CALSTRS®

Member Marketing and Outreach Strategy

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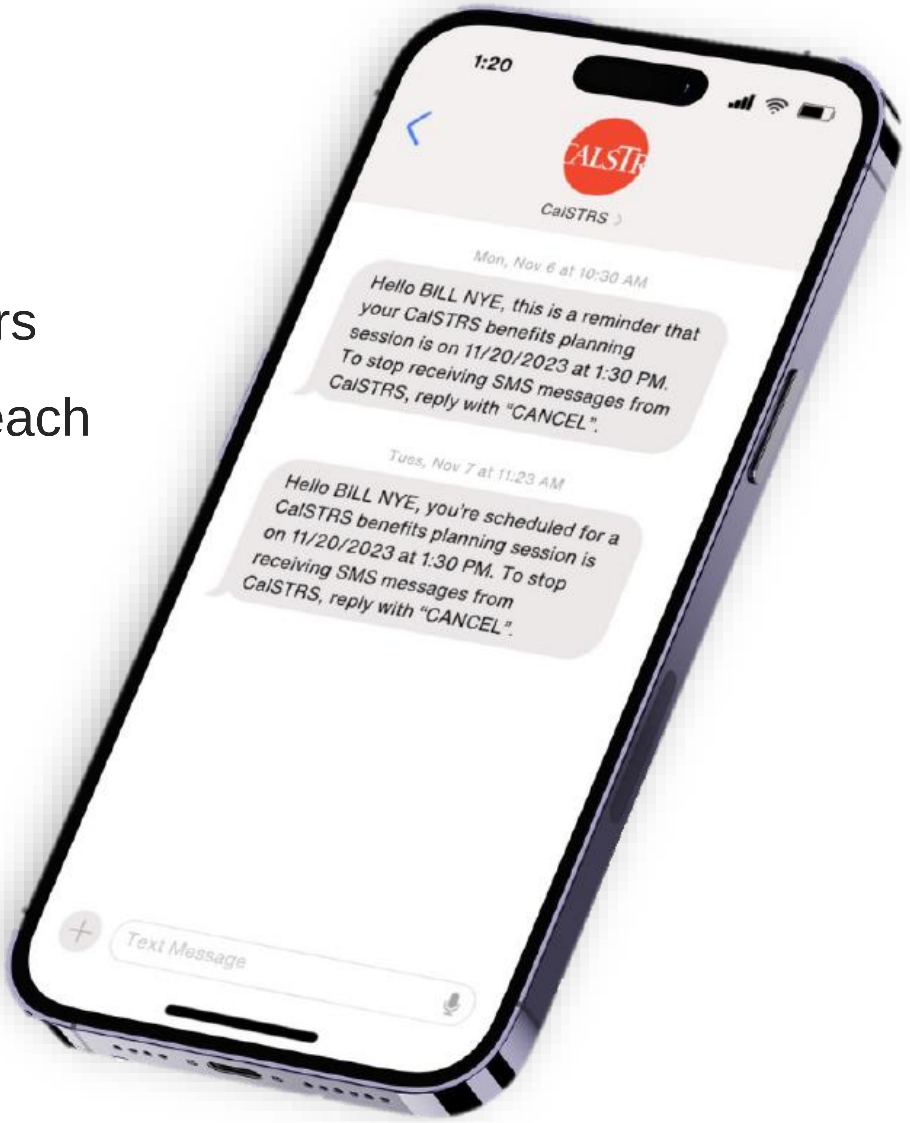
Teachers' Retirement Board
Benefits and Services Committee
January 2024

