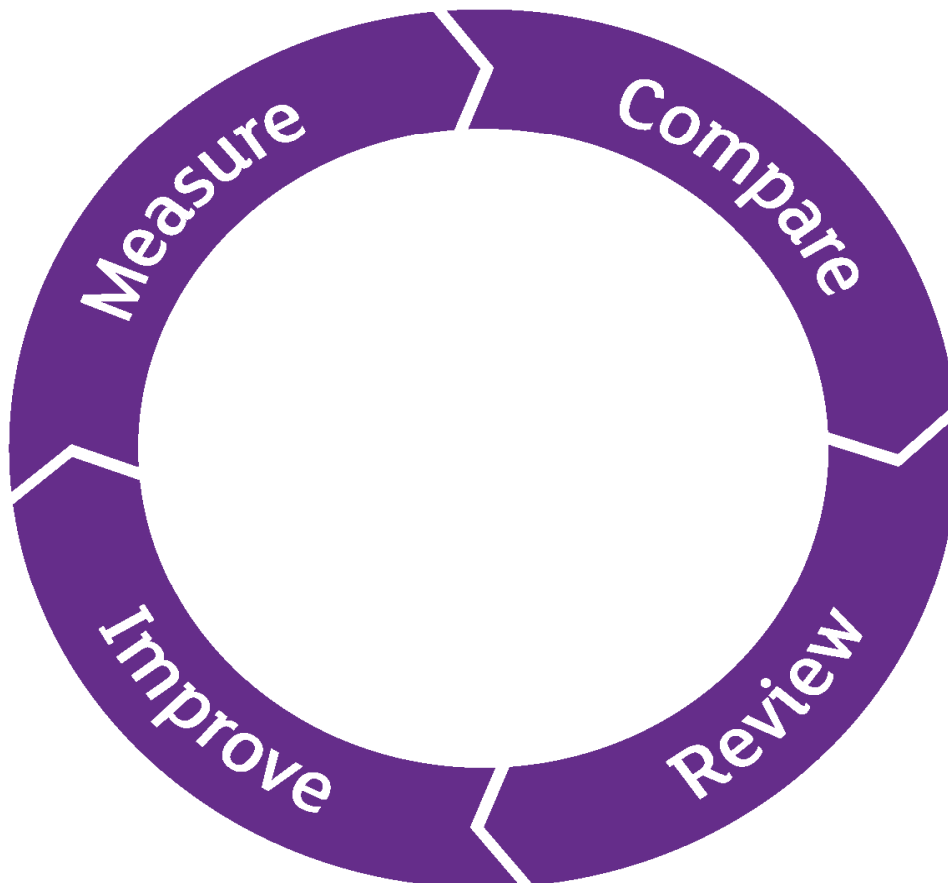


Information Services

pensions administration benchmarking club

2016 - Wiltshire Final Report



PREFACE

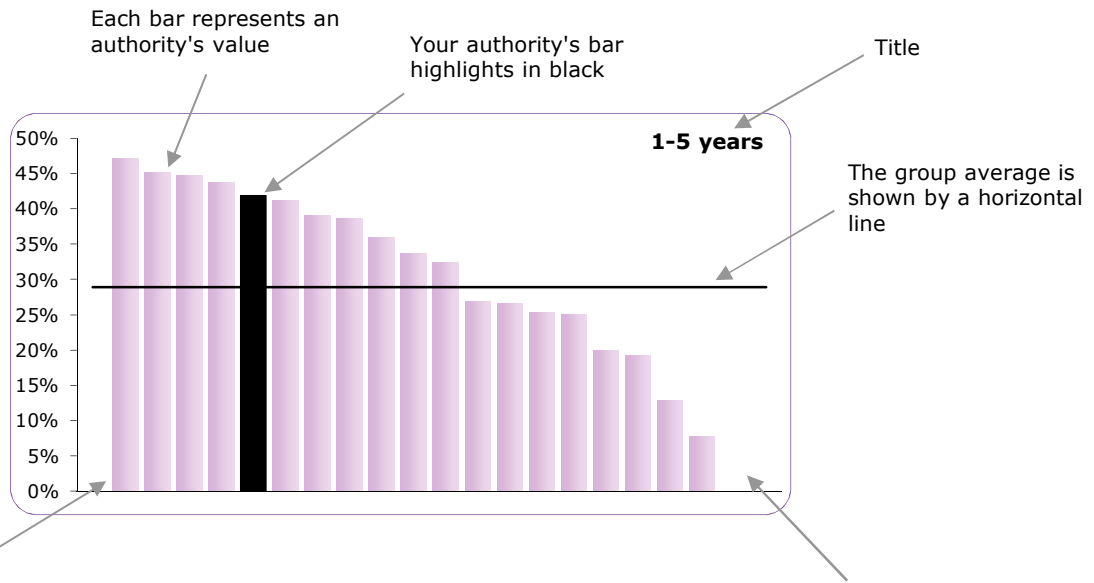
This report compares your data with the group of authorities specified on the title page.

Throughout the report your figures are shown in tables and in graphical form. If you are not familiar with our reports we hope this page will help you to better understand the way we present this data.

Averages: Almost all of our tables and charts compare your figure with a group average. The average is the unweighted mean value for the group. This average value ignores missing data, or data that we have excluded and for this reason sets of averages sometimes do not reconcile precisely.

Charts: We display a large amount of data on charts as this allows us to show the data for the entire group efficiently and gives far more information than a simple average (i.e. range of data, individual authority values etc.). Below we have annotated an example chart to help explain what they are showing.

Bar Charts: These are our standard method of displaying a full set of data



'Missing bars' on the left represent missing data or excluded data and are not included in calculating the average

Staff experience			
	FTE	%	Avg
< 1 year	1.5	10%	9%
1-5 years	6.5	42%	29%
5-10 years	3.5	23%	21%
> 10 yrs	4.0	26%	41%
Total	15.5		

'Missing bars' on the right represent zero values and are included in the average

INTRODUCTION

This report compares your performance with the group of authorities specified on the title page. It is divided into the following sections.

	Page
1 Summary 2016	4
2 Cost Measures	5
3 Workload Measures	11
4 Staff Related Measures	22
5 Industry Standard Performance Indicators	26
6 Comparison by method of service delivery } <i>final reports</i>	27
7 Timeseries } <i>final reports only</i>	28

Section 1 - Summary 2016

This page provides a brief summary of the most salient aspects of the report.

Section 2 - Cost Measures

This section concentrates on cost/member ratios starting with total cost/member which is then broken down by staff costs, payroll costs, direct costs, overheads and income. Further analysis of direct costs and overheads is also provided in this section.

Section 3 - Workload Measures

The first measure of workload is the number of members in the scheme, which is shown along with a breakdown by class of membership. This is followed by an analysis of the number and type of LGPS employers.

Other workload measures include:

- Joiners and leavers with a full analysis of the various types of retirements
- Number of quotations provided and actual events processed
- AVCs, ARCs and Added years
- Appeals

Section 4 - Staff Related Measures

The measures included here are an analysis of staff numbers by pay band, sickness absence, pensions work experience, staff qualifications and staff turnover.

Section 5 - Industry Standard Performance Indicators

In this section we show how authorities perform against each of the LGPC performance indicators.

Section 6 - Comparison by Method of Service Delivery (final report only)

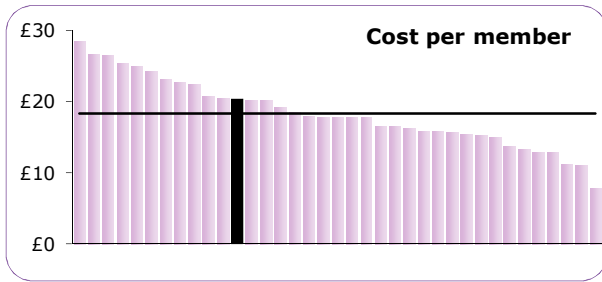
This shows members' costs and averages compared for in-house and externally managed pension schemes.

Section 7 -Timeseries (final report only)

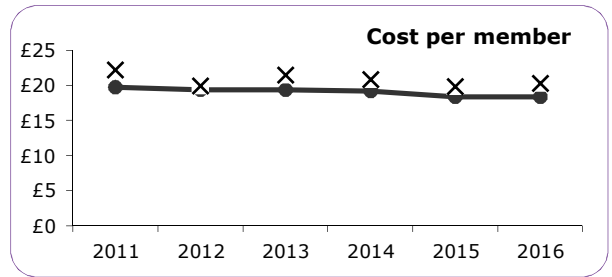
This shows the individual members' performance over time compared to the club average for cost per member, which is analysed over staff cost and other costs.

SECTION 1 - SUMMARY 2015/16

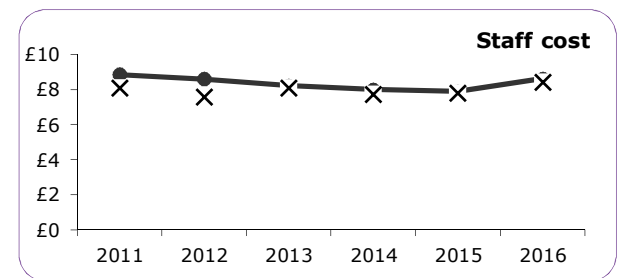
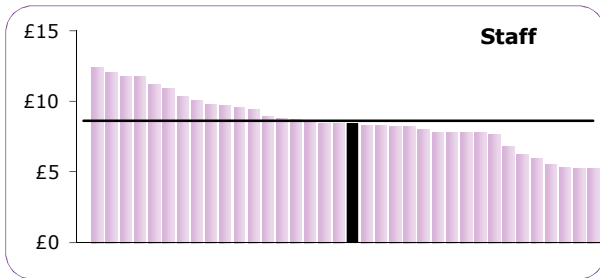
NET COST / MEMBER 2015/16



