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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 April through May 2014. 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 April 21, 2014, surveys were sent to 367 pension system administrators representing both defined benefit and defined contribution plans. Additionally, surveys were sent to over 82 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 the Legislature and plan administrators, trustees and members of Texas public retirement systems.

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 April 21, 2014, emails were sent to 449 customers with a 4-week response period; the last batch of responses was received on May 16, 2014. Responses were received from 105 recipients translating to a response rate of 23.38%, higher than the rate in prior biennia. Out of the 105 respondents, 1 did not submit a survey form and instead responded by an e-mail message stating that the plan's management requested not to complete the survey. The remaining 104 respondents submitted survey forms.

The survey included 14 questions representing the various customer service quality elements and each question had 6 response categories: Very Unsatisfied, Unsatisfied, Neutral, Satisfied, Very Satisfied, and Not Applicable (N/A). These response categories were given the numerical representation of 1 through 5, respectively, and the "Not Applicable or (N/A)" response received no score. In previous years the survey participants were asked to rank their experiences on a scale of 1 to 10. This year the satisfaction ratings were measured on a 5-point scale, with 5 being "Very Satisfied," and 1 being "Very Unsatisfied."

To interpret the responses for the 2014 survey, the agency used a different rating methodology than in previous years. First, the results in each category were divided into two areas: Satisfied and Not Satisfied. The PRB then chose to tabulate a response of 4 or greater as "Satisfied" and a response of 3 or lower as "Not Satisfied." "Not Applicable" and blank responses were not included.

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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To determine the final overall satisfaction percentage for each category, the total number of responses equaling 4 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 5 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	Neutral	Satisfied	Very Satisfied
1	0	15	27	50

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	Neutral	Satisfied	Very Satisfied
0	1	17	30	43

Q3 – How satisfied are you that the staff is professional, courteous and demonstrates a willingness to assist?				
Very Unsatisfied	Unsatisfied	Neutral	Satisfied	Very Satisfied
0	1	9	22	63

Q4 – How satisfied are you that the staff is sufficiently knowledgeable and helpful?				
Very Unsatisfied	Unsatisfied	Neutral	Satisfied	Very Satisfied
0	1	9	29	56

Q5 – How satisfied are you with the accuracy and relevance of information provided by the staff?				
Very Unsatisfied	Unsatisfied	Neutral	Satisfied	Very Satisfied
0	1	12	26	56

Q6 – How satisfied are you with the usefulness of the information provided on the PRB website?				
Very Unsatisfied	Unsatisfied	Neutral	Satisfied	Very Satisfied
0	0	16	33	41

Q7 – How satisfied are you with the ease of navigation and organization of the PRB website?				
Very Unsatisfied	Unsatisfied	Neutral	Satisfied	Very Satisfied
0	2	15	31	39

Q8 – How satisfied are you that the PRB effectively communicates the registration and reporting requirements under Chapter 802, Government Code?				
Very Unsatisfied	Unsatisfied	Neutral	Satisfied	Very Satisfied
0	2	17	26	45

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

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Q9 – How satisfied are you that the registration and reporting requirements information you receive is easy to understand?

Very Unsatisfied	Unsatisfied	Neutral	Satisfied	Very Satisfied
0	9	13	22	47

Q10 – How satisfied are you with PRB publications, including research papers and best practices?

Very Unsatisfied	Unsatisfied	Neutral	Satisfied	Very Satisfied
0	0	20	25	46

Q11 – How satisfied are you that when requested, assistance is provided in a timely manner?

Very Unsatisfied	Unsatisfied	Neutral	Satisfied	Very Satisfied
1	1	8	19	58

Q12 – How satisfied are you with the educational services provided by the PRB?

Very Unsatisfied	Unsatisfied	Neutral	Satisfied	Very Satisfied
0	2	15	24	43

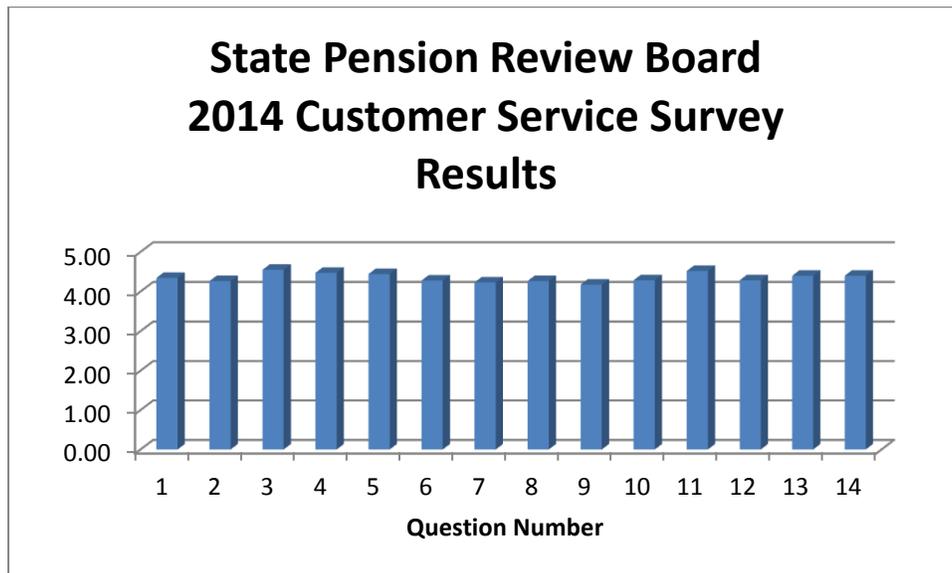
Q13 – How satisfied are you that the PRB promotes sound pension practices?

