UNIVERSITY
OF
CALIFORNIA

UC Retirement System (UCRS)

Launch Results: UCRS Portal

May 28, 2012

First three months after launch

Site Activity, 2012 vs. 2011

Post-launch (February 22-May 28, 2012) vs. same timeframe 2011

	Feb 22-May 28, 2012	Feb 22-May 28, 2011	% change
Visits			
Visits	96,776	61,842	56.5%
Unique Visitors	67,604	42,352	59.6%
Pageviews	397,311	94,425	320.8%
Pages/Visit	4.11	1.53	168.6%
Avg. Time on Site	0:04:27	0:01:26	210.5%
Bounce Rate	37.9%	62.0%	-38.9%
% New Visits	69.6%	55.2%	26.1%
% Returning Visits	30.4%	44.8%	-32.1%
Browsers			
Internet Explorer	48.9%	51.5%	-5.0%
Firefox	25.2%	25.2%	0.0%
Safari	15.1%	17.0%	-11.0%
Chrome	9.4%	5.5%	72.6%

Site Use

February 22-May 28, 2012

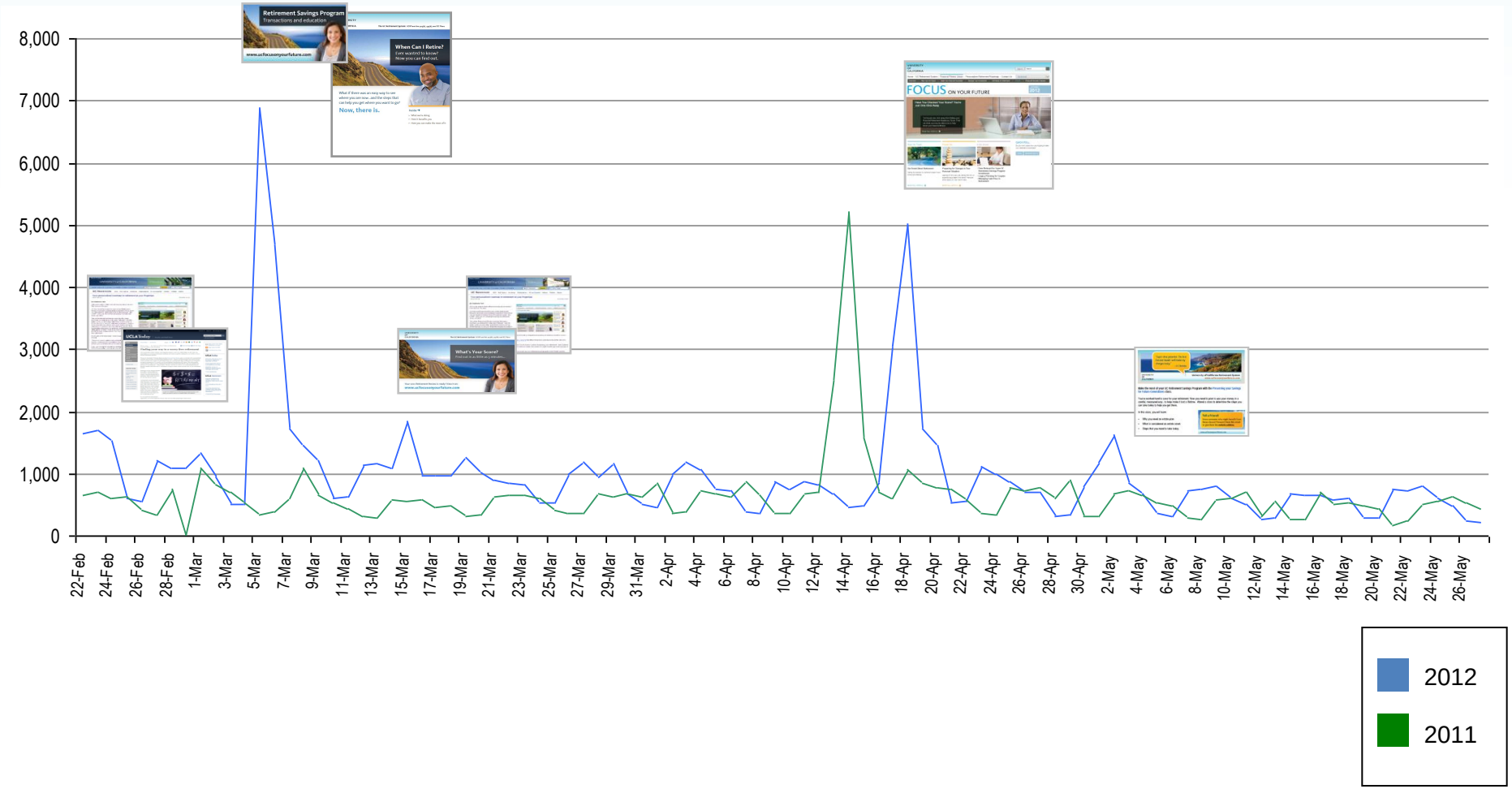
	QUANTITY
Users who have logged in and interacted with a personalized area	20.0% of all unique users (13,530)
Roadmaps saved	39.3% of all who logged in (5,323)
Learning recommendations received	23.0% of all who saved a Roadmap (1,224)

