



CALSTRS®

Member Marketing and Outreach Strategy

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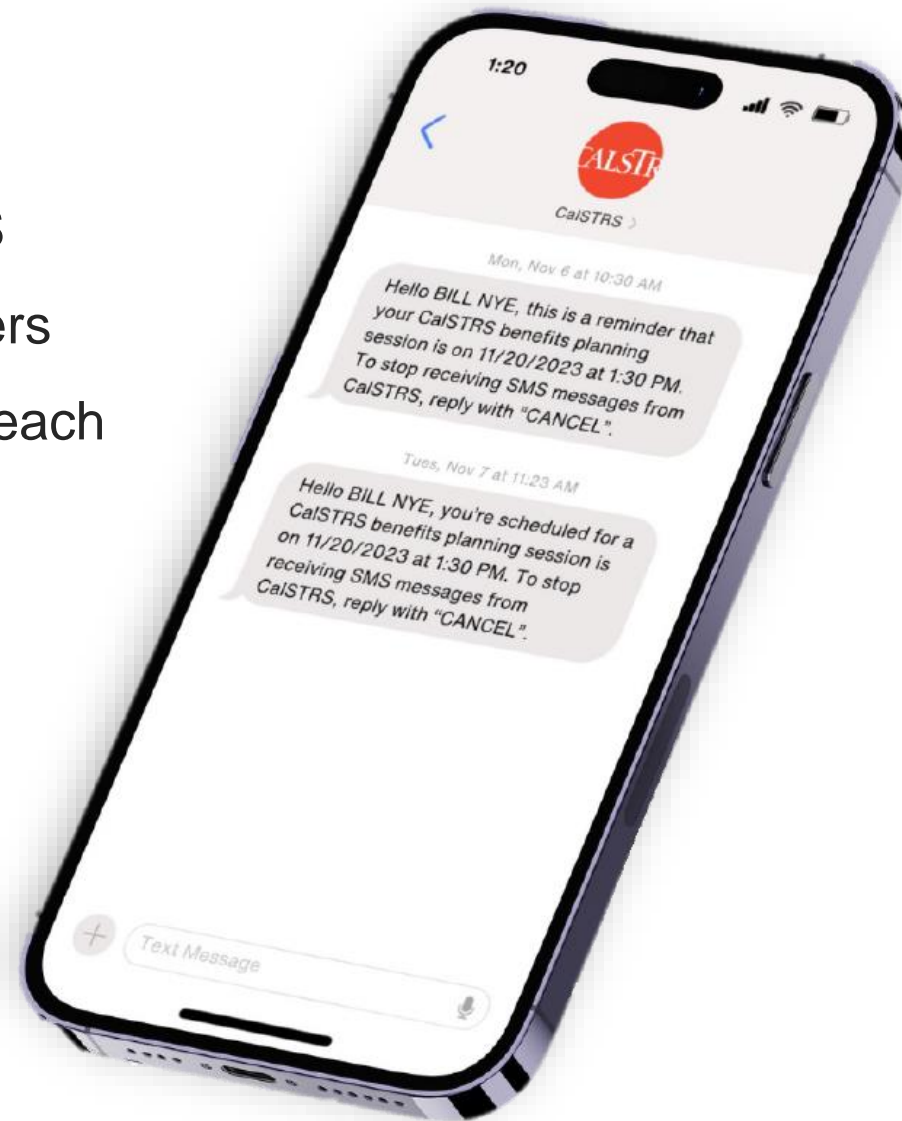
Teachers' Retirement Board
Benefits and Services Committee
January 2024

Marketing and outreach channels

- Print and email campaigns
- Social media
- Industry events and conferences
- Partnerships with employers and stakeholder groups
- Statewide presence with defined regions

