

Customer Survey Results - Lincolnshire Members (1st October to 31st December 2022)

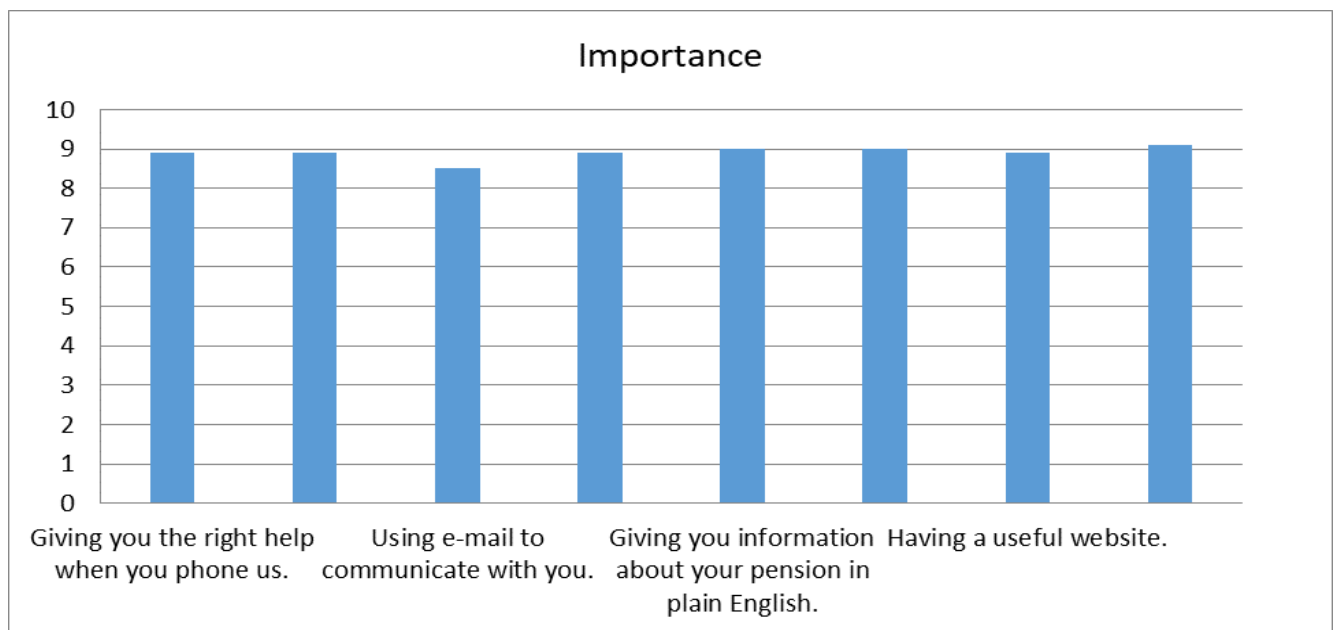
Over the quarter October to December we received **3** online customer responses.

Over the quarter October to December **171** Lincolnshire member's sample survey letters were sent out and **26 (15.3%)** returned:

Overall Customer Satisfaction Score;

October to December 2021	January to March 2022	April to June 2022	July to September 2022	October to December 2022
91.5%	95.3%	80.2%	90.4%	81.3%

The charts below give a picture of the customers overall views about our services;



Sample of positive comments:

Member Number	Comments
8006233	Can't fault your service at all. Mark Furness Pensions officer was superb, so helpful and explained everything well.
8017008	Newly flexible retirement, Brilliant support from start to finish. Having made a mistake with my account details staff reassuring was high in confirming that payment process was still active.
8027397	Pleased with your service once my former employer submitted all the required information to you. Had to ring several times but again due to lack of information given to you. My questions were answered promptly and easy to understand explanations. Service was friendly and professional at all times
8018993	Excellent service. The service I received is excellent. The staff I was speaking to were very helpful. Many thanks to them.

