



Benefits & Services Committee

Item Number 4 – Open Session

Subject: Employer Engagement and Outreach

Presenter(s): Jeff Zimmer

Item Type: Information

Date & Time: May 4, 2022 – 15 minutes

Attachment(s): None

PowerPoint(s): Employer Engagement and Outreach- Employer Services

PURPOSE

To provide the committee information about employer engagement and outreach efforts managed by the Employer Services division of Benefits and Services. While other areas in CalSTRS interact with employers¹, CalSTRS employer partners interact with Employer Services most frequently, both as customers and suppliers of contribution data for members. Through these interactions, Employer Services builds a partnership with employers to facilitate the reporting of more than 13 million lines of Defined Benefit and Cash Balance contribution data for approximately 450,000 active members. Approximately 90 report sources (usually County Offices of Education) collect information from their nearly 1,800 school districts and send the information to CalSTRS.

This informational item provides details about the Employer Services focus on this relationship, new outreach methods recently developed, training metrics and our attempts to measure our employer partners' engagement and satisfaction.

DISCUSSION/SUMMARY

In 2020, Employer Services began the initial stages of what has become a continued evolution of our business and the partnership between CalSTRS and our employers for the ultimate benefit of CalSTRS members. The division was rebranded as Employer Services (from Member Account

¹ Service Retirement oversees post-retirement earnings reported by employers and communicates with and participates in training for employers on that subject, Audit Services performs audits of districts, Retirement Readiness markets Pension2 to employers, and the Financial Services Branch works with employers on the collection of cash contributions and administering Penalties and Interest. Employer Services maintains strong partnerships with all these peer business areas.

Services) to better reflect our purpose, and staff in the division helped create a mission statement that unites us in this purpose:

“We build relationships with employers and business partners by providing service and education that lead to accurate contribution reporting and member benefits.”

This mission establishes service, accuracy, and education as three foundational themes, helps us frame our relationships with employers more as a partnership, and emphasizes our efforts to serve them as customers. Over the last two years, we have strengthened existing or created new services in pursuit of our mission and to improve outreach and engagement.

Outreach

To better understand our employer partners’ unique needs, Employer Services developed a new approach to periodically check in and speak with employers. The Employer Help teams that are the main points of contact for employers started offering informal conference calls to discuss current topics, gather questions and gain knowledge about a report source’s specific needs. The Employer Help teams that facilitate these calls also bring in other teams and trainers across Employer Services to allow opportunities to provide information about legislation or audit findings that could be helpful to the audiences. The table below shows the number of these calls Employer Services conducted in FY21-22 to date:

Number of Conference Calls								
July	August	September	October	November	December	January	February	March
14	13	9	17	10	6	5	8	15

These outreach opportunities have proven to be beneficial for Employer Help teams as well as our customers. The teams can address pending items and gather information that staff might have previously requested; after the call, the employer is more responsive to the specific topic or work item. Staff have noticed increases in efficiency and the ability to quickly resolve cases that would require days to weeks of back-and-forth emails. Another benefit is how the working relationship between staff and employers is usually strengthened after a call. Newer Employer Help staff gain more confidence, and the employers gain confidence in our staff once we use these calls to establish rapport. Feedback from employers has noted that the outreach calls are productive, informative, and helpful.

One of the most critical occasions for outreach is immediately after a district receives a final audit report from CalSTRS. The Employer Services Audit Resolution Team works with districts to ensure they understand any findings and the requirements to report any necessary corrections. The Audit Resolution Team also refers the district to our Training and Development team in case the district requests additional training and education. In both FY20-21 and FYTD21-22, the Audit Resolution Team has provided immediate guidance on the volume of audit reports after receiving the handoff from Audit Services:

Audit Reports Received and ART Outreach Completed				
	Quarter 1	Quarter 2	Quarter 3	Quarter 4
FY 20-21	19	19	23	22
FYTD 21-22	29	17	-	-

This fiscal year, the Audit Resolution Team began a new process to partner with the Employer Help teams to perform a six-month audit follow-up after the district receives initial guidance from the Audit Resolution Team. Now, the Employer Help team responsible for covering the county that had one or more districts audited will sample more current contribution data related to an audit finding to check if the district might require additional education or customized information to ensure the reporting noted as a finding continues to be reported correctly.

Starting in early FY21-22, Employer Services partnered with the Senior Director of Governmental Relations and Legal Affairs for the California County Superintendents Educational Services Association (CCSESA) to establish monthly meetings with a pension advisory group made up of select county business officials across the state. These meetings created a forum to provide information and updates, but most importantly it became a clearinghouse for complex or escalated issues that require deeper and more dedicated conversations, offering these officials direct access to Employer Services and CalSTRS leadership.

This meeting offers Employer Services a new communication channel to reach employers and have representatives from the group spread the word about new services or audiences that are more difficult to reach. For example, Employer Services conducted two days of charter school educational sessions in April 2022 in a pilot effort to provide information about CalSTRS reporting laws and processes to charter schools, a large and critical audience that Employer Services is exploring new ways to reach. Both through the CCSESA pension advisory group meeting and independent marketing, Employer Services was able to register a record number of charter schools to attend this pilot training experience.

