



P R B
Pension
Review
Board

Report on Customer Service

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State Pension Review Board

Report on Customer Service

Survey Objective & Inventory of External Customers

As part of the strategic planning process, the State Pension Review Board (PRB) conducts an annual external assessment of the services provided by the agency. The most recent external assessment was conducted in June through July 2015. The survey was conducted through an online host service; participants remained anonymous; and responses were automatically emailed to PRB staff for compilation and analysis.¹

To conduct the survey as efficiently as possible, the agency focused on its priority population of customers who are involved in significant agency services. Accordingly, on June 16, 2015, surveys were sent to 263 pension system administrators representing both actuarially-funded and volunteer firefighter defined benefit systems. Additionally, surveys were sent to 72 other PRB contacts, including actuaries, trustees, government contacts, and other interested parties. PRB services offered to this group of customers include conducting reviews of Texas public retirement system reports and providing technical assistance and education to plan administrators, trustees and members of Texas public retirement systems and the Legislature.

Information-Gathering Methods

The survey included questions on PRB service areas, staff, communications, the agency's website, timeliness and printed information. The survey also allowed respondents to add general comments and/or suggestions for each question and provide additional comments with regard to PRB services, resources and research that they would want the PRB to focus on in the future.

On June 16, 2015, emails containing links to the online survey were sent to 335 customers with a 4-week response period; the last batch of responses was received on July 13, 2015. Responses were received from 54 recipients translating to a response rate of 16.12%, lower than the previous year's rate of 23.38%.

The survey included 14 questions representing the various customer service quality elements. Each question had 5 response categories: Very Unsatisfied, Unsatisfied, Satisfied, Very Satisfied, and N/A (Not Applicable). These response categories were given the numerical representation of 1 through 4, respectively, and the "(N/A)" response received no score. In the prior year, the survey participants were asked to indicate their experiences on a 5-point scale, including a "Neutral" response. This year the satisfaction ratings were measured on a 4-point scale, with 4 being "Very Satisfied," 1 being "Very Unsatisfied," and without a "Neutral" choice, since the calculation of a neutral answer could not be measured as either satisfied or unsatisfied, and the "N/A" choice could be used if the survey participants were neither satisfied nor unsatisfied.

To interpret the responses for the 2015 survey, the agency used a different rating methodology than last year, due to the removal of the "Neutral" choice. First, as in prior years, the results in each category were divided into two areas: Satisfied and Not Satisfied. The PRB then chose to tabulate a response of 3 or greater as "Satisfied" and a response of 2 or lower as "Not Satisfied." Last year's survey used a 5-point scale, with responses of 4 or greater as "Satisfied" and 3 or lower as "Not Satisfied". This meant that the "Neutral" answers were tabulated negatively, since

¹ In previous surveys, the PRB has received comments from plans indicating unwillingness to fill out the survey with negative marks for fear of retaliation. For that reason, the PRB conducts an anonymous survey.

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they could not be tabulated as “Satisfied” if a survey participant felt “Neutral”. As in previous years, “Not Applicable” and blank responses were not included.

To determine the final overall satisfaction percentage for each category, the total number of responses equaling 3 or greater was then divided by the total number of responses indicating a numerical value. To calculate the average ranking in each category, all numerical responses were summed and then averaged. The standard deviation represents the deviation of response values from the calculated average.²

Key Findings

The following tables show each question and the responses received under the 4 numerical response categories.

Q1 – Overall, how satisfied are you with the services provided by the PRB, such as education, technical assistance, actuarial impact statements etc.?			
Very Unsatisfied	Unsatisfied	Satisfied	Very Satisfied
0	3	23	26

Q2 – Overall, how satisfied are you with the resources provided by the PRB, such as research papers, best practices, PRB website etc.?			
Very Unsatisfied	Unsatisfied	Satisfied	Very Satisfied
0	0	28	21

Q3 – How satisfied are you that the staff is professional, courteous and demonstrates a willingness to assist?			
Very Unsatisfied	Unsatisfied	Satisfied	Very Satisfied
0	0	20	33

Q4 – How satisfied are you that the staff is sufficiently knowledgeable and helpful?			
Very Unsatisfied	Unsatisfied	Satisfied	Very Satisfied
0	0	21	30

Q5 – How satisfied are you with the accuracy and relevance of information provided by the staff?			
Very Unsatisfied	Unsatisfied	Satisfied	Very Satisfied
0	0	25	25

Q6 – How satisfied are you with the usefulness of the information provided on the PRB website?			
Very Unsatisfied	Unsatisfied	Satisfied	Very Satisfied
1	2	30	15

Q7 – How satisfied are you with the ease of navigation and organization of the PRB website?			
Very Unsatisfied	Unsatisfied	Satisfied	Very Satisfied
1	2	28	15

² No degrees of freedom were used in the denominator of the standard deviation calculation.