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

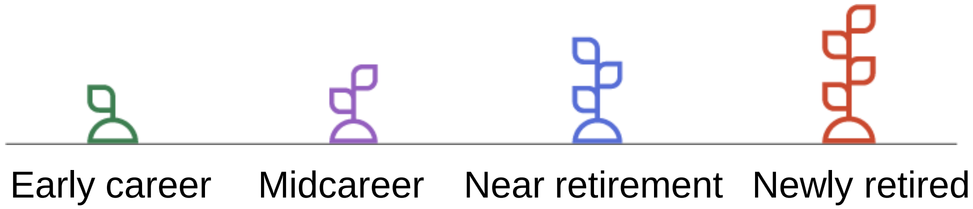
Expansion initiatives

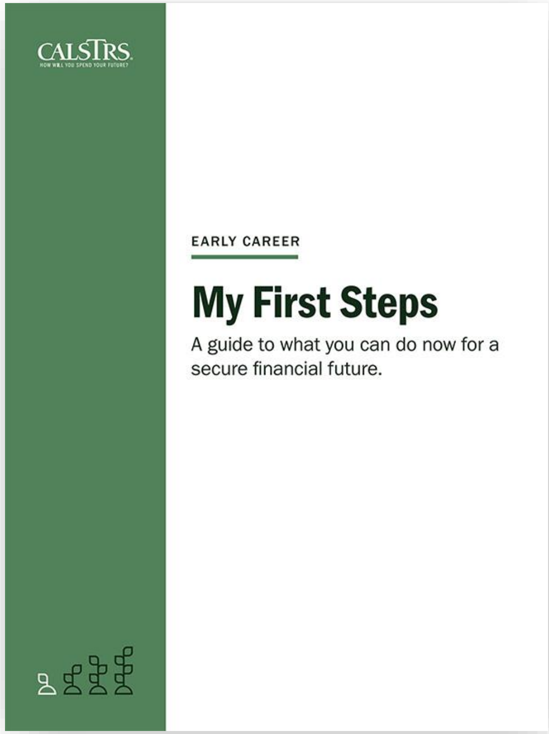
- Self-scheduling in *my*CalSTRS
- SMS text appointment reminders
- Additional event-triggered outreach

