

Colorado Secure Savings Program

Program Tracking Metrics Summary

November 15, 2021

Program Tracking Metrics: Overview

- **AKF has previously provided the Board with suggested metrics to track**
- **The Program Tracking Metrics cover six key categories of data:**
 - **Accounts**
 - **Assets**
 - **Employers**
 - **Employees**
 - **Marketing and Outreach**
 - **Industry Comparisons**
- **The "owner" of each data set will be responsible for reporting those metrics monthly**

Summary of Program Tracking Metrics

Metric Category	Description	Reported By
Accounts	Provides data on the total number of accounts in the Program, broken down into various sub-categories (e.g., number of funded accounts). Also details monthly enrollments/closures.	Program Administrator
Assets	Provides the Program's monetary and transactional data. Shows information on how assets are being invested, as well as how money is moving in and out of the Program (i.e., contributions and withdrawals).	Program Administrator

Summary of Program Tracking Metrics – cont'd

Metric Category	Description	Reported By
Employer Data	Provides numerical data on employers, broken down into various sub-categories (e.g., number of registered vs. number of exempt employers).	Program Administrator
Employee Data	Provides available demographic information on enrolled employees (e.g., age, geographic region).	Program Administrator

Summary of Program Tracking Metrics – cont'd

Metric Category	Description	Reported By
Marketing and Outreach	Quantifies the Program's awareness efforts by tracking number of presentations, impressions, and other touch points.	Treasury Staff and Marketing Agency
Industry Comparisons	Provides graphical representation of how the Program's core metrics compare to other State-run Auto-IRAs.	AKF

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