Complaints/Suggestions:

Member Number	Comments	Summary of Acknowledgement Letter Sent to Member
8040929	I had to repeatedly ring to get information about my pension and I felt I passed over every time. Nobody explained what the problem was, I know there were issues with the information given but there was no hurry to sort out my pension between March and September when it was due. I had to make repeated phone calls and spoke to different people all the time, no of them ring me back to explain	Employer supplied pay for 52 weeks of the year on the RTN instead of term time only pay. we sent them 5 emails to query this. their first reply they simply sent us a spreadsheet. This is not sufficient and it is their responsibility to provide us with an actual pay figure to use in the calc. They did reply and provide us with a more reasonable pay figure to use with was £4000 less than the initial one they had supplied us with. The ret pack was done, checked and posted the same day that the pay was received from the employer.
8045026	I had to contact you about informing as pension provider I am retiring. No urgency or contact when you were informing to WYPF. I spent a month trying to get answer from all involved. When I asked I would like to my notification expedited I would have thought this should have been completed earlier, I retired on 1st November, didn't have any contact from you until I was given contact number from another service, you need to sort data plan as this was totally unacceptable. I needed to know my figures to sort out finances.	<p>Email sent by Nat -Thank you for returning your customer survey form. I have looked through your file and please find below a summary of events:</p> <p>17/10/22 – You phoned our contact centre to inform us that you were retiring on 1/11/22. As your retirement notification hadn't been received from your employer we requested it from them.</p> <p>21/10/22 – You phoned to check the progress of your retirement pack and were informed that your employer hadn't sent it as yet.</p> <p>25/10/22 – You phoned to see if we had received the retirement notification but we hadn't as yet.</p> <p>25/10/22 – Your retirement notification received.</p>

		<p>25/10/22 – You phoned to say that Dataplan had confirmed that they had sent us the retirement notification. This was received at 14.38.</p> <p>8/11/22 – Your retirement quote was processed.</p> <p>8/11/22 – You phoned to chase progress. Your case was marked as urgent.</p> <p>9/11/22 – Your retirement quote was checked and posted to you.</p> <p>14/11/22 – You phoned to discuss your retirement pack.</p>
8129928 (online)	Dreadful. You have repeatedly and persistently failed to respond and act upon instructions and demonstrated a cavalier attitude to managing your responsibility to your members.	<p>Lucy has sent an email to the member on 7th December which has been imported on to the record. This was followed up with a telephone call where she spoke to the member about this issue. He was very pleased with the outcome of our conversation and happy that we were now able to progress his case in the way he wanted – despite the delays.</p> <p>she explained that while we had tried on a number of occasions to get the relevant information from Lincolnshire CC we could also have dealt with this in a different way and I apologised for the delays that had occurred. We agreed a way forward and the member was satisfied with this.</p>
8022845 (online)	Very slow and not helpful at all, been waiting since March 2022 for pensions to be sorted out. No one cares about you, no one is doing anything about my pension because Yorkshire pension made a mistake with my account, I've phoned every week since August 2022 and I'm going round in circles.	<p>This is a type 2 AVC case where the excess AVC's can't be paid through WYPF. These cases actually casue us no end of trouble. We don't have any working instructions or letters for these cases and we have to work our way through them the best we can. However as they are so fiddly and the information that we send to members needs developing, the members so not understand these cases at all.</p> <p>In this case the member had chosen to take his AVC's through WYPF but then the excess AVC's through the AVC provider - Pru. He completed the forms incorrectly (they are not clear as they are Pru's forms and not WYPF's so we had to send it back to him. he completed it again (still incorrectly) but we were trying to assist the member as until this is finalised and Pru accept the forms then we are unable to to pay anything to the member.</p> <p>We sent the completed forms to Pru and they rejected them as the quotation number he had put on the form was now out of date so Pru sent us some further illustrations that we had to send to the member for him to choose from. This delayed everything and effectively we have to start the whole process again.</p>

		<p>The staff involved in this case were actually as frustrated as the member and we did feel really bad for him.</p> <p>The experienced staff on the team strongly feel that we should treat the Type 2 DB into payment cases in the same way that we treat the type 2 retirement cases where the excess can be taken as an annuity through WYPF along with the rest of their AVC's.</p> <p>I believe this is the next thing on the list for the MSM in charge of this areas to look at and the experienced staff would like to be involved in this due to the problems we have on an ongoing basis with similar such cases,</p> <p>This members benefits have finally been paid.</p>
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