

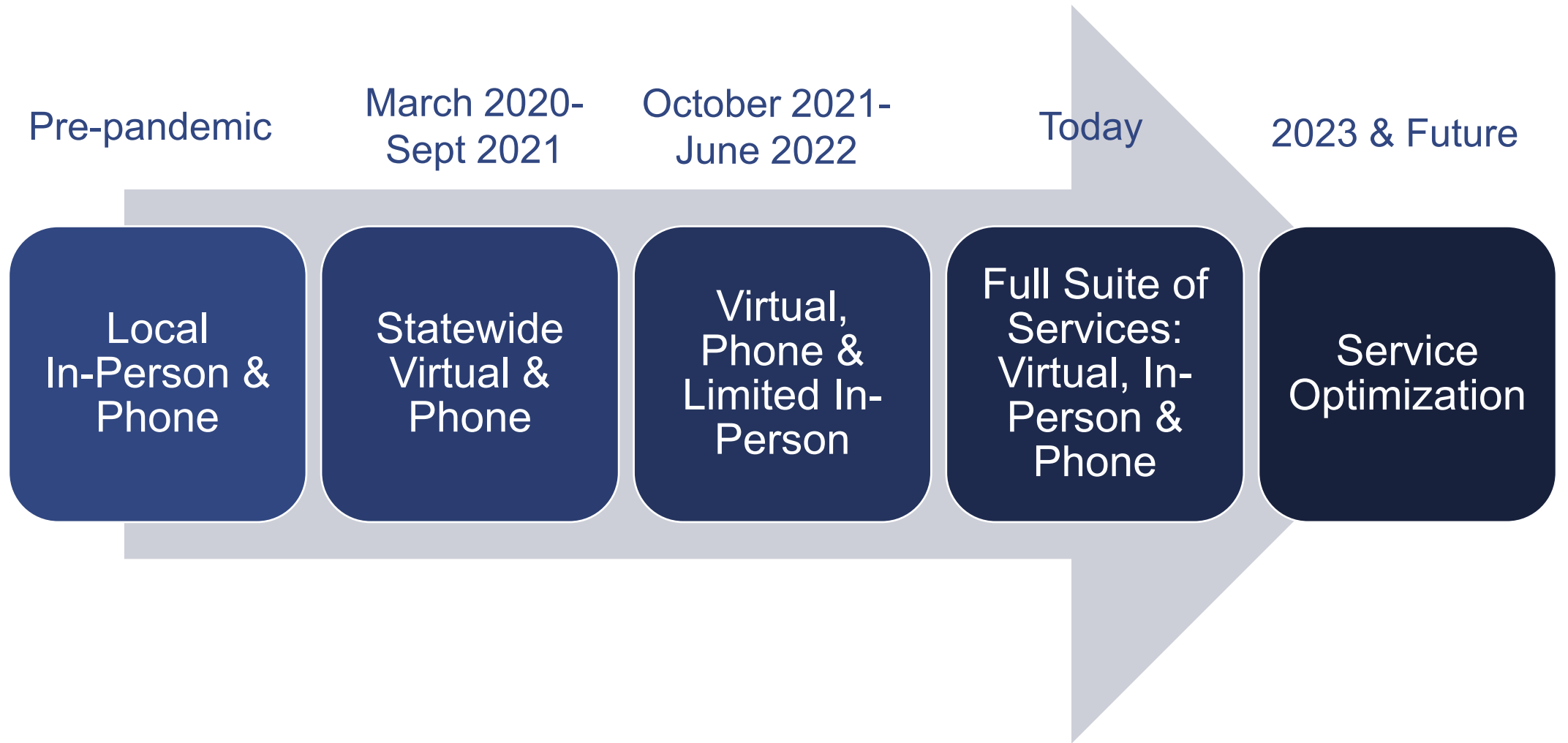
CALSTRS

The Member Experience

Now & into the Future

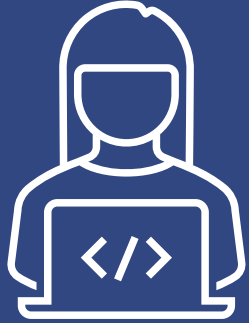


Member services evolution



Benefits planning services

Personalized sessions



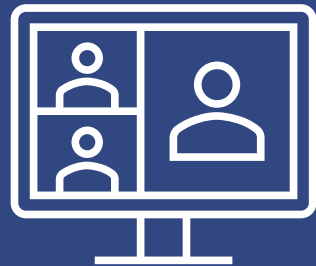
Individual Virtual



Individual In-Person



Individual Telephone



Group Virtual



Group In-Person

Benefits education offerings



