

West Midlands Pension Fund

Enhancing customer service with Civica UPM



Benefits

- > Enhanced staff productivity
- > Improved customer service
- > Simpler workload management for staff
- > Improved payroll administration and accuracy
- > Simplified regulatory compliance, especially for fund valuations
- > Simpler reporting to CLG

The £7.5 billion West Midlands Pension Fund (WMPF), one of the UK's top five largest pension funds, required radical changes to its business processes following the Government's overhaul of local government pensions regulations in 2008. WMPF saw this upheaval as an opportunity to re-engineer its administrative processes, redefine its customer services, and transform communication with customers and members alike. Its ambitions were realised with version 2 of Civica's Universal Pensions Manager (UPM) product, which provided the platform for streamlining workflow processes, improved compliance with regulations, and increased overall staff productivity.

The Challenge

WMPF had used Civica UPM from 2001 for its pensions administration, with management and Civica teams adapting the platform to changing regulations over the years. However, given the scale of the 2008 regulatory changes, WMPF's management needed an overhaul of business processes. As the fund still retained in-house expertise, its experts knew they could develop new levels of functionality and drive improvements - with the right system provider in place.

WMPF had only six weeks from the changes' announcement to the due date to make the first wave of changes. Mark Crutchley, WMPF's Head of Communications, Marketing & Business Support, explains: "*Staff had to work out future administrative needs and, in the 'holding period', make calculations such as projections of employer fund values and savings for long-serving members.*"

WMPF set up a project team to assess the new regulations, likely administrative requirements and desired innovations. The new pensions platform needed to maintain services to members as well as retain existing business and develop new opportunities with employers. On ICT, the fund wanted to adopt Microsoft applications that could be used by more senior managers and departmental staff.

The Solution

After rigorous evaluations, WMPF managers selected Version 2 of Civica's UPM Local Government pensions management system. The new Microsoft-based UPM LG software module delivers robust pensions administration and payroll capabilities. It also provides full reporting and auditing capabilities.

Through the Fund's close relationship with Civica, an existing member of the pension industry's technical group liaising with the Communities and Local Government (CLG) and industry bodies, it also gained early insight into potential changes to funds' operations.

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Phased migration

The migration to UPM version 2 took place over three distinct phases.

In phase one, WMPF migrated to Version 2 of Civica UPM, ensuring more system flexibility with fund administrators able to configure changes to workflow processes, letters and system set-up themselves.

In phase two, Civica and WMPF implemented Version 2 of UPM's pensioner payroll module over 12 months to deliver an improved payroll function including:

- > Full migration of the payroll data and functionality.
- > Building of an integrated payroll system, improving payment accuracy for 65,000 pensioners - over £250 million in payments was processed after only 12 months.

In phase three, WMPF's project team under external consultant Tom Rennie continued the process improvements, comprising:

- > System changes.
- > Research of both employer customers and WMPF's own staff on future improvements.
- > Change 'roadmap' - based on process de-duplications to streamline administration cycles and reduced staff resources.

Results

WMPF's process improvements are reducing operational costs and improving system accuracy. Civica's version 2 UPM system has simplified compliance with Government and financial sector reporting: it passed HMRC reviews in 2009 and internal auditing found no issues. In addition, the new administration platform is simplifying the triennial fund valuations required by the industry regulator while supporting annual reports submitted to the CLG.

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Looking ahead: self-service options

WMPF continues to look ahead to members' needs. Future service developments include making the fund more accessible to members with an online web portal, enabling users to submit information and track their pension. These innovations will further improve the relationship between WMPF and its members and employers. They are also leading to more effective working practices for fund staff. WMPF is also planning to introduce direct data transfer between all parties in the near future.



About Civica

Civica is an international market leader in specialist IT systems and business process services for the public sector and other regulated markets. Through experienced people who understand local service delivery, we apply information systems, managed services and outsourcing to help customers achieve a successful and more cost-efficient way of working.

The Group works with more than 2,000 organisations across local government, education, social housing, health care and enforcement. Underpinned by best-in-class operational and financial performance, we combine the technology, operational and business process expertise to help customers deliver essential services at less cost.

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