








# CUSTOMER ENGAGEMENT PLAN 2023/24

	APRIL 2023	MAY 2023	JUNE 2023	JULY 2023	AUGUST 2023	SEPTEMBER 2023	OCTOBER 2023	NOVEMBER 2023	DECEMBER 2023	JANUARY 2024	FEBRUARY 2024	MARCH 2024		
<b>Employer</b>	1. Quarterly Employer Brief  	1. Accounting Disclosure year-end 31 March	1. Employer Peer Group	1. Employer Mid-Year Review 2. Employer Survey 3. Quarterly Employer Brief  	1. ABS Communications	1. Accounting Disclosure year-end 31 July 2. Employer Peer Group	1. Accounting Disclosure year-end 31 August	1. Annual General Meeting (AGM) 2. Employer Covenant questionnaires	1. Quarterly Employer Brief 2. Employer Peer Group	1. Review of PAS to commence 2. Preparation for Annual Funding Updates to commence	1. Year-end requirements issued 2. Payroll provider changes campaign	1. Employer Peer Group 2. Quarterly Employer Brief 3. Employer Funding reviews  		
		Employer Annual Health Checks			McCloud Data Collection Support - tbc			Face-to-Face Employer Coaching						
	Discretionary Policy Review Project													
	Monthly File Submissions, Engagement and Performance Feedback													
	Employer Webinars													
	Pension Administration System Transition Activities													
<b>Member (Active)</b>	1. Depot Roadshows 2. Pre-retirement workshops 3. Targeting smaller employers in Housing associations to provide member support 4. Bursar event – poss Birmingham 5. Pre-retirement workshops 6. Member intention surveys 7. Targeting school training days	1. Pre-retirement workshops 2. Targeting smaller employers in LEA schools to provide member support 3. Roadshow event – schools and academies 4. Targeting school training days	1. Pre-retirement workshops 2. Targeting smaller employers in Leisure Services to provide member support 3. Active Engagement Forum 4. Bursar Event – Bite-Size Events 5. Induction Quarterly Webinars 6. Targeting school training days 7. Pru and Utmost AVC statements	1. Pre-retirement workshops 2. Targeting smaller employers in Child Services to provide member support 3. Colleges & University roadshow event 4. Targeting school training days	1. Pre-retirement workshops 2. Targeting smaller employers in Community Bodies to provide member support 3. Targeting school training days	1. District roadshow 2. Targeting smaller employers in LEA schools to provide member support 3. Active LGPS & You Webinars 4. Induction Quarterly Webinars 5. Pre-retirement workshops 6. Member intention surveys 7. Targeting school training days 8. Annual Benefit Statements	1. Pensions Tax 2. Targeting smaller employers in Adult Services to provide member support 3. Pre-retirement workshops 4. Targeting school training days 5. Pension Saving Statements	1. Pre-retirement workshops 2. Targeting smaller employers in Parish councils to provide member support 3. Bursar Event – Bite-Size Events 4. Active newsletter 5. Targeting school training days	1. Pre-retirement workshops 2. Targeting smaller employers in LEA schools to provide member support	1. Pre-retirement workshops 2. Targeting smaller employers in LEA schools to provide member support	1. Pre-retirement workshops 2. Depot Roadshows 3. Targeting smaller employers in LEA schools to provide member support			
	Presentations/One-to-One Consultations/Drop-in Surgeries and Marketplace Events, Post-Event Surveys, Webinars													
	<b>Member (Deferred)</b>	1. Depot Roadshows	1. Deferred LGPS & You Quarterly Webinars 2. Deferred Benefit Statement (DBS) 3. DBS Email Notification		1. Deferred Planning Your Retirement workshops  	1. District roadshow	1. Pensions Tax	1. Deferred Planning Your Retirement workshops	1. Deferred LGPS & You Quarterly Webinars				1. Depot Roadshows	
		Presentations/One-to-One Consultations/Drop-in Surgeries and Marketplace Events, Post-Event Surveys, Webinars												
	<b>Member (Pensioner)</b>	1. Tea & Teach Events		1. Quarterly payslips issued  				1. District roadshow 2. Quarterly payslips issued	1. Deferred newsletter	1. Quarterly payslips				1. Quarterly payslips issued 2. Annual payslips
		Monthly Payslips												
	<b>Governing Bodies</b>	Presentations/One-to-One Consultations/Drop-in Surgeries and Marketplace Events, Post-Event Surveys, Webinars												
1. Pensions Board meeting		1. Governing Body Induction 2. Pensions Committee		1. Employer Mid-Year Review 2. Pensions Board meeting	1. Pensions Committee	1. Pensions Board meeting	1. Annual General Meeting	1. Pensions Committee	1. Pensions Board meeting				1. Pensions Committee	
Weekly Briefings to the Pensions Committee Chair from Executive Director of Pensions/Members of the Senior Management Team and Updates to Governing Body Members When Required														
Training Events								Training Events						