Webinars

- Instructor-led virtual classes
- Interactive worksheets & polling questions
- Live Q & A
- Offerings for all career stages
- Topical-based offerings based on career stages



In-Person Workshops

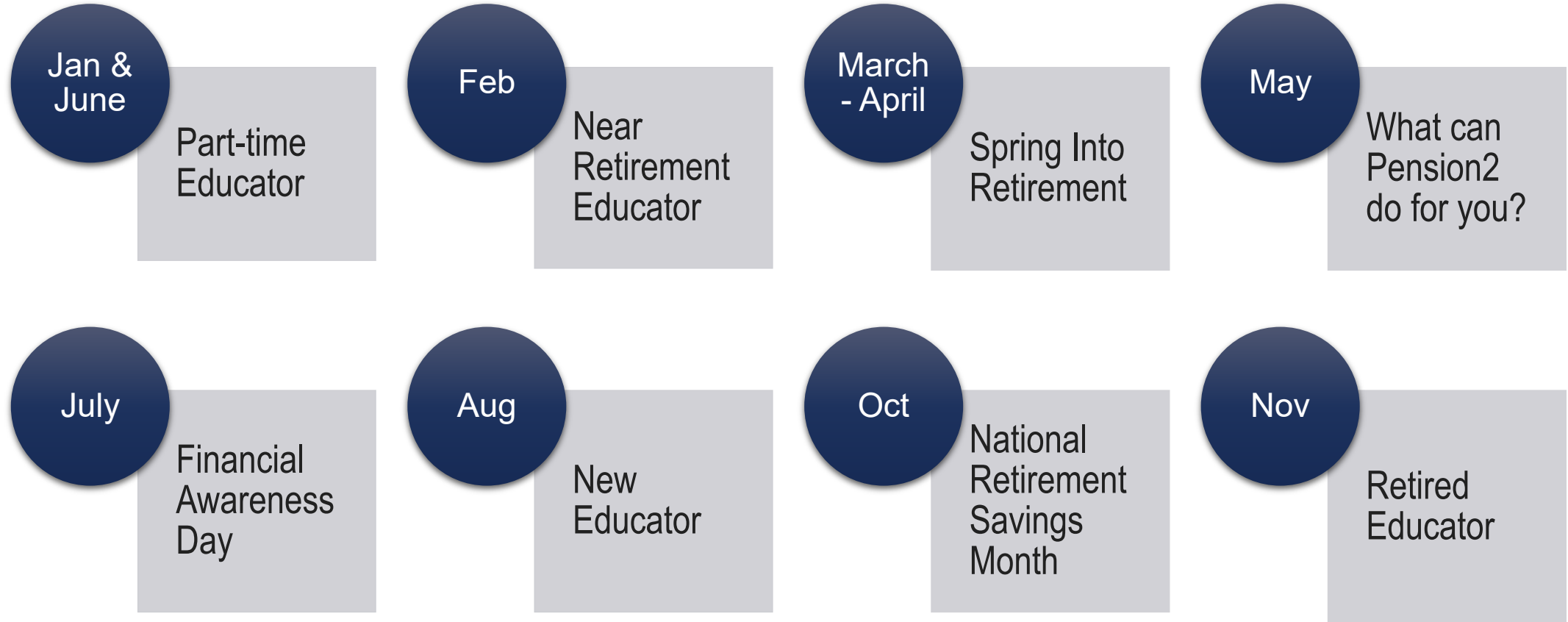
- Instructor-led classes
- Live Q & A
- Interactive worksheets & hands-on demonstrations
- Specialized delivery at outreach locations