Key Dates for Communication

February 14, 2012	Teaser email, postcard, video
February 22, 2012	Soft launch
February 22, 2012	“Our University”
February 25, 2012	“UCLA Today”
March 5, 2012	AYS banner Launch communication
March 12, 2012	Follow-up postcard
March 13, 2012	“This Week @ UC San Diego” “Roadmap” webinar email
March 27, 2012	“Roadmap” webinar
April 3, 2012	Global class invitation Targeted workshop email
April 5, 2012	“Roadmap” webinar (waitlist)
April 10, 2012	“College Savings” webinar email
April 12-13, 2012	Bay Area Finance Fairs
April 17, 2012	UC FOCUS newsletter email
April 24, 2012	“College Savings” webinar
May 1, 2012	“New Dimensions”
May 2, 2012	Targeted workshop email
May 8, 2012	“Right Path” webinar email
May 22, 2012	“Right Path” webinar

Site Activity, Visitor Trend

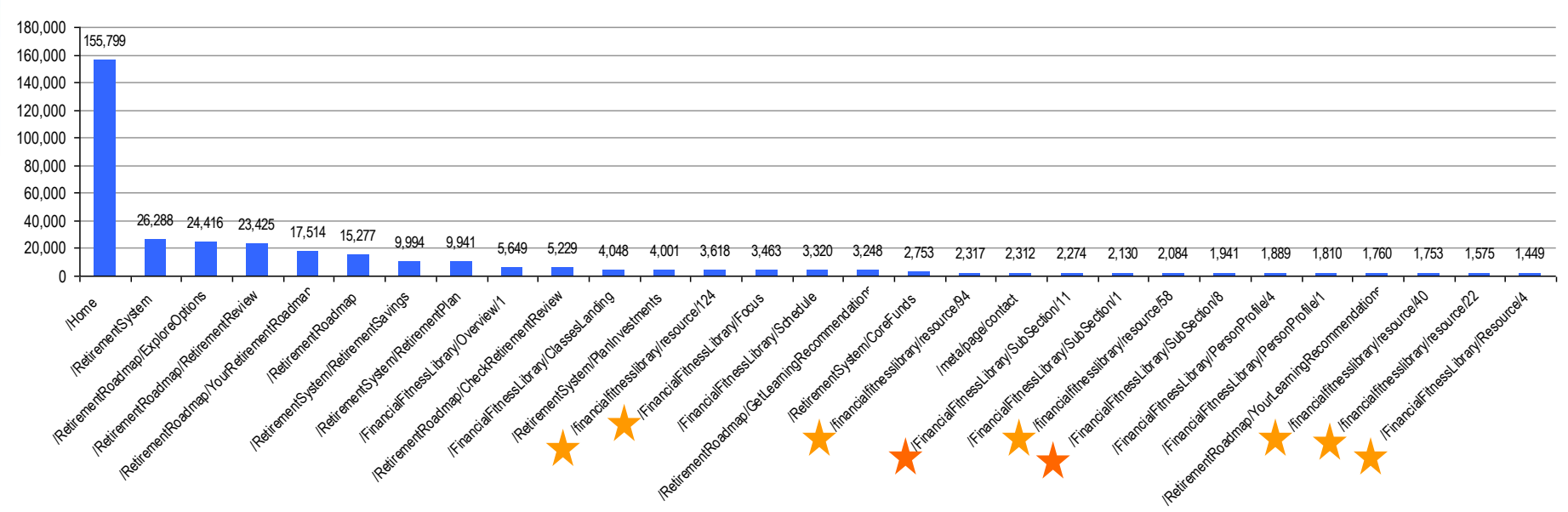
Post-launch (February 22-April 30, 2012) vs. same timeframe 2011