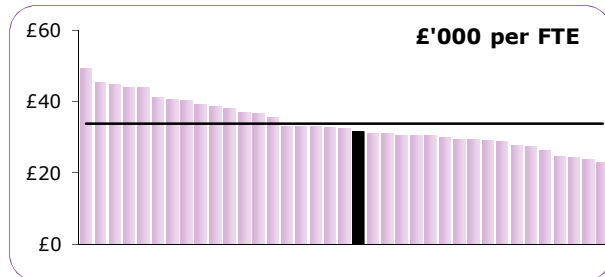
● Club average
X Wiltshire



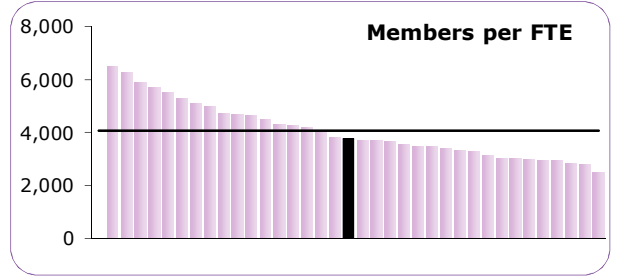
STAFF COST / MEMBER 2015/16



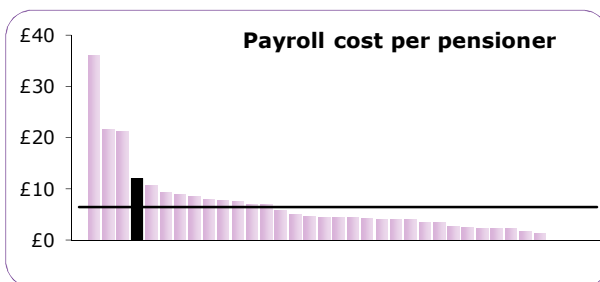
COST £'000 / FTE



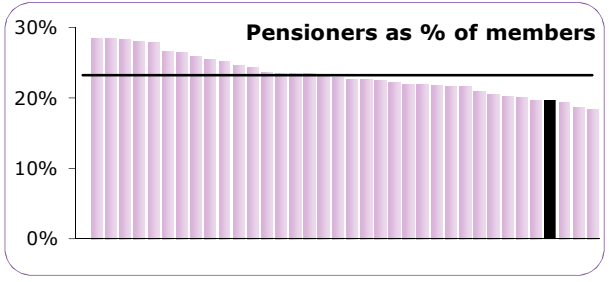
MEMBERS LGPS / ADMIN FTE



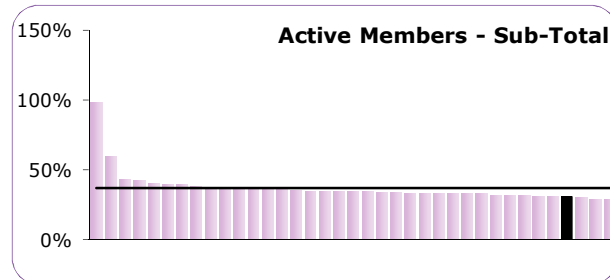
PAYROLL COST / PENSIONER



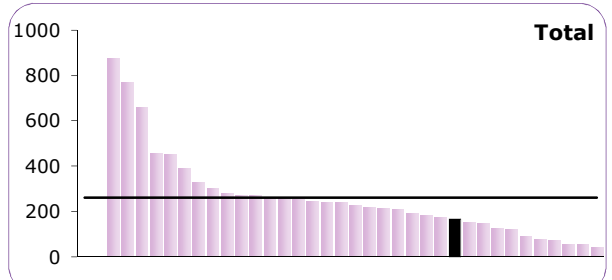
PENSIONERS AS A % MEMBERS



ACTIVES AS A % MEMBERS



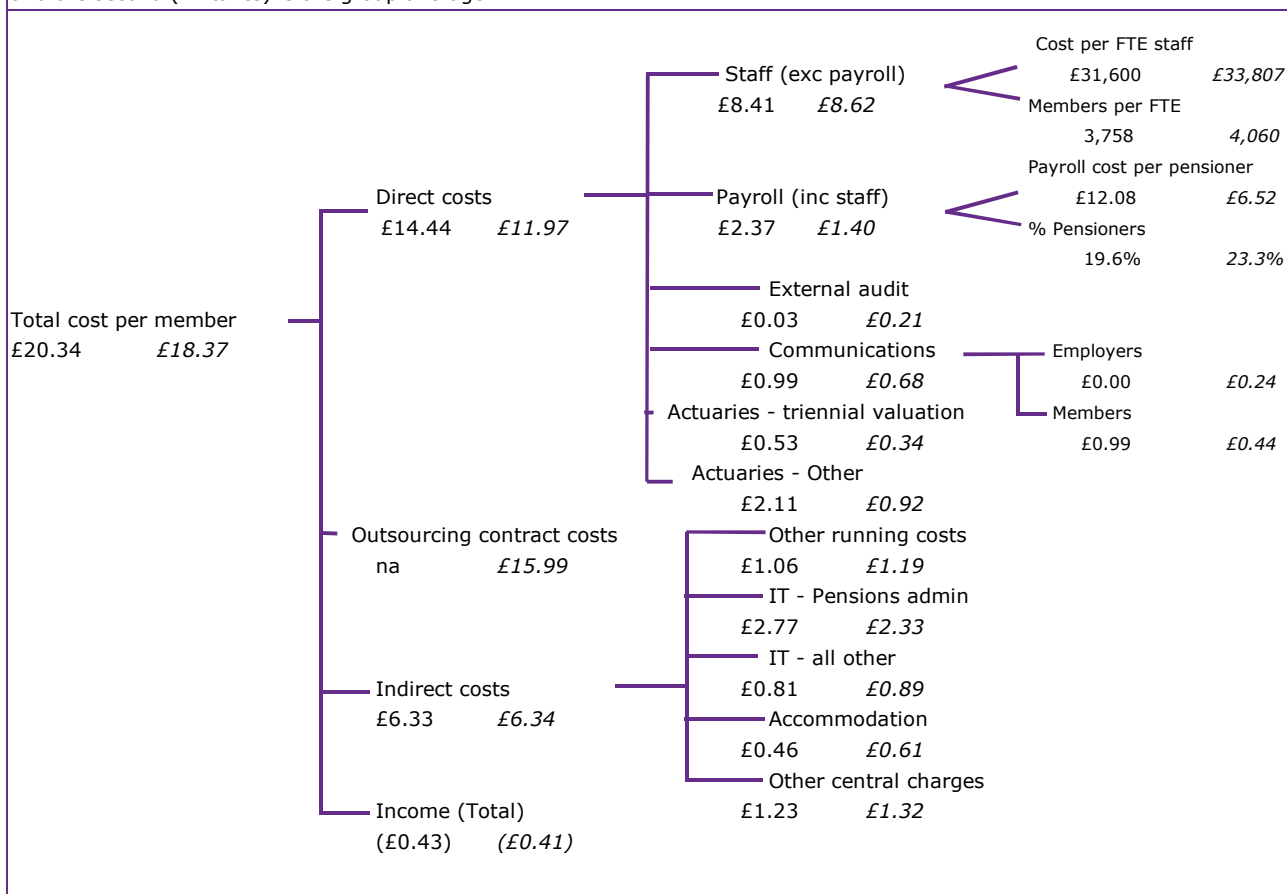
NUMBER OF LGPS EMPLOYERS



SECTION 2 - COST MEASURES

COST/MEMBER TREE 2015/16

This tree diagram analyses the cost per member. For each benchmark two figures are given the first being the authority's cost and the second (in italics) is the group average.



FTE staff	
Pension Section total	27.6
<i>less</i>	
IT staff	4.0
Payroll staff	-
Communications staff	2.0
Employing authority work	-
Work for other schemes	0.5
Other work	3.6
Admin of LGPS	17.5

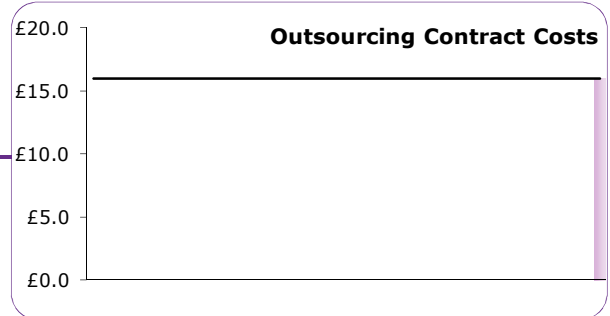
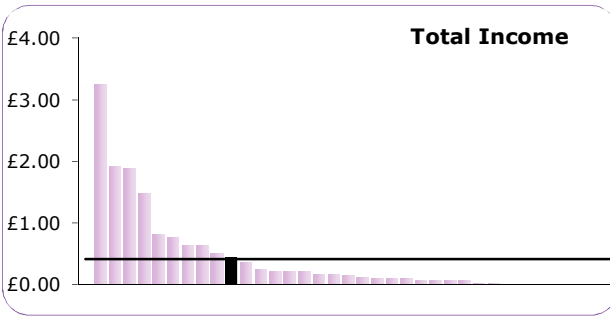
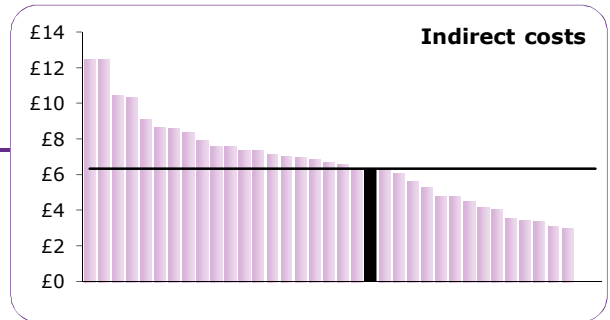
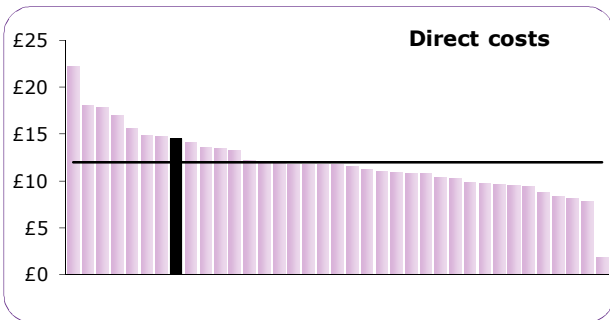
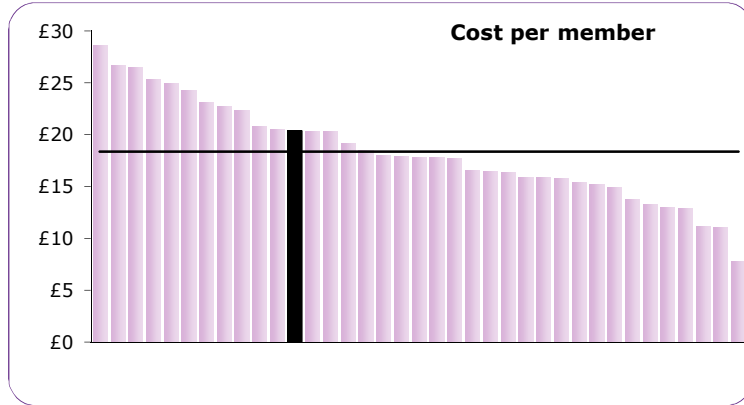
Net Costs £'000	
	£'000
Pension Section total	1,561
<i>less</i>	
Work for other schemes	12
Employing authority work	40
Other work	171
Admin of LGPS	1,338

Admin of LGPS costs	£'000	£ per member	Avg
Staff - administration	553	8.41	8.62
Staff - payroll	-	-	0.34
Payroll	156	2.37	1.06
Communications (Total)	65	0.99	0.68
Actuaries - triennial valuation	35	0.53	0.34
Actuaries - other	139	2.11	0.92
External audit	2	0.03	0.21
Total Direct Costs	950	14.44	11.97
Outsourcing costs	-	na	15.99
Other running costs	70	1.06	1.19
IT - Pensions admin	182	2.77	2.33
IT - All other	53	0.81	0.89
Accommodation	30	0.46	0.61
Other central charges	81	1.23	1.32
Total Indirect Costs	416	6.33	6.34
Gross Cost	1,366	20.77	18.74
Income - Members	-	-	(0.04)
Income - Employers	-	-	(0.14)
Income - Other	(28)	(0.43)	(0.23)
Total Income	(28)	(0.43)	(0.41)
Net Cost	1,338	20.34	18.37

Total Scheme Membership 65,768

*Outsourcing Contract Costs average only includes those members who have outsourcing costs.

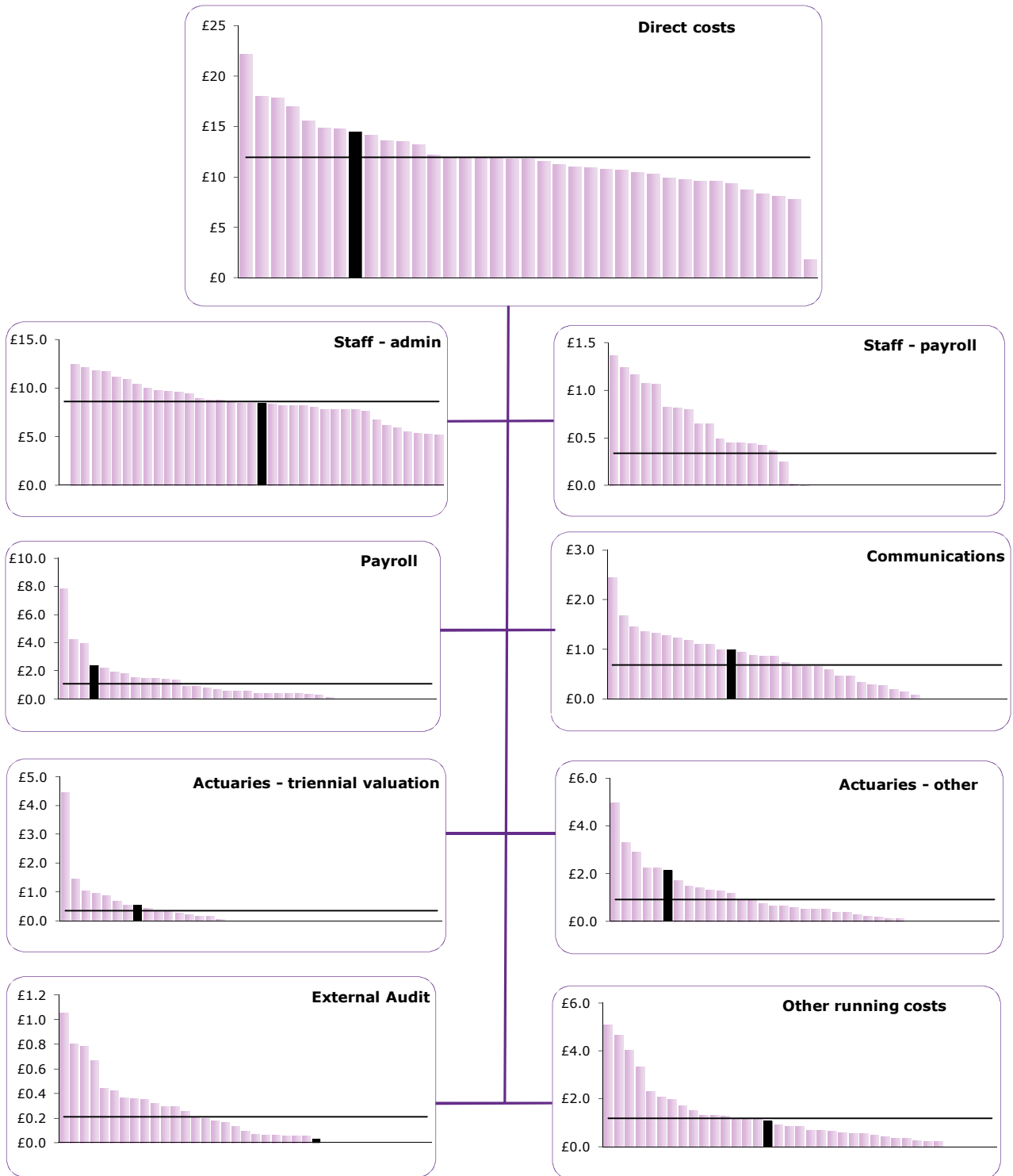
COST PER MEMBER 2015-16



Admin of LGPS costs		£ per member	
	£'000		Avg
Total Direct Costs	950	14.44	11.97
Outsourcing costs	-	na	15.99
Total Indirect Costs	416	6.33	6.34
Total Income	(28)	(0.43)	(0.41)
Net Cost	1,338	20.34	18.37

Total Scheme Membership 65,768

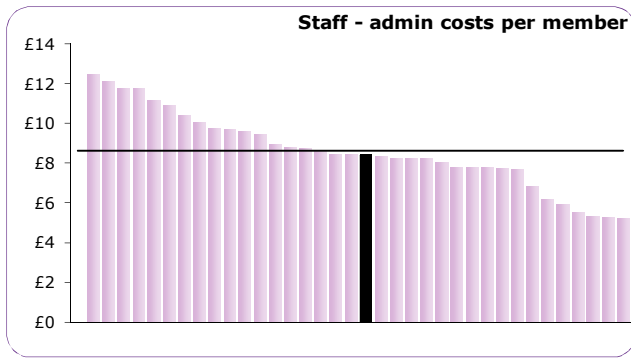
COSTS PER MEMBER - Direct costs 2015/16



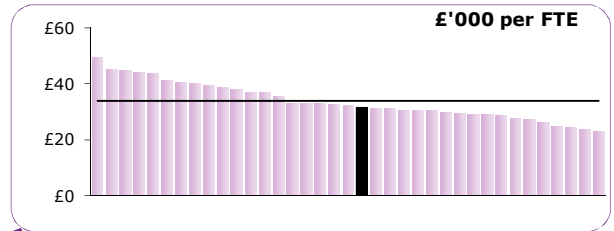
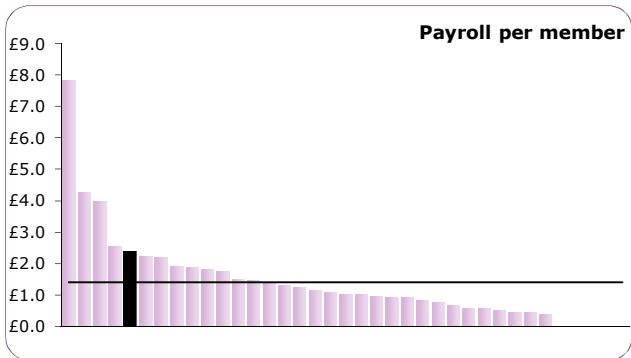
Direct costs	£'000	£ per member	Avg
Staff - admin	553	8.41	8.62
Staff - payroll	-	-	0.34
Payroll	156	2.37	1.06
Communications	65	0.99	0.68
Actuaries - triennial valuation	35	0.53	0.34
Actuaries - other	139	2.11	0.92
External audit	2	0.03	0.21
Total	950	14.44	11.97