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Q8 – How satisfied are you that the PRB effectively communicates the registration and reporting requirements under Chapter 802, Government Code?			
Very Unsatisfied	Unsatisfied	Satisfied	Very Satisfied
1	0	24	24

Q9 – How satisfied are you that the registration and reporting requirements information you receive is easy to understand?			
Very Unsatisfied	Unsatisfied	Satisfied	Very Satisfied
0	1	28	19

Q10 – How satisfied are you with PRB publications, including research papers and best practices?			
Very Unsatisfied	Unsatisfied	Satisfied	Very Satisfied
0	0	26	18

Q11 – How satisfied are you that when requested, assistance is provided in a timely manner?			
Very Unsatisfied	Unsatisfied	Satisfied	Very Satisfied
0	0	19	30

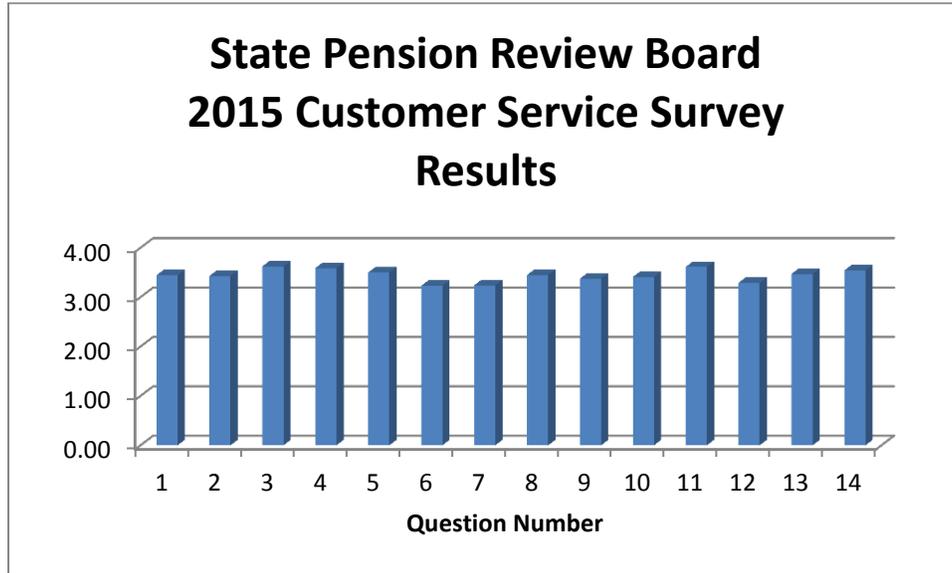
Q12 – How satisfied are you with the educational services provided by the PRB?			
Very Unsatisfied	Unsatisfied	Satisfied	Very Satisfied
0	5	24	19

Q13 – How satisfied are you that the PRB promotes sound pension practices?			
Very Unsatisfied	Unsatisfied	Satisfied	Very Satisfied
0	1	25	25

Q14 – How satisfied are you with the overall openness and transparency of the PRB's operations?			
Very Unsatisfied	Unsatisfied	Satisfied	Very Satisfied
0	0	22	26

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The chart below shows the average of the responses for each question. Responses of "N/A" or omissions were not counted towards the averages.



The table below shows the overall satisfaction percentages, and the average of the responses for each question with their respective standard deviations.

	Overall Percent Satisfied	Average Ranking	Standard Deviation
Overall Satisfaction w/ PRB Services	94.23%	3.44	0.61
Overall Satisfaction w/ PRB Resources	100%	3.43	0.50
Staff Professional/Courteous/Willingness to assist	100%	3.62	0.49
Staff Knowledgeable and Helpful	100%	3.59	0.50
Accuracy and Relevance of Information	100%	3.50	0.51
Usefulness of Information on Website	93.75%	3.23	0.63
Ease of Navigation and Organization of Website	93.48%	3.24	0.64
Communication of Chapter 802 Requirements	97.96%	3.45	0.61
Understanding Registration & Reporting Information	97.92%	3.38	0.53
PRB Publications	100%	3.41	0.50
Assistance in Timely Manner	100%	3.61	0.49
Educational Services	89.58%	3.29	0.65
Promote Sound Pension Practices	98.04%	3.47	0.54
Overall Transparency	100%	3.54	0.50

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Analysis of the Survey Findings

The results of the survey indicate satisfaction in all categories. Every category received an average score above 3.23, indicating that the survey respondents are generally satisfied with the services provided by the PRB. The highest scoring customer-service quality elements were the PRB staff, service timeliness, and overall transparency.

The PRB chose to tabulate a response of 3 or greater as “Satisfied” and a response of 2 or lower as “Not Satisfied.” “Not Applicable” and blank responses were not included. Even the lowest average scores were still within the “Satisfied” range.

The respondents’ “overall satisfaction with the services provided by the PRB” was 94.23%. The average ranking for this category places it eighth out of fourteen, with the standard deviation being the fourth highest of all categories.

For seven of the fourteen categories, the overall percent of survey participants satisfied was 100%. This means that none of the survey participants chose an unsatisfied answer for each of the seven questions. Those categories include “overall satisfaction with PRB resources,” “staff is professional and courteous,” “staff is knowledgeable and helpful,” “information is accurate and relevant,” “satisfaction with PRB publications,” “assistance in a timely manner,” “and “overall transparency”. These categories also had the highest average rankings with the lowest standard deviations. This is a strong indicator that the PRB staff continues to operate at the highest level of professionalism, and that the agency produces accurate and transparent information to retirement systems and the public.

