



# Oregon

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## Public Employees Retirement System

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September 28, 2012

TO: Members of the PERS Board  
FROM: David Crosley, Communications Officer  
SUBJECT: 2012 Customer Service Survey Results

PERS conducted customer satisfaction surveys for members (including retirees) and employers in August 2012. This was the seventh year of our survey program.

The 2005 Legislature adopted standardized customer service performance measures and survey questions for all agencies in all branches of state government. The measures require agencies to survey customers and report results in their budget presentations.

Our 2012 surveys continue to show good overall ratings from both members and employers. We will continue to conduct yearly surveys to measure and trend improvement in our customer service.

### **MEMBER CUSTOMER SATISFACTION SURVEY**

#### **BACKGROUND**

PERS posted a customer service survey on its website in the member and retiree sections during August 2012. We also placed a hard copy of the survey in the August 1 retiree newsletter, *Perspectives*, that retirees could complete and mail to PERS. Retirees also had the option of completing the survey online. The August 1 *Perspectives* newsletter for active members noted that the survey was available online. In total, we received approximately 1,700 responses, a number of which included individual comments. In comparison, we received fewer than 1,600 responses in 2011.

We identified two key issues and suggestions from the comments received as detailed below. We also describe our strategies to address those items and the methodologies used in the survey. The following graphs and charts display the survey results and provide a comparison of responses for the 2008-2012 survey years.

In addition to the core questions, we also asked for input regarding the PERS website:

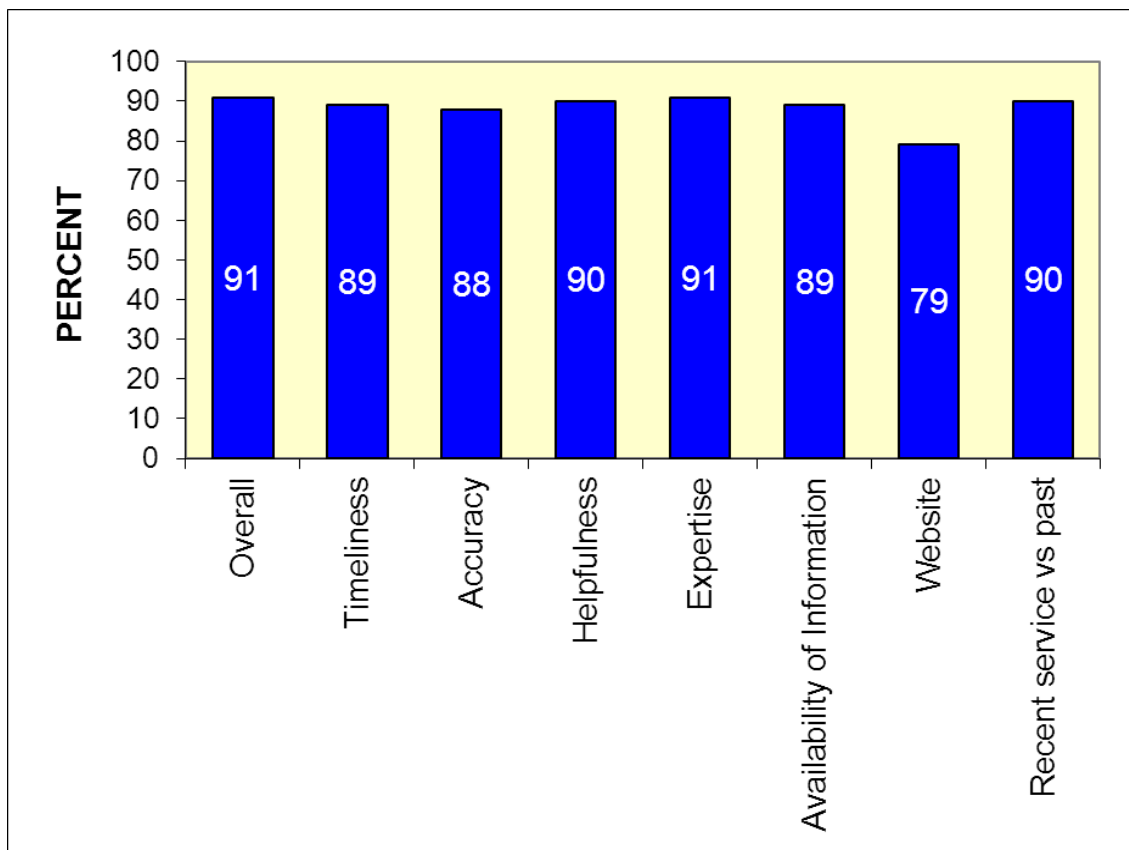
- Was the PERS website easy to navigate?
- Did you find the information you wanted?
- Are there any changes you would make to the PERS website?

