



NATIONAL ASSOCIATION OF STATE RETIREMENT ADMINISTRATORS

**Survey on Methods and Processes for Conducting Membership Surveys
Conducted December 2004**

17 Systems Responded

Does your system conduct regular, formal surveys of your members to determine their satisfaction with the services you provide, or have you conducted such a survey on an ad hoc basis during the last two years?

Yes: 9 No: 8

Of those responding “yes” to the previous question: does your system staff develop and administer the survey, or do you use an outside vendor?

Staff only: 3 Both: 6

Comments included:

- We develop the survey but use an outside vendor to process and summarize
- Staff develops, outside vendor administers

If you survey your members regularly, how often?

- Weekly
- We do annual written satisfaction surveys for defined benefit program participants.
- General sampling - every 2-3 years; specific transactions – quarterly
- We survey according to services requested. Each month we survey a certain number of members who have requested any of the following services: Purchases of credit, estimates of benefits, retirements, personal counseling and phone counseling.
- Every two years
- We submit customer satisfaction cards that are color coded with each mailout of information requested by the member.
- Monthly random customer satisfaction surveys are mailed to members who use the Customer Contact Center. When funds are available, we survey the members one year, the employers the next year and the retirees the third year. Then the cycle repeats.

How do you determine the size of your sample? Do you attempt to contact a statistically significant number of members?

- Two of each counselor's visitors per week, three if there is unusually heavy appointment scheduling. Typically 45% to 50% of visitors seen
- We use random sample based upon a percentage of the overall membership.
- Send survey to the target group, e.g. all annuitants.
- For specific transactions, 100% of those who have been thru the processes are surveyed.
- We attempt to contact a statistically significant number of members. The size of our current surveys was suggested by an outside consultant.
- Statistically significant for active members and for retirees.
- We submit customer satisfaction cards that are color coded with each mailout of information requested by the member.
- For the monthly customer satisfaction surveys, we randomly select 20 inquiries. For the annual surveys, the vendor's sample consisted of respondents who had received either a benefit estimate, purchase of prior service cost letter or account balance letter or had attended a pre-retirement education program. From these, a statistical sample size was determined

How do you reach your members to survey them—by phone, written correspondence, email/internet?

- We mail them a standardized survey with 1 thru 5 satisfied/unsatisfied boxes to check.
- We ask members/benefit recipients to respond to surveys in our publications and on our website
- Written correspondence
- Typically we survey by mail.
- Written
- Written correspondence
- Phone
- Written correspondence
- For monthly member phone surveys, they are mailed. For the annual surveys, they were mailed in two waves. A week later, postcards were sent to thank them for taking the time to complete the survey

Do you administer different surveys for different groups, i.e., active members, retirees, disabilitants, etc.?

Of the nine respondents who indicated that they survey their members regularly or have conducted a survey in the last two years, six responded affirmatively to this question; three said no. These six respondents also provided the following comments:

- We asked benefit recipients about content of our newsletters and asked if they would like less, more, or the same amount of information on several topics. We've tailored our newsletters for this population to represent the responses. We also ask web users to complete a survey about their experience. We have made changes to the site to reflect users' experiences. We ask members/benefit recipients who attend meetings or have had a counseling appointment to tell us about their experience. We use a custom survey for appointments, retiree health care meetings, and for regular meetings for active members
- We survey active members, recent retirees (those added to the retired payroll less than 2 years), other retirees (all recipients who have been on the retired payroll for 2 or more years), and all participating employers
- Seeking specific response from specific groups, e.g. not all retirees participate in our health care program. Therefore when we are surveying for customer satisfaction on our health care program, we target just those who participate.
- Specific surveys for recent retirees, disability applicants, those who took a separation benefit, 401k loan or rolled funds into our 401k.
- As stated above, our surveys are issued in connection with a specific service that the person has recently requested. Since different services are requested by different groups, we, in effect survey different groups.
- Survey active members, retirees, and employers. Our third party administrators survey Virginia Sickness and Disability participants, Group Life Insurance participants and Deferred Compensation participants.

Please provide an example of the types of *key* questions you ask in your survey(s):

- Was counselor courteous and responsive? Information presented in clear understandable way? Were you seen promptly for you appointment? Were filing deadlines explained? If needed, did counselor assist with completing forms? Overall satisfaction with visit.
- For actives, satisfaction with the information and service received as well as gauging receipt of materials we provide. For recent retirees, experience and satisfaction with the process of being added to the retired payroll. For other retirees, satisfaction with the information and service provided when

contacting the retirement system. For employers, satisfaction with the materials we provide and the level of service received when contacting us.

- Overall satisfaction with system Satisfaction with specific process Ease of forms Ease of other information Number of contacts to get request solved Time to resolve issue.
- Was the timeframe for performing the requested service satisfactory? What do you consider a satisfactory timeframe for performing the requested service? If you had direct contact with one of our employees, were you treated courteously? Are our notices and publications clear and easy to understand?
- How did you contact us? Do you feel all of your questions were answered adequately? Were your letters/calls answered in a timely manner? What was the quality of service you received: Excellent, good, average, fair, poor? Comments or suggestions? Would you like us to contact you?
- Have you contacted us in writing by mail (not including email)? yes, no How much time did it take to receive a response from us? less than one week, one to two weeks, more than two weeks, don't know.

Do you administer informal or ad hoc surveys, such as sending response forms along with member correspondence, debriefing members who visit your office, etc.?

Four respondents indicated yes. Of these, three also conduct surveys on a regular basis and one does not.

If you do administer informal or ad hoc surveys, please describe:

- Surveys are sent only to those who visit our office.
- After a fashion. We have comment cards and encourage all visitors to complete them and all our publications have a short survey included in the front and members/agencies are encouraged to complete them and return them to us.
- We provide all members who receive services from our staff with a customer satisfaction card to provide their comments on the customer service they received.
- Latest survey was a mailer within a health care targeted publication

Thanks to the following systems that responded to this survey:

Arkansas PERS
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Delaware PERS
Florida RS
Idaho PERS
Louisiana TRS
Maryland SRPS
Montana TRS
New Mexico PERA

North Dakota Teachers' Fund for Retirement
Oklahoma TRS
Pennsylvania Public School ERS
City of St. Louis Public School RS
Tennessee Consolidated Retirement System
Texas TRS
Virginia RS
Wichita Retirement Systems

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