**Action Plan for Pensions 2012 – Appendix A**

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| **Objective** | **Channel** | **Audience** | **Activity** | **Lead** | **Date** | **Status** |
| **GENERAL PENSIONS PROMOTION** |
| To increase the number of LCC employees in the Lancashire County Pension Fund by 5%To achieve an opt out rate of less than 50% | Website:* Your Pension Service
* LCC intranet
 | All Staff  | * Create an easy to use pensions calculator
 | KW/JW | 29 October  | Ongoing and on target  |
| * Show comparison data with sample private sector pensions/state pensions.
 | KW/JW | 29 October  | Ongoing and on target  |
| * Create Timeline explaining the changes to pensions that will come into effect April 2014.
	+ Oct/Nov 2012 - launch member self service
	+ Jan 2013 - launch auto enrolment
	+ April 2014 – New LGPS 2014
 | KW | April 2014 | Ongoing  |
| * Sign up function to newsletter/text alerts
 | KW | 29 October  | Considering if possible – not yet known  |
| * Explore possible use of smart apps
 | DL | 18/19 September  | Explored with Heywood. Seen as future development.Not available at this point. |
| **LAUNCH MEMBER SELF SERVICE:** |
|  | * All internal channels
 | All Staff  | Function allows access to pension records and enables users to forecast retirement benefits * Use internal channels to promote function
* Use current Scheme newsletter
 | DL/JW | * Agree wording early October
* Go Live Oct/Nov
 | Awaiting go live date from Heywood and OCL  |
| **AUTO ENROLMENT**  |
|  | Letters  | All staff | Agree wording for letters to go out from Chief Exec.* Include financial planning session information
* Include where to go to get more info - websites
 | DL/JW/ KW | * Agree wording 26 September
* Letter to go out to staff post 29 October 2012
 | Ongoing and on target  |
|  | Website:* Your Pensions Service
* LCC intranet
 | All Staff | * Background to scheme (national)
* FAQ's – include how to opt out and option for financial session before choosing to opt out. **(opt out info can only go on Pensions service website – with links to it on LCC site)**
* Link to all benefits of the scheme
 | KW | * Agree wording by 29 October
* Info to go live on website – same time as letter goes out to staff
 | Ongoing and on target  |
|  | Pensions/financial planning surgeries * Leaflet invites to non members
 | All Staff | Set up surgeries for non member staff to book places on and get help with working out their pension and also other financial advice* Enlist staff and financial advisors (money advise service)
* Include teachers pension scheme staff in these sessions where appropriate (i.e. schools)
* Promote through internal channels (use click delegate to book places).
* Use non member data to specifically target those not in the scheme – Leaflet directly inviting to a FP session
* Agree design for Leaflet

Do a second round of this post auto enrolment (dependant on take up and feedback )* 'Before you opt out – come for a financial planning session'
 | KW working with JW to organise dates/locations/advisors | 1 November through to 28 Feb 2013 | Ongoing and on target  |
|  | * Phil's email
* Phil Q and A
* Commercial break
* Staff notices
 | All Staff | Regular feature scheduled into Phil's emails – explaining auto enrolment.  | KW working with JW on content | See separate schedule of internal messages | Need to agree wording and timeline of information to go out in each edition ASAP |
|  | * Poster Campaign
* Pull ups (for use at FP sessions)
* FP session invites
 | All Staff | Poster design:* Aim of posters - to explain auto enrolment using the national I'm In campaign theme to – call to action directing to websites for more information
* Poster distribution – data needed on those who will be auto enrolled to best target distribution.
 | KW | Design work started July 2012 To 'go live' as letter goes out to staff post 29 Oct 2012  | Design work ongoing. Link to national I'm In campaign.Awaiting project meeting 26 September  |
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