

Customer Engagement Plan 2018

Employer	Employer Peer Group Employer coaching session	Employer coaching session Employer Briefing Note Launch Customer Engagement Strategy 2018	Employer Peer Group Engage employers to promote benefit statements on Portal	Employer survey results, actions and improvements published Employer Briefing Note	Employer Peer Group Issue accounting disclosure for employers with year ending 31 March Mid Year Review	Employer Briefing Note Employer Coaching Session Employer Peer Group Consultation on PAS Employer survey issue
Member (active)	Member satisfaction results published Reminder to access benefit statements on portal	SS SCAVC events		Main depot roadshow Prize draw for web portal registrations Member satisfaction results published SS SSAVC Events	School/Academy roadshow Pension Portal Workshop	College/University roadshow BASBM Summer Conference
Member (deferred)	Member satisfaction results published Reminder to access benefit statements on Portal	AVC events	Main depot roadshow	Main depot roadshow Prize draw for web portal registrations Member satisfaction results published	School/Academy roadshow	Deferred benefit statements available on web portal College/University roadshow Deferred Member Newsletter
Member (pensioner)	Member satisfaction results published Reminder to access to benefit statements on Portal		Quarterly and annually paid pensioner payslips, newsletter and P60s issued	P60s issued Prize draw for web portal registrations Member satisfaction results published Pensioner Newsletter	School/Academy roadshow	Quarterly payslips School/Academy roadshow Reminder to access P60 on Portal
Trustees / Pension Board	Media Roundup 23 January: Pensions Board meeting	Media Roundup 20 February Shareholder Forum (LGPS Central)	Media Roundup Pooling update 28 March: Pensions Committee	Media Roundup External investment training Satisfaction results published	Media Roundup Mid Year Review	Media Roundup Trustee and Pensions Board induction 25 June: Pensions Committee
	January	February	March	April	May	June

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Employer	Solihull Bursar Group	Employer Briefing Note	Employer coaching session Issue accounting disclosure to employers with year end 31 July Employer Peer Group	Employer Briefing Note Issue accounting disclosure to employers with year end 31 August	Annual general meeting Employer coaching session Employer satisfaction survey circulated Employer Briefing Note Initial Valuation Discussions	Issue Employer Survey Employer Peer Group
Member (active)	College/University roadshow AVC statements sent to members by Prudential Prize draw for web portal registrations Member satisfaction results published	Annual benefit statements available on web portal Web portal workshops	Civic roadshow events	Civic roadshow events Active Member Newsletter BASBM Autumn Conference Pension Tax Prize draw for web portal registrations Member satisfaction results		
Member (deferred)	Education site roadshow Prize draw for web portal registrations Member satisfaction results published Deferred Member Newsletter		Civic roadshow events	Civic roadshow events AVC autumn events Prize draw for web portal registrations Member satisfaction results published		
Member (pensioner)	College/University roadshow Prize draw for web portal registrations Member satisfaction results published		Overseas pension confirmation distributed Civic roadshow events Quarterly payslips issued	Civic roadshow events Pensioner Engagement Forum Prize draw for web portal registrations Member satisfaction results published		Quarterly payslips issued
Trustees/ Pension Board	Media Roundup 3 July: Pensions Board July: Trustee training Training needs analysis Member satisfaction results published	Media Roundup	Media Roundup 5 September: Pensions Committee	Media Roundup Satisfaction results published	Media Roundup Annual general meeting	Media Roundup 12 December: Pensions Committee

