

State Pension Review Board

Report on Customer Service

May 2020

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Survey Objective & Inventory of External Customers

As part of the strategic planning process, the State Pension Review Board (PRB) conducts a biennial external assessment of the services provided by the agency. The most recent external assessment was conducted in April through May 2020. The survey was conducted through an online host service where participants remained anonymous and responses were automatically e-mailed to PRB staff for compilation and analysis.

To conduct the survey as efficiently as possible, the agency focused on its priority population of customers who are involved in significant agency services. On April 13, 2020, surveys were sent to 294 pension system trustees and administrators of actuarially-funded defined benefit systems, governmental contacts, as well as other PRB stakeholders. 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, timeliness, website, communication, printed information, education, the agency's mission, transparency, and overall satisfaction. Respondents were also able to provide additional comments at the end of the survey on areas of improvement.

On April 13, 2020, e-mails containing links to the online survey were sent to 294 customers with a 4-week response period ending on May 8, 2020. Responses were received from 48 participants translating to a response rate of 16.33% - higher than the previous 2018 Customer Service Survey response rate of 11.94%. The 2018 survey experienced a lower response rate due to utilizing a larger participant group than was necessary. To more effectively identify direct PRB customers, the survey was sent to pension system trustees who have taken the PRB's online courses, rather than to all trustees.

In prior survey reports, the agency applied its own methodology for computing the results. For this survey, the PRB utilized the Office of the Governor and the Legislative Budget Board's standard list of questions and six required response categories. Additionally, the PRB provided questions specific to the agency's operations. The final survey included 14 questions, including one two-part question, representing the various customer service quality elements. Each question had 6 response categories: Very Unsatisfied, Unsatisfied, Neutral, Satisfied, Very Satisfied, and N/A (Not Applicable). These response categories were given the numerical representation of 1 through 5, respectively, and the "(N/A)" response received no score. The satisfaction ratings were measured on a 5-point scale, with 5 being "Very Satisfied," 1 being "Very Unsatisfied."

To interpret the responses for the 2020 survey, 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," a response of 3 as "Neutral," and a response of 2 or lower as "Not Satisfied." 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. Larger standard deviations indicate that the average score was being strongly affected by outlier responses.

Key Findings

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

Education and Mission

Q1 – How satisfied are you with the agency’s promotion of sound pension practices?				
Very Unsatisfied	Unsatisfied	Neutral	Satisfied	Very Satisfied
0	1	3	17	26

Q2 – How satisfied are you with the overall openness and transparency of the PRB’s operations?				
Very Unsatisfied	Unsatisfied	Neutral	Satisfied	Very Satisfied
0	0	4	18	26

Q3A – Have you taken the PRB’s Minimum Educational Training Program online courses?	
No	Yes
28	20

Q3B -How satisfied are you with the content of the training courses?				
Very Unsatisfied	Unsatisfied	Neutral	Satisfied	Very Satisfied
0	0	2	9	9

Q4 - Overall, how satisfied are you with the agency’s educational services, including technical assistance, presentations, research papers, guidance, and online courses?				
Very Unsatisfied	Unsatisfied	Neutral	Satisfied	Very Satisfied
0	0	7	16	19

Staff

Q5 – How satisfied are you with agency staff, including employee courtesy, friendliness, and knowledgeability, and whether staff members adequately identify themselves to customers by name, including the use of name plates or tags for accountability?				
Very Unsatisfied	Unsatisfied	Neutral	Satisfied	Very Satisfied
0	0	3	10	30

Communications/Technical Assistance/Printed Information

Q6 – How satisfied are you that the PRB effectively communicates PRB policies, activities and reporting requirements under Chapter 802, Texas Government Code?				
Very Unsatisfied	Unsatisfied	Neutral	Satisfied	Very Satisfied
0	0	4	19	25

Q7 – How satisfied are you with any agency brochures or other printed information, including the accuracy of that information?				
Very Unsatisfied	Unsatisfied	Neutral	Satisfied	Very Satisfied
0	0	8	16	19

