



Report on Customer Service  
FISCAL YEARS 2015-2016  
June 2016

**ERS**  
EMPLOYEES RETIREMENT  
SYSTEM OF TEXAS

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# REPORT ON CUSTOMER SERVICE

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FISCAL YEARS 2015-2016

JUNE 2016

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## INTRODUCTION

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**ERS offers competitive benefits to enhance the lives of its members.**

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The ERS customer benefits department handles approximately 475,000 member interactions annually regarding insurance and retirement benefits through incoming phone calls, emails, and member visits.

We offer 24-hour self-service options, including our telephone Interactive Voice Response (IVR) system, to provide information regarding retirement account balance and service credit information. In addition, our online tool, ERS OnLine, allows members to obtain information about their benefits and make changes or updates to their personal information. It is important to ERS that we are meeting the expectations of our members. Therefore we have

developed a comprehensive quality improvement program that includes satisfaction surveys to assess our performance.

The results of our member satisfaction surveys are very positive.

- Ninety-four percent of survey respondents rate the ERS telephone/email representative as courteous and professional,
- while visitors to ERS give their experience a 99% satisfaction rate and
- new retirees rate ERS' handling of their first annuity payment with a 97% satisfaction rate.

Providing our customers with the highest level of service — and listening to what they have to say — is our way to honor the service of Texas state employees and retirees.



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## ERS CUSTOMER INVENTORY

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The current General Appropriations Act enumerates six budget strategies relevant to the programs described below.

(Data are primarily from the ERS Comprehensive Annual Financial Report for Fiscal Year 2015. All data are as of August 31, 2015.)

### **Strategy A.1.1. ERS Retirement Plan**

1. Active employees — 142,409
2. Retired employees — 100,003
3. Inactive members — 101,122  
(terminated employees who retain ERS membership)

### **Strategy A.1.3. JRS Retirement Plan 2**

1. Active officers — 563
2. Retired officers — 322

### **Strategy A.1.4. JRS Retirement Plan 1**

1. Active officers — 10
2. Retired officers — 397

### **Strategy A.1.5. Public Safety Death Benefits Program – Chapter 615**

1. Surviving spouse lump sum benefits awarded — 12
2. Guardians receiving payments on behalf of surviving children — 114

### **Strategy A.1.6. ERS Retiree Death Benefit Program**

1,705 retiree deaths in FY15

### **Strategy B.1.1 Group Benefits Program for Insurance (GBP)**

523,079 members and participants:

1. Active employees — approximately 40.8% of the total
2. Retired employees — approximately 19.4% of the total
3. Dependents/others — approximately 39.8% of the total

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# CUSTOMER SATISFACTION SURVEYS

## Contact Center Assistance

### Methodology

ERS conducted a random sample of email and phone call interactions with 74,520 surveys sent during the period of September 1, 2014 through April 30, 2016. We received 9,095 survey responses back, representing a 12.2% response rate for these interactions. The ERS representatives conducting these interactions are unaware of which calls are selected to receive the survey.

The survey results allow ERS to focus on key performance areas and to identify opportunities to improve our service to members. These surveys are evaluated as they are received to identify trends quickly and are analyzed to assess overall performance and design training programs to address areas that need improvement.

**Following are questions from the survey.**

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**Question 1** – Overall, I am satisfied with the service I received from ERS.

**Question 2** – The ERS representative was courteous and professional.

**Question 3** – The ERS representative answered my questions in terms I understood.

**Question 4** – The ERS representative answered all of my questions completely.

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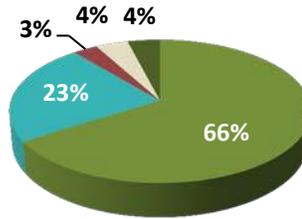
# CUSTOMER SATISFACTION SURVEYS

## Contact Center Assistance

### Results

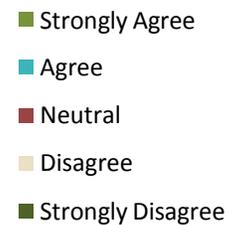
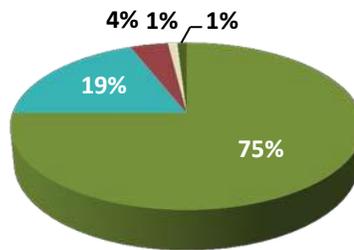
#### Question 1

Overall, I am satisfied with the service I received from ERS.