Very Unsatisfied	Unsatisfied	Neutral	Satisfied	Very Satisfied
0	1	13	28	53

Q14 – How satisfied are you with the overall openness and transparency of the PRB's operations?

Very Unsatisfied	Unsatisfied	Neutral	Satisfied	Very Satisfied
0	0	16	25	54

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



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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	82.80%	4.34	0.83
Overall Satisfaction w/ PRB Resources	80.22%	4.26	0.80
Staff Professional/Courteous/Willingness to assist	89.47%	4.55	0.71
Staff Knowledgeable and Helpful	89.47%	4.47	0.71
Accuracy and Relevance of Information	86.32%	4.44	0.75
Usefulness of Information on Website	82.22%	4.28	0.75
Ease of Navigation and Organization of Website	80.46%	4.23	0.82
Communication of Chapter 802 Requirements	78.89%	4.27	0.85
Understanding Registration & Reporting Information	75.82%	4.18	1.02
PRB Publications	78.02%	4.29	0.81
Assistance in Timely Manner	88.51%	4.52	0.80
Educational Services	79.76%	4.29	0.84
Promote Sound Pension Practices	85.26%	4.40	0.76
Overall Transparency	83.16%	4.40	0.76

Analysis of the Survey Findings

The results of the survey indicate satisfaction in all categories. Every category received an average score above 4.18, indicating that the survey respondents are satisfied with the services provided by the PRB. The highest scoring customer-service quality elements were the PRB staff, service timeliness, and printed information provided.

The PRB chose to tabulate a response of 4 or greater as “Satisfied” and a response of 3 or lower as “Not Satisfied.” “Not Applicable” and blank responses were not included. The lowest average scores were still above the “Not Satisfied” level of 3.

The respondents’ “overall satisfaction with the services provided by the PRB” was 82.80%. The average ranking for this category places it eighth out of fourteen, with the standard deviation being the fourth highest of all categories.

Categories with the highest rate of satisfaction were “staff is professional and courteous” and “staff is knowledgeable and helpful.” These categories also have the first and third highest average rankings overall and the smallest standard deviation, respectively. This is a strong indicator that the PRB staff continues to operate at the highest level of professionalism. After a recent increase in PRB’s staffing level, the agency now has greater expertise to effectively serve its constituents.

The respondents’ overall satisfaction with educational services provided by the PRB is approximately 80%. The average ranking for this category places it eighth out of fourteen, with the standard deviation being the third highest of all categories. The 83rd Texas Legislature made certain education-related changes, including mandating the agency to develop and administer

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◆ an educational training program for trustees and administrators of Texas public retirement systems. Instead of conducting the 2013 annual seminar, the agency started the process of developing an educational training program. The PRB formed an educational training program working group to make recommendations to the PRB regarding the development and implementation of the program. The PRB is also in the process of developing online training, including possibly offering live webinars to offer training and disseminate other relevant pension-related information.

The category with the third highest satisfaction rating was “PRB provides assistance in a timely manner.” This category also had the second highest average ranking overall. The PRB also received strong marks for “PRB promotes strong pension practices” and “accuracy and relevance of information provided by the staff.”

The category with the lowest level of overall satisfaction was “understanding registration and reporting information.” The standard deviation for this category is the highest, indicating the largest variance of responses from the average. In response to the various changes made by the 83rd Texas Legislature through House Bill 13, Senate Bill 200 and Senate Bill 220, the PRB has been making significant efforts to communicate and educate the retirement systems regarding these changes. The PRB has been regularly issuing memorandums to the retirement systems to update them on reporting requirement changes. To better serve agency customers, the staff will utilize the results of this survey to improve upon making the statutory registration and reporting requirements information more user-friendly.

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.

- The Pension Review Board is what keeps Texas retirement plans on track. Other states would do well to establish an agency like the PRB. I am always pleased with the service and communication provided by the Pension Review Board. The individuals there are knowledgeable, professional, and pleasant to work with.
- Responsiveness to my inquiries has been very timely and helpful. Michelle Kranes and Ashley Rendon are stand-outs. Have always been able to find what I'm looking for [on the website]. Great process on developing new required training. All experiences have been exceptional and professional. Looking forward to training availability to meet required training.
- Really enjoyed the annual conferences we used to have.
- Excellent staff and working relationship. Couldn't be better.
- I received a reply email to my question in an extremely short period of time. I was very pleased.
- Joey Evans has always been very helpful and professional.
- Staff has been very responsive to our recommendations and suggestions to help implement the provisions of HB13 and SB 200. Overall, we believe the staff of PRB is very customer-focused and has done a very good job to provide accurate, objective information on public pension plans.
- Very responsive agency which provides excellent analysis and information. Calls are always promptly returned and staff is eager to assist.

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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. It is clear the results of this survey 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 2014 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.

Customer-Related Performance Measures

Outcome Measures	Estimated FY 2014
Percent of legislative and public retirement system requests for technical assistance answered	100%
Percentage of Surveyed customer respondents expressing overall satisfaction with services received	82.80%
Percentage of surveyed customer respondents identifying ways to improve service delivery	0%
Output Measures	
Number of technical assistance reports produced	90
Number of customers surveyed	449
Number of customers served	800
Efficiency Measures	
Cost per customer surveyed	\$0
Explanatory Measures	
Number of customers identified	449
Number of customer groups inventoried	5