The PRB’s website extends into two categories in the survey; “usefulness of information on website,” and “ease of navigation and organization of website,” which received 93.75% and 93.48% overall satisfaction ratings, respectively. These categories also received the lowest average rankings and highest standard deviations, which indicates the largest variance of responses from the average. The PRB has received communication from plans regarding the website, and is currently working on an update in order to allow users to have a better experience while on the PRB website.

“Communication of Chapter 802 requirements” and “understanding of registration and reporting information” had the seventh and eleventh highest average ranking out of fourteen, with averages of 3.45 and 3.38, respectively. These categories have improved since last year, with fewer respondents indicating that they were unsatisfied with the Chapter 802 and reporting information.

The respondents’ overall satisfaction with the PRB’s ability to promote sound pension practices was approximately 98%. The average ranking is 3.47, which is sixth out of fourteen.

The category with the lowest level of overall satisfaction was “educational services”. The respondents’ overall satisfaction in this category was approximately 90%; the standard deviation for this category was the highest, and the average 3.29, which is twelfth out of fourteen. The 83rd Texas Legislature made certain education-related changes, including requiring the agency to develop and administer an educational training program for trustees and administrators of Texas public retirement systems and requiring the PRB to develop and provide online training. In 2014, the PRB established the Minimum Educational Training (MET) Program, and adopted rules to govern the program after an extensive process of stakeholder input through working group and Board meetings. In accordance with the statutory mandates, the PRB has shifted its education-related efforts from holding an annual seminar to developing online training, which will be made available in the near future.

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The survey also asked participants to provide general comments and/or suggestions for each question and provide additional comments with regard to PRB services, resources and research that they would want the PRB to focus on in the future.

Following are some of the comments received.

General

- The PRB plays a vital role in coordinating the flow of information and issues with respect to Texas public pension plans. It is difficult to remain neutral on hot-button topics, so I respect the PRB's work in presenting the facts on issues as objectively as possible. I would like to see the PRB continue that objective and neutral position. The staff has done excellent work implementing the requirements from the previous legislative session. I think the current Board has a good perspective that there is no one-size-fits-all, and I hope that the Board continues its pragmatic and fact-based approach to reviewing and implementing Board policy.
- My experience with the PRB staff has been completely positive.
- The PRB staff is to be commended for their continued effort to serve Texas' pension community on such a shoe string budget. Well done.
- The PRB is a great asset to the State of Texas and a great resource for our pension fund and all funds around the state.
- I appreciate the high quality, professional services we receive from the PRB. Keep up the good work!
- The fastest turn-around time for getting answers of any state agency we deal with.

Specific

- Recommend that the PRB sponsor an experience study of mortality for public safety workers in Texas. With the permission of the local Boards, data can be provided by the actuarial firms. Technical assistance may be available by the Society of Actuaries RPEC committee.
- PRB has a difficult job juggling what's best for a small pension plan versus a large statewide plan. They do a very good job for the most part, but some suggested standards (amortization periods) may be more restrictive than ASOPs would require. All in all, PRB does a very good job.
- The PRB sets Texas above other states in the oversight of public pension plans. It is a model other states should follow. I am especially grateful that the PRB has provided Form PRB-1000 as both an Adobe Acrobat fill-in form and as an Excel spreadsheet. This has made compliance much easier. I hope the PRB will continue on its current course.
- MET program should be online for members to use.
- Need to have an internet based CE program to make is easier for those of us that live in the outer parts of the state.
- Website needs to be updated with complete info.
- My only problem is with the website. It belongs in the 1980's or 1990's.
- Website has more information than any other state agency my fund deals with. Please continue the research papers very informative.

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Conclusion

The PRB is committed to providing services that will help strengthen the public retirement systems in Texas. The PRB will use the results of this survey to help guide the agency in this mission. The results of this survey clearly emphasize that the PRB remains an asset to Texas public retirement systems and the legislature. The PRB would like to thank all participants of the 2015 customer service survey for taking the time to share their valuable input.

Approach to Customer Service

The PRB will act in accordance with the highest standards of ethics, accountability, efficiency, and openness. We are proud to be of service to the state by providing the necessary information and recommendations to help ensure that promised pension benefits are provided to the public retirement systems' annuitants and in seeing that tax dollars are spent most efficiently. To accomplish these objectives, the PRB strives to:

- support and promote sound pension practices;
- provide timely and meaningful information on laws, rules or activities overseen by the agency;
- return phone calls promptly, if possible within one working day;
- respond to requests for written information within fourteen working days;
- route information requests to the appropriate agency within one working day, even if the request does not relate to the PRB;
- provide an internet site (www.prb.state.tx.us) that contains information on the agency, the laws and reporting procedures that pertain to public pension systems, publications, pamphlets and presentations on the agency's activities.