

State Pension Review Board

Report on Customer Service

May 2018

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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 2018. The survey was conducted through an online host service; 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. Accordingly, on April 16, 2018, surveys were sent to 653 pension system trustees and administrators of actuarially funded defined benefit systems, their actuaries, governmental contacts, and 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 and transparency, and general and overall satisfaction. The survey also allowed respondents to add comments and/or suggestions for each question and allowed respondents to provide additional comments at the end on areas of improvement.

On April 16, 2018, e-mails containing links to the online survey were sent to 653 customers with a 4-week response period; the last batch of responses was received on May 11, 2018. Responses were received from 78 participants translating to a response rate of 11.94%, lower than the previous rate of 16.12%. Due to the low response rate, in future surveys, PRB staff plans to target trustees who have taken the PRB's online courses, rather than all trustees. This would help ensure the survey reaches individuals who have experience working with PRB services and resources, and should return a higher response rate.

The survey included 10 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. 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 respondents felt the question did not apply to their experience with the PRB.

To interpret the responses for the 2018 survey, 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." 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.

Key Findings

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

Staff

Q1 – How satisfied are you that the staff is professional, courteous and demonstrates a willingness to assist?			
Very Unsatisfied	Unsatisfied	Satisfied	Very Satisfied
1	2	20	45

Q2 – How satisfied are you with the accuracy and relevance of information provided by the staff?			
Very Unsatisfied	Unsatisfied	Satisfied	Very Satisfied
1	5	24	40

Timeliness

Q3 – How satisfied are you that when requested, assistance is provided in a timely manner?			
Very Unsatisfied	Unsatisfied	Satisfied	Very Satisfied
2	2	26	39

Website

Q4 – How satisfied are you with the usefulness of the PRB website?			
Very Unsatisfied	Unsatisfied	Satisfied	Very Satisfied
2	4	37	29

Communication/Printed Information

Q5 – How satisfied are you that the PRB effectively communicates the PRB policies and reporting requirements under Chapter 802, Government Code?			
Very Unsatisfied	Unsatisfied	Satisfied	Very Satisfied
1	6	32	30

Education/Mission/Transparency

Q6 – How satisfied are you with the educational services provided by the PRB, including the online courses?			
Very Unsatisfied	Unsatisfied	Satisfied	Very Satisfied
3	5	31	32

Q7 – How satisfied are you that the PRB promotes sound pension practices?			
Very Unsatisfied	Unsatisfied	Satisfied	Very Satisfied
5	6	34	29

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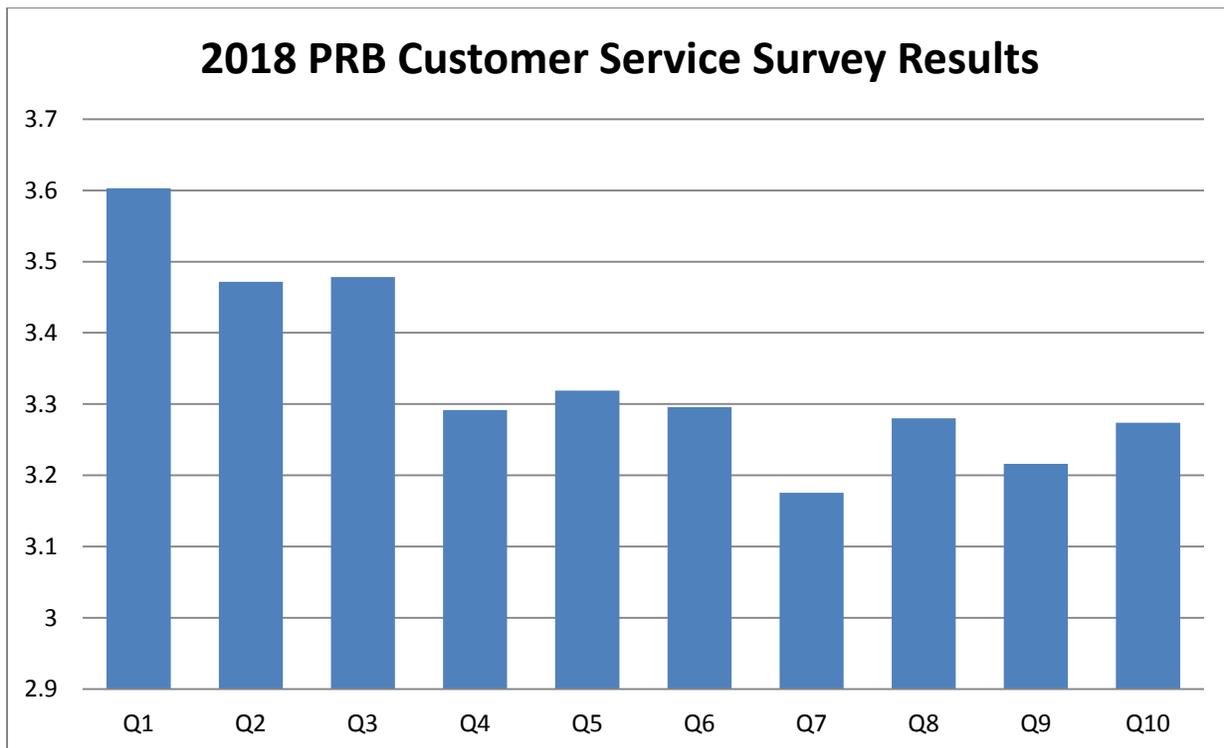
Q8 – How satisfied are you with the overall openness and transparency of the PRB's operations?			
Very Unsatisfied	Unsatisfied	Satisfied	Very Satisfied
4	3	36	32