April 2022 Charter School Sessions		
	Number of Students Registered	Number of Schools Represented
Day One	80	61
Day Two	77	56

Engagement

The primary point of engagement with our employer partners happens during our day-to-day interactions and the inquiries we attempt to resolve. The four Employer Help teams in Employer Services each have staff dedicated to certain employers to provide familiarity and to create expertise about a certain employer’s or group of employers’ needs and specific situations. The size and geographic location of the employers are balanced across these teams to ensure adequate support for both our smallest and our most complex employer partners.

Number of Initial Inquiries								
July	August	September	October	November	December	January	February	March
618	653	643	583	576	464	546	469	594

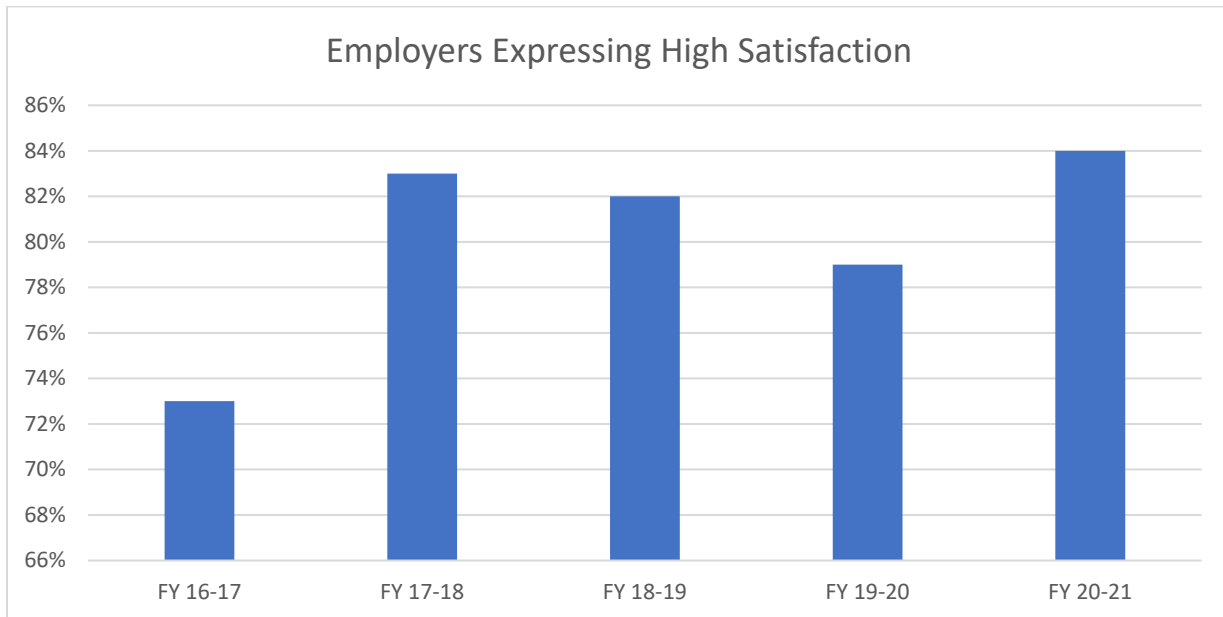
Each of these inquiries are engagement opportunities because they can be leveraged to give us information about additional topics or examples to include in training and provide possible information to use in our outreach if a concern or question at one employer becomes a trend that we see from inquiries across multiple employers.

Training continues to be one of the most powerful and important ways of engaging with our employer customers. These training opportunities also serve as introductions to new payroll reporting staff at employer sites, forums for conversations about specific examples or real-world situations and a way to demonstrate the investment Employer Services has made in training as an engagement tool, continually updating our training and subsequent evaluations for an adult learning audience while listening to employer feedback to deliver self-paced computer-based training.

The Employer Services Training and Development team has delivered remarkably significant numbers of training opportunities over the last two fiscal years, even pivoting quickly and expertly into using virtual meeting tools while we and our employer partners were working remotely.

Training Delivery and Audience Reached			
	Number of Trainings	Number of Students	Number of Employers Served
FY 20-21	45	2,135	1,092
FYTD 21-22	44	1,297	631

Every year, Employer Services conducts an employer survey to determine the satisfaction of our employer partners with the services we provide. This satisfaction metric has increased from the first survey in FY 16-17 and reached its highest rating in the last fiscal year. The survey also provides an opportunity for written feedback that we collect and use to modify and improve our services.



As our services evolve, so does our survey. Employer Services is partnering with the CalSTRS Survey, Research and Analysis area to include new questions on the survey to better determine employers’ experiences with the level of effort our services require, additional information on our training, and questions focused on their experience as customers throughout their journeys.

Challenges

As with most efforts related to administering the collection of reporting data for our members, the sheer number, heterogeneity, and employment complexity of California’s school employers make a simple approach to outreach and engagement difficult or impossible. Employer Services has built a foundation of services that can be applied broadly, and through our focus on outreach and engagement we become better at understanding individual differences to improve our management of these relationships to provide the most meaningful help and information at the right time.