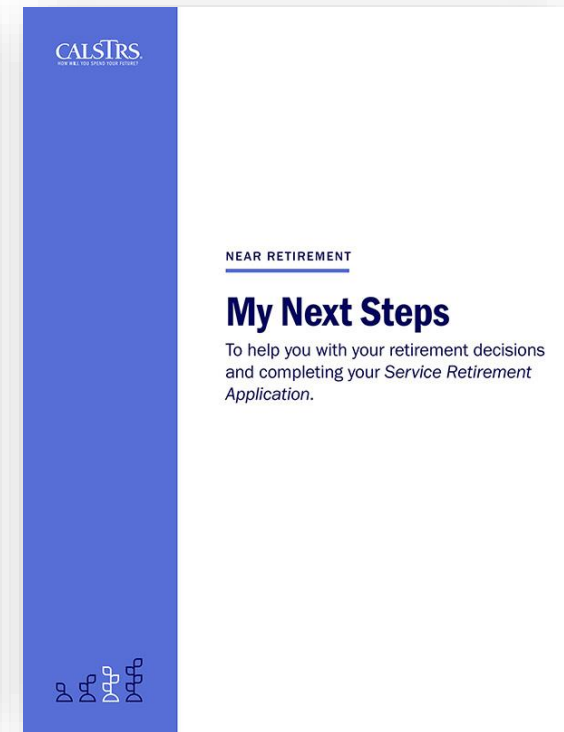
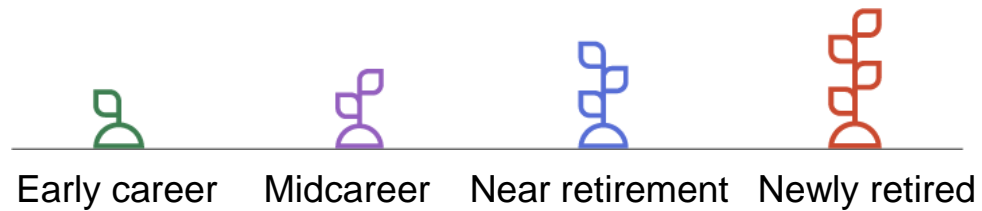
Expansion initiatives

- Self-scheduling in *myCalSTRS*
- SMS text appointment reminders
- Additional event-triggered outreach



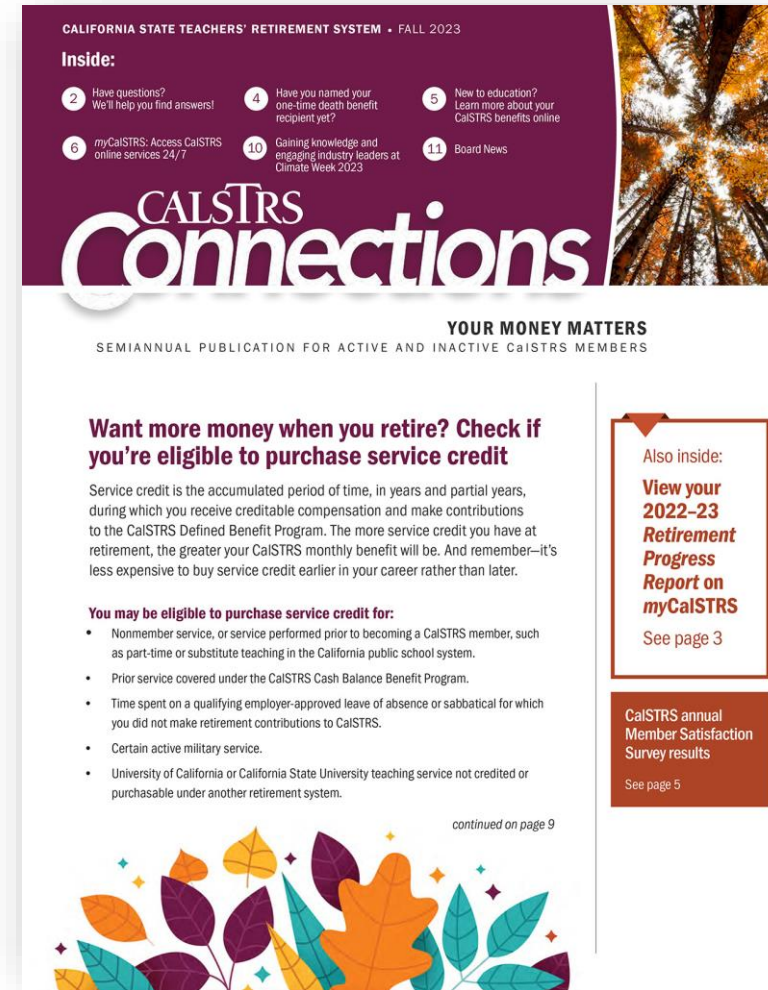
Expansion initiatives

- Career stage materials brand refresh
- My First Steps
- My Next Steps



Expansion initiatives

- Connections newsletter



Expansion initiatives

Integrated campaign approach

- CalSTRS.com
- Email
- In-person workshops
- Newsletters
- Publications
- Social media
- Webinars



The image shows a Facebook post from CalSTRS. The post text reads: "Thanks to everyone who came to our recent Retired Educator workshops in Santa Clara, as well as our other member service centers. Retired members had a chance to learn about Pension 2 as an instrument of pre-tax savings if working in retirement or as a rollover instrument, how to work without affecting their retirement benefit, how to use tools at their fingertips such as myCalSTRS and more." Below the text is a photograph of a workshop in progress. A man in a blue shirt is standing at the front of a room, presenting to a group of people seated at tables. A large screen at the front displays the myCalSTRS logo and some text. The room is well-lit with overhead lights. At the bottom of the post, there are 14 likes and 1 comment.

