



**To: The Members of the Stanford Center on Longevity Advisory Council**

**From: Tamara Sims, Director Sightlines Project**

**Re: June, 2018 Advisory Council Meeting Updates**

### **Financial Security In-depth Sightlines Report**

We are nearing the end of this second phase of the Sightlines Project, in which we have taken a more in-depth look at patterns of findings derived from the original Sightlines report and the questions raised by our advisory council, faculty affiliates, corporate affiliates and other members of the SCL network. This work will be encapsulated in a full-length research report, *"The Sightlines Project Special Report: Seeing Our Way to Financial Security in the Age of Longevity"*.

This report was designed to focus in on some of the most compelling findings of the initial Sightlines report, including

- more comprehensive descriptions of variations in financial security outcomes for different segments of the American population,
- original research further investigating factors associated with financial security using a generational lens, and
- reviews of the latest high impact research in retirement and financial education.

As with all Sightlines reports, these findings are synthesized in order to help influencers better understand national patterns of behavior and guide informed conversations, policies, and practices around the longevity of the U.S. population.

The table of contents and select chapter drafts of the report are available at:

<http://longevity.stanford.edu/council-june-2018/sightlines-directors-report/>. In addition to these chapters, the final report will also include brief overviews and commentaries on select research topics (e.g., health care spending, fraud). We will pre-release the full report to the Advisory Council and our Corporate Affiliates in July, followed by a public release in early September. We welcome your feedback regarding content and/or outreach strategies.

### **Sightlines Impact**

One goal of the Sightlines project is to use it as a diagnostic assessment and framework for learning about how to optimize longevity across various communities and organizations, so we continue to look for opportunities to engage with different subsets of the US population.

Recent activities include

- CalSTRS (California State Teachers Retirement System) survey to examine teacher attitudes about retirement and financial security in retirement. We presented our findings to their board in February

- Stanford alumni survey to investigate Sightlines outcomes when the educational characteristics are relatively homogenous
- Stanford student services help in crafting an undergraduate financial literacy program applying our findings to program development.
- Fidelity Investments is applying aspects of the Sightlines framework in the development of a tool assessing employee well-being, with the goal of preventing absenteeism in the workplace.

We are also developing relationships with policy makers at both the county (King County, WA) and municipal (Los Altos, CA) levels where behavioral interventions may show the most promise.

We are especially excited about the publications of the [Milestones report](#) which highlights the tremendous impact of policy decisions on individual behavior. This report was featured in Stanford report and picked up by the Wall Street Journal for an upcoming piece on Millennials and retirement. As discussed in the interview, the Milestones project findings illustrate how institutional policies (i.e., default retirement plans) are poised to change Americans' long-standing goals for retirement and optimize decision making in this era.

We have also made great efforts in further expanding our research and communications networks. To do so, we have begun developing new relationships with potential collaborators within Stanford such as new faculty, research centers, and students, and outside of Stanford connecting with new corporate entities and community-based organizations to raise awareness and discuss the possibility for new research and communication opportunities. A primary outlet for initial connections is [The Sightlines Project website](#). The website is a repository of our own work as well as those in our network including the latest data analysis and descriptions of project methods, publications (i.e., research briefs and full-length reports, new, upcoming white papers, expert interviews and commentaries), and diverse perspectives on all three Sightlines domains (i.e., financial security, social engagement, healthy living). In addition to the website, we regularly give presentations at national conferences and invited meetings, connect with journalists to discuss the Sightlines framework and our latest research, and post the latest Sightlines findings on [social media daily \(during our Milestones release we had a remarkable 1,408 impressions per tweet average\)](#).

This year, our goal is to finalize development and implement a formal communications strategy to double our outreach efforts beginning with the public release of the Financial Security report. We will launch our social media campaign to “tease” findings from the report and engage faculty and other experts in commentary prior to the public release. After the nationwide publication of the report, we will continue the conversation using video interviews, written commentaries and podcasts via our website and social media platforms. We will also present findings through a series of online and in-person presentations by report authors and other contributors to diverse audiences spanning academia and industry.

The next focus for the Sightlines Project will be “Social Engagement”, with a report planned for summer 2019. This report will focus on important issues such as loneliness, caregiving, marriage, hearing loss, and social technology. We look forward to presenting an update of this report during our next meeting in January. Thoughts and suggestions on these topics are of course welcomed in the interim.