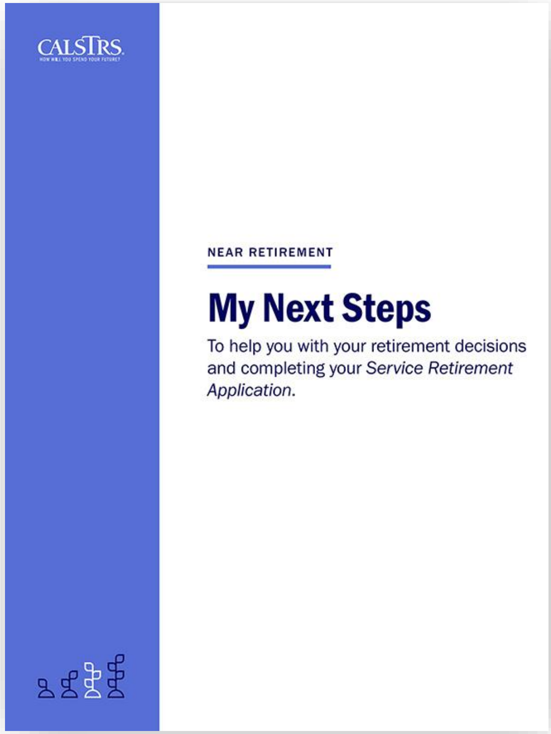


Expansion initiatives

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

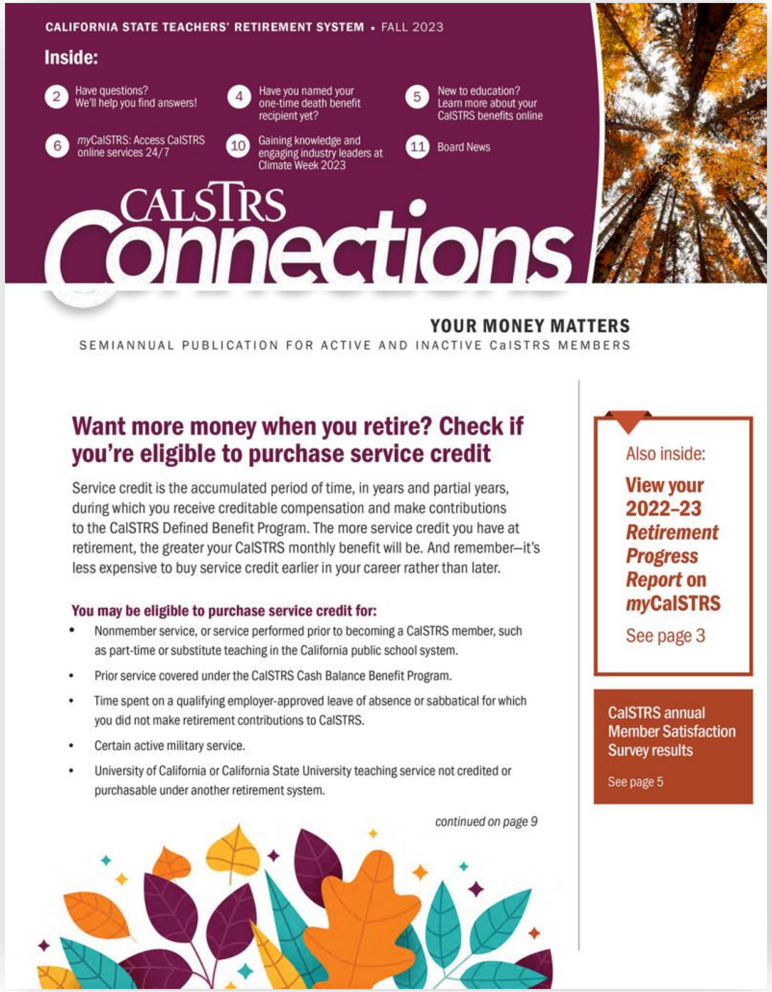






Expansion initiatives

- Connections newsletter



CALIFORNIA STATE TEACHERS' RETIREMENT SYSTEM • FALL 2023

Inside:

CALSTRS Connections

YOUR MONEY MATTERS

SEMIANNUAL PUBLICATION FOR ACTIVE AND INACTIVE CalSTRS MEMBERS

Want more money when you retire? Check if you're eligible to purchase service credit

Service credit is the accumulated period of time, in years and partial years, during which you receive creditable compensation and make contributions to the CalSTRS Defined Benefit Program. The more service credit you have at retirement, the greater your CalSTRS monthly benefit will be. And remember—it's less expensive to buy service credit earlier in your career rather than later.

You may be eligible to purchase service credit for:

- Nonmember service, or service performed prior to becoming a CalSTRS member, such as part-time or substitute teaching in the California public school system.
- Prior service covered under the CalSTRS Cash Balance Benefit Program.
- Time spent on a qualifying employer-approved leave of absence or sabbatical for which you did not make retirement contributions to CalSTRS.
- Certain active military service.
- University of California or California State University teaching service not credited or purchasable under another retirement system.

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Also inside:

View your 2022–23 *Retirement Progress Report* on *my*CalSTRS

See page 3

CalSTRS annual Member Satisfaction Survey results

See page 5

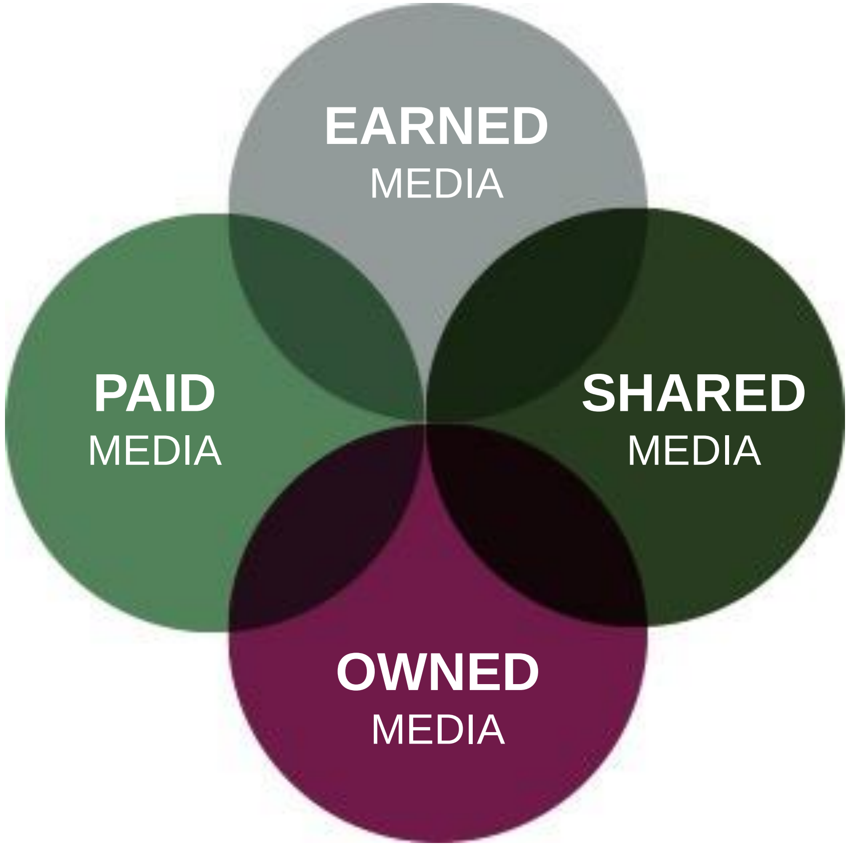
Expansion initiatives

Integrated campaign approach

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

Expansion initiatives

PESO Model™



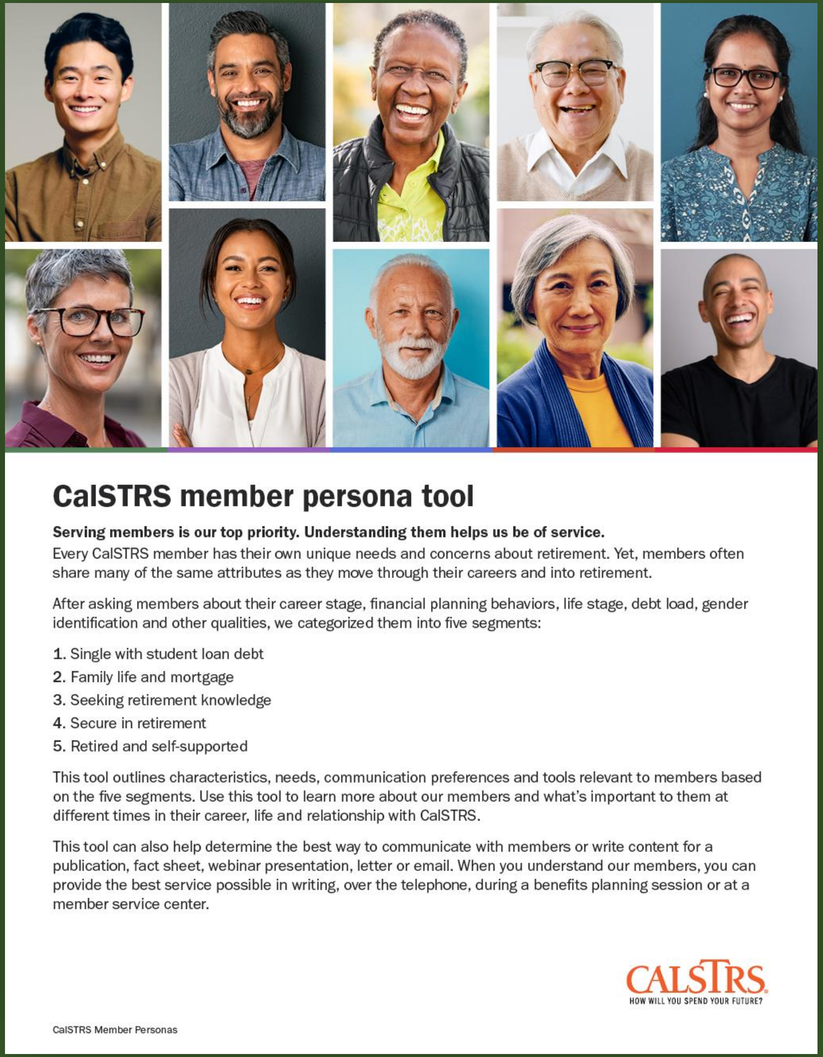
Visit spinsucks.com/communication/refreshed-peso-model/ to learn more about the PESO Model™.

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.

CALSTRS
HOW WILL YOU SPEND YOUR FUTURE?

CalSTRS Member Personas

Questions?