



PASA Data Working Group

Data Improvements Plan Template

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Produced in partnership with:



Our Experts for Data:

PASA 

The PASA logo symbol, which is a stylized, dark red letter 'P' with a vertical line through it, resembling a dollar sign or a stylized 'B'.

Acknowledgements

PASA is grateful to the members of the PASA Data Working Group (DataWG) who authored the Guidance and their employers:

Joanne Darbyshire (Board Sponsor)	PASA Board Director
Kristy Cotton (Chair)	PwC
Claire Fuller	First Actuarial
Paul Rickman	LCP
Steve Robinson	Equiniti
Julie Beadle	WTW
Steve Ackland	Aim
Hannah Blomfield	Intellica
Louise Donohue	Heywood
James Wilday	Aptia
David Rich	Mortality Manifest
Paul Young	Capita
Jemma Bryne	Government Actuary's Department

Use of AI in Pensions Administration – Embrace the Opportunity with Caution

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1. Scope and Objectives

Note the below is an illustrative outline only. Scope and objectives should be specific to the case being considered

Date last updated:

[Insert Date]

Data improvement plan for Scheme X:

[Insert overview paragraph if desired to provide context, for example the timing of the Data Improvement Plan (DIP), previously completed work, the trigger for the DIP]

Objectives:

The objectives of this DIP are as follows:

- [List objectives in priority order if there is more than one. One example of an objective may be preparing to move to a new administration system or administrator]

Targeted outcome:

The targeted outcome for this DIP is:

- [List desired outcome(s). For example, to reduce the number of missing addresses and achieve a common data score above 98%]

Scope:

The scope of this DIP is as set out below:

- Data – summarise the data to be impacted by the DIP
- Membership – summarise the membership groups to be impacted
- Time period – outline the timeframe of data the DIP will impact, i.e. how far back the improvement work will go
- [Insert any other key scoping parameters, i.e. where you are focusing on data sourced from a specific employer, or an output for a specific scheme event]

Dependencies:

Dependencies within the DIP timeline are recorded within the DIP project plan. However summarised below are key dependencies not listed:

[Identify and list work which may affect or depend upon the outcome of the DIP and implementation of the data improvement. Examples may include:

- data or benefits rectification work which must be completed in advance of this DIP where the improvement plans have been divided up into phases
- member communications exercises
- approaching the insurance market for quotation]

Timeframe:

The timeframe being worked to for this DIP is [insert end date for this project, sign post key milestones if helpful]

Documentation: List key documents and inputs for this DIP which are not covered elsewhere. For example:

- Data Management Plan
- Data Dictionary
- Stakeholder list
- Other DIPs (e.g. for previous improvements which are a prior dependency for this DIP)

2. Roles and Responsibilities

Note the below is an illustrative outline only. Roles and responsibilities should be specific to the case being considered

Owner and responsible parties

- **Owner:** [Insert owner, expected to be trustee]
- **Responsible parties:** [Insert details of other responsible parties, e.g. adviser who prepared DIP, parties responsible for workstreams]

Trustee/Governing body

- Document elements of role such as the process for making decisions and signing off on outcomes. Where any responsibilities are delegated or there's, for example, a joint working group in place, document this
- Consider the need for formal controls e.g. a decisions log, change control log, cost reporting, etc

Administrator

- Document how the administrator should report progress e.g. to the governing body, participating employer(s) etc

Other third party provider

- If a specialist service provider is engaged, document their responsibilities as distinct from the administrator. Similarly, if any other third parties are involved (e.g. scheme actuary) should also record their responsibilities

Project Manager

- If a project manager is appointed, document their responsibilities including the extent to which they are responsible for communicating decisions/requests for work to be completed to third parties

Resource requirements

- Set out the resource requirements for the activities. Which service providers, what skillset and how resource will be ring-fenced/managed



Get in touch:

info@pasa-uk.com

www.pasa-uk.com