



Organisation & Recruitment (O&R) Report

Jonathan Safir - Deputy General Secretary
on behalf of the Executive Council

From Strategy to Action

Recruit more new members
Retain the members we have
Sustain growth
Strengthen CSPA for the future

What does the strategy look to do

RECRUIT

RETAIN

STRENGTHEN

-
- | | | |
|----|-----------------------|--|
| 01 | Modernise recruitment | Increase new joiners |
| 02 | Strengthen retention | Improve membership experience and value |
| 03 | Build visibility | Raise the profile of CSPA nationally and locally |
| 04 | Acting locally | Provide practical materials, training and support to Groups & Branches |
| 05 | Use evidence | Keep action sustainable, realistic and measurable |

Membership losses outpace recruitment

32,703	1,066	2,169	-1,103
total membership	new members	members lost	net movement

The challenge is to sustain recruitment while strengthening retention.

Retention depends on value, relevance and earlier engagement

1,156

deceased

25.29 years average
duration

1,003

resigned

11.48 years average
duration

2,169

total losses

WHY MEMBERS RESIGN

Health, financial pressure, moves into care, changing priorities and bereavement dominate.

Dissatisfaction is rarely cited.

REACHING NEW MEMBERS EARLIER

79.9

average member age



60

average joiner age

Age data covers 76% of members.

Recruitment is improving

Momentum has been strong; the task now is to make it repeatable.

97

average monthly
joiners
in 2026

+83.6%

versus the previous year
and nearly 3x 2024 volume

193

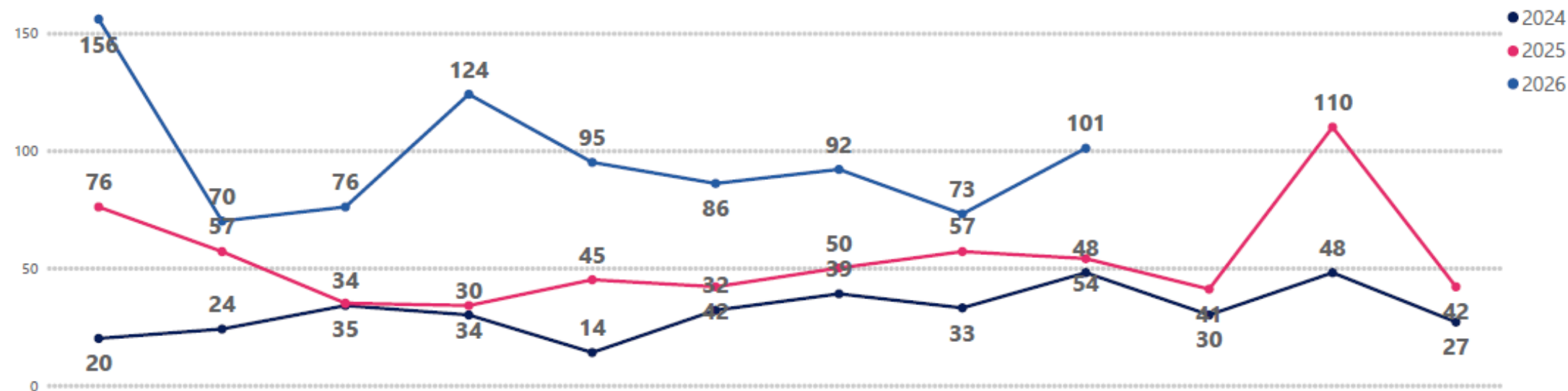
new pension advice cases

55% of which
were new joiners

270–310

projected final-quarter
joiners

Joiners by Month YOY



Digital channels are where attention converts into membership

1,037

joined through the website

97% of all new members

CSPA website

- 142,000 main-site visitors
- 264,000 views
- 2:30 minute average stay

Members website

- 26,000 member-site visitors
- 102,000 views
- 3:50 minute average stay

Testing New Channels, Reaching New Audiences

21,406

people reached through paid LinkedIn campaigns

Strong campaign performance

Pension Support Campaign (April & September)
£500 spend | 9,488 reached | 474 clicks | 5.0% CTR
CTR achieved 10x the typical campaign average of 0.5%

Webinar Promotion (April/May)
£150 spend | 11,918 reached | 151 clicks | 1.2% CTR

Webinars and partnerships are opening scalable routes

Face-to-face activity builds awareness; webinars and partners extend reach.