Approximately 78 percent of respondents said the website was easy to navigate and approximately 72 percent found the information they were seeking. In many cases where information was not found, benefit recipients were looking for individual amounts owed as part of the Strunk and Eugene Overpayment Recovery Project.

Another questions asked: "If you rated PERS 'Fair' or 'Poor' in any part of question 3, please tell us why you did not rate us 'Excellent' or 'Good.'" Many noted their dissatisfaction with having to repay PERS based on erroneous 1999 earnings crediting and the associated legislative actions and court rulings.

An additional question this year asked: “Are PERS forms easy to understand and use?” More than 78 percent of respondents answered “yes,” with less than seven percent answering “no.” The remainder had “not used” PERS forms.

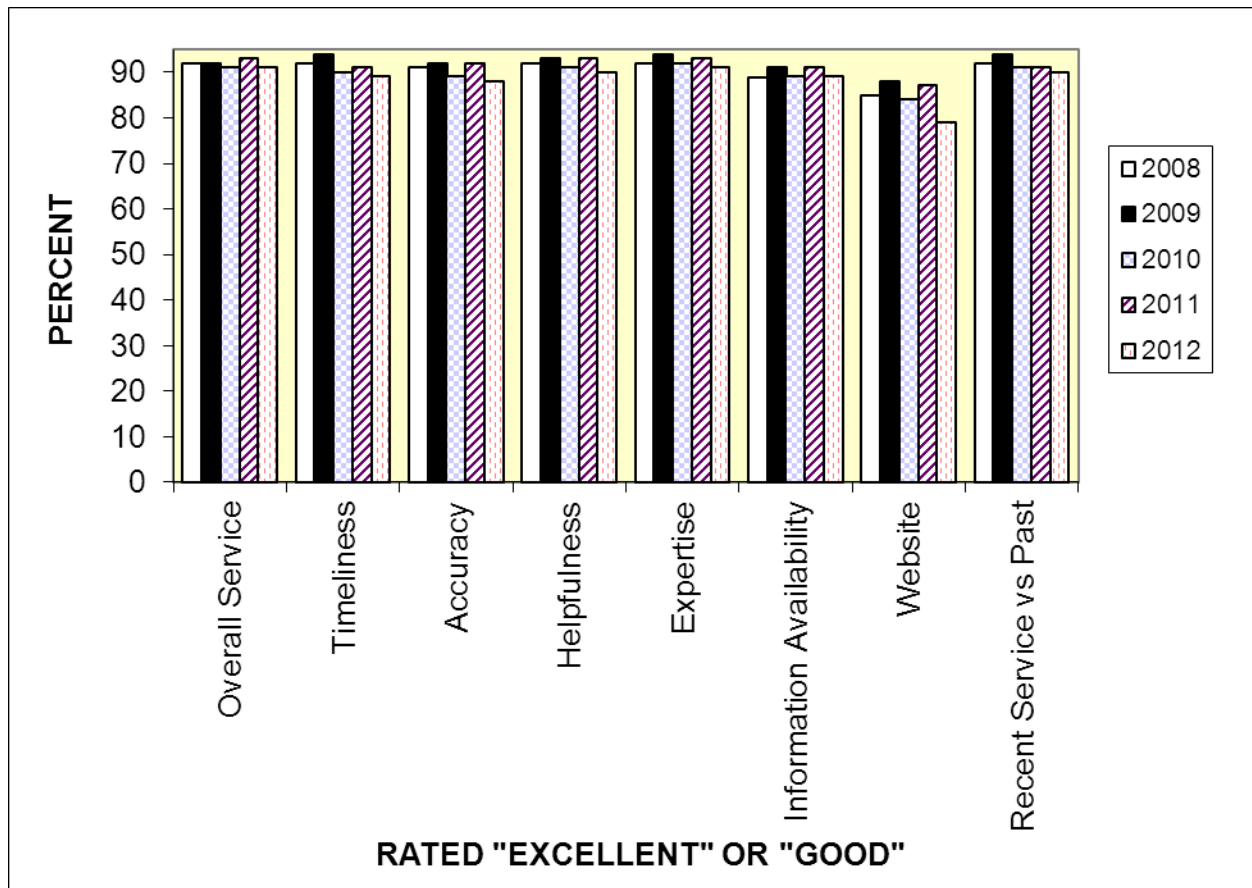
**Percent of member respondents rating “excellent” or “good” (the state’s Key Performance Measures do not include the “Don’t Know” responses; the numbers in the graph have been rebaselined to exclude those responses).**



