



**LOCAL PENSION BOARD – 4 FEBRUARY 2026**

**REPORT OF THE DIRECTOR OF CORPORATE RESOURCES**

**RECORD KEEPING – DATA IMPROVEMENT**

**Purpose of the Report**

1. The purpose of this report is to inform the Board of plans to maintain and improve the quality of pensions data held during 2026-2027.

**Background**

2. The Pension Regulator's Code of Practice requires Funds to have a plan detailing the steps officers will take to improve their quality of data in the year ahead. Going forward, officers will submit a report to the Board annually detailing plans for data improvement in the year ahead.
3. The overall quality of pensions data remains high. The data quality scores as submitted to The Pension Regular annually are shown in the appendix and are currently both over 97%.
4. Officers will continue to strive to keep the overall quality high whilst focussing on any areas that need particular attention.

**Business as Usual**

5. The Pension Section already follows a significant number of processes to maintain high quality pension member records and this work will continue throughout 2026-2027. Further details are included in the appendix.

**Plans for 2026-27**

6. In addition to 'Business as Usual' actions there will be three areas addressed in 2026-27. These areas will all be included in the Pensions Administration Business Plan.

**Pension Dashboard Programme (PDP)**

7. The exercise to connect to the dashboard eco-system concluded in October 2025. Ahead of the go-live date (yet be determined) officers continue to regularly cleanse data and reduce the number of outstanding preserved benefits and aggregation cases, to ensure that data is as 'clean' as possible, ahead of the launch.
8. An address cleanse of deferred members will also be conducted prior to go-live.

#### McCloud Remedy

9. Officers continue to work through administrative tasks linked to the McCloud remedy. The current focus is on the adjustment of pensions for pensioners who are eligible for an increase under the remedy.
10. Remaining categories of McCloud related work include:
  - Death Cases
  - Transfers
  - Interfund Adjustments
  - Trivial Commutations
  - Teachers (Enhanced Pensions)
11. The deadline for the completion of McCloud remedy is 31 August 2026.

#### Workflow Review

12. A review of how workloads and key performance indicator data is presented in the quarterly administration report, and how that data aligns with the requirements of the Fund's annual report will be conducted during the year, subject to agreement of the Local Pension Board.
13. Once the approach is agreed officers will work through the implementation of these changes. This will include a wider review of all casework 'workflow' processes that are used on the Altair administration system to ensure that they are compatible with all reporting requirements.
14. Workflow processes are created in Altair and are used to monitor the status of outstanding work. This includes whether a case is with the employer, pension officer or manager for checking. Workflow data is used to provide the figures used in the Board reports.
15. Many of the original workflows were created many years ago and whilst quite simple, have served their purpose. However, as reporting requirements evolve, it is now considered that many existing workflows may need to change.

**Next Steps**

16. Officers will report on progress to the Board in the administration reports during 2026-2027.

**Recommendation**

17. It is recommended that the Board notes all areas of the report.

**Equality and Human Rights Implications**

18. There are no equality or human rights implications arising from the recommendations in this report.

**Appendix**

Data Improvement 'Business as Usual' Processes February 2026

**Officers to Contact**

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