DIRECT COSTS PER MEMBER - Staff and Payroll costs 2015/16

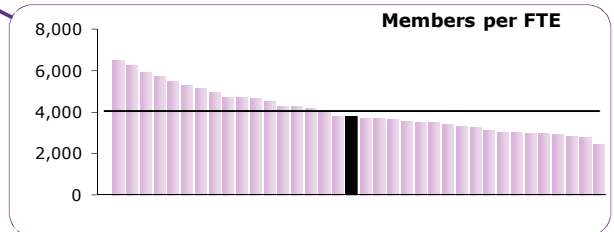
	£'000	£ per member	Avg
Staff - admin	553	8.41	8.62



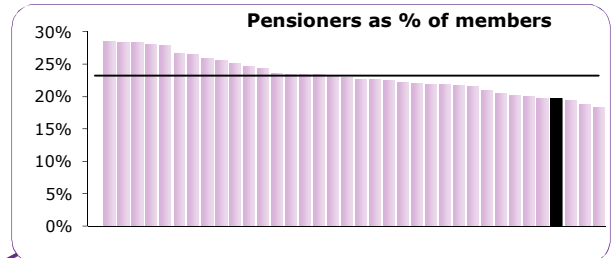
	£'000	£ per member	Avg
Payroll (combined)	156	2.37	1.40



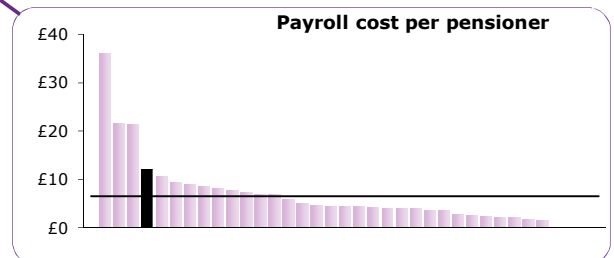
Wiltshire 31.6 Avg 33.8



Wiltshire 3,758 Avg 4,060

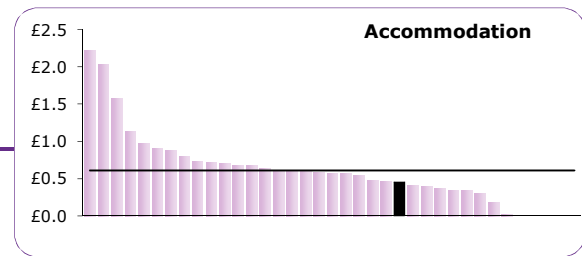
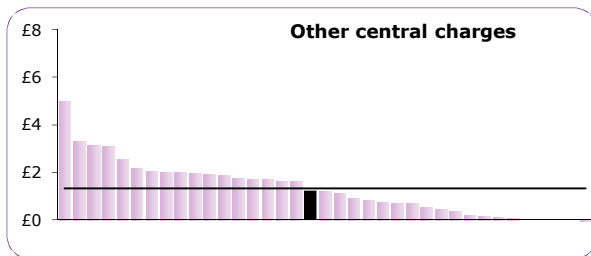
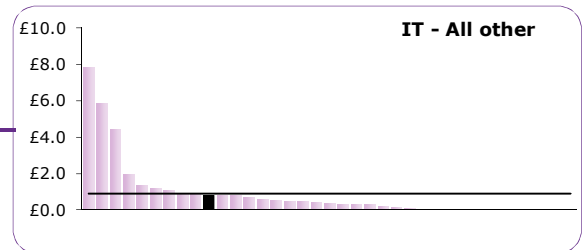
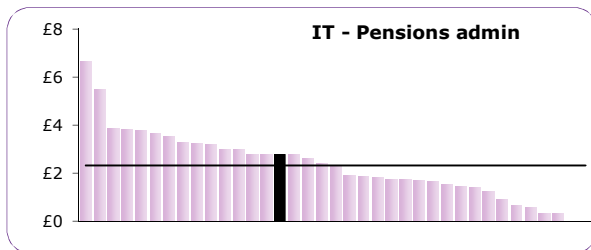
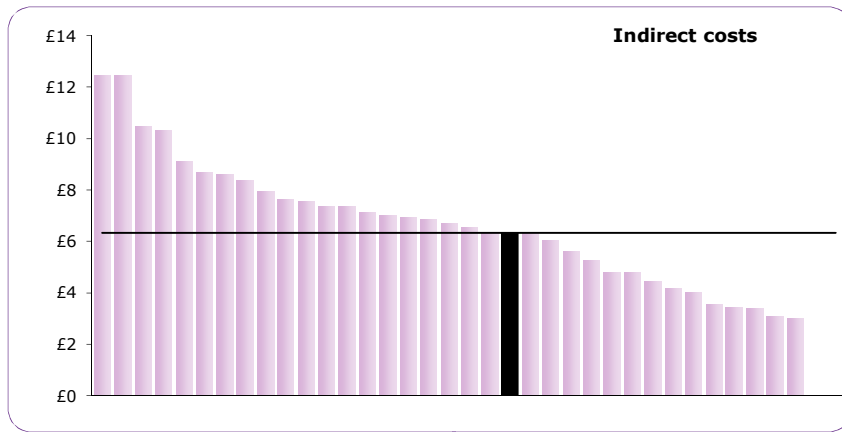


Wiltshire 20% Avg 23%



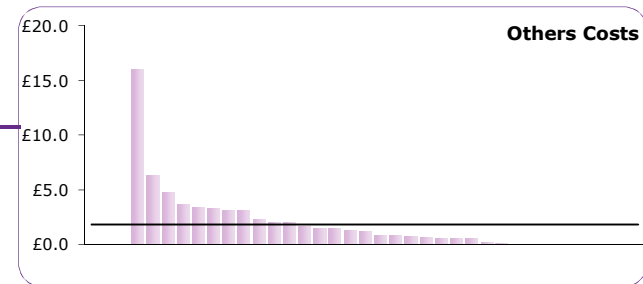
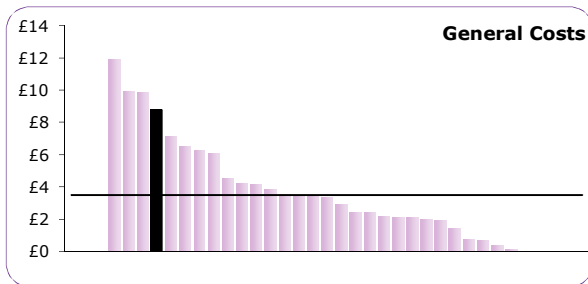
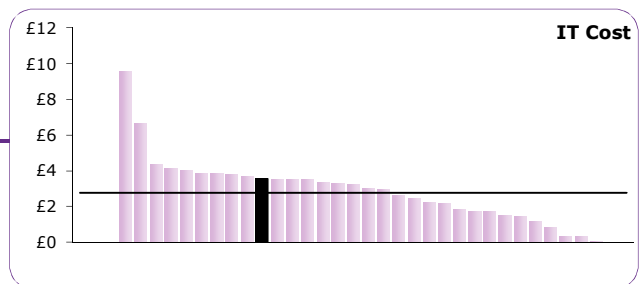
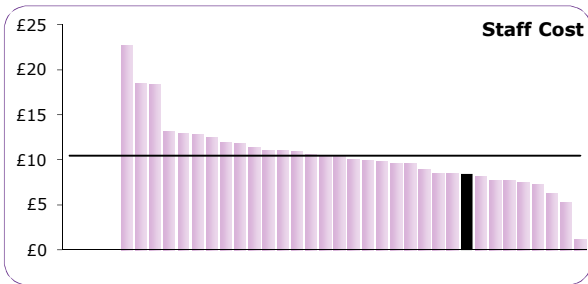
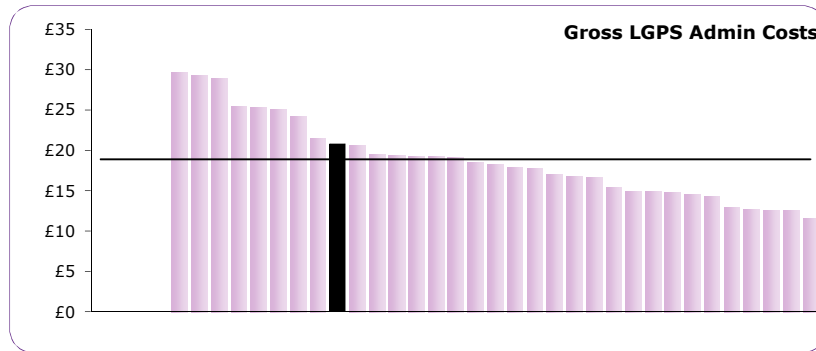
Wiltshire 12.1 Avg 6.5

COSTS PER MEMBER - Indirect costs 2015/16



Indirect costs	£'000	£ per member	Avg
Other running costs	70	1.06	1.19
IT - Pensions admin	182	2.77	2.33
IT - All other	53	0.81	0.89
Accommodation	30	0.46	0.61
Other central charges	81	1.23	1.32
Total	416	6.33	6.34

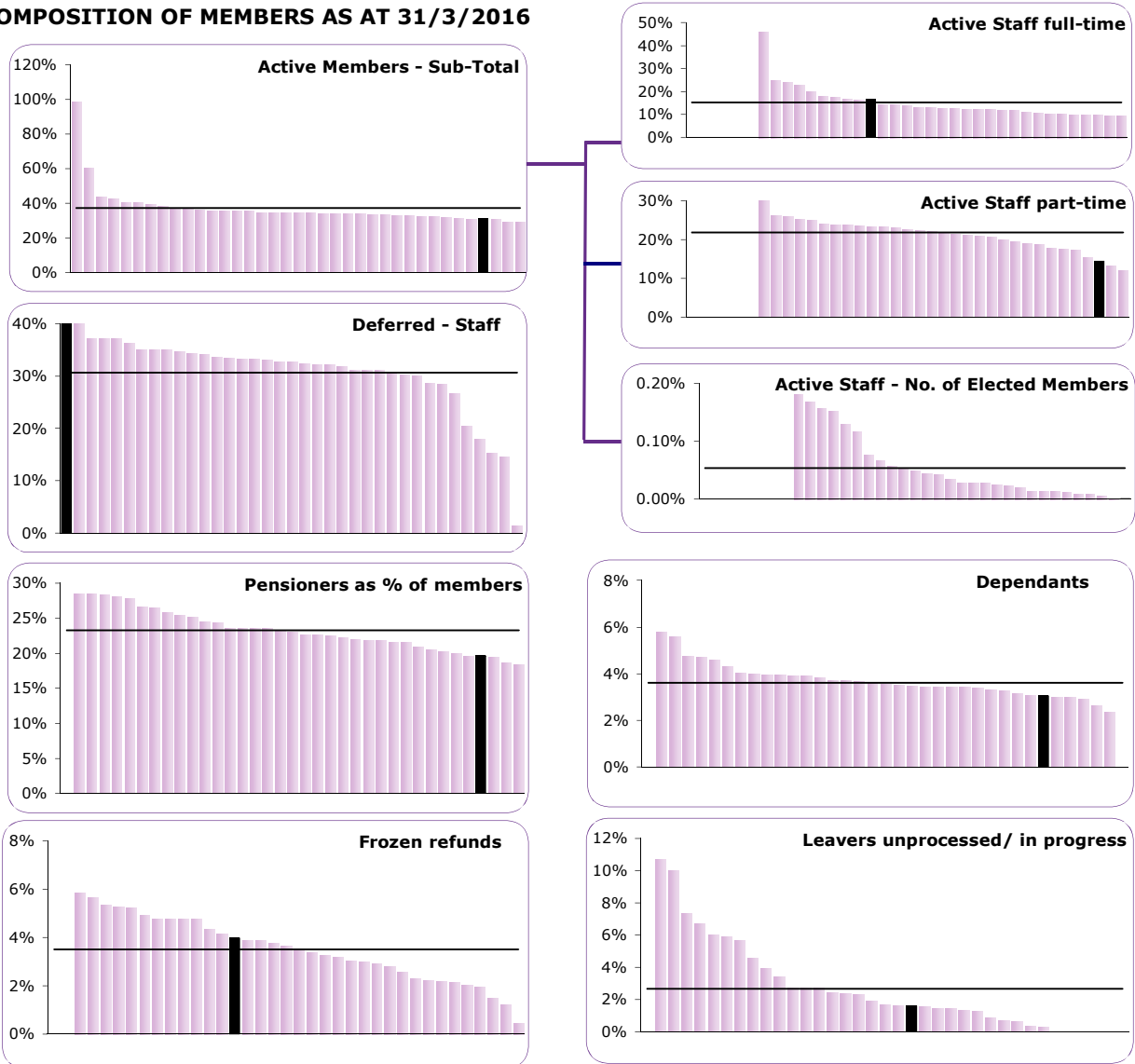
COSTS PER MEMBER - LGPS Administration Expenses Analysis 2015/16



LGPS Administration Expenses		£ per member	Avg
	£'000		
Staff Costs	553	8.41	10.47
IT Costs	235	3.57	2.78
General Costs	578	8.79	3.50
Other Costs	-	-	1.85
Gross LGPS Admin Exp.	1,366	20.77	18.85
Gross LGPS Income	28	0.43	0.67
Net LGPS Admin Exp.	1,338	20.34	248.03