Member Resources

- Publications: print & online
- Career-stage web pages
- Educational videos
- Online calculators
- 403bCompare.com
- Frequently asked questions

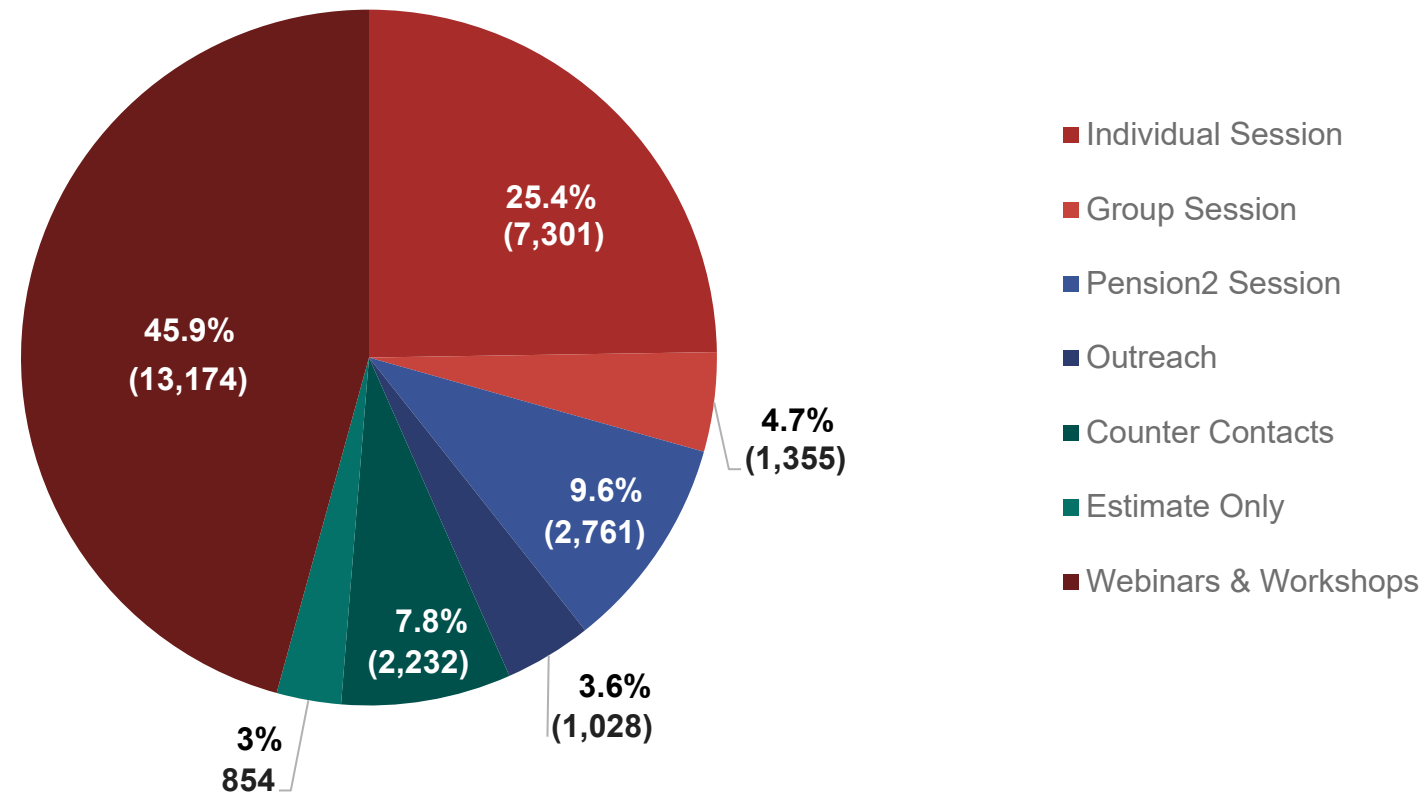
Member outreach & events: 2023



Member services

Attendance across all services

28,705 Member Interactions



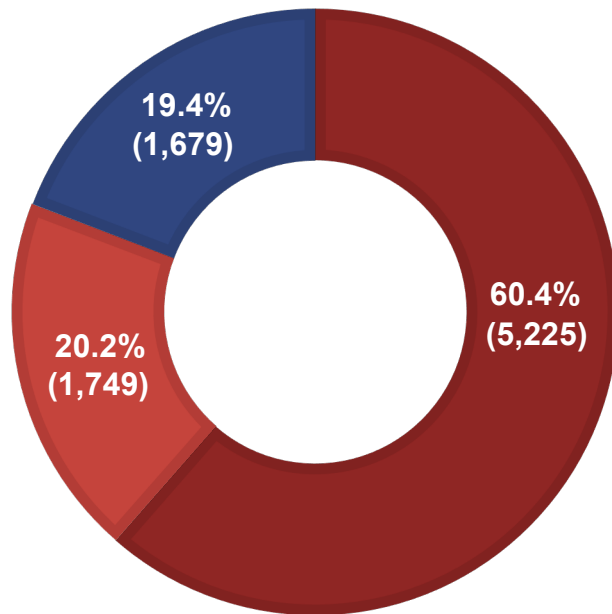
Fiscal Year-to-Date

Member behavior

Access preferences

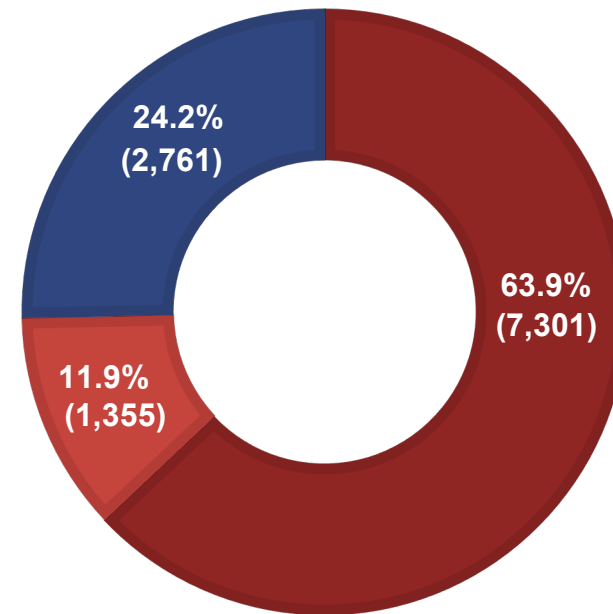
BENEFITS PLANNING SESSIONS BY MODE OF DELIVERY

■ Virtual ■ In Person ■ Telephone



BENEFITS PLANNING SESSIONS BY TYPE

■ Individual ■ Group ■ Pension2



Fiscal Year-to-Date

Member service center modernization

- Retain accessibility & statewide coverage
- Reduce overall footprint
- Open concept designs
- Focus on front counter interactions & expand private meeting spaces
- Leverage versatile conference spaces
- Maintain welcoming atmosphere



Santa Clara Member Service Center Moving to Oakland Fall 2023



- Leveraging nearby conference space for workshops & events
- Square footage reduction of 39%
- Significant savings through new lease term
- Cost-effective move strategy

Service optimization

2023 and future

- Leverage technology to expand digital interactivity & engagement
 - Virtual event management platform
 - Evaluate Zoom licensing capability to maximize value of statewide resourcing
 - Member self-service functionality with Pension Solution
- Advance educational design & delivery to improve comprehension & retention using adult online learning principles
 - Flexible learning options
 - Engaging delivery formats