**Numerical member results (numbers rounded; may not equal 100%)**

How do you rate...	Percent				
	Excellent	Good	Fair	Poor	Don't Know
The overall quality of service?	58	28	6	3	5
The timeliness of services PERS provides?	57	28	5	5	5
PERS' ability to provide services accurately the first time?	56	26	6	5	7
PERS' helpfulness?	61	24	5	4	6
The knowledge and expertise of PERS employees?	55	27	5	3	10
The availability of information at PERS?	52	30	6	4	7
The PERS website?	21	22	8	4	45
Our service in the past year compared to previous years?	45	24	5	4	23

**Comparison of 2008-2012 Member Results**



**KEY MEMBER ISSUES AND SUGGESTIONS (in order of number of responses)**

**1. Retiree’s would like to receive a more timely option change benefit increase in the case of a beneficiary’s death.**

Retiree’s feel that it can take too long to receive an option change and the additional monthly benefit in cases where a beneficiary dies and the retiree is entitled to a higher benefit because of the option selected at retirement.

**Resolution:** The Benefit Payments Division and Customer Services Division are working together to process these benefit changes for approximately 150 recipients. The goal is to process all current requests by the end of 2012.

**2. Benefit recipients who are receiving estimated payments would like to receive final payments.**

Benefit recipients receiving estimated payments would like to switch to a final benefit amount.

**Resolution:** The Benefit Payments Division anticipates providing a final benefit amount for the approximately 200 benefit recipients receiving an estimated payment by the end of 2012.

## **SURVEY METHODOLOGIES**

To maximize member response, PERS created this survey online and posted it in a prominent spot on our home page. We also published the location of the survey in our member and retiree newsletters, inviting members and retirees to participate. The online survey ran throughout August 2012.

Further, we placed a hard copy of the survey in the newsletter that goes to retired members and they had several weeks to complete and mail the survey to PERS.

We used surveymonkey.com to create the survey, using the six key questions the state requires all state agencies to use for the Customer Satisfaction Performance Measure survey.

The survey included a comments section. The most common comments are summarized and addressed in the respective Key Issues and Suggestions section of this report.

The survey report combines the online and hard copy responses, even though only retired members received hard copies.

## **EMPLOYER CUSTOMER SATISFACTION SURVEY**

### **BACKGROUND**

PERS surveyed employers online for the sixth consecutive year. The 2012 results are discussed below.

The employer satisfaction survey was posted online throughout August 2012. Employers received an e-mail inviting them to take the survey; 286 responses were received, a number of which included individual comments. In comparison, we received 140 responses in 2011.

We identified two key issues and suggestions from the comments received as detailed below. We also describe our strategies to address those items and the methodologies used in the survey.

The following graphs and charts display the survey results and provide a comparison of responses for the 2008-2012 survey years.

Again this year, we used three supplemental questions regarding the PERS employer website:

