CUSTOMER ENGAGEMENT PLAN 2020/21

	January 2020	February 2020	March 2020	April 2020	May 2020	June 2020	July 2020	August 2020	September 2020	October 2020	November 2020	December 2020	January 2021	February 2021	March 2021
Employer	**New** Employer coaching session **Employer valuation consultation** **FSS consultation**	Year-end requirements issued Employer survey Employer Peer Group **Final valuation contribution confirmed**	**COVID Impact Support** **Valuation results certified**	**PSD payment reminders**	Accounting disclosure year-end 31 March	Webinars: Monthly Data Submission; Retirements; Fund Update Employer Brief Employer Peer Group BASBM conference	Employer Mid-Year Review Webinars; Monthly Data Submission; Retirements;	Webinar: Tenders, TUPE, Admission Bodies, Pass Through Employer survey	Webinars: Refunds; Deferments Accounting disclosure year-end 31 July Employer Peer Group Employer Brief	Webinars: Monthly Data Subission; Pay and Service Accounting disclosure year-end 31 August **PSD payment reminders**	Webinars: Pay And Service; Fund Induction; Ill-Health Retirements BASBM conference	Employer Brief Annual General Meeting Employer Peer Group	Employer coaching session Employer survey Webinars (tbc)	Year-end requirements issued Webinars (tbc)	Employer Peer Group Employer coaching session Webinars (tbc)
							Employer Hub testing and planned rollout to commence								
					Rollout of increased employer online and electronic support (videos, webinars, support guides)										
Member (active)	Pensions tax Pensions Portal Pre-retirement workshops WM Travel merger letter	Pensions Portal Pre-retirement workshops ELAS merger letter	Depot roadshows Pensions Portal Pre-retirement workshops	Member Covid19 support email	ELAS merger update letter	City of Wolverhampton Council webinars x3 Walsall MBC webinars x 1	Walsall MBC webinar x 2 Solihull MBC webinar x 3 Sandwell MBC webinar x 4 Dudley MBC webinar x 4 Coventry CC webinar x 6	Annual benefit statements ABS email notification Birmingham CC webinars x 8 **Ensuring website compliance with public sector access requirements**	District roadshow (tbc) Pre-retirement workshops (tbc)	Active newsletter Pensions Portal Pre-retirement workshops (tbc) Member survey (tbc)	Pensions tax webinars Pensions Portal (tbc)	Pensions Portal (tbc) Pre-retirement workshops (tbc) Christmas card	Pensions tax Pensions Portal (tbc) Pre-retirement workshops (tbc)	Pensions Portal (tbc) Pre-retirement workshops (tbc)	Depot roadshows (tbc) Pensions Portal (tbc) Pre-retirement workshops (tbc)
						One-to-one telephone consultations									
				Website review											
Member (deferred)	Pensions tax Pensions Portal Pre-retirement workshops WM Travel merger letter	Pensions Portal Pre-retirement workshops ELAS merger letter				Deferred benefit statement (DBS) DBS email notification	DBS email notification	**Ensuring website compliance with public sector access requirements**	District roadshow (tbc) Pensions Portal prize draw Pre-retirement workshop Deferred newsletter	Pensions Portal Pre-retirement workshops (tbc) Member survey (tbc)	Pensions tax webonars (tbc) Pensions Portal (tbc)	Pensions Portal (tbc) Pre-retirement workshops (tbc) Christmas card	Pensions tax webinars (tbc) Pensions Portal (tbc) Pre-retirement workshops (tbc)	Pensions Portal (tbc) Pre-retirement workshops (tbc)	Depot roadshows (tbc) Pensions Portal (tbc) Pre-retirement workshops (tbc)
				Website review											
Member (pensioner)			Quarterly payslips issued Pensioner newsletter Covid19 support email	Pensioner newsletter		Quarterly payslips issued		**Ensuring website compliance with public sector access requirements**	District roadshow (tbc) Pensions Portal prize draw Quarterly payslips issued	Pensioner engagement forum (tbc)		Quarterly payslips issued			Pensioner newsletter Quarterly payslips issued
				Website review											
Pensions Committee/ Board	LGPS monthly updates Pensions Board meeting	LGPS monthly updates	LGPS monthly updates Pensions Committee	LGPS monthly updates Pensions Board	LGPS monthly updates	LGPS monthly updates Pensions Committee Induction training	LGPS monthly updates Employer Mid-Year Review Pensions Board	LGPS monthly updates	LGPS monthly updates Pensions Committee	LGPS monthly updates Pensions Board	LGPS monthly updates	LGPS monthly updates Annual General Meeting including Committee and Board Pensions Committee	LGPS monthly updates Pensions Board meeting	LGPS monthly updates	LGPS monthly updates Pensions Committee