance design
- Telemedicine/virtual medicine
- Prescription drugs
- Mental health
- Plan design

### Financial Wellbeing Research Center

This Center is dedicated to conducting qualitative and quantitative research to evaluate the efficacy of employer financial wellbeing programs.

- EBRI's Financial Wellbeing database
- EBRI's Consumer Database
- EBRI's *Financial Wellbeing Employers' Survey*
- Annual Financial Wellbeing Symposium



## Survey Partnerships

**Survey Partners** help design surveys, assess preliminary findings, analysis, and implications, and participate in survey communication activities.

**EBRI** EMPLOYEE BENEFIT  
RESEARCH INSTITUTE

### EBRI Surveys

Our Survey Partnerships allow you to work with us on design, analysis, articles, and events related to our surveys:

- Retirement Confidence
- Workplace Wellness
- Consumer Engagement in Health Care
- Employer Financial Wellbeing
- Spending in Retirement

## Retirement Confidence Survey

The longest running survey of its kind, the Retirement Confidence Survey assesses how American workers and retirees save, plan, and achieve financial security for retirement. For 2022, we'll provide a special focus on the perspectives of LGBTQ employees, as well as female employees, by marital status.

## Workplace Wellness Survey

This survey focuses on understanding holistic employee wellbeing during turbulent times. It takes a closer look at wellness, paid leave, workplace financial protection, education, and emerging benefits and programs aimed at addressing employees' physical, emotional, and financial wellbeing. For 2022, we'll provide a special focus on the perspectives of LGBTQ employees, as well as female employees, by marital status.

## Consumer Engagement in Health Care Survey

This survey provides reliable national data on the growth of high deductible plans and their impact on the behavior and attitudes

of health care consumers, and a fresh focus on the evolving health care delivery system, care coordination and technology, the role of doctors vs. nurses, health technology and wearables, concierge services and more.

## Spending in Retirement Survey

EBRI's newest survey asks the question: "Why do people spend the way they do in retirement?" Focusing on individuals age 62 to 75, the survey explores what people's goals are in retirement, what debt look like in retirement, retirement savings, retirees' sources of income, how people make decisions in retirement, and how satisfied people are in retirement. For 2022, the survey will include a focus on Black and Hispanic retirees.

## Financial Wellbeing Employer Survey

EBRI's only employer survey, the Financial Wellbeing Employer Survey explores the current state of financial wellbeing programs, financial wellness benefits being offered, motivations and measure of financial wellness initiatives, and recent trends in financial wellness. Survey sponsors are also invited to EBRI's annual Financial Wellbeing Symposium.

## Why become a Survey Partner?

Obtain full survey results—available only to Partners!

- Provide input into the 2022 study and get your important survey questions answered
- Use in marketing, presentations, and public relations
- Get specialized breakouts of key target markets
- Enjoy the marquee value of being featured in survey reports, webinars, articles, and events

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**Survey Partnerships  
range from  
\$12,500 to  
\$15,000 each**

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# EBRI Events

At our events and meetings, you'll learn about our latest research and can weigh in on our research priorities and activities.

## Policy Forums:

Held in Washington, DC on a semi-annual basis, our forums bring together a cross-section of EBRI members, policymakers, plan sponsors, benefit experts, and representatives from academia, interest groups, and labor to examine current research and policy issues.

## Regional Workshops:

Hosted by EBRI members in locations around the U.S., EBRI and other experts network with peers and examine current research and policy issues.

## Board of Trustees:

Held in Washington, DC, each May and December, EBRI trustees meet to provide input on EBRI's research agenda and business priorities. Key policymakers and experts join to discuss current policy issues. (Sustaining only with invited guests)

## Webinars:

Showcasing EBRI research and member perspectives, EBRI webinars draw plan sponsors, policymakers, providers, and the press.



### EBRI events

We host a number of in-person meetings, web briefings, and conference calls each year.

### EBRI Research Committee

EBRI's Research Committee is geared for members who seek the most engagement in EBRI's research agenda and the shaping of its research.

### Exclusive to Sustaining Members:

## Research Committee

*Sustaining Members can nominate individuals from their organization to join EBRI's Research Committee, headed by our Research Chair and Vice Chairs of Retirement, Health Care, Financial Wellbeing, Agenda Planning, and Public Policy. The Research Committee meets every May and December, with subcommittees meeting periodically.*

### RESEARCH AGENDA PLANNING

- Meets Quarterly
- Submits Research Ideas
- Votes on Research

### IN-PROGRESS RESEARCH

- Meets Quarterly
- Provides Input on Research in Flight

### PUBLIC POLICY ADVISORY COUNCIL

- Meets Monthly
- Plans the Public Policy Forums
- Helps Educate Policy Makers

# EBRI Members-Only Resources

## EBRInsights

A weekly newsletter that highlights previews of new research, including exclusive members-only research. Members are alerted to must-see items, upcoming events, and the latest insights by EBRI.

## Issue Briefs

Provide in-depth expert analyses of employee benefit issues and trends, including data updates; emerging designs, practices, and products; and employee benefit policies and proposals.

## Fast Facts

Provide high level take-aways of EBRI research in a condensed format. It distills the critical research highlights from longer research pieces, including Issue Briefs and surveys.

## Infographics

EBRI's most user-friendly research pieces conveying our data and analysis in visually intuitive, graphical formats.

## EBRIInteractives

Transform data into actionable insights through interactivity. Members can download the data to share in reports.

## PowerPoints

Allow members to easily incorporate EBRI research into your presentations, articles, and more. PowerPoints include charts and bullet points, providing key EBRI research findings.

## By the Numbers

Provide simple statistics and citations on workplace retirement and health coverage.

## Point of Views

Feature member commentary and takeaways from EBRI Research.

## Webinars

Allow attendees to learn about EBRI research directly from our expert Researchers and guest speakers.

## Access to Archives

Get the historical data you need, through access to the full EBRI Publication archive on the EBRI website.



## Access To EBRI Publications

EBRI's Publications are available via the EBRI website, email, and social media channels.

\*Members-only publications require user credentials

## EBRI Family of Publications

EBRInsights

Issue Briefs

Fast Facts

Infographics

By the Numbers

Point of View