Top Content

Financial Education Program

February 22-May 28, 2012



★ Top-viewed educational content was promoted in emails, related to plan details, featured on home page, or in FOCUS.

★ Encouragingly, participants also have begun to browse the Financial Fitness Library Sections (Articles/Tools/Tutorials) and Subsections (Plan/Build/Manage/Get Ready)

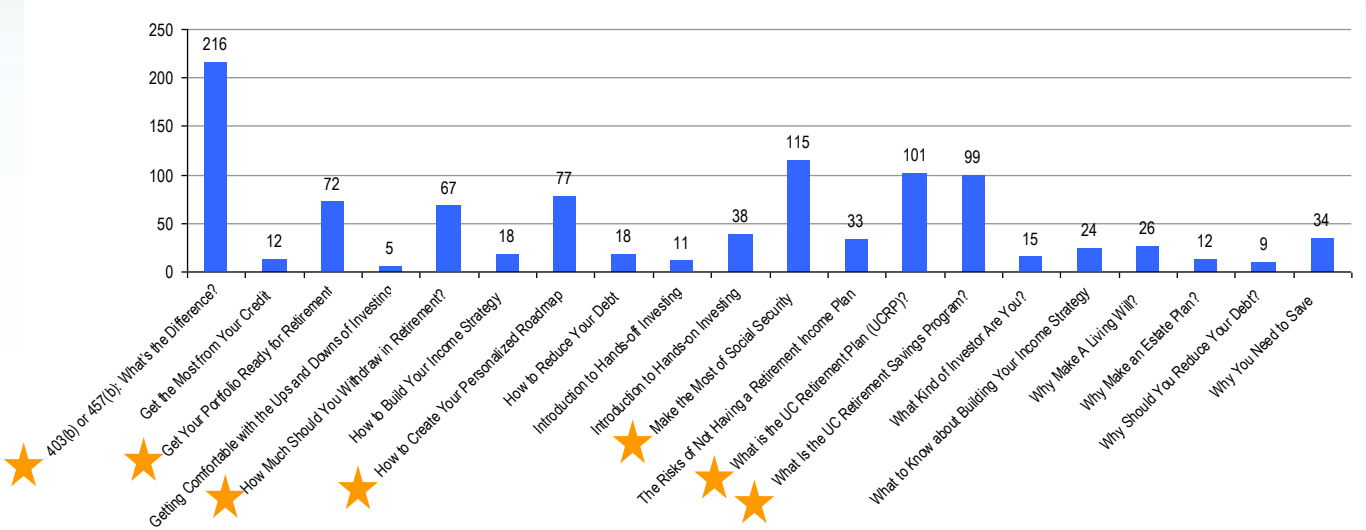
Top Content: Resource Name Key

Financial Education Program

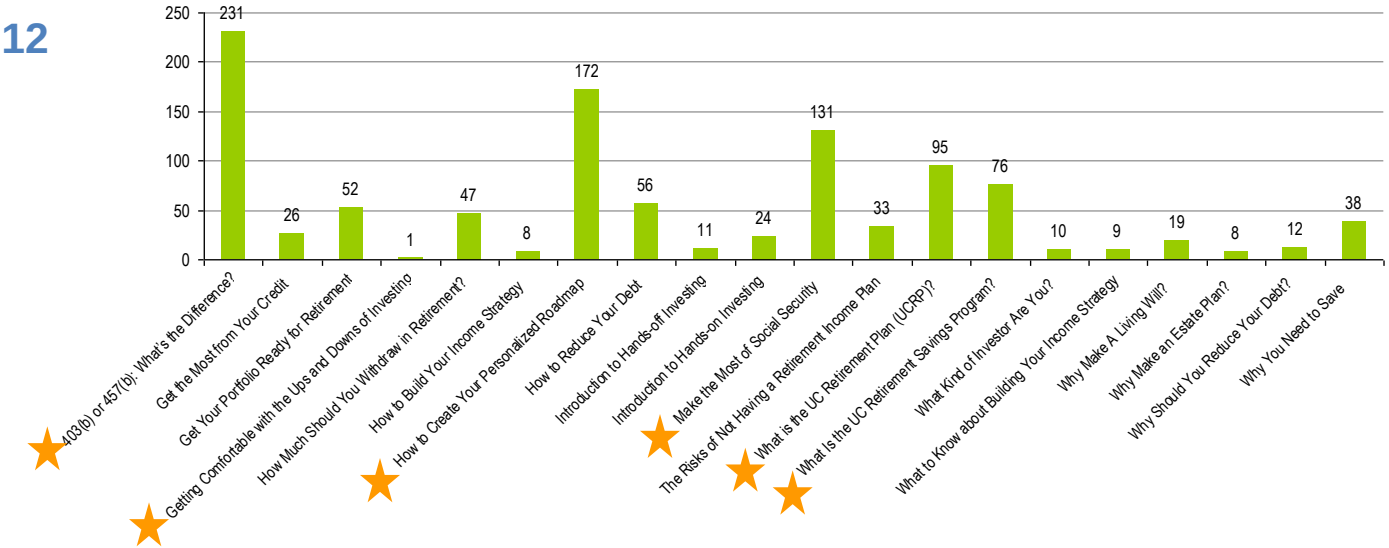
URL	Financial Fitness Library Resource Name
/FinancialFitnessLibrary/Overview/1	What's Popular
/FinancialFitnessLibrary/ClassesLanding	Financial Education Classes
/financialfitnesslibrary/resource/124	Have You Checked Your Score?
/FinancialFitnessLibrary/Focus	FOCUS
/FinancialFitnessLibrary/Schedule	Class Schedule
/financialfitnesslibrary/resource/94	Creating Your Personalized Retirement Roadmap class
/FinancialFitnessLibrary/SubSection/11	★ Get Ready for Retirement/Getting Ready
/FinancialFitnessLibrary/SubSection/1	★ Plan Your UC Future/Getting Started
/financialfitnesslibrary/resource/58	Make the Most of Your Retirement Savings Program
/FinancialFitnessLibrary/SubSection/8	★ Manage Your Investments/Building Investing Skills
/FinancialFitnessLibrary/PersonProfile/4	Deb
/FinancialFitnessLibrary/PersonProfile/1	Tracy
/financialfitnesslibrary/resource/40	Get Personal Help Planning for Your Future