General/Overall

Q9 – 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
3	7	35	29

Q10 – 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
3	4	36	30

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
Staff			
Q1 - Staff Professional/Courteous/Willingness to assist	95.59%	3.60	0.63
Q2 - Accuracy and Relevance of Information	91.43%	3.47	0.70
Timeliness			
Q3 - Assistance in Timely Manner	94.20%	3.48	0.70
Website			
Q4 - Usefulness of Information on Website	91.67%	3.29	0.70
Communication/Printed Information			
Q5 - Communication of Chapter 802 Requirements	89.86%	3.32	0.70
Education/Mission/Transparency			
Q6 - Educational Services	88.73%	3.30	0.78
Q7 - Promotes Sound Pension Practices	85.14%	3.18	0.85
Q8 - Openness and Transparency	90.67%	3.28	0.78
General/Overall			
Q9 - Overall Satisfaction w/ PRB Resources	86.49%	3.22	0.78
Q10 - Overall Satisfaction w/ PRB Services	90.41%	3.27	0.75

Analysis of the Survey Findings

The results of the survey indicate satisfaction in all categories. Every question received an average score above 3.18, 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, service timeliness, and agency website.

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.

Staff

The staff category contained two questions, one of which received the highest overall satisfaction ranking; "staff is professional, courteous and demonstrates a willingness to assist" received a 95.59% overall satisfaction percentage, and "accuracy and relevance of information provided by the staff" received 91.43% from survey respondents. "Staff is professional, courteous and demonstrates a willingness to assist" received the highest average ranking of all the questions, with an average of 3.60 and a standard deviation of 0.63, which was the lowest of all questions. The PRB staff strives to assist all constituents with any technical assistance they may require. Some responses to these questions from respondents include:

- PRB staff members are highly professional.
- We have been very impressed with the PRB staff, particularly since their duties have grown substantially over the last decade. They continue to demonstrate professionalism, openness to discussion and comments, responsiveness, and technical acumen.
- We utilize the PRB reports when determining trends and current practices. Looking forward, some of the PRB information is based on data that is one or more fiscal years old, whereas major reforms would make the data less relevant.

Timeliness

The timeliness category was the second-highest category, and contained one question that received a 94.20% overall satisfaction percentage from survey respondents. The average ranking for this question was also second-highest, and standard deviation was 0.70, which tied for second-lowest. The PRB has internal processes to ensure that constituents receive assistance as soon as possible. The PRB received one comment on this question:

- The PRB staff's openness and responsiveness are very commendable.

Website

The website category received the third-highest satisfaction percentage, 91.67%, and the fifth-lowest average ranking of 3.29, with a standard deviation of 0.70, which tied for second-lowest. The PRB has recently made changes to the website in an attempt to create a more user-friendly environment. The agency received several comments on this question, as well as others, that provide an opportunity for the PRB to further improve the website and user experience. PRB staff plans to assess the ease of finding relevant information, including board meeting information and reporting requirement overview information, in response to comments received. The PRB received the following comments on this question:

- It is hard to find the board meeting minutes and board packets.
- The PRB website has changed in the last year and we have not had the opportunity to fully utilize the new site to determine its usefulness.

Communication/Printed Information

The communication and printed information category included one question relating to how effectively the agency communicates policies and reporting requirements under Chapter 802 of the Texas Government Code. Survey respondents were 89.86% satisfied with the communication and printed information, which was the fourth-lowest percentage, with an average ranking of 3.32, which was the fourth-highest average. The standard deviation was 0.70, which tied for second lowest. Again, the survey respondents provided input on this question, which provided the agency with potential areas of improvement. PRB staff plans to consider developing enforcement mechanisms related to trustee training requirements, and to look into ways to enhance stakeholder communication efforts regarding policy changes, within available resources. Some of the comments received are as follows:

- What is lacking is enforcement, particularly of the training requirement. We have several Board members who have not completed training. A notice letter to us – that we could include in our annual document – would help enforce the training requirement.
- The PRB could do a better job at communicating PRB policies. Sometimes the first we know about a policy is the agenda where it is proposed to be changed. The website could do a better job of providing a general overview of reporting requirements.