99 → 4 new joiners

Civil Service Live

contacts to members



100+ → 6 new joiners

CSPA webinar

attendees to members



80+ attendees

RAF webinar

first-session attendance



400+ attendees

Charity webinar

people reached

NEXT Money Awareness Week 4 Nov • RAF session 7 Nov • Capita webinar • pensions and retirement podcasts • Pre-retirement sessions

New providers broaden the value of membership

APT TRAVEL

Tours, cruises and
excursion holidays

EVEXIA

Financial planning
services

LOVAT PARKS

UK holiday homes and
holiday breaks

ISAAC MONEY

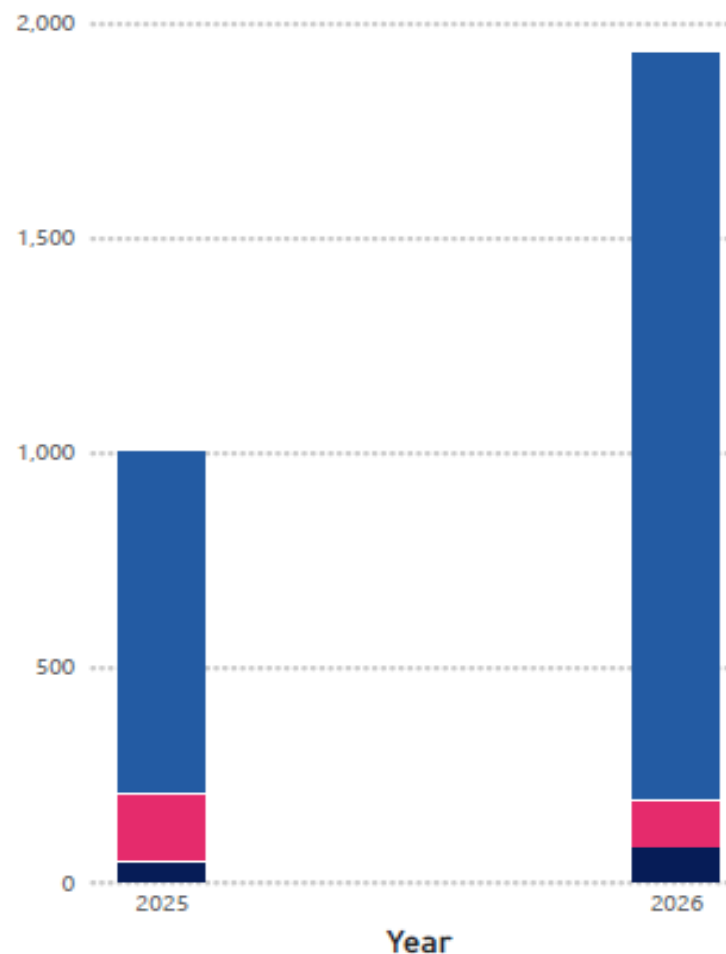
Retirement-planning
website and app

More choice gives members tangible
reasons to join and to stay.

CSIS Benefit Uptake by Type

Oct-Oct YOY

● Car ● Home ● Travel



Groups & Branches

There have been some changes

34

Groups

2

Branches

GROUP CHANGES

Devon Central & District

Devon Central + Plymouth merged

Birmingham & District

Considering amalgamation of Coventry postcodes

Isle of Wight

6-month secretary trial

Encouraging Groups to:

Take on additional postcodes where feasible

Merge rather than close

National support should enable realistic local action

1-3

priority actions per
Group or Branch

01 Choose what fits

Use local knowledge and capacity.

02 Prioritise one action

The workplan is a menu, not instructions.

03 Use HQ support

Materials, tools and co-ordination.

Learning from Our Groups and Branches

We would like to hear about:

Governance & Sustainability

Committee roles, succession planning and overall group health.

Communications & HQ Engagement

How you communicate with members and engage with CSPA HQ.

Meetings & Attendance

How often you meet, meeting formats and levels of member participation.

Digital Capability

Use of online platforms, equipment and confidence with technology.

Barriers & Opportunities

Challenges facing your Group and opportunities for future development.

Support Needs

Areas where additional guidance, resources or assistance from CSPA HQ would be helpful.