**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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