Q8 – How satisfied are you with agency communications, including toll-free telephone access, the average time you spend on hold, call transfers, access to a live person, letters, electronic mail, and any applicable text messaging or mobile applications?				
Very Unsatisfied	Unsatisfied	Neutral	Satisfied	Very Satisfied
0	0	4	9	25

Internet Site

Q9 – How satisfied are you with the agency’s Internet site, including the ease of use of the site, mobile access to the site, information on the location of the site and the agency, and information accessible through the site such as a listing of services and programs and whom to contact for further information or to complain?				
Very Unsatisfied	Unsatisfied	Neutral	Satisfied	Very Satisfied
1	0	4	18	22

Q10 – How satisfied are you with the agency’s Texas Public Pension Data Center, including ease of use and availability of information?				
Very Unsatisfied	Unsatisfied	Neutral	Satisfied	Very Satisfied
1	0	7	15	17

Complaint Handling/Timely Information

Q11 – How satisfied are you with the agency’s complaint handling process, including whether it is easy to file a complaint and whether responses are timely?				
Very Unsatisfied	Unsatisfied	Neutral	Satisfied	Very Satisfied
0	0	9	5	5

Q12 – How satisfied are you with the agency’s ability to timely serve you?				
Very Unsatisfied	Unsatisfied	Neutral	Satisfied	Very Satisfied
0	0	7	11	26

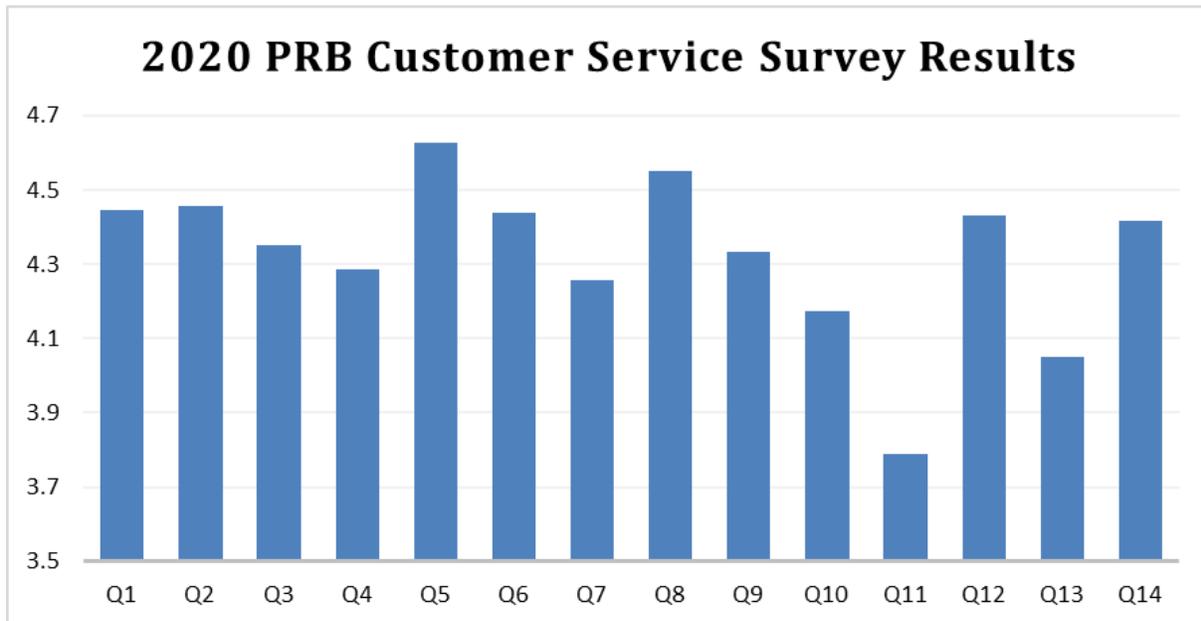
Facilities

Q13 – How satisfied are you with the agency’s facilities, including your ability to access the agency, the office location, signs, and cleanliness?				
Very Unsatisfied	Unsatisfied	Neutral	Satisfied	Very Satisfied
0	0	6	7	7