Education/Mission/Transparency

The education, mission, and transparency category contained three questions. The first, educational services, received the third-lowest overall percentage of satisfaction, 88.73%. The average ranking was 3.30, which ranked fifth-highest, and the standard deviation was 0.78, which was the fourth-highest. This question also captures an agency performance measure, which for FY 2017 was 95.52%. The second question, asking whether the PRB promotes sound pension practices, received the lowest overall percent satisfied, 85.14%, lowest average ranking, 3.18, and highest standard deviation, 0.85. This indicates that a larger number of respondents felt unsatisfied or very unsatisfied than with other questions, yet a large majority of respondents still felt satisfied.

The PRB has recently updated board policies and has begun intensive actuarial reviews, and received many comments concerning those actions in this survey. The last question in this section, concerning openness and transparency, received the fifth-highest overall percentage of satisfaction, 90.67%, the fourth-lowest average ranking of 3.28, and a standard deviation of 0.78. Comments received include potential improvements to the agency's educational program. The following are some of the comments received:

- If you could pursue becoming a certified provided of CPE with Texas State Board of Public Accountancy, that would be great.
- I do feel the only education promotes the minimum standard which many only aspire to achieve. Some kind of higher standard should be pushed.
- The online courses are excellent. They represent an economical and convenient method for obtaining and maintaining educational requirements. We would like to see additional courses for the non-core areas as well.
- The Board seems to be guided by what they consider sound financial goals without any plan on how to achieve these goals.

- There is a concern that each PRB board leadership change brings a new "approach" to pension design or funding (e.g., ever-changing amortization period recommendations) that tends to ignore the historical and unique features of the public plans in the State.
- PRB staff operations have been open and professional.

General/Overall

This category asked survey respondents to provide their opinion on the overall satisfaction with PRB resources and with PRB services. Resources included research papers, best practices, the PRB website, etc., while services included education, technical assistance, actuarial impact statements for pension-related legislation, etc. Survey respondents felt 86.49% satisfied with PRB resources, which ranked second-lowest. The average ranking was also second-lowest, at 3.22, and the standard deviation was 0.78. Survey respondents felt 90.41% satisfied with PRB services, which had an average ranking of 3.27, which was second-lowest and a standard deviation of 0.75. The comments received for these two questions were as follows:

- PRB provides some resources, but sometimes you have to dig through the website or be a regular user of the website to know where to find these resources. This issue is not unique to the PRB, all organizations have this issue to some extent.
- There is a concern that some PRB reports use older data that may be outdated or not relevant for policy purposes, especially when there have been intervening plan reforms.
- This agency does a great job especially in light of their small number of staff.

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 like the PRB to improve upon. The following provides some comments/suggestions:

- I'd like to give acknowledgement (shout-out) to Joey Evans! He has been so helpful and patient whenever I needed assistance with anything regarding our organization's pension plan!
- Staff is extremely professional and always willing to assist when requested. I cannot think of any areas for improvement. They do so much with such little resources as provided by the Legislature.
- Just want to encourage continued awareness that each Plan is unique and that locally governed plans are oftentimes very different from State mandated Plans. Need this awareness in guidelines and principles developed that can ultimately lead to legislation. PRB staff is very professional, approachable and responsive. Great job!
- The PRB Staff is always very courteous, professional, and knowledgeable. It also appears that staffing levels are finally sufficient to provide the level of oversight that is requested of them.
- I commend the PRB for shedding light on pension issues. I believe the PRB is most successful when they provide true "guidelines" for pensions operate within. I believe at times some board members are overly prescriptive when they try to fix certain plans with tools that may not work for other plans or even prevent some plans to work through their issues. I have found the PRB members open to listen to input and ideas. I am concerned about a comprehensive over reaction leading to a focus on DC plans as the silver bullet mindset.

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 and to consider ways to implement potential service improvements suggested by respondents. 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 2018 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 2018
Percent of legislative and public retirement system requests for technical assistance answered	100%
Percentage of surveyed customer respondents expressing overall satisfaction with services received	90.41%
Percentage of surveyed customer respondents identifying ways to improve service delivery	10.26%
Output Measures	
Number of technical assistance reports produced	150
Number of persons participating in training sessions	300
Number of customers surveyed	653
Number of customers served	800
Efficiency Measures	
Cost per customer surveyed	\$0
Explanatory Measures	
Number of retirement systems registered with the PRB	342
Number of customers identified	653
Number of customer groups inventoried	5