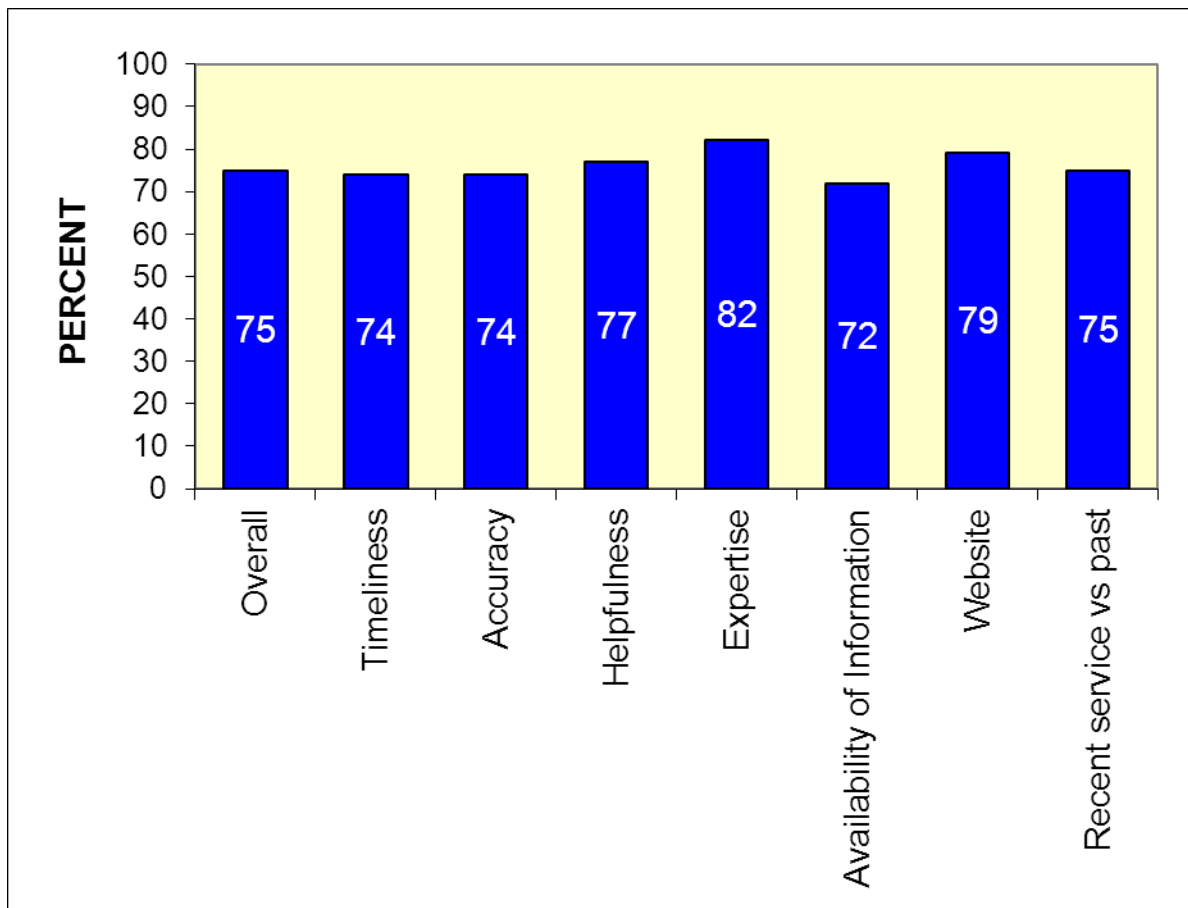
- Was the PERS employer website easy to navigate?
- Did you find the information you wanted?
- Are there any changes you would make to the PERS website?

More than 70 percent of employers responded that the employer website is “easy” or “somewhat easy” to navigate and 75 percent of employers responded that information they were seeking was “easy” or “somewhat easy” to find.

Another questions asked: “If you rated PERS ‘Fair’ or ‘Poor’ in any part of question 3, please tell us why you did not rate us ‘Excellent’ or ‘Good.’ ” Some employer noted that PERS’ employer representatives should be available by telephone or email throughout the day. However, the representatives are available from 8 a.m. to 5 p.m. Monday through Friday.

An additional question this year asked: “Are PERS’ employer forms easy to understand and use?” More than 73 percent of employers who responded answered “yes,” with approximately four percent answering “no.” The remainder had “not used” PERS employer forms.