Overall

Q14 – Please rate your overall satisfaction with the agency.				
Very Unsatisfied	Unsatisfied	Neutral	Satisfied	Very Satisfied
0	0	7	14	27

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
Education and Mission			
Q1 – Promotion of Sound Pension Practices	91.49%	4.45	0.72
Q2 – Openness and Transparency	91.67%	4.46	0.65
Q3A – Completion of MET Courses	N/A	N/A	N/A
Q3B – MET Course Content	90.00%	4.35	0.67
Q4 – Educational Services	83.33%	4.29	0.74
Staff			
Q5 – Agency Staff	93.02%	4.63	0.62
Communications/Technical Assistance/Printed Information			
Q6 – Chapter 802 Requirements	91.67%	4.44	0.65
Q7 – Printed Information	81.40%	4.26	0.76
Q8 – Agency Communications	89.47%	4.55	0.69

	Overall Percent Satisfied	Average Ranking	Standard Deviation
Internet Site			
Q9 – Internet Site	88.89%	4.33	0.83
Q10 – Data Center	80.00%	4.18	0.90
Compliant Handling/Timely Information			
Q11 - Complaints	52.63%	3.79	0.85
Q12 – Timeliness	84.09%	4.43	0.76
Facilities			
Q13 – Facilities	70.00%	4.05	0.83
Overall			
Q14 – Overall Satisfaction	85.42%	4.42	0.74

Analysis of the Survey Findings

The results of the survey indicate overall satisfaction in most categories. 13 out of 14 survey questions received an average score above 4, indicating that the survey respondents are generally satisfied with the services provided by the PRB. The highest scoring customer-service categories were the PRB staff and education and mission, followed by the communications/technical assistance/printed information category. The lowest average score received for a question was a 3.79, which included 9 “Neutral” and 10 “Satisfied” responses.

The PRB tabulated a response of 4 or greater as “Satisfied,” a response of 3 as “Neutral,” a response of 2 or lower as “Not Satisfied.” Not applicable (N/A) responses were not included in the calculation.

Education/Mission/Transparency

The education, mission, and transparency category contained four questions, one of which had two parts. Overall, this category received very high satisfaction scores.

The first question, asking whether the agency promotes sound pension practices, received a satisfaction percentage of 91.49%, an average score of 4.45 and had a standard deviation of 0.72. In 2018, this question received the lowest overall percent satisfied (85.14%), lowest average ranking (3.18), and highest standard deviation (0.85). Although the addition of the “Neutral” response category alters the statistical values from 2018 to the 2020 survey, overall, the promotion of sound pension practices had the most improvement between the two surveys.

The second question, concerning openness and transparency, received a satisfaction percentage of 91.67%, an average score of 4.46 and had a standard deviation of 0.65, which tied for the second lowest standard deviation. The low standard of deviation indicates that many customers had similar positive experiences. The agency promotes sound pension practices and transparency in various ways; one of

which is through the intensive actuarial review process. While conducting these reviews, the agency works closely with a pension plan experiencing serious funding challenges to highlight areas of potential improvement and offer recommendations to help the plan get back on a path to solid financial footing. The reviews are discussed publicly at PRB meetings and both the plans and their governmental sponsors are invited to attend and testify during the meetings.

The third question in this section had two parts to capture the agency's performance measure concerning training participants' satisfaction with course content. The first part asked if the respondent has taken a PRB Minimum Educational Training Program online course. Of the 48 responses, 20 respondents answered that they had taken a course and 28 respondents that they had not. The second part of the question, directed towards the respondents that have taken courses, asked about satisfaction with course content and received a 90% satisfaction percentage. The agency is currently in the process of updating the online courses to reflect the most up-to-date industry best practices, recommendations, and laws.