/financialfitnesslibrary/resource/22	Your UC Retirement System class
/FinancialFitnessLibrary/Resource/4	IRS Limits for 2012 Announced
/FinancialFitnessLibrary/Schedule/9	Class Schedule/UC Berkeley
/FinancialFitnessLibrary/SubSection/4	Build Your UC Foundation
/financialfitnesslibrary/resource/38	Your Emergency Fund: How Much Is Enough?
/financialfitnesslibrary/resource/123	Upcoming Dates for Systemwide Live Webinars
/FinancialFitnessLibrary/Resource/127	Fees Reduced for Some UC Retirement Savings Program Investments
/FinancialFitnessLibrary/PersonProfile/5	Jim
/FinancialFitnessLibrary/Overview/2	Personal Situation
/FinancialFitnessLibrary/Overview/5	Tutorials
/financialfitnesslibrary/resource/7	Take Home Pay Calculator

Tutorial Views

April 1-30, 2012



March 1-30, 2012



★ **Top-viewed content tended to be either featured on the home page (profiles, home rotating promos, FOCUS, class schedules) or related to plan details**

Selected Participant Comments

"Overall, (the site) has been very well received. I've had some participants run their roadmap right there in class with their laptop and consistently hear comments as to how simple and user friendly the process is.

Also, I've seen the "ah-ha" moments happen frequently where participants really understand how UCRP and RSP can work together to replace income in retirement. Most participants have more incentive to enroll or increase deferrals after running their numbers."

