

# Health care system moves to outsourcing with a trusted partner

A case study: A move to pension outsourcing allows benefits staff to focus on other strategic priorities



## At a Glance

**Client:** A private, not-for-profit health system, with nearly 12,000 employees and providers.

**Challenge:** Facing a significant shift in HR staffing, the client needed a new approach to pension administration that would allow remaining staff to focus on other strategic priorities while still providing high-quality services to participants.

**Approach:** As their long-time actuary, WTW demonstrated thorough knowledge of the client's plan and processes, allowing us to transition it smoothly to a full outsourcing solution.

**Result:** Moving from in-house administration to outsourcing resulted in a significant reduction of the administrative burden on HR staff, freeing resources, time and budget that could be used for other priorities.

**This health system has been serving its community for nearly 60 years. They are committed to improving the health and wellbeing of their community, which includes their own employees and care providers. This meant entrusting a long-time partner with administration of their pension plan to ensure participants continued to receive high-touch service.**

## The Challenge

As this client faced change within their internal HR organization, they needed a trusted provider with strong institutional knowledge to take over administration of their pension plan. They were seeking an efficient, time-saving way to continue to deliver their plan accurately, which had previously been administered internally.

## The Solution

As the actuary for this client, we already assisted with calculations for the pension plan administration. When it became clear that they needed to make a change to their administration model, we were ready to present a full outsourcing solution, taking over administration and providing a high-quality participant self-service solution and call center.

The client had already seen our capabilities in action through our actuarial services and a bulk lump sum project and knew we would provide a smooth transition to a new delivery approach. Our institutional knowledge was key: they trusted us to serve as an extension of their team.

## The Results

Implementing pension outsourcing resulted in a significant reduction of the administrative burden on the client's HR staff as they no longer were answering calls and performing day-to-day administration tasks. The company has seen a high turnover rate in HR staff with responsibility for the pension plan within a short time window. Even during times of turnover, they could focus their additional time and resources on other strategic priorities. They could focus their additional time and resources on other strategic priorities.

### About WTW

At WTW (NASDAQ: WTW), we provide data-driven, insight-led solutions in the areas of people, risk and capital. Leveraging the global view and local expertise of our colleagues serving 140 countries and markets, we help you sharpen your strategy, enhance organizational resilience, motivate your workforce and maximize performance. Working shoulder to shoulder with you, we uncover opportunities for sustainable success — and provide perspective that moves you. Learn more at [wtwco.com](https://wtwco.com).



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