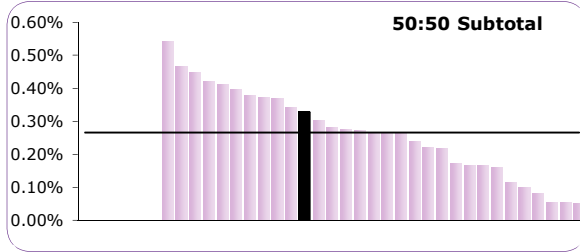
SECTION 3 - WORKLOAD MEASURES

COMPOSITION OF MEMBERS AS AT 31/3/2016



Composition of members				
	No.	%	Avg	Avg %
Active:				
- full-time	10,832	16.5%	17,825	15.1%
- part-time	9,548	14.5%	18,476	21.9%
- no. of elected Members	1	0.0%	38	0.05%
- sub-total	20,381	31.0%	35,339	37.2%
Deferred:				
- Staff	26,816	40.8%	30,930	30.7%
- Elected Members	8	0.0%	32	0.0%
Pensioners	12,909	19.6%	23,651	23.3%
Dependants	1,998	3.0%	3,946	3.6%
Frozen refunds	2,610	4.0%	3,250	3.5%
Leavers unprocessed/ in progress	1,046	1.6%	2,500	2.7%
Total	65,768		99,647	

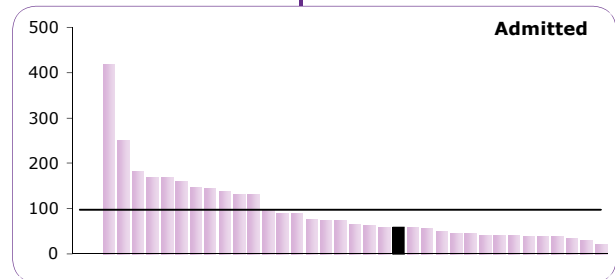
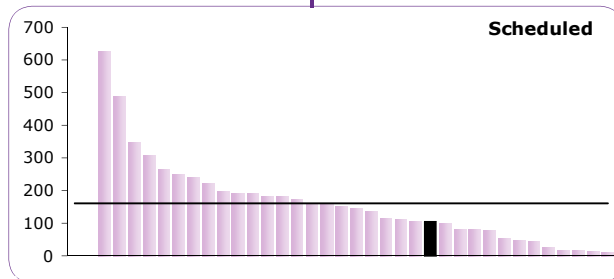
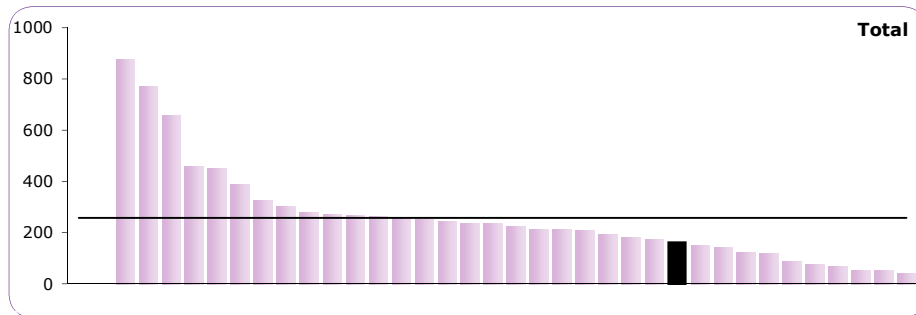
COMPOSITION OF MEMBERS AS AT 31/03/2016



Composition of active members

	No.	%	Avg
50:50	67	0.3%	0.3%

NUMBER OF LGPS EMPLOYERS AS AT 31/03/2016



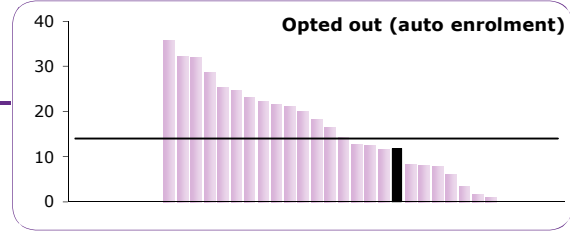
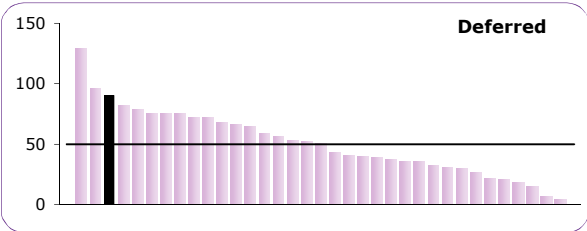
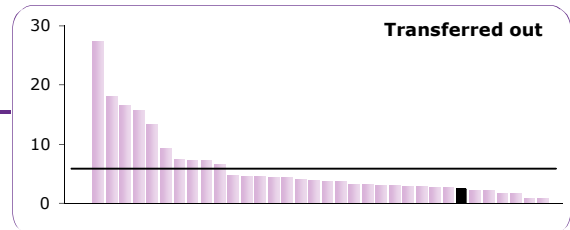
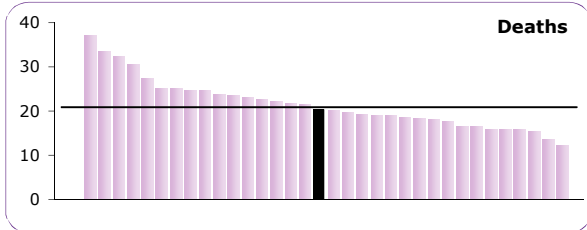
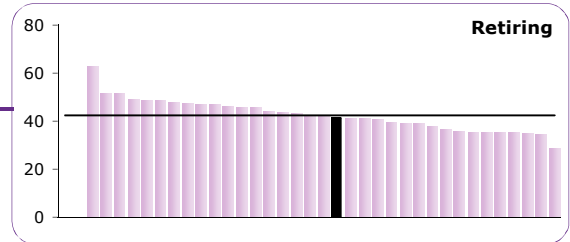
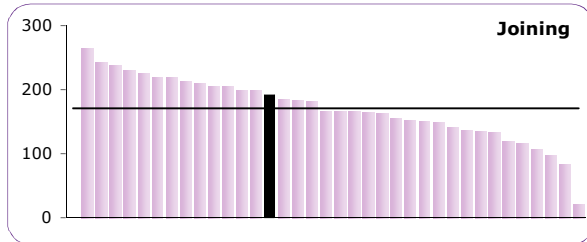
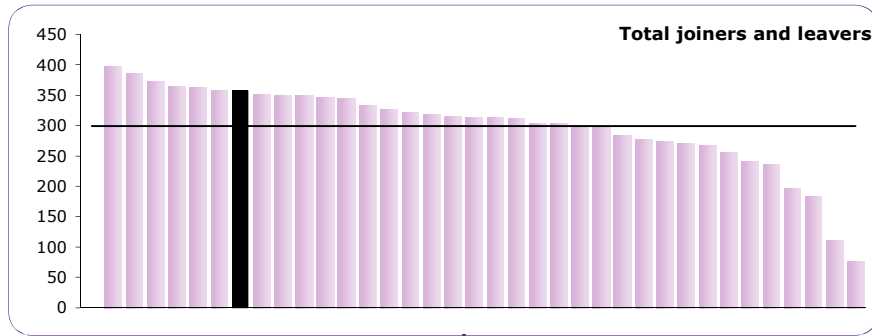
LGPS employers (31/3/16)

	No.	Avg	of which:	No.	%	Avg
Scheduled	107	162	Local Authorities	2	2%	10%
Admitted	60	97	Transferee	45	75%	43%
Total	167	259				

Employer changes 2015/16

	+/- Changes		Admitted		Leaving	
	No.	Avg	No.	Avg	No.	Avg
Scheduled	<min	2	1	12	1	1
Admitted	-	1	14	8	-	29

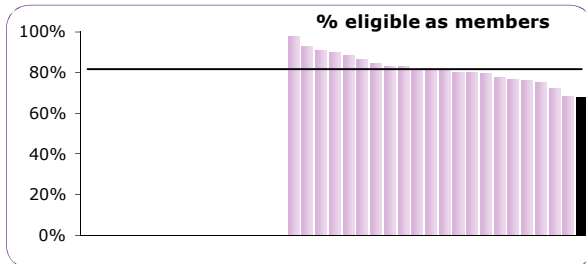
JOINERS & LEAVERS (per '000 active members)



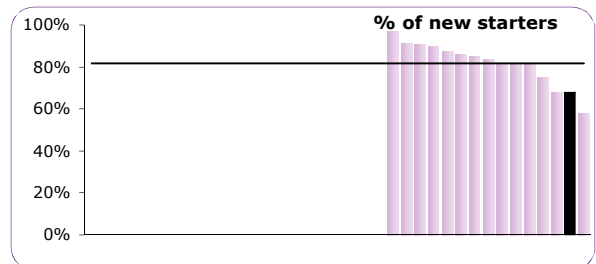
Joiners & leavers (per '000 active members)			
	No.	'000	Avg
Joining	3,911	192	171
Retiring	843	41	42
Deaths	413	20	21
Transferred out	48	2	6
Deferred	1,836	90	50
Opted out	239	12	14
Total	7,290	358	299

Active members
20,381

LGPS members as % eligible employees

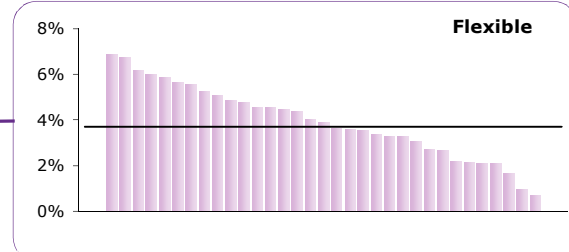
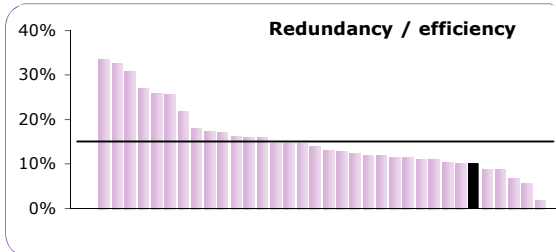
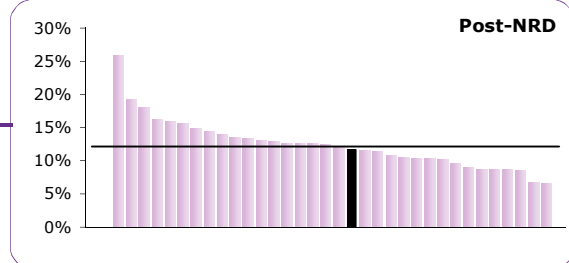
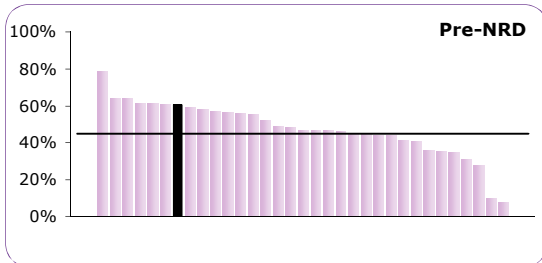
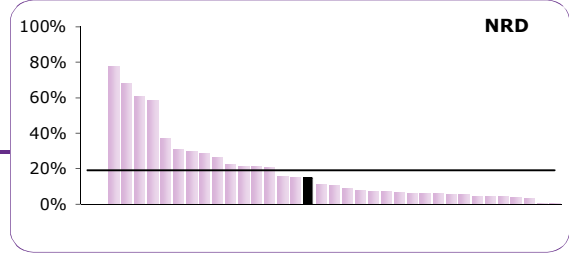
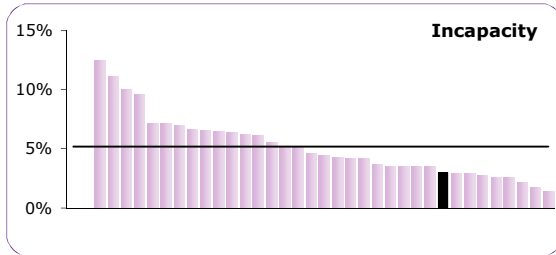
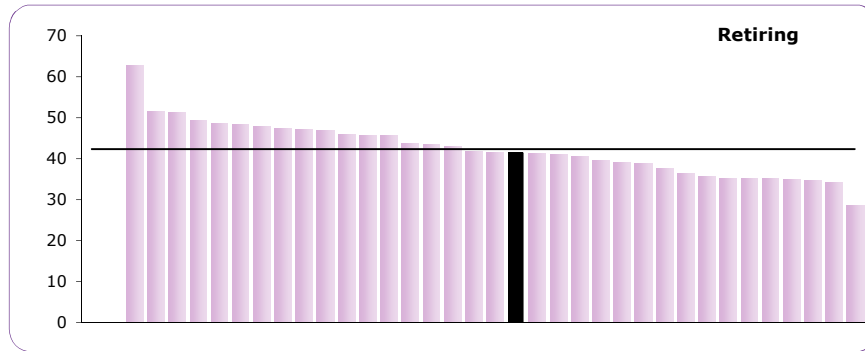


Wiltshire 68% Avg 82%



Wiltshire 68% Avg 82%

RETIRING (per '000 active members)