– Joe Hager, Senior Retirement Counselor, Fidelity Investments

"It's so user-friendly. Finally, my pension and my Fidelity are all on one site."

"That's so cool how the score changes instantly. I really need to contribute more."

"Love how I can customize the roadmap using my outside assets and my partner's information. So much better than the mailing we used to get."

"This is like a stress test of my current retirement plan. Great wake-up call for me."

"That's it! Just one click and I get my score? I can't wait to go back to my desk and run my numbers."

Selected Participant Comments

"The feedback I have received on the tool has been mostly very positive. It seems that for the most part, employees are finding the tool to be very helpful relative to figuring out if they are on track for retirement and also thinking in terms of what steps they can take to increase their retirement readiness."

– Jeff Crowley, Senior Retirement Counselor, Fidelity Investments

"Great tool, very helpful."

"The tool seems very intuitive."

"I feel like it's a great way to see if I'm on track."

"Wow, that's really cool!"

"I think it's wonderful."

Visitor and Content Detail

Site Activity, Visitor Trend Detail

Financial Education Program

Date	2012	2011
2/22	1,641	664
2/23	1,704	693
2/24	1,528	603
2/25	595	635
2/26	557	401
2/27	1,216	345
2/28	1,090	755
2/29	1,083	0
3/1	1,336	1,096
3/2	945	813
3/3	507	693
3/4	497	536
3/5	6,891	329
3/6	4,685	387
3/7	1,732	612
3/8	1,464	1,089
3/9	1,202	647
3/10	598	532
3/11	626	435
3/12	1,138	304
3/13	1,171	301
3/14	1,100	570
3/15	1,837	566
3/16	967	581

Date	2012	2011
3/17	958	464
3/18	961	481
3/19	1,256	304
3/20	1,024	349
3/21	892	620
3/22	838	652
3/23	829	664
3/24	523	617
3/25	543	415
3/26	986	354
3/27	1,191	356
3/28	935	674
3/29	1,171	628
3/30	672	690
3/31	519	638
4/1	451	853
4/2	998	364
4/3	1,194	385
4/4	1,060	728
4/5	755	673
4/6	738	619
4/7	399	881
4/8	374	665
4/9	881	364

Date	2012	2011
4/10	758	367
4/11	879	677
4/12	819	704
4/13	668	2,525
4/14	453	5,203
4/15	483	1,571
4/16	882	694
4/17	3,062	618
4/18	5,026	1,068
4/19	1,714	841
4/20	1,445	772
4/21	540	763
4/22	555	586
4/23	1,121	360
4/24	990	340
4/25	884	768
4/26	700	716
4/27	699	777
4/28	320	606
4/29	341	903
4/30	799	310
5/1	1,198	307
5/2	1,631	686
5/3	855	718

Date	2012	2011
5/4	681	657
5/5	364	526
5/6	308	488
5/7	730	294
5/8	747	277
5/9	812	578
5/10	605	598
5/11	519	709
5/12	257	322
5/13	286	557
5/14	688	277
5/15	654	268
5/16	653	702
5/17	585	510
5/18	606	523
5/19	287	492
5/20	296	439
5/21	744	178
5/22	733	252
5/23	808	511
5/24	610	554
5/25	494	625
5/26	243	544
5/27	222	448

