


Ff Pensioner payroll and administration transfer – April 2016 onwards

Project Lead : Project Sponsor:	Faye Mansfield Kerry McCafferty	Project Objectives: To seamlessly transfer the Firefighter pension administration and pensioner payroll from the current provider, Buckinghamshire County Council to West Yorkshire Pension Fund into business as usual at WYPF for the go live date of 1 April 2016. All stakeholders are kept informed of the transition All BMKFA member data is transferred to WYPF and the transfer audited and confirmed full and correct.	Overall RAG 
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Finance		Plan		Risks & Issues		Scope		Resources	
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Exec Summary – Past Period's Activities

Contract

- Data Sharing Agreement signed by all parties w/c1 February
- Contract signed w/c 15 February
- User agreements & contact forms completed and sent to WYPF 24 March

Finance

- Initial finances specified
- Additional costs identified for image migration estimated at £17,000












Resources

- Faye Mansfield named lead for BMKFA
- Jacky Manning named lead for RBFA
- Liz Hughes & Mike Dean leads in BCC
- Yunus Gajra, Ola Ajala & David Robertson in WYPF

Key actions:

- Formal monthly face to face meeting held throughout the project and continue (though not as frequently as monthly) post April 2016
- Weekly telephone catch up calls held with WYPF, and regular call continue
- Training dates held by WYPF on 1 March & 15 March
- Queries on data dealt with on a case by case basis between WYPF, BCC and Authority
- Internal audit has been regularly updated on progress of project, culminating in a review of records held on the WYPF employer portal in HR on 18 May 2016. Final report on this project communicated via Audit on 16 June 2016

Key Milestones

Milestone	Key date	RAG
HMRC written to and notified of the Authority's change of Ff pension administrator from BCC to WYPF	06 April 2016	
WYPF welcome letter sent to FF pension scheme members	15 April 2016	
6 x individuals with a voluntary deduction previous through BCC (personal accident insurance) were advised in writing that the arranged will cease due to the contract termination with BCC and were advised to seek independent financial advice should they wish to continue with personal accident insurance as not provided via WYPF	19 April 2016	
First live WYPC payroll run	21 April 2016	
Payslips dispatched and Bacs run sent off by WYPF	22 April 2016	
Image migration completed and data sent from Heywood to WYPF	25 April 2016	
Login details sent to HR from WYPF to allow HR access to the WYPF employer portal and access to pension records	25 April 2016	
Microfishe couriered to WYPF	03 May 2016	
BCC forgot to advise HMRC they were no longer paying fire pensioners from April 2016, leading to 2 tax codes being generated. Issue picked up by WYPF and expediently resolved by WYPF and the Authority. All affected individuals were written to	23 May 2016	
Year end data sent from HR to WYPF	July 2016	
Heywood confirmed they would retain the fire records for the Authority for a limited period at no additional cost	31 July 2016	
WYPF attending the next Local Pension Board meeting	September 2016	