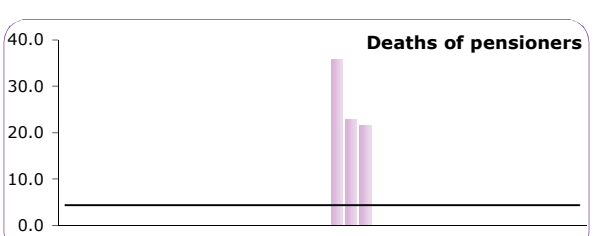
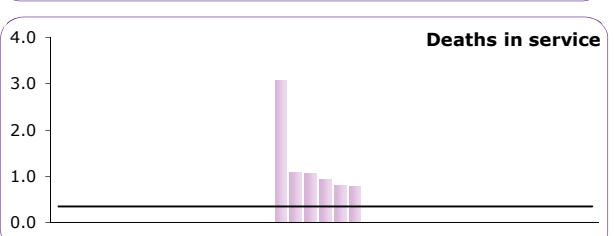
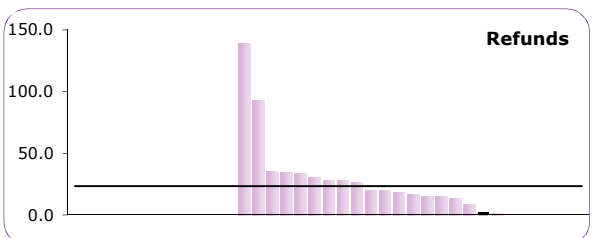
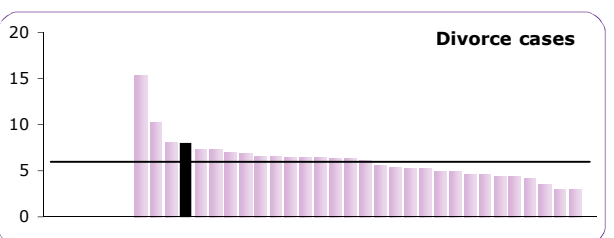
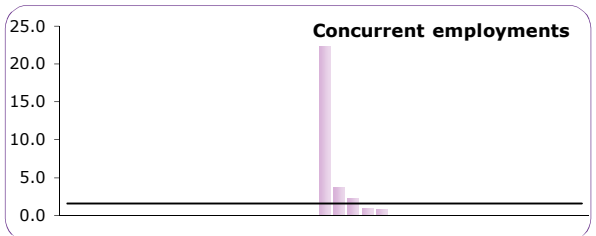
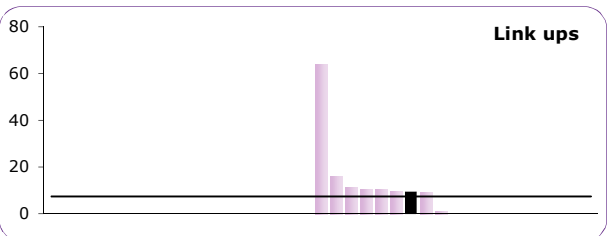
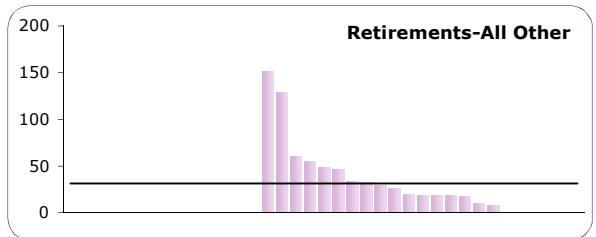
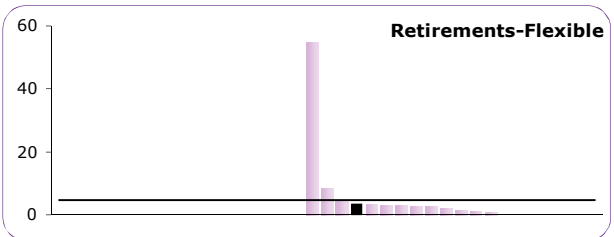
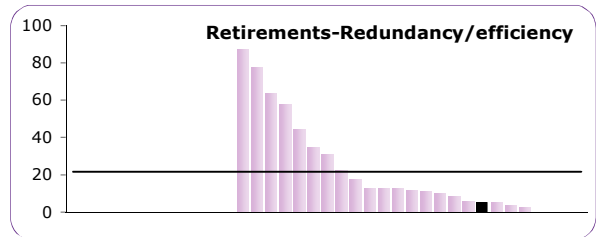
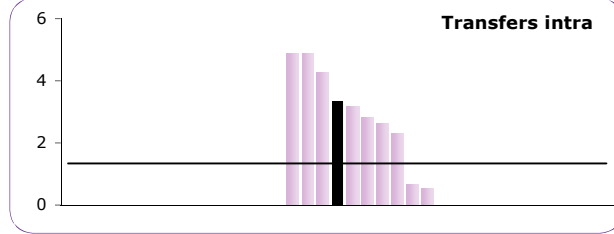
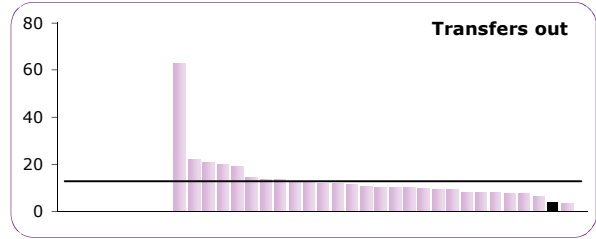
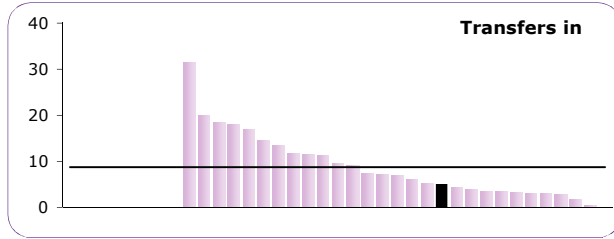


Retirements	No.	%	Avg
Incapacity	24	3%	5%
NRD	120	15%	19%
Pre-NRD	487	60%	45.0%
Post-NRD	94	12%	12%
Redundancy / efficiency	81	10%	15%
Flexible	-	0.0%	3.7%
Total	806		

Retiring (per '000 active members)			
	No.	'000	Avg
Retiring	806	41	42

Active members	
	20,381

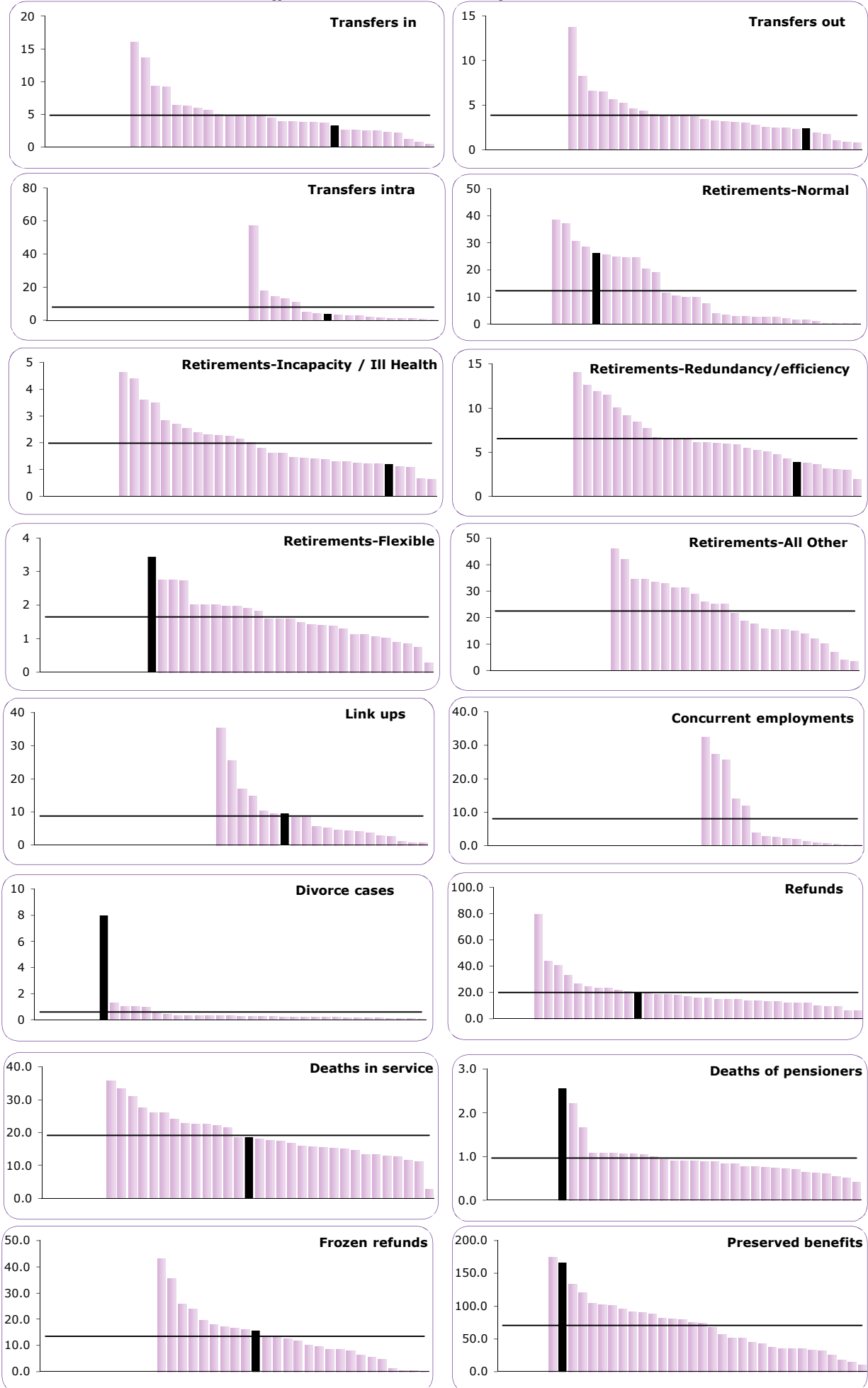
NUMBER OF QUOTATIONS PROVIDED (per '000 active members)



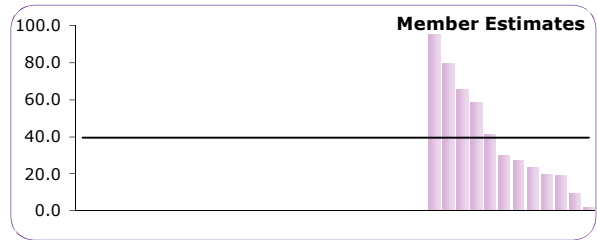
No of bulk transfers	No.	'000	Avg
TUPE -in	na	na	0
TUPE -out	na	na	0
Academies	na	na	0

Active members: 20,381		No.	'000	Avg
Quotations provided				
TUPE -in		na	na	0.0
TUPE -out		na	na	0.0
Academies		na	na	0.0
Retirements:				
- Normal		761	37	15.0
- Incapacity/ill-health		24	1	1.7
- Redundancy/efficiency		103	5	21.6
- Flexible		70	3	4.5
- All other		na	na	31.3
Transfers in		102	5	8.8
Transfers out		73	4	12.8
Transfers intra		68	3	1.3
Link ups		193	9	7.5
Concurrent employments		na	na	1.6
Refunds		49	2	23.3
Divorce cases		162	8	5.9
Deaths in service		na	na	0.4
Deaths of pensioners		na	na	4.5

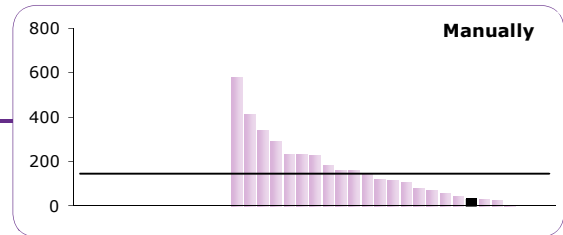
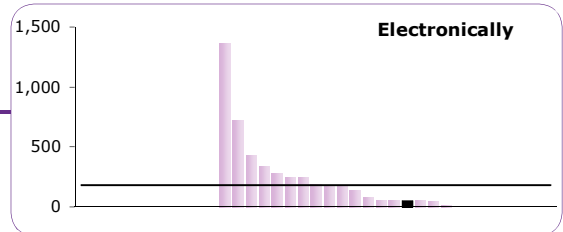
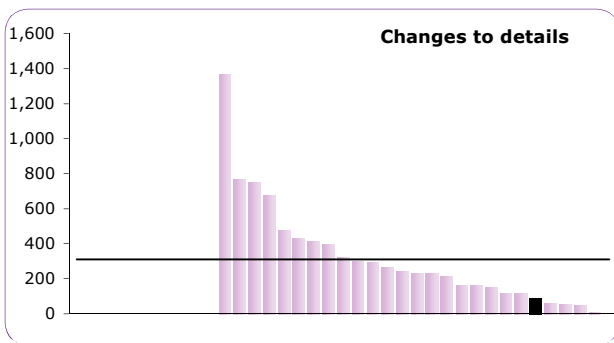
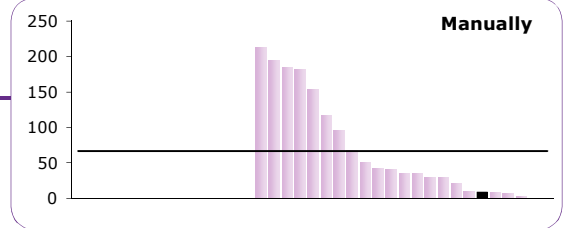
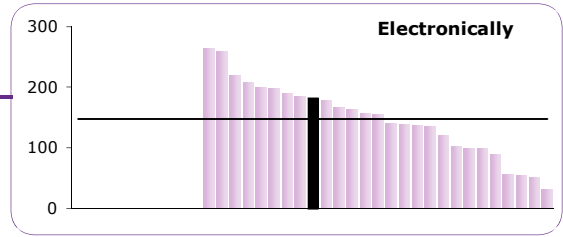
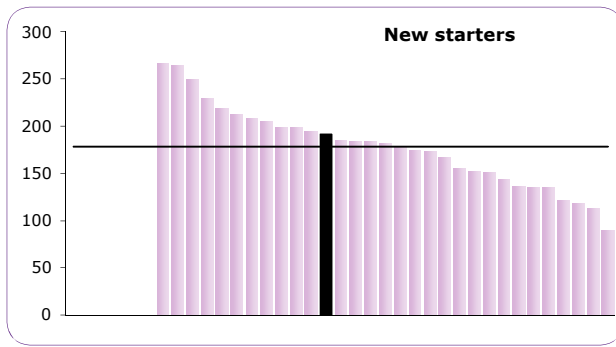
NUMBER OF ACTUAL EVENTS (per '000 active members)



Active members:		20,381		
Actual events	No.	'000	Avg	
TUPE -in	na	na	0	
TUPE -out	na	na	0	
Academies	na	na	10	
Retirements:				
- Normal	532	26	12	
- Incapacity/ill-health	24	1	2	
- Redundancy/efficiency	79	4	7	
- Flexible	70	3.4	2	
- All other	..	na	23	
Transfers in	64	3	5	
Transfers out	48	2	4	
Transfers intra	72	4	8	
Link ups	193	9	9	
Concurrent employments	na	na	8	
Refunds	411	20	20	
Frozen refunds	317	15.6	13	
Preserved benefits	3,378	166	71	
Divorce cases	162	8	1	
Deaths in service	377	18.5	19	
Death of pensioners	52	3	1	
Single Status / Job Evaluation	na	na	na	
Members Estimates	na	na	39	



