

# CYNGOR SIR POWYS COUNTY COUNCIL

## Powys Pension Board 10<sup>th</sup> July 2018

**REPORT BY:** Board Secretary

**SUBJECT:** Data Quality Testing

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**REPORT FOR:** Information

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### 1. **Introduction**

In 2015, the Pensions Regulator (TPR) assumed responsibility for Public Sector Pension Schemes. Prior to this, in June 2010, TPR issued guidance on the approach that they consider to be good practice for measuring the presence of member data. Specific targets were set for data TPR deemed as 'common' and Aquila Heywood has assisted Powys Pension Fund (PPF) in the collection and qualification of this data.

The Fund produced a Data Quality testing and monitoring procedure document in May 2017.

### 2. **Background**

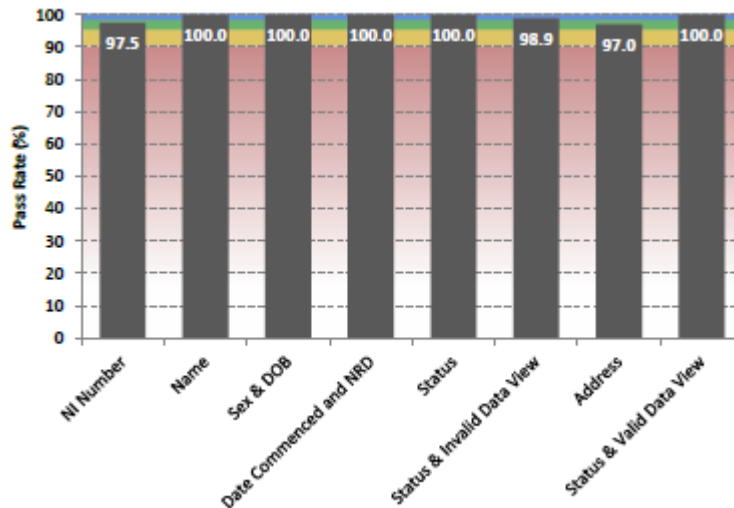
- 2.1 In May 2017, the Fund produced a Data Quality testing and monitoring procedure with specific reference to the testing and ongoing monitoring data quality. This was in advance of the requirement to report in The Pension Regulator (TPR) Annual Return, scores against specific scheme Common Data and Scheme Specific Data

### 3. **Data Quality Testing – Common Data**

- 3.1 TPR require measurement against 9 categories for Common Data:

NI Number, Name, Sex & DOB, Date Commenced and Normal Retirement Date, Membership Status, Invalid Membership Status, Address and Status and valid Data View.

Summary of Common Data results



- 3.2 Six of the eight categories met the highest benchmark of greater than 98% with 1 category not recording a single failure. 4 categories achieved a pass rate of over 99.95% and were rounded up to 100%.

The categories that did not reach the highest benchmark concerned member **NI numbers** and **Addresses** which both fell within the Green benchmark at **97.5%** and **97.0%** respectively. With the exception of these categories, the general quality of the common data at PPF is of a **high standard**.

There is some work required with the above categories to bring them into the highest benchmark.

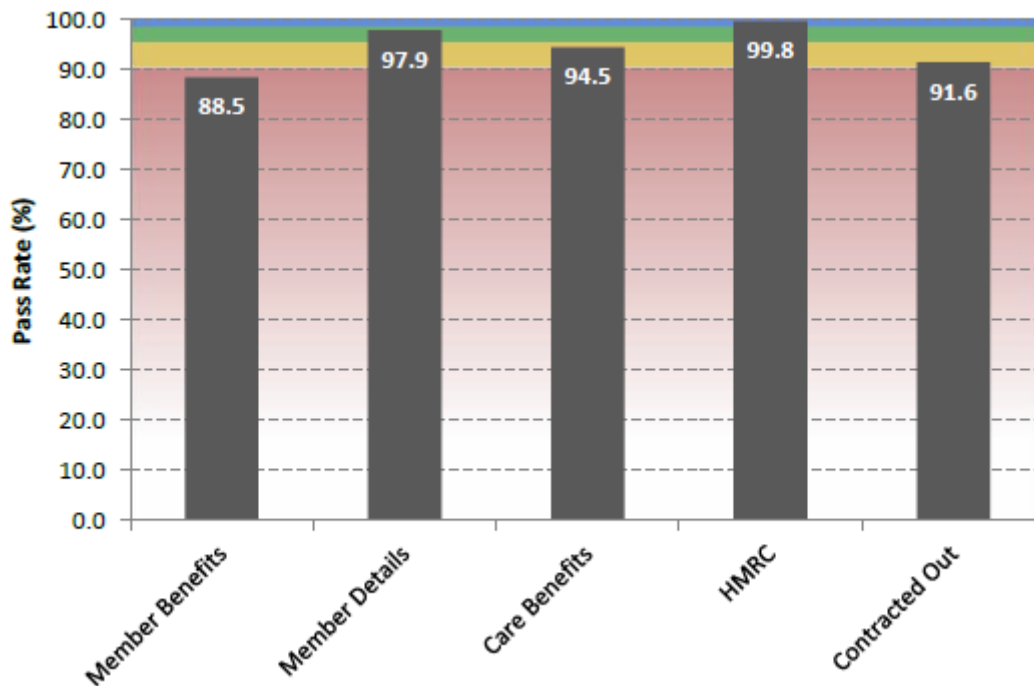
The percentage of member records without a single common data failure is **93.4%** and this is the figure that TPR will be requesting on the scheme return.

#### **4. Data Quality Testing – Scheme Specific Data**

- 4.1 TPR require measurement against 5 categories for Scheme Specific Data:

Member Benefits, Member Details, CARE Benefits, HMRC and Contracted Out data.

Summary of Common Data results



The overall percentage of tests passed for PPF's scheme-specific data is **95.7%**. The percentage of member records without a single scheme-specific data failure is **75.9%** and this is the figure that TPR will be requesting on the scheme return.

#### 5. TPR Annual Return and Data Improvement Plan

The above scores are above average according to the Pensions Administration software providers and the scores of 93.4% (Common data) and 75.9% (Scheme Specific Data) are the ones that will be reported in the TPR Annual Return.

Both scores are an excellent starting point and highlight areas to be included in the Fund's Data Improvement Plan.

#### 5. Recommendation

The Board is asked to note the contents of this report.

<b>Recommendation:</b>		<b>Reason for Recommendation:</b>	
<ul style="list-style-type: none"> <li>That the Board notes the above findings.</li> </ul>		As per report	
<b>Person(s) To Action Decision:</b>			
<b>Date By When Decision To Be Actioned:</b>			
<b>Relevant Policy (ies):</b>	N/A		
<b>Within Policy:</b>	N/A	<b>Within Budget:</b>	N/A
Contact Officer Name:	Tel:	Fax:	Email:

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