

**Data Improvement Plan - London Borough of Havering Pension Fund**

Activity	Action	Owner	Priority	Timescale	Outcome/Objectives	Progress	Comments
Data Improvement Plan implementation	Agree LPP input into Data Improvement plan	Havering Contract Manager	1	Jul-21	LPPA agree to support the plan	LBH/LPPA met 02/07/2021	
	Obtain Board and Committee approval to implement the plan	Havering Contract Manager	1	Sep-21	Board sign off and Committee agree the plan		
<b>Year end</b>							
Activities associated with annual "year-end" processing, to ensure the Fund is "data ready" for the formal valuation exercise, annual benefit production and issue of pension savings statements	Liaise with participating employers to confirm year-end data requirements	LPPA	1	Feb-22	All employers receive bespoke EOY template and have access to Your Fund		
	Identify any specific employer training that may be required	LPPA and Havering PF	1	Feb-22	Training given where required		
	Provide training to participating employers where necessary	LPPA and Havering PF	1	Mar-22	Employers confirm they understand their data responsibilities and the data requirements of the Fund		
	Ensure all year-end posting is carried out in administration system	LPPA	1	Jul-23	Year end posting is complete and update provided to Havering PF		
	Run year-end validations through administration system	LPPA	1	Jul-23	Validation work completed and update provided to Havering PF		
	Clear errors - liaising directly with participating employers where necessary	LPPA	1	Jul-23	Errors cleared and update provided to Havering PF		
	Report progress to Pension Board	Havering Contract Manager			Progress to be reported at each relevant meeting		
<b>Education</b>							
Ensure employers are aware of their responsibilities as scheme employers	Identify training issues required by participating employers	LPPA	1	Ongoing	Employer training plan put in place		
	Ensure delivery of training, where required	LPPA and Havering PF	1	As and when required	Complete work as noted in 'action' comments		
	Report progress to Pension Board	Havering Contract Manager			Progress to be reported at each relevant meeting		
<b>Annual Data Audit</b>							
Regular activities available to ensure quality and timeliness of data received in relation to scheme members from external agencies and sources	Report on new Target Address Tracing	LPPA	3	Mar-22	Receive assurances from LPPA that the service received is effective and value for money		
	Undertake regular checks to ensure all contact details are present and correct: address, email and telephone number and update as required	LPPA	3	Oct-21	Work completed and update provided to Havering PF as part of quarterly reporting		
	Ensure appropriate use of the LGPS "NI Database" to ensure correct payment of death grants	LPPA	1	Oct-21	Assurances provided by LPPA		
	Routinely check the NI Database as part of day-to-day administration and action as appropriate	LPPA	3	Mar-22	Assurances provided by LPPA		
	Ensure appropriate use of the DWP "Tell us Once" service, to ensure timely notification of scheme member deaths, where appropriate	LPPA	1	Oct-22	Assurances provided by LPPA		
	Undertake regular data mortality screening against the national death register as administered by the General Register Office + take action where unreported deaths are identified	LPPA and Havering PF	1	Mar-22	Complete work as noted in 'action' comments		
	Report progress to Pension Board	Havering Contract Manager			Progress to be reported at each relevant meeting		
<b>Data Accuracy</b>							
Regular run of data through Fund Actuary's "Data Portal" as a means of checking accuracy of member data - part of regular inter-valuation data monitoring	Arrange for running of valuation extracts from administration system	LPPA	2	Aug-21	Complete work as noted in 'action' comments		
	Upload on to Data Portal	LPPA and Havering PF	2	Aug-21	Complete work as noted in 'action' comments		
	Analyse critical errors and warnings + undertake data correction activities in administration system where required	LPPA and Havering PF	2	Aug-21	Complete work as noted in 'action' comments		
	Re-run reports and upload to Data Portal to confirm corrections	LPPA and Havering PF	2	Aug-21	Complete work as noted in 'action' comments		
	Perform a Payroll to Altair comparison for Pensioner/Dependant members and review mismatches	LPPA and Havering PF	3	Dec-21	Pension payments within Altair and Fusion match to within an agreed tolerance limit		
	Report progress to Pension Board	Havering Contract Manager			Progress to be reported at each relevant meeting		
	<b>Employer engagement</b>						
Actions to link data held by Fund with that of participating scheme employers	Ensuring monthly employee and employer contribution returns are received within required timescales	Havering PF	1	ongoing monthly	Monthly monitoring task		
	Issuing reminders to those employers who miss deadlines	Havering PF	1	ongoing monthly	Monthly monitoring task		
	Escalating persistent offenders to the Administering Authority and seeking to resolve persistent failure, utilising legal services where required	Havering PF	1	ongoing monthly	Escalated cases are progressed and actively monitored. Outcome is high engagement with Scheme employer		
	Undertake monthly reconciliation of employee and employer contributions and the supporting member summaries provided by each employer	Havering PF	1	ongoing monthly	Monthly monitoring task		
	Put in place a communications plan for regular contact with scheme employers	LPPA and Havering PF	2	Mar-22	All employers receive regular news updates and training opportunities		
Report progress to Pension Board	Havering Contract Manager			Progress to be reported at each relevant meeting			
<b>Continual development of technology</b>							
Objectives to ensure where technology is used it assists in the delivery of consistent and accurate member data	Continue to seek opportunities to develop appropriate technology to improve member data quality standards	LPPA and Havering PF	1	Sep-22	Technology is used to advance, improve and better member data quality		
	Streamline operational processing participating employer and administration activities	LPPA and Havering PF	1	Sep-22	Complete work as noted in 'action' comments		
	Implement full monthly reporting on UPM	LPPA and Havering PF	1	Sep-22	Complete work as noted in 'action' comments		
	Report progress to Pension Board	Havering Contract Manager			Progress to be reported at each relevant meeting		
<b>TPR data scoring</b>							

Undertaking regular data scoring exercise as part of TPR annual reporting exercise	Review scores provided within the LPPA quarterly performance report	Havering PF	2	Oct-21	Complete work as noted in 'action' comments		
	Agree plan for tackling any gaps/errors/inconsistencies uncovered	LPPA and Havering PF	2	Dec-21	Complete work as noted in 'action' comments		
	Undertake data correction and report progress	LPPA	2	Mar-22	Receive assurances from LPPA that action has been taken		
	Report progress to Pension Board	Havering Contract Manager			Progress to be reported at each relevant meeting		
<b>Website</b>							
Undertake a review of Fund website - to ensure content is appropriate for needs of members and their beneficiaries	Review site content for both Havering Pensions and LPPA Pensions websites	Havering PF	1	Dec-21	Complete work as noted in 'action' comments		
	Update Havering Pensions website content where required	Havering PF	1	Apr-21	Complete work as noted in 'action' comments		
	Ensure all relevant documents are published to the Havering Pensions website	Havering PF	1	Apr-21	Complete work as noted in 'action' comments		
	Report progress to Pension Board	Havering Contract Manager			Progress to be reported at each relevant meeting		