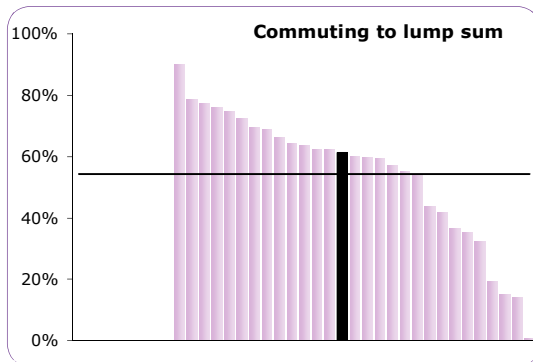
ACTUAL CALCULATIONS (per '000 active members)



RETIREMENTS

Active members
20,381

Retirements commuting to lump sum

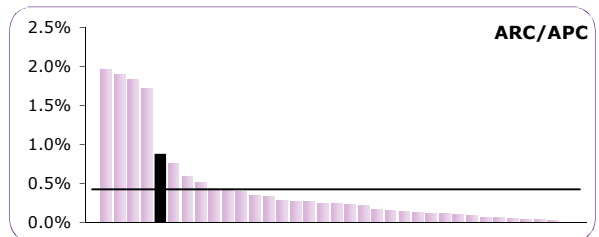
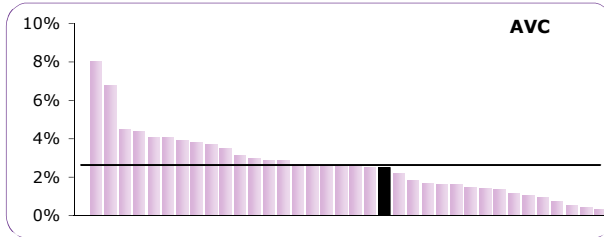


Actual calculations			
	No.	'000	Avg
New starters	3,911	192	178
- electronically	3,722	183	148
- manually	189	9	67
Changes to details	1,798	88	309
- electronically	1,129	55	180
- manually	669	33	146

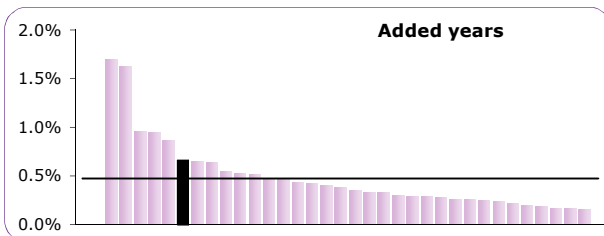
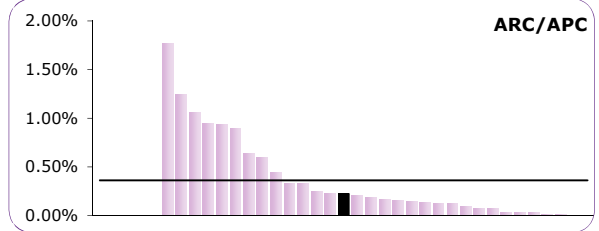
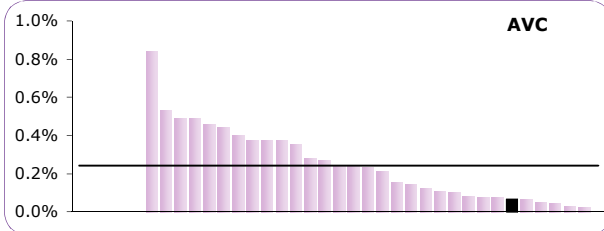
Retirements commuting lump sum		
	Number	% total
	495	61%
		Avg
		54%

AVCs, ARCs and Added years

% Currently contributing



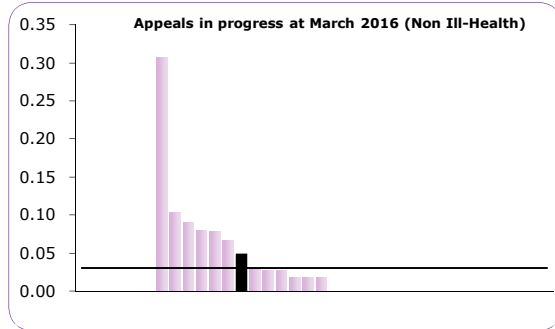
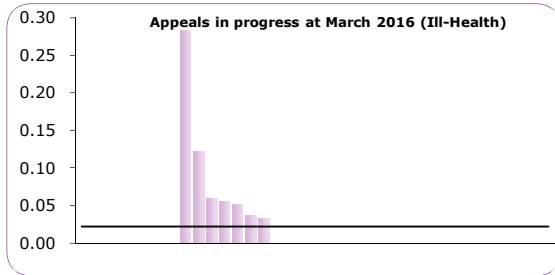
% New contributors this year



Contributors to AVCs and ARCS			
	No.	%	Avg
Currently contributing			
- AVC	511	2.51%	2.64%
- ARC/APC	179	0.88%	0.42%
- Added years	136	0.67%	0.47%
Total	826	4.05%	3.43%
New contributors this year			
- AVC	14	0.07%	0.24%
- ARC/APC	46	0.23%	0.36%
Total	60	0.29%	0.52%

Active members
20,381

APPEALS

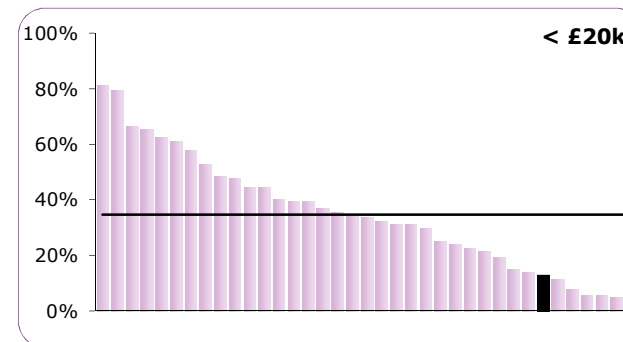
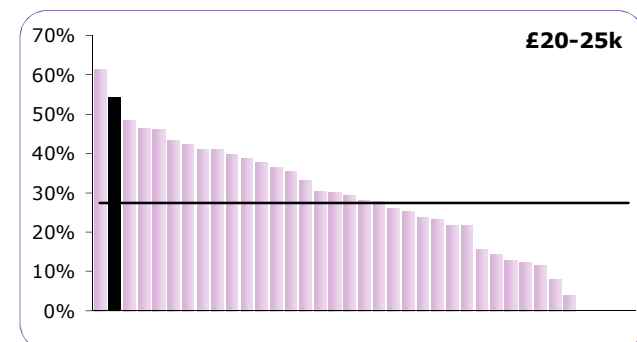
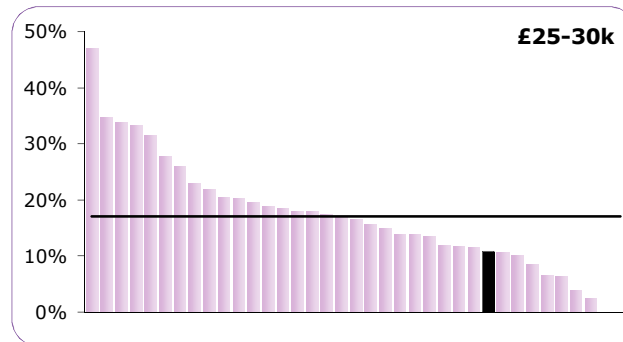
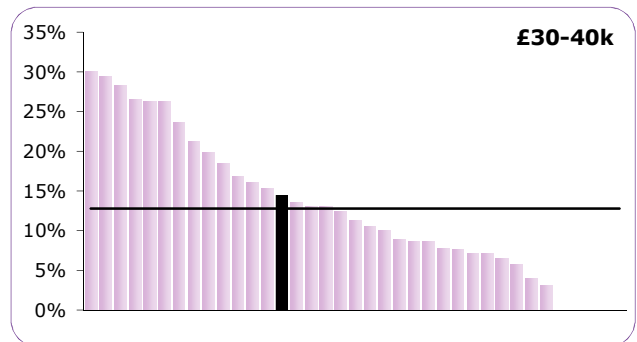
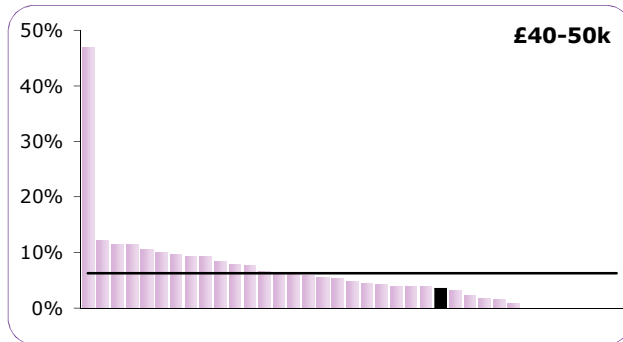
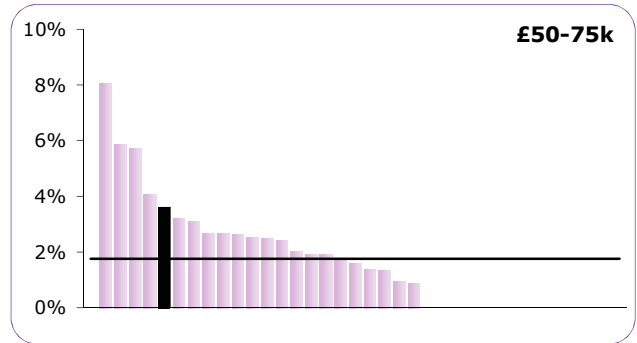
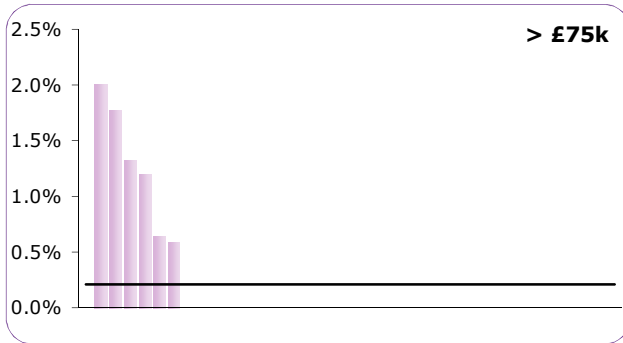


*Club total: This shows the total for all the Benchmarking Club members 2016

Number of appeals	No.	Per '000 members	Avg	Club* total
Ill-Health				
In progress at start of year	0	0.00	0.03	25
In progress at end of year	0	0.00	0.02	29
Non Ill-Health				
In progress at start of year	0	0.00	0.04	31
In progress at end of year	1	0.05	0.03	27
1st Stage				
Appeals in Progress - 03.15	0	0.00	0.03	27
New Appeals in Year	3	0.15	0.14	194
Appeals Withdrawn	0	0.00	0.01	7
Appeals Upheld	1	0.05	0.03	36
Appeals Not Upheld	1	0.05	0.11	156
Appeals in Progress - 03.16	1	0.05	0.03	22
2nd Stage				
Appeals in Progress - 03.15	0	0.00	0.02	14
New Appeals in Year	0	0.00	0.00	59
Appeals Withdrawn	0	0.00	0.00	-
Appeals Upheld	0	0.00	0.02	17
Appeals Not Upheld	0	0.00	0.05	53
Appeals in Progress - 03.16	0	0.00	0.01	(2)
Ombudsman Referrals				
Appeals in Progress - 03.15	0	0.00	0.01	8
New Appeals in Year	0	0.00	0.01	13
Appeals Withdrawn	0	0.00	0.00	1
Appeals Upheld	0	0.00	0.00	1
Appeals Not Upheld	0	0.00	0.01	10
Appeals in Progress - 03.16	0	0.00	0.01	4

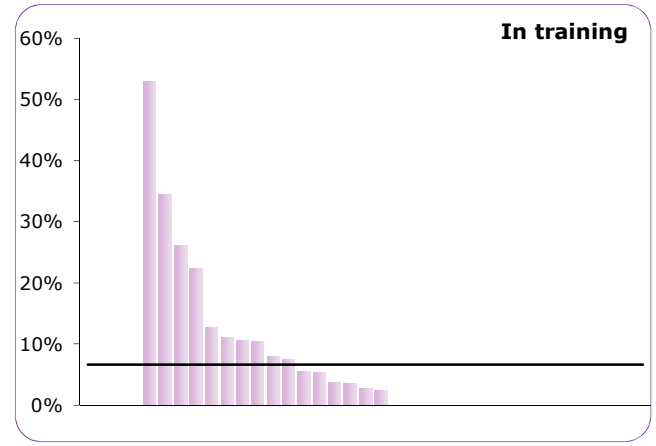
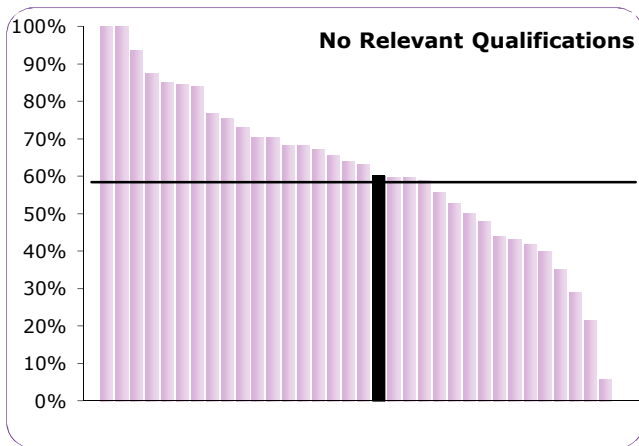
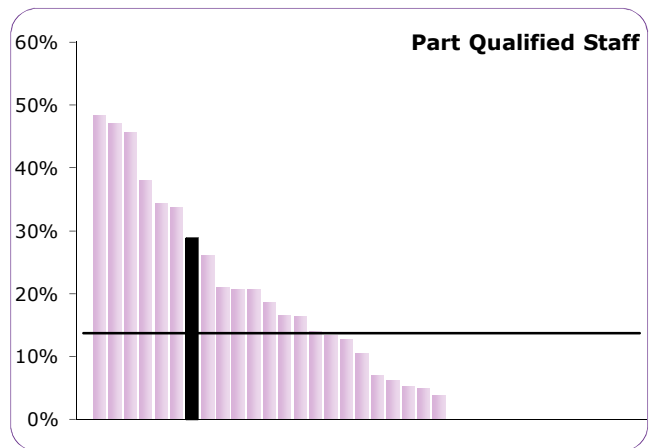
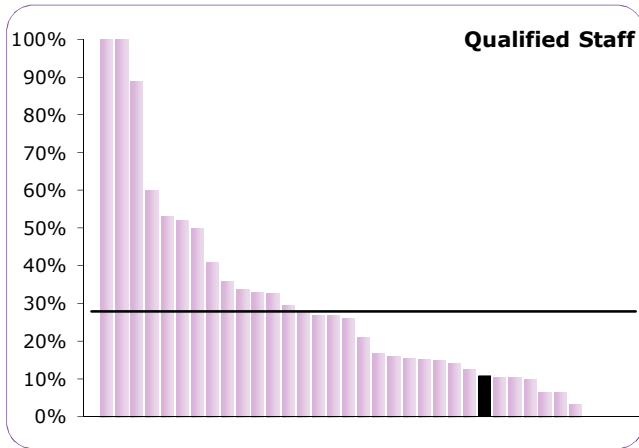
SECTION 4 - STAFF RELATED MEASURES