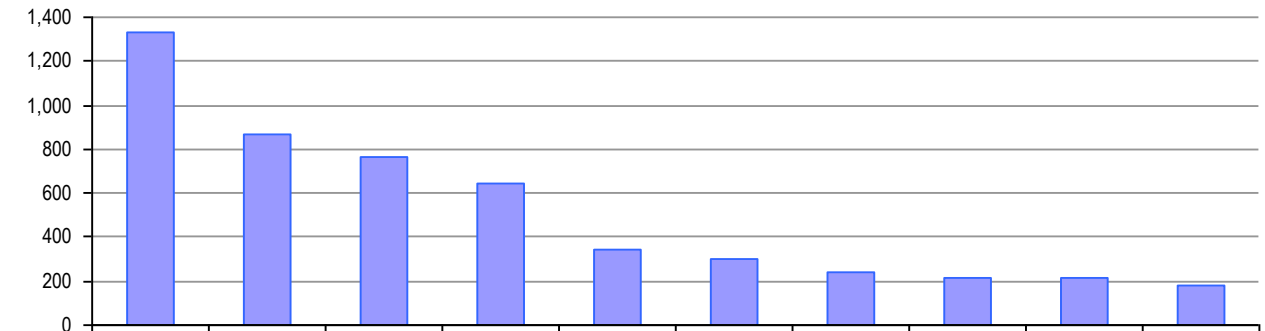
Site Activity, Visitor Trend by City

Financial Education Program

Feb 22-27, 2012

Our University
Feb 22

UCLA Today
Feb 22



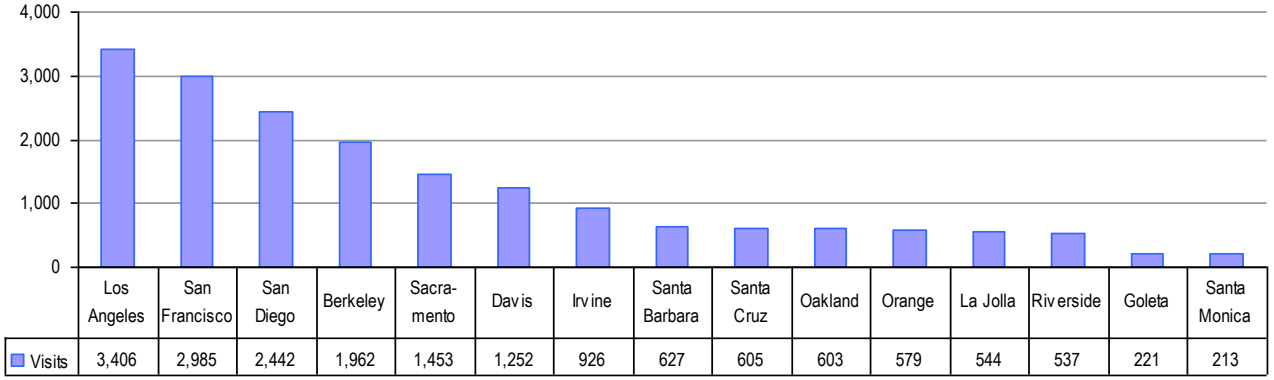
	Los Angeles	San Francisco	Sacramento	San Diego	Berkeley	Davis	Irvine	Oakland	Orange	Santa Barbara
Visits	1,327	871	767	643	343	304	240	216	212	180

Mar 5-15, 2012

AYS Banner
Brochure
Mar 5

Postcard
Mar 12

This Week @
UC San Diego
Mar 13



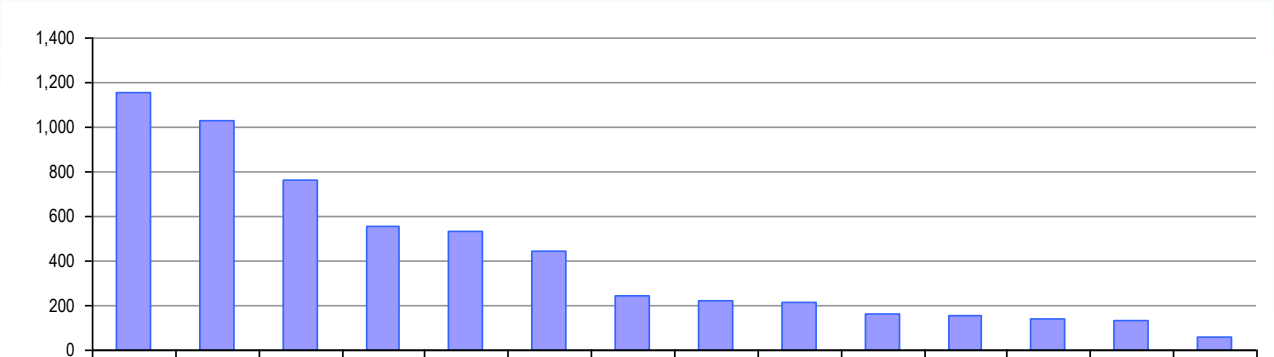
	Los Angeles	San Francisco	San Diego	Berkeley	Sacra-mento	Davis	Irvine	Santa Barbara	Santa Cruz	Oakland	Orange	La Jolla	Riverside	Goleta	Santa Monica
Visits	3,406	2,985	2,442	1,962	1,453	1,252	926	627	605	603	579	544	537	221	213

