



# Deferred Compensation

*Invest in you.*

At Ohio Deferred Compensation we realize how much dedication and hard work is required on the part of our employers to advocate for retirement savings. To recognize all of their hard work and to express our appreciation, Ohio DC recognized seven outstanding employers with a Certificate of Achievement through our Employer Recognition Program. Each of the employers below support their employees' financial well-being through collaboration with educational initiatives, cooperation with Field Account Executives' efforts, and measurably improved participation statistics over time.

## More than 50% of active participants enrolled in the SMarT Plan

### ***City of Lancaster***

The City of Lancaster Human Resources managers have been diligent in promoting retirement savings with Ohio DC. There is a culture of saving that is easy to build on during onsite visits. The City allows frequent visits which allows for in-depth conversation opportunities with employees.



Danielle Williams, HR Director  
City of Lancaster

### ***Delaware County District Library***

The Delaware County District Library has a proactive approach that includes regularly updating newsletters and forwarding timely communications about Ohio DC, emphasizing the importance of saving for retirement. From the moment employees are hired, the Human Resources team ensures they understand how supplementing their OPERS pension with additional savings can significantly impact their financial future. They go beyond basic education by hosting annual financial wellness presentations at both the main and branch locations, giving staff direct access to Field Account Executives.

## Increased percentage of new enrollments

### ***Switzerland of Ohio Local School District***

The Switzerland of Ohio Local School District has invited the Field Account Executive to each in-service day since 2019 to conduct four educational workshops throughout the day. They have also adopted the ROTH option which has added to overall participation. School principals, the union, and the Treasurer support on-site visits. The leadership genuinely cares about the financial wellness of employees.



Connie Kress, Treasurer of Switzerland of Ohio LSD, staff, and Ohio DC Account Executive

## Increased percentage in active participants

### ***Perry County***

Perry County sends out the Opt-in form to all employees every two years. The most recent distribution added more than 25 new participants. The County promotes Ohio DC and there is strong word-of-mouth encouragement between employees.



Michael Vandewater of Perry County Auditor's office

### ***Cloverleaf Local Schools***

Cloverleaf Local Schools has an outstanding commitment to promoting Ohio DC to its staff. Leadership has demonstrated a forward-thinking approach to financial wellness and retirement readiness. They encourage educational initiatives that allow the Field Account Executive to conduct group workshops and one-on-one consultations with staff.

## Increased percentage in total participant contributions

### ***Butler County Regional Transit Authority***

The Butler County RTA management team has been a great partner in educating employees. They distribute plan literature and invite the Field Account Executive on-site to conduct educational meetings multiple times per year during Wellness Fairs and for individual employee counseling sessions.



Tom Bugher, Ohio DC  
Dee Weidner, Director of Finance and Mary Jane Leveline, Director of People, Culture, & Employee Development

### ***Highland District Hospital***

Highland District Hospital leadership encourages staff to plan for their financial future. They actively share educational resources provided by Ohio DC and facilitate opportunities for employees to meet with the Field Account Executives. The workforce is well informed through guidance, education, and encouragement from Hospital leadership.



Meghann Ackley, VP of Finance – Amber Ferguson, Payroll Specialist – Amanda Knauff, HR Director – Donna Bender, HR Generalist – Tim Parry, President and CEO