STAFF PAY



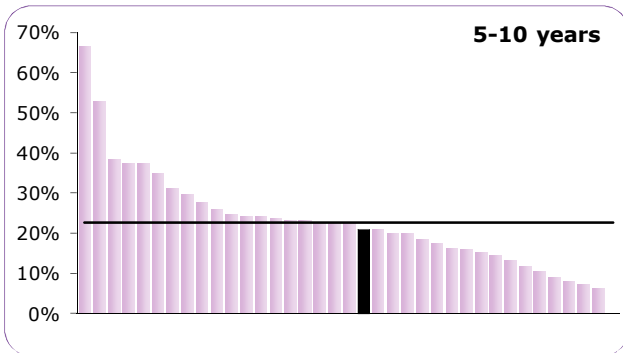
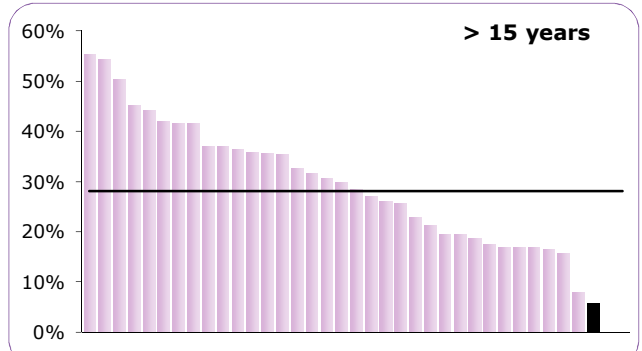
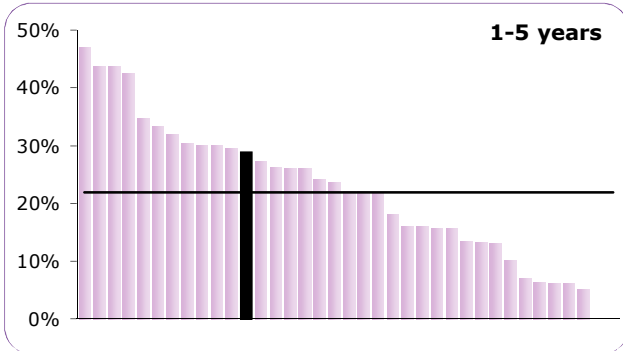
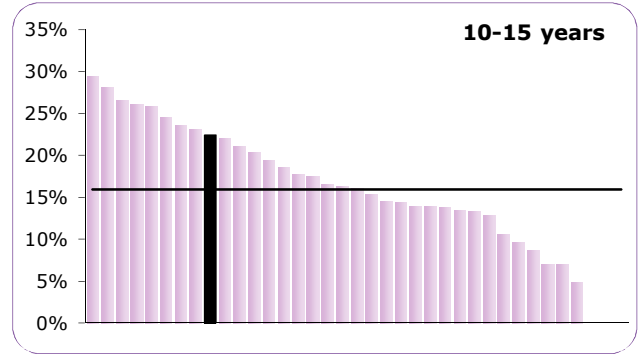
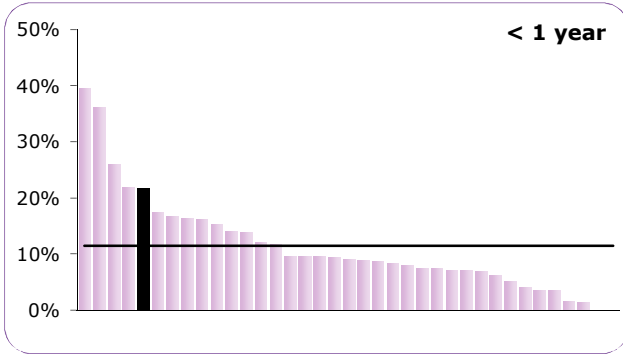
Staff pay			
	FTE	%	Avg
> £75k	0.0	0%	0.2%
£50-75k	1.0	4%	1.7%
£40-50k	1.0	4%	6.2%
£30-40k	4.0	14%	12.8%
£25-30k	3.0	11%	17.0%
£20-25k	15.0	54%	27.4%
< £20k	3.6	13%	34.7%
Total	27.6		

STAFF QUALIFICATIONS



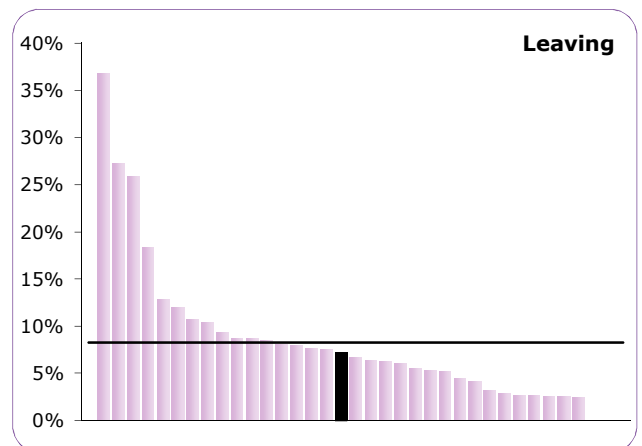
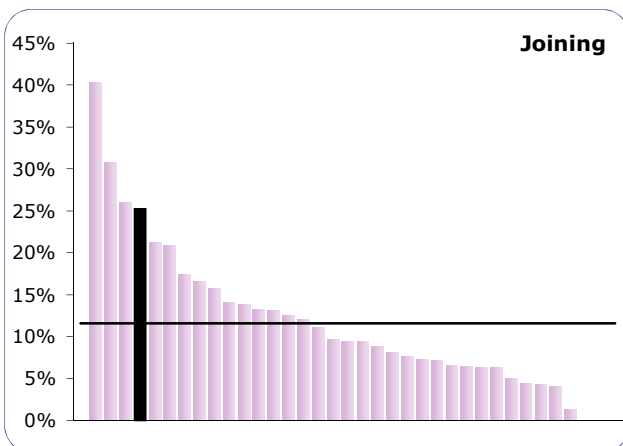
Staff qualifications			
	FTE	%	Avg
Qualified Staff	3.0	11%	28%
Part Qualified Staff	8.0	29%	14%
No Relevant Qualifications	16.6	60%	58%
Total	27.6		
Number in Training	..	na	7%

STAFF PENSIONS EXPERIENCE



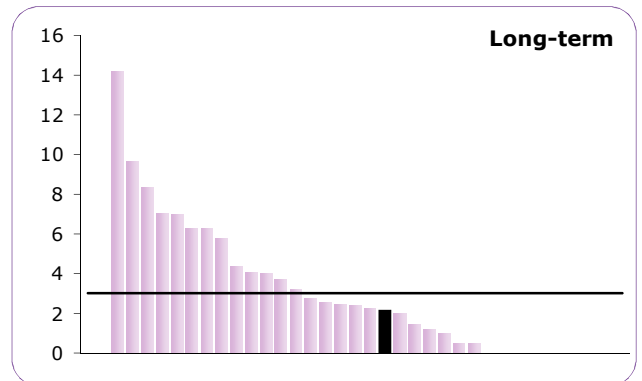
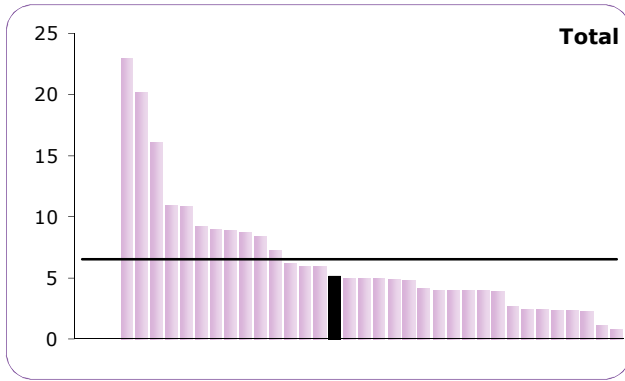
Staff experience			
	FTE	%	Avg
< 1 year	6.0	22%	11%
1-5 years	8.0	29%	22%
5-10 years	5.8	21%	23%
10-15 years	6.2	22%	16%
> 15 years	1.6	6%	28%
Total	27.6		

STAFF TURNOVER



Staff Turnover			
	FTE	% change	Avg
Staff at 1/4/2015	22.6		
+ Staff joining Pension section	7.0	25.4%	11.6%
- Staff leaving Pension section	2.0	7.2%	8.3%
Staff at 31/3/2016	27.6	22.1%	4.6%

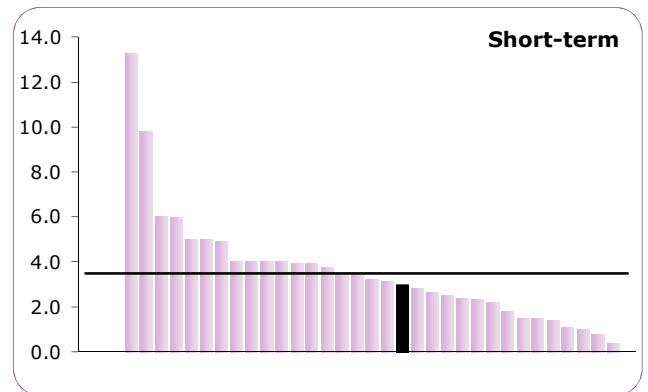
SICKNESS ABSENCE



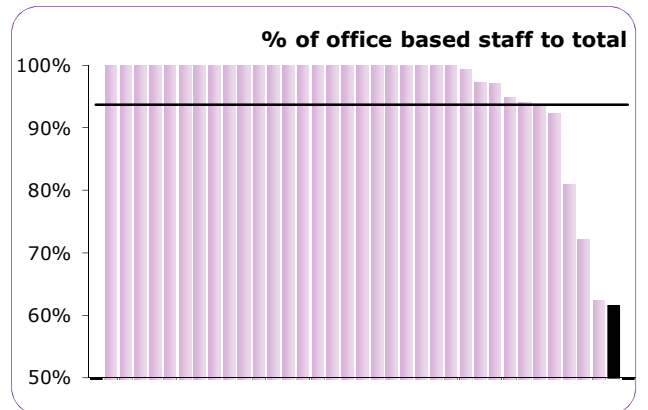
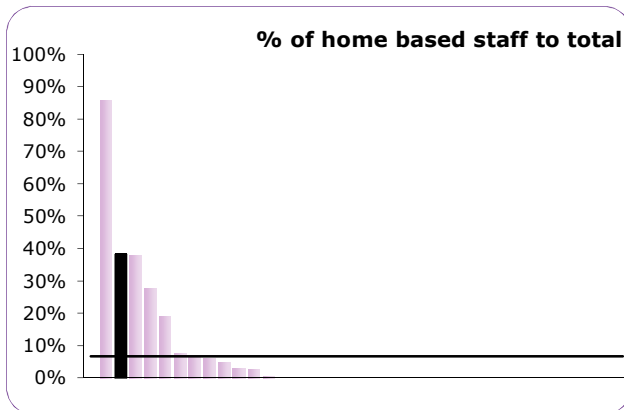
Sickness absence	Days/FTE	Avg
Long-term sickness	2.2	3.0
Short-term sickness	3.0	3.5
Total	5.2	6.5

Long-term sick (periods of sickness over 20 working days)

Short-term sick (periods of sickness of 20 days or less)



