



REFOCUS



REVIVE



RESET

403(b) Day[®] 2021

PLAN SPONSOR GUIDEBOOK

BINGO AS RETIREMENT PLANNING LINGO

Focus. Now, close your eyes. Someone shouts, “Bingo!” Refocus. What comes to mind? Winning! Someone has won! Will you be next? Revive. The game starts again. Now, Reset. You have another chance to improve your financial wellness. This year’s 403(b) Day[®] wants everyone to shout “Bingo!”

As the plan sponsor, you call the game, and your role is to not let Retirement Bingo be left to chance. Everyone can be winners. Guide your plan participants to complete various tasks and mark them off in the required pattern to have a fun and educational experience.

SUPPORTED BY



403(b) Day® 2021

Due to the stress from COVID-19, 403(b) Day® 2021 will focus on three things.

The first action for our theme is to **Refocus**,
We shall not rely on any unknown hocus pocus.
We'll adjust the focal lens on our retirement planning,
And take a clear look at just where we're standing.

Now to **Revive**, there's always room for improvement,
If the goal of your plan is to maximize upward movement.
Like a splash of cool water on a hot summer day,
Shower down newfound knowledge tailor-made your way.

After we've revived your retirement plan,
It's time to **Reset**, do differently, or start again.
When saving for retirement, always aim to win,
Use this Bingo as a guide, get cozy with it, like a friend!

HOW TO PLAY

Because some employees may still be working remotely, this game is designed to be played anywhere. Begin with the Refocus Bingo card. Have the "players" look at the entire board and choose the tasks that pertain to them because we know that with retirement planning, one size does not fit all. Once the player completes the necessary number of tasks horizontally, vertically, or diagonally, for Bingo on that card – they win a badge. Next play the Revive Bingo card, followed by the Reset card. Once "Bingo!" is called on all three cards, they win the bonus badge, and become an honorary **403(b) Day® 2021 Graduate**.

WAYS TO PLAY

Retirement Bingo can be played individually or as teams. If played in teams, there is the challenge of competing to see which team receives their badges first. Another way to play is to have players describe to one another how they completed their tasks, thereby passing on knowledge. As the plan sponsor, you call the shots. You can set a time limit on when to shout Bingo! or leave it to the participant's discretion. As they accomplish tasks and earn Bingo, you send them the Badge(s) they've earned throughout this campaign.

WAYS TO PROMOTE

The promotional PDF can be printed as an 8.5x11in Flyer or an 11x17in Poster to hang in break rooms, factory areas, bulletin boards or elsewhere. If you are holding meetings, perhaps during open enrollment, add dates to the Flyer or Poster and edit the PDF to add your company logo or plan information. Use the .jpg or .png images in emails or on the company intranet with hyperlinks to the three Bingo Cards and Player Instructions PDF.

403(b) Day® 2021

If you're planning an event or series of events, decide what kind of event you want to host:

- A lunch-n-learn – Employees can work on their Bingo cards over the lunch hour. You can ask them to bring their own lunch, provide lunch or offer refreshments. Or, how about a Zoom lunch if you are all working from home?!
- A presentation – Consider offering several times to work around employee schedules and include allocating time for them to work on their Bingo card tasks.
- A benefits fair or booth – Employees can stop by when they're available to participate.
- A webinar – If you have an online workforce or office across several locations, consider having an electronic event. You can host a webinar on one or more of the topics highlighted in the bingo cards, record it, then make the recording available to those who couldn't attend. Invite the spouses too.

Once you've decided the type of event, you need to get the word out to maximize employee attendance:

- Hang the posters two to three weeks prior to the event to generate interest and send out emails around the same time promoting the campaign to entice participation.
- Send out electronic invitations, including meeting invites for employees to save to their work calendars. Additionally, provide reminders the week before the event, and the day before the event.
- Consider making the event mandatory to show employees how important it is to plan for their future. Just because the focus is on your retirement plan doesn't mean you shouldn't discuss other benefits your company provides. Check with other benefits providers to see if they can supplement your efforts.
- Think about monitoring your results to determine if your campaign was a success. Find ways to get an assessment of your employees' financial situations before they begin to play the game. Be sure to note how many participants completed tasks and earned badges. Was the campaign a success based on what you were hoping to achieve? Did you receive feedback on how employees' felt about their financial preparation?

**Regardless of how you choose to celebrate 403(b) Day® 2021,
be sure to tweet photos with the hashtag #403bday and tag us at @PSCA401k!
You can email us at psca@usaretirement.org and brag about your success!**