The fourth and final question in this section asked about overall satisfaction with the agency's educational services. This question received a satisfaction percentage of 83.33%, an average score of 4.29, and had a standard deviation of 0.74. This question received the lowest satisfaction score of its category; however, the question did not receive any "Unsatisfied" or "Very Unsatisfied" responses. Additionally, this question had the highest number of "Neutral" ratings for the section, which lowered the averages, as the response was not calculated as satisfied. Feedback from respondents indicated that the lower scores for this question may have been due to a desire for more continuing education course options. The agency allows for trustees to retake core courses for continuing education credit as well as attend approved seminars and courses offered by third parties. The PRB is also considering effective ways to offer more continuing education content.

Comments related to this section include:

- I think the available courses are very good, I indicated neutral because I would like to see the PRB expand the content of the available courses so they could be taken to meet the continuing ed requirements.
- It would be great if you could add more online advanced training for trustees.
- Would like to see additional training for those who need the 2 year refresher.

Staff

The staff category contained one question which received the highest overall satisfaction ranking of the survey. The question, "How satisfied are you with agency staff, including employee courtesy, friendliness, and knowledgeability, and whether staff members adequately identify themselves to customers by name, including the use of name plates or tags for accountability?" received a 93.02% overall satisfaction percentage, an average score of 4.63 and it had a standard deviation of 0.62, which was the lowest standard of deviation for all questions. The PRB staff strives to consistently assist all constituents with any technical assistance they may request.

The written feedback received from the survey discussing the staff's professionalism and ability included:

- Professional staff. Very helpful and willing to discuss items of concern.
- They do an amazing job particularly given the workload and staff size.

- The Staff of the PRB does a great job. They are to be commended.

Communications/Technical Assistance/Printed Information

The communications, technical assistance, and printed information category included three questions relating to the agency's ability to relay policies and the Texas Government Code Chapter 802 requirements, printed information, and the ability to communicate with agency staff.

The question relating to how effectively the agency communicates policies and reporting requirements under Chapter 802 of the Texas Government Code received the second highest satisfaction percentage of 91.67%. The question also had an average score of 4.44 and a standard deviation of 0.65, which was a tie for the second lowest standard deviation. The PRB prides itself on providing technical assistance to customers and helping systems to comply with statutory reporting requirements. For example, to help implement the new requirements from legislation passed during the 86th Legislature, the agency went through a public process to developed guidance, including a template to assist systems.

The question concerning agency brochures or other printed information received a satisfaction percentage of 81.40%. The agency provides printed materials and handouts at every Board and Committee meeting. Additionally, the PRB may mail printed materials by request. All information is always made available online which appears to be preferred over receiving printed materials.

The final question in the section, concerning agency communications, including telephone calls and e-mails, received a satisfaction percentage of 89.47%.

The PRB received the following comments about agency communications:

- Anumeha Kumar, Bryan Burnham, and Wes Allen all have been very helpful in assisting me by meeting and going over the documentation needed for submission as I transition into a new role.
- As a new Pension Trustee, I am very satisfied with the support I have received from the PRB.

Internet Site

The question related to the agency's internet site received a satisfaction percentage of 88.89%. Agency staff is in the process of refining the website to increase the ease of navigation. The PRB received no comments directly related to the website from the survey.

The agency published the Texas Public Pension Data Center in 2019. The question asking respondents about their satisfaction with the Data Center had a satisfaction percentage of 80.00%, with the average score of 4.18 and a standard deviation of 0.90. This question had the highest standard deviation due to the majority of respondents being satisfied with the service, but one survey respondent answered with "Very Unsatisfied." The same survey respondent also chose "Very Unsatisfied" for the previous question (internet site); however, they did not leave any comments specifying anything in particular that could be improved. As the Data Center is new, customers are still adapting to using the new feature. Additionally, the agency has begun directing more technical assistance, including data request-related questions to the Data Center, as it contains the most current information for all public pension plans in Texas. The agency looks forward to increasing the utilization of the data center in the near future. The PRB did not receive any comments about the Data Center.