STAFF LOCATION

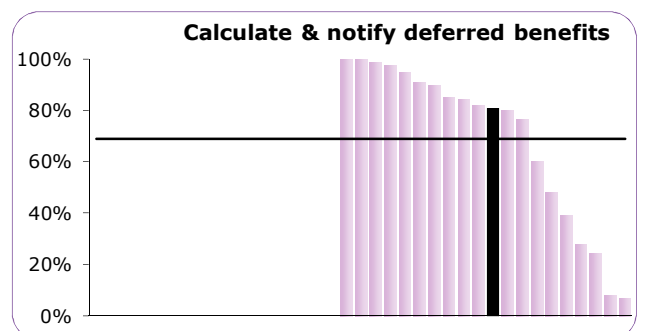
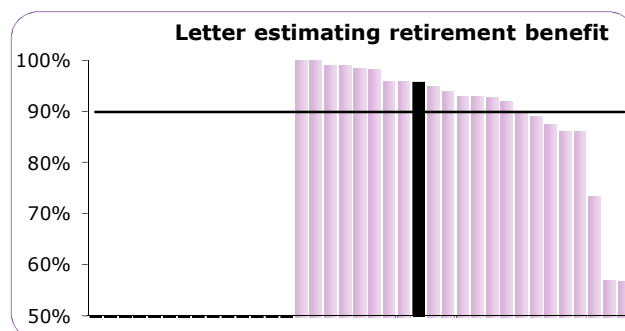
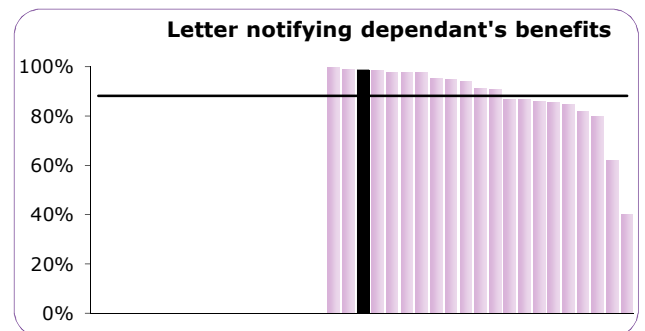
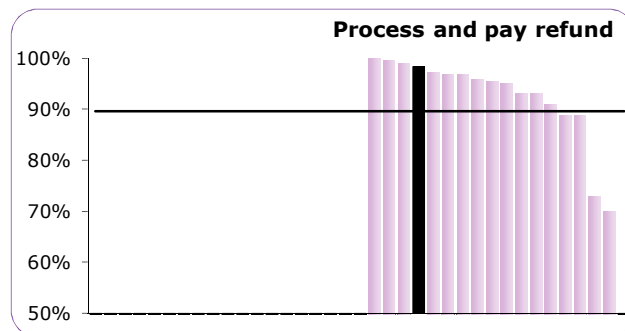
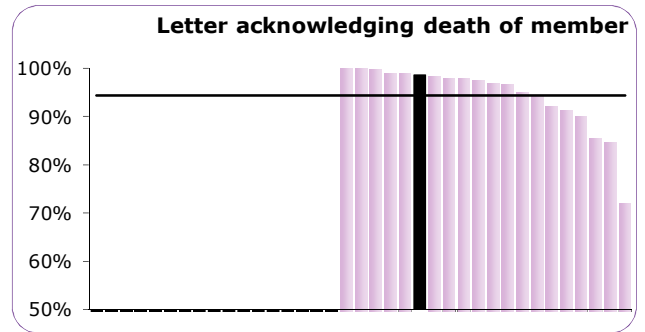
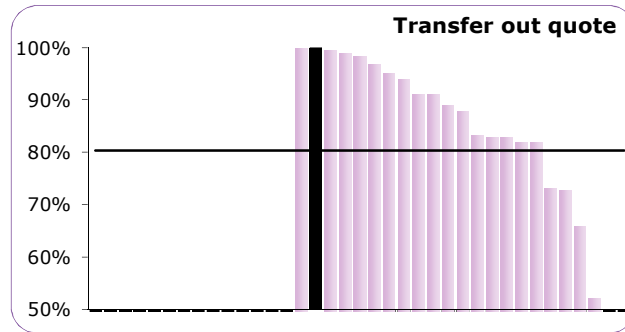
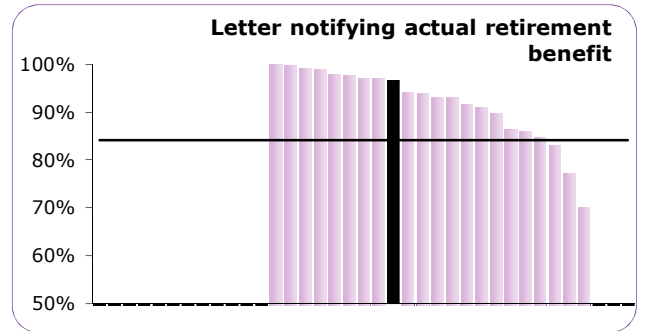
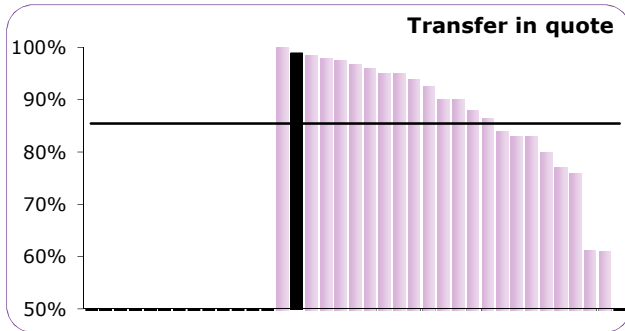


Staff location	FTE	% to total		
		Avg	FTE	Avg
Home based	10.6	2.1	38%	7%
Office based	17.0	33.2	62%	94%
Total	27.6			

Office Based: Staff members who spend >50% of their contracted time working in the office

Home Based: Staff members who spend 50% of their contracted time working from home.

SECTION 5 - INDUSTRY STANDARD PI's



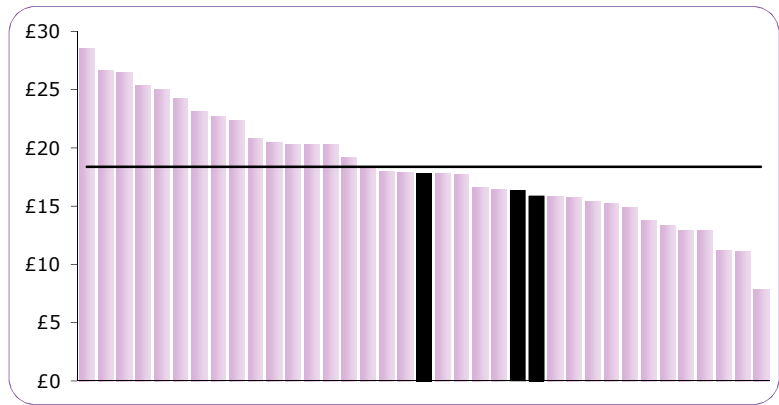
Industry Standard PI's	Target	Achieved	Avg
Letter detailing transfer in quote	10 days	99.0%	85.4%
Letter detailing transfer out quote	10 days	100.0%	80.3%
Process and pay refund	5 days	98.4%	89.6%
Letter notifying estimate of retirement benefit	10 days	95.8%	89.9%
Letter notifying actual retirement benefit	5 days	96.7%	84.1%
Process and pay lump sum retirement grant	5 days	99.0%	84.3%
Letter acknowledging death of member	5 days	98.7%	94.3%
Letter notifying amount of dependant's benefits	5 days	98.8%	88.1%
Calculate and notify deferred benefits	10 days	80.8%	68.8%

SECTION 6 - COMPARISON BY METHOD OF SERVICE DELIVERY

COMPARISON OF OUTSOURCED/IN-HOUSE MEMBERS

Total members with data:	38
Outsourced members:	3

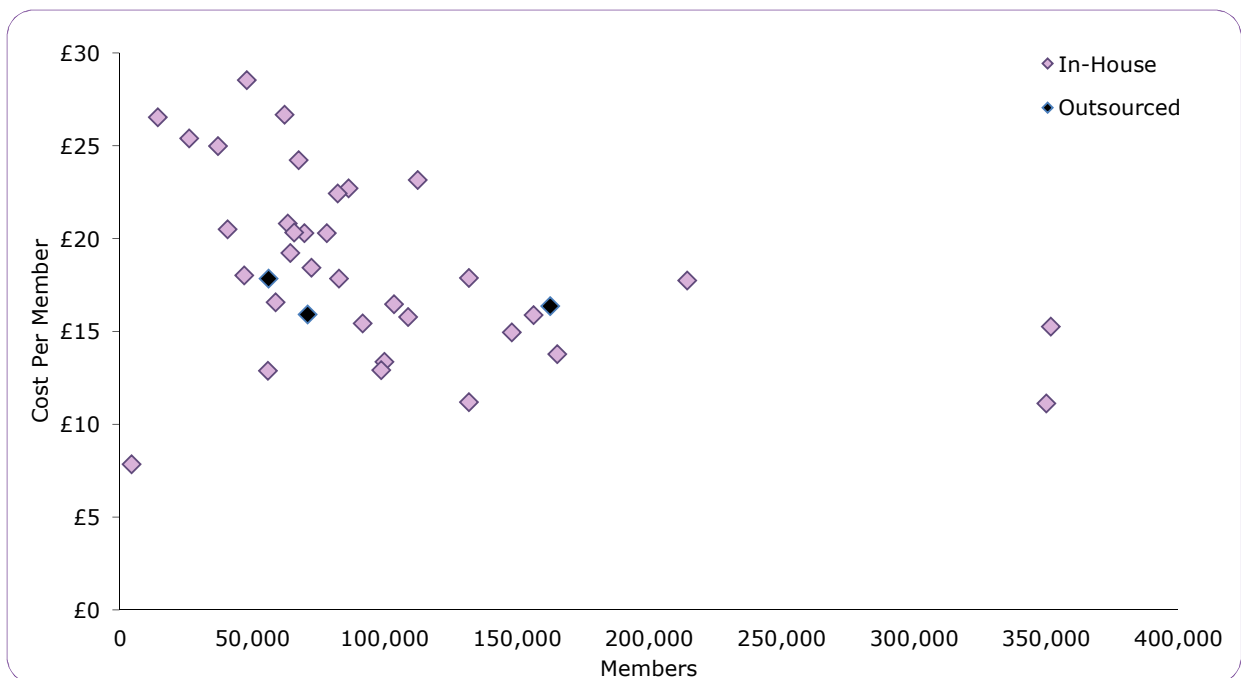
LGPS ADMIN COST PER MEMBER (INCLUDING PAYROLL)



Black bars show outsourced members

	Cost	Members	Cost per Member
Wiltshire	£1,338	65,768	£20.34
Club average	£1,683	99,473	£18.37
Outsourced average	£1,595	96,455	£16.71
In-house average	£1,690	99,740	£18.52

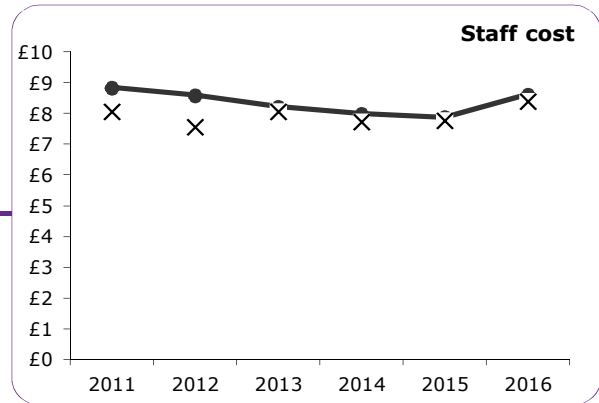
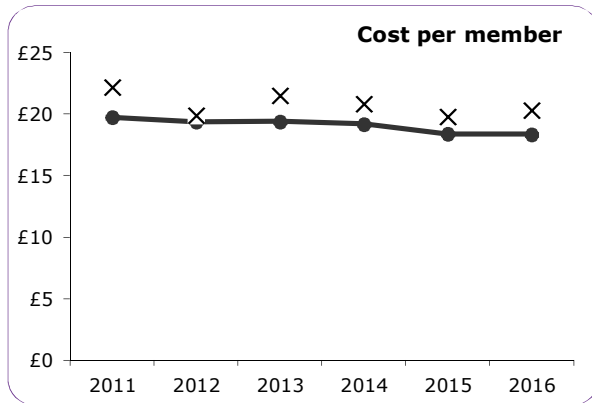
COST PER MEMBER COMPARED WITH NUMBER OF MEMBERS



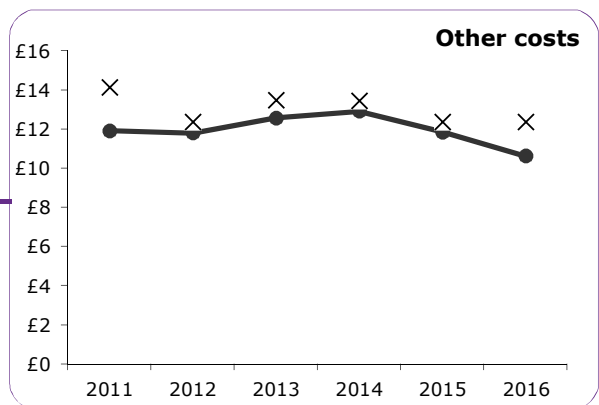
SECTION 7 - TIMESERIES

The 2016 averages are the actual club averages.

For previous years, the averages shown here are scaled up or down from the 2015 figure based on the average rate of change in each year. This is calculated using data from members who supplied figures in consecutive years, otherwise the simple average in each year would be distorted by changes in the composition of the club from year to year.



KEY:
 Club average
 Wiltshire



Time series analysis						
	2011	2012	2013	2014	2015	2016
Members	51,751	54,122	56,585	60,212	63,319	65,768
Net cost (£'000)	1,149k	1,079k	1,219k	1,256k	1,256k	1,338k
Cost per member	£22.20	£19.94	£21.54	£20.86	£19.84	£20.34
Average	£19.75	£19.39	£19.40	£19.19	£18.41	£18.37
Staff cost	£8.08	£7.58	£8.08	£7.74	£7.79	£8.41
Average	£8.85	£8.60	£8.22	£7.99	£7.88	£8.62
Other costs	£14.12	£12.36	£13.47	£13.42	£12.35	£12.36
Average	£11.90	£11.79	£12.55	£12.90	£11.84	£10.61

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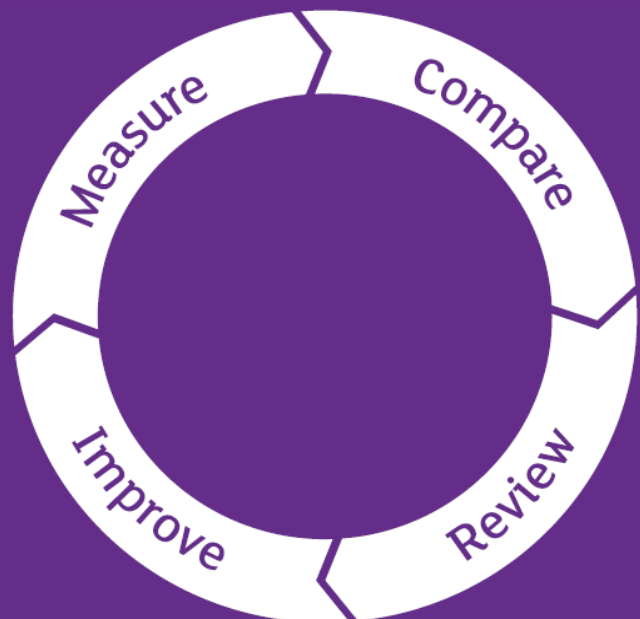
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