

Support the 2017 Retirement Confidence Survey

By Harry Conaway, EBRI
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Many of you already know lots about EBRI's annual Retirement Confidence Survey (RCS), which we co-sponsor with Greenwald & Associates. (Some of you supported the RCS in prior years). But I have found that some EBRI and ASEC members don't know about the RCS, and many more don't know that underwriting the RCS enables them to:

- **Support EBRI's mission** to provide independent, objective, nonpartisan facts and other information about the U.S. employee benefit system to policymakers and others in the retirement community.
- **Support the American Savings Education Council's (ASEC) mission** to make retirement and financial planning and savings a vital concern for all Americans by raising public awareness about what is needed to ensure long-term financial independence and wellness.
- **Participate in RCS design**, access data and information not generally available, participate in identifying implications, be briefed on RCS findings prior to publication, and participate in various outreach and communication opportunities.

In the next week or so, we will begin the planning, implementation, and analysis process that will culminate in the release of the results of the 2017 RCS (targeted for next March). That's why I'm reaching out to you now to see if you would be interested in learning more about underwriting the 2017 RCS.

Background

The RCS is a **well-known, highly trusted** survey that examines the attitudes of American workers and retirees toward retirement planning, savings, and income. It is widely cited by the media, plan sponsors, retirement plan advisors, service providers, policymakers in Congress and the Executive Branch, and others in the retirement plan community. Next year will be the 27th annual RCS, making it the **longest-running retirement survey** of its kind. (For more information, review the [2016 and earlier waves of the RCS](#), along with related press releases and fact sheets.)

The **need for relevant and reliable data** about America's retirement system and worker/retiree readiness for retirement has never been greater. Indeed, no matter who wins the upcoming presidential and congressional elections, we expect that retirement issues will be front-and-center policy issues in 2017, as Americans of all political persuasions will continue to express concerns about retirement.

The 2017 RCS will make a **substantial contribution** to these discussions. And it will be an important **part of the larger package** of highly credible, valuable retirement information EBRI is developing to both:

- **Reinforce EBRI's and ASEC's reputation** as the premier source of information about the U.S. retirement system and the likely implications of various design and policy changes, and
- **Support policymakers, employers, service providers, and others** in the retirement community in making fact-based decisions.

A key to achieving these goals is to **add new organizations** to the RCS underwriters' group to **help the RCS stay current and relevant**, and to make sure it robustly reflects the always-evolving interests and areas of inquiry of the broader retirement community. We want and we need your input.

Benefits and Opportunities

As a 2017 RCS underwriter:

- Your organization will be able to name one or two individuals (in addition to yourself) as your organization's representatives on the 2017 Advisory Board of the RCS.
- You will have the opportunity to participate in the design and revision of the questionnaire. This will give you the chance to suggest broad themes and specific questions that better align with the current and emerging priorities of your organization and the broader retirement community. Are there issues or questions you'd like the RCS to include? Questions that would enhance or build on questions you might otherwise be including in a survey?
- You will be invited to participate in a pre-release briefing on the results of the RCS, with the opportunity to suggest implications that will make the report more valuable. This will enable you to engage with experts from EBRI and Greenwald & Associates on the RCS data and analysis.
- You will receive a copy of the detailed RCS data tabulation books, press materials, and a full report.
- You may receive raw data if you choose, so that you can do further analyses on your own areas of interest.
- Your organization will receive broad media recognition as an underwriter of one of today's most frequently cited and trusted surveys on retirement, via various press, media outreach efforts and in the final report.
- You will be able to use the RCS materials and findings for your own research, product-development, client relationship, marketing, media, and other purposes—as many RCS supporters have in the past. And you can work with us to consider activities we might be able to assist on.

Please Consider Underwriting the 2017 RCS

We hope your organization will join as an underwriter of the 2017 RSC. The cost of co-sponsorship is \$8,500. Also, please note that we can invoice you this year or next, depending on your preference.

To become a 2017 RCS underwriter or if you have any questions or comments, please contact: Craig Copeland (202) 775-6356, copeland@ebri.org; Jack VanDerhei (202) 775-6327, vanderhei@ebri.org; or me at (202) 775-6321; conaway@ebri.org Also, contact me if you're interested in discussing other opportunities to participate in EBRI surveys, projects and initiatives, including those involving health and/or financial wellness.

Thank you for your time and consideration—and for your continued support of EBRI and ASEC!