Newly Retired Series



Newly retired webinars

As a retired CalSTRS member, you have access to our services and resources. Learn how to continue making the most of your CalSTRS membership by attending these online webinars.

myCalSTRS: Discover What You Can Do

Wednesday, May 1 at 3:30 p.m.

With your myCalSTRS account, you can change your address and income tax withholdings, view and print your benefit statements and 1099-R forms, manage your direct deposit account and update your one-time death benefit recipient. Attend this webinar to learn more about your myCalSTRS account.

For more information and to register for this event, please visit CalSTRS.com/webinars.

Learn and Discover: Retired Educator

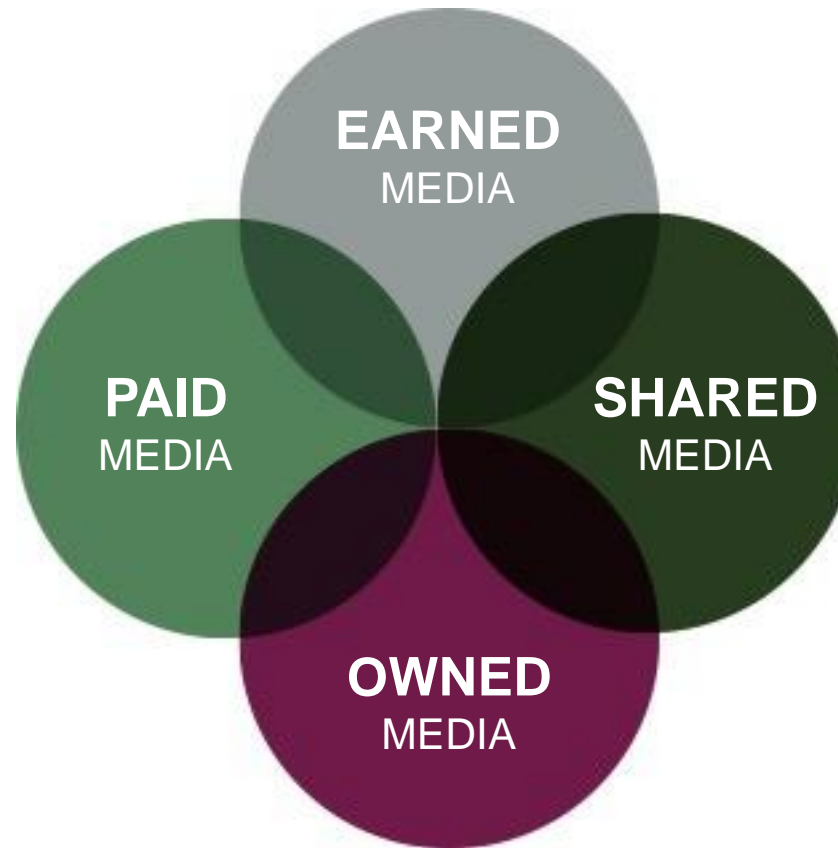
Wednesday, May 1 at 3:30 p.m.

As a retired educator, you have access to valuable CalSTRS tools and resources. Register to learn when you can work without affecting your CalSTRS retirement benefit, how the federal required minimum distribution may affect you, and more.

For more information and to register for this event, please visit CalSTRS.com/webinars.

Expansion initiatives

PESO Model™



Visit spinsucks.com/communication/refreshed-peso-model/ to learn more about the PESO Model™.

Foundations of outreach

- Customization
- Repetition
- Exposure
- Word choice
- Trusted entity



Next steps

- Continue Retirement Readiness and Communications partnership
- Use CalSTRS research to inform decisions
- Develop and use member persona tool
- Learn from A/B message testing



CalSTRS member persona tool

Serving members is our top priority. Understanding them helps us be of service.

Every CalSTRS member has their own unique needs and concerns about retirement. Yet, members often share many of the same attributes as they move through their careers and into retirement.

After asking members about their career stage, financial planning behaviors, life stage, debt load, gender identification and other qualities, we categorized them into five segments:

1. Single with student loan debt
2. Family life and mortgage
3. Seeking retirement knowledge
4. Secure in retirement
5. Retired and self-supported

This tool outlines characteristics, needs, communication preferences and tools relevant to members based on the five segments. Use this tool to learn more about our members and what's important to them at different times in their career, life and relationship with CalSTRS.

This tool can also help determine the best way to communicate with members or write content for a publication, fact sheet, webinar presentation, letter or email. When you understand our members, you can provide the best service possible in writing, over the telephone, during a benefits planning session or at a member service center.



A faded, light-colored background image showing three women in a meeting. The woman in the center is smiling and looking to the right. The woman on the left is also smiling and looking towards the center. The woman on the right is looking down and has her right arm raised. The overall tone is professional and collaborative.

Questions?