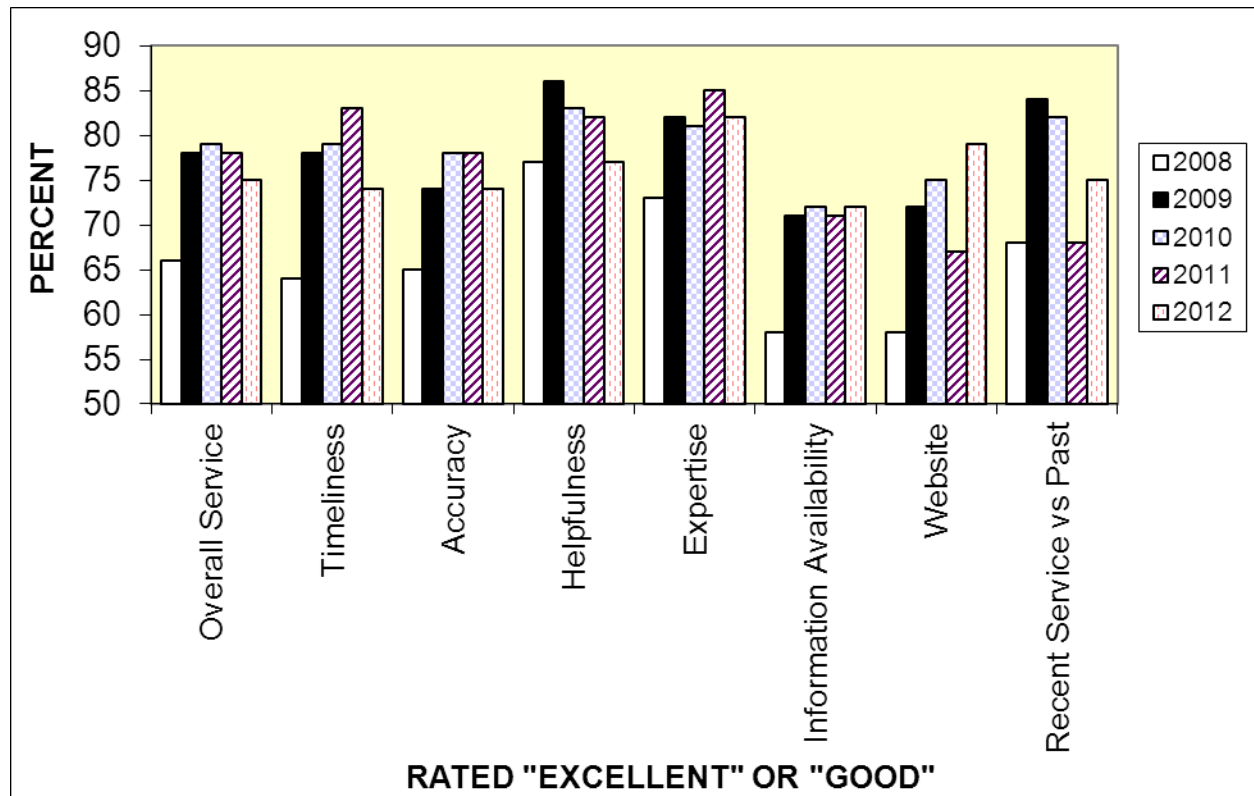
**Percent of employer respondents rating “excellent” or “good” (the state’s Key Performance Measures do not include the “Don’t Know” responses; the numbers in the graph have been rebaselined to exclude those responses).**



**Numerical employer results (numbers rounded; may not equal 100%)**

How do you rate...	Percent				
	Excellent	Good	Fair	Poor	Don’t Know
The overall quality of service?	21	53	19	6	1
The timeliness of services PERS provides?	22	51	14	11	2
PERS’ ability to provide services accurately the first time?	24	48	19	7	3
PERS’ helpfulness?	31	45	17	6	1
The knowledge and expertise of PERS employees?	32	48	16	3	2
The availability of information at PERS?	22	49	20	8	1
The PERS employer website?	17	51	14	4	14
Our service in the past year compared to previous years?	19	46	11	11	13

**Comparison of 2008-2012 Employer Results**



**KEY EMPLOYER ISSUES AND SUGGESTIONS (in order of number of responses)**

**1. Employers want telephone access to Employer Service Center representatives throughout the business day.**

Employers want to speak with an Employer Service Center representative during all business hours.

**Resolution:** The Employer Call Center is open from 8:30 a.m. until 12:00 p.m. weekdays. The call center is not open all day because staff need time to work directly with their caseloads. However, employers can also call their designated Employer Service Center representative at any time during the day and direct phone numbers for staff are posted on the PERS website. We will renew education efforts to let employers know that they have access to a representative throughout the work day.

**2. Employers requested that PERS process unposted employee records in a more timely manner.**

In 2011, PERS deployed new functionality that enables the system to use a qualifying or non-qualifying designation to make decisions on PERS eligibility. This is necessary for data accuracy. This change requires staff to correct data going back to 2004 and has prevented records from posting, requiring PERS staff intervention.

**Resolution:** PERS staff has been working diligently to correct this data and have made great strides, posting all payroll reports for 2011 and exceeding goals for 2012 payroll reports. In July 2012, PERS also brought in a team of temporary staff, and together with PERS staff, they have corrected over 145,000 suspended records for 2011. Our goal is to have all the 2011 suspended records posted by year end.

## **SURVEY METHODOLOGIES**

To maximize employer response, we created this survey online and sent an email to all employers inviting them to participate. A follow-up email was sent to employers approximately one week before the survey deadline. The survey ran throughout August 2012. We set the survey so more than one employee per employer could respond since we often interact with more than one employer contact.

We used surveymonkey.com to create the survey, using the six key questions the state requires all state agencies to use for the Customer Satisfaction Performance Measure survey. Again this year we included two additional key questions:

1. "How do you rate the PERS website?"
2. "How do you rate our service in the past year compared to our service in previous years?"

The survey included a comments section. The most common comments are summarized and addressed in the respective Key Issues and Suggestions section of this report.