Site Activity, Visitor Trend by City

Financial Education Program

Mar 16-22, 2012

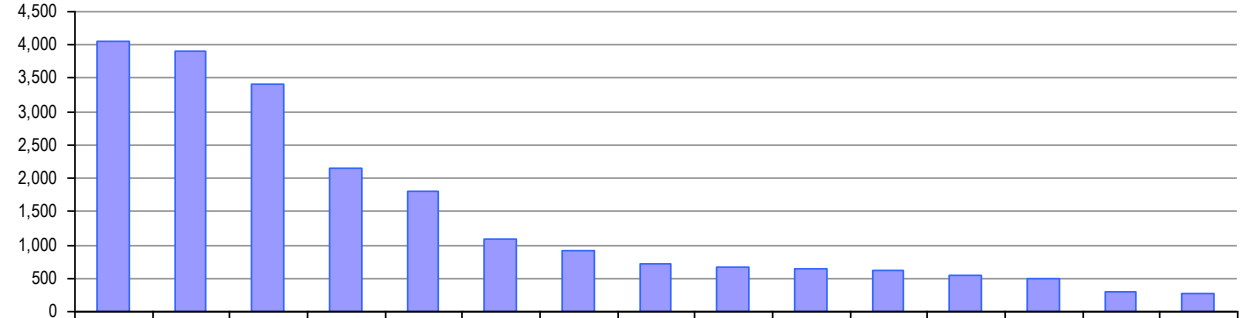
Postcard
Mar 12



	San Francisco	Los Angeles	San Diego	Berkeley	Sacra-mento	Davis	Irvine	Oakland	Santa Barbara	Orange	Santa Cruz	Riverside	La Jolla	Santa Monica
Visits	1,154	1,028	763	558	534	441	247	224	214	162	152	141	137	61

April 1-30, 2012

Focus Newsletter
Apr 17



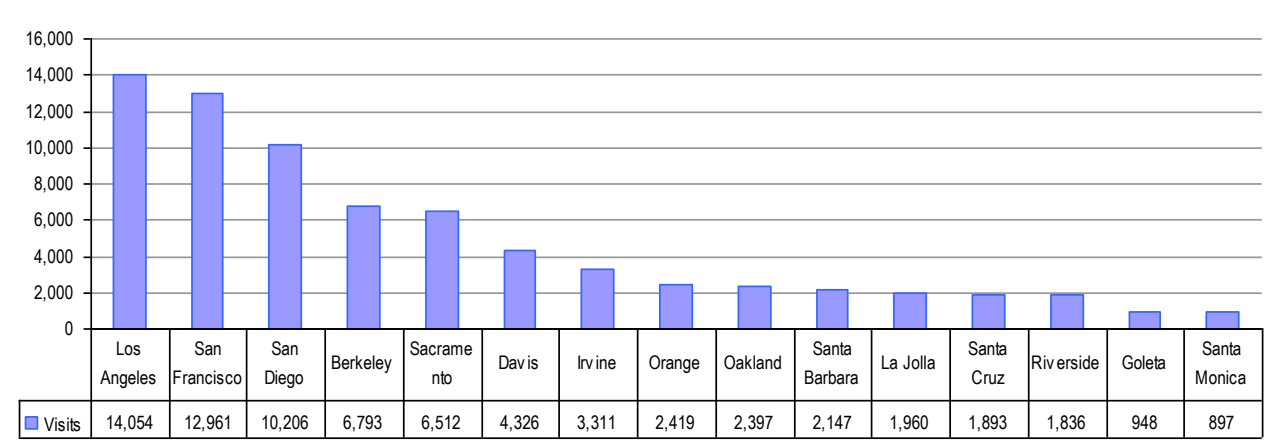
	San Francisco	Los Angeles	San Diego	Berkeley	Sacra-mento	Davis	Irvine	Oakland	La Jolla	Orange	Santa Barbara	Riverside	Santa Cruz	Santa Monica	Goleta
Visits	4,044	3,902	3,408	2,152	1,810	1,100	925	706	657	654	607	541	506	299	273