Complaint Handling/Timely Information

This category contained the question regarding the agency's complaint handling process, which received the lowest satisfaction percentage of 52.63% and an average score of 3.79. This question had the second highest standard deviation of 0.85. Despite having the lowest average, this question did not receive any "Unsatisfied" or "Very Unsatisfied" responses; however, nearly half of the responses were "Neutral," which was not considered satisfied when tabulating the responses. The large number of "Neutral" scores is likely reflective of the fact many people did not utilize the PRB's complaint process. This question had the highest number of "N/A" responses (29). The PRB received no comments about the complaint process.

The question relating to the agency's ability to timely serve customers received an average satisfaction percentage of 84.09%, with an average score of 4.43 and a standard deviation of 0.76. The PRB has an internal process to ensure constituents receive assistance as soon as possible. Additionally, the PRB recently restructured and created a communications team which should help improve this score in the future. The agency received one comment related to this question:

- Every time I have interacted with PRB staff they respond quickly and very friendly. Very impressed with this agency's service and dedication.

Facilities

This category contained one question; "How satisfied are you with the agency's facilities, including your ability to access the agency, the office location, signs, and cleanliness?" which received the second lowest satisfaction percentage of 70%. Additionally, this question also received the second lowest average score of 4.05, with a standard deviation of 0.83. Despite having low scores, no respondents indicated they were unsatisfied with the facilities. This question only received 20 responses, 6 of which were "Neutral," which lowered the satisfaction scores. Many constituents do not visit the PRB facilities in person which is likely the reason for the large number of "N/A" responses to this question. The PRB recently redesigned the layout of the reception area to make it more pleasant and appealing to those who do visit the office.

The PRB received only one comment on the facilities:

- The Staff of the PRB does a great job. They are to be commended. My only comment is that their offices could be improved upon.

Overall

This category asked survey respondents to rate overall satisfaction with the agency and received an 85.42% satisfaction percentage with an average score of 4.42. All survey respondents provided an answer for this question and there were no unsatisfied responses. The lower percentage can be attributed to "Neutral" responses.

Comments received about the agency overall, which have not been previously mentioned in this report, include:

- PRB is showing great leadership.
- I think the TX PRB is showing tremendous leadership.

Conclusion

The survey process overall could have been improved by adding additional conditional questions to limit neutral responses received from a respondent not utilizing a service, which is what occurred in the question about the complaint process. Nearly half of the responses for that question were neutral, which could indicate some respondents were not familiar with the service. Had the question been divided into two parts, much like question 3, it could have allowed for a more accurate assessment of the satisfaction rate. In the future, the agency could also improve the survey process by providing clearer instructions, allowing respondents to know they may answer “N/A” for services they are unfamiliar with or do not utilize.

Overall, the PRB received predominantly positive responses from the 2020 Customer Service Survey. No “Unsatisfied” responses were received, and the survey only had two “Very Unsatisfied” responses, which were both received from the same respondent about the internet site and data center. The PRB will use the results of this survey to help guide the agency in its mission and to consider ways to implement potential service improvements suggested by respondents, such as considering the addition of new continuing education courses and improving website navigation. The results of this survey show that the PRB remains an asset to Texas public retirement systems and the legislature. The PRB would like to thank all participants of the 2020 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.texas.gov) 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 2020
Percent of legislative and public retirement system requests for technical assistance answered	100%
Percentage of surveyed customer respondents expressing overall satisfaction with services received	85.42%
Output Measures	
Number of technical assistance reports produced	150
Number of persons participating in training sessions	250
Total direct customers surveyed	294
Response rate	16.33%
Total customers served	800
Efficiency Measures	
Cost per customer surveyed	\$0
Explanatory Measures	
Number of retirement systems registered with the PRB	347
Total customers Identified	294
Total customer groups inventoried	5