Site Activity, Visitor Trend by City

May 1-28, 2012

New Dimensions
May 1

Workshop Email
May 2

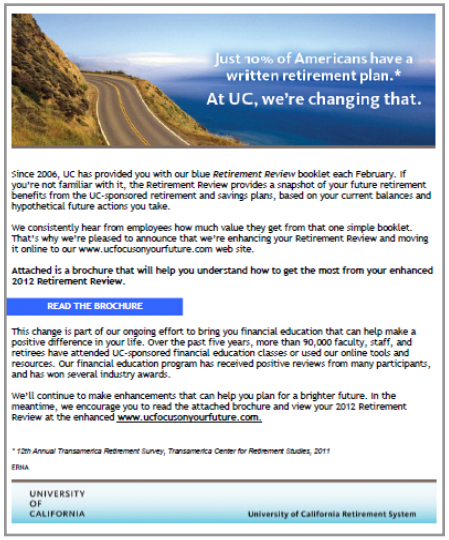


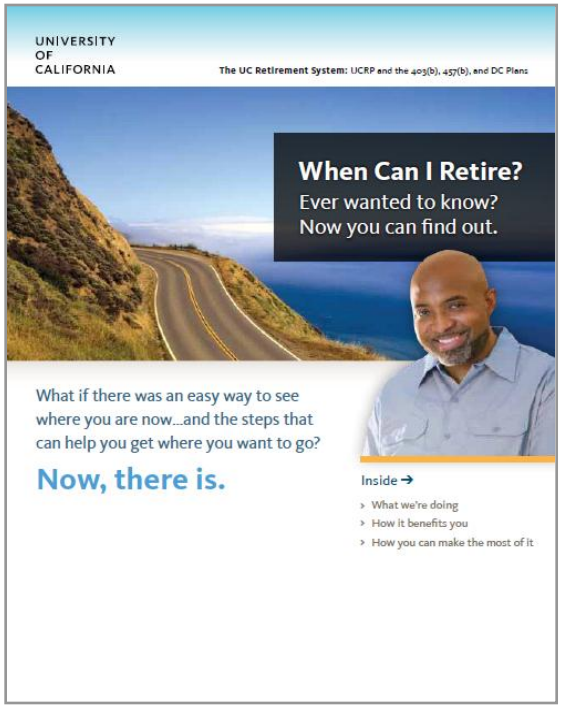
	Los Angeles	San Francisco	San Diego	Berkeley	Sacramento	Davis	Irvine	Orange	Oakland	Santa Barbara	La Jolla	Santa Cruz	Riverside	Goleta	Santa Monica
Visits	14,054	12,961	10,206	6,793	6,512	4,326	3,311	2,419	2,397	2,147	1,960	1,893	1,836	948	897

Launch Communications

March 5-16, 2012

	QUANTITY	PERCENTAGE
Emails sent	79,726	n/a
Emails not returned	79,461	99.7%
Emails opened	16,328	20.5%
Launch brochure views	7,057	8.7%

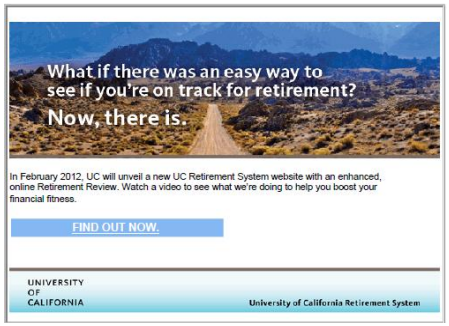


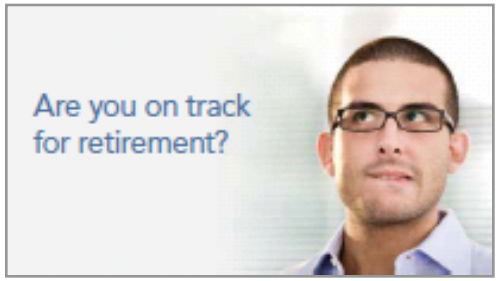


Teaser Email, Postcard, and Video

February 14-28, 2012

	QUANTITY	PERCENTAGE
Emails sent	79,726	n/a
Emails not returned	79,543	99.7%
Emails opened	17,009	21.3%
Teaser video views	12,131	15.2%





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