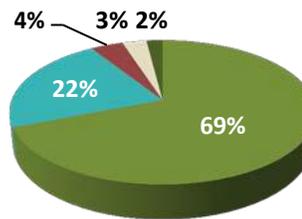
#### Question 2

The ERS representative was courteous and professional.



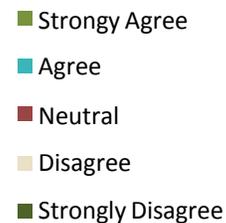
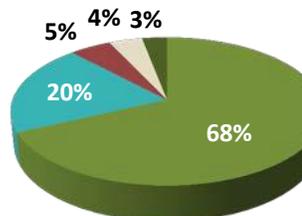
#### Question 3

The ERS representative answered my questions in terms I understood.



#### Question 4

The ERS representative answered all of my questions completely.



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## TARGETED SURVEYS

### Annuity Check Payment Services

#### Methodology

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ERS paid more than \$2 billion in retirement payments to 100,003 retired state employees and beneficiaries in annuity payments in FY2015. Our customers rely on the funds they have earned and they have high expectations for their prompt and accurate payment.

ERS sends every new annuitant a satisfaction survey 60 days after retirement. We target a specific service, sending the survey shortly after the service is complete. About 28% of new annuitants complete and return the survey, which meets statistical validity requirements. The surveys are returned via fax or mail.

#### The following is a sample survey.

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*ERS is committed to providing excellent service to our customers. We know how important prompt and correct payment of your annuity is to you. As a new retiree, we want you to tell us how we're doing. If you have any questions that require a response from ERS, please include your name and contact information, otherwise, this is an anonymous survey. Thank you for taking a few minutes to complete this survey.*

1. Did ERS inform you about the payment process?  
Yes  No  Not Sure
  2. Did you receive retirement counseling from ERS?  
Yes  No
  3. Did you receive your annuity check in the timeframe you expected?  
Sooner  When Expected  Later
  4. Was your annuity check for the amount that you expected?  
More  Amount Expected  Less
  5. Overall, how satisfied are you with your annuity check delivery?  
Not satisfied  Satisfied  Extremely satisfied
-

**TARGETED SURVEYS**  
**AnnuityCheck Payment Services**  
**Results**

Cumulative Annuity Survey September 1, 2014 through April 30, 2016

<b>Did ERS inform you about the payment process?</b>	<b>Yes</b>	<b>No</b>	<b>Not Sure</b>		<b>TOTAL</b>
	<b>97%</b>	<b>1%</b>	<b>2%</b>		<b>100%</b>
<b>Did you receive retirement counseling from ERS?</b>	<b>Yes/ Individual</b>	<b>Yes/ Phone</b>	<b>Yes/ Group</b>	<b>No</b>	
	<b>27%</b>	<b>66%</b>	<b>2%</b>	<b>5%</b>	<b>100%</b>
<b>Did you receive your annuity check in the time frame you expected?</b>	<b>Sooner</b>	<b>When Expected</b>	<b>Later</b>		
	<b>11%</b>	<b>86%</b>	<b>3%</b>		<b>100%</b>
<b>Was your annuity check for the amount you expected?</b>	<b>More</b>	<b>Amount Expected</b>	<b>Less</b>		
	<b>3%</b>	<b>89%</b>	<b>8%</b>		<b>100%</b>
<b>Overall, how satisfied are you with your annuity check delivery?</b>	<b>Extremely Satisfied</b>	<b>Satisfied</b>	<b>Not Satisfied</b>	<b>No Comment/ Other</b>	
	<b>60%</b>	<b>37%</b>	<b>2%</b>	<b>1%</b>	<b>100%</b>
<b>Total % Satisfied</b>	<b>97%</b>				



**TARGETED SURVEYS**  
**Personal Benefit Counseling Services**  
**Results**

**Cumulative Customer Satisfaction Survey September 1, 2014 through April 30, 2016**

	<b>Strongly Agree /Agree</b>	<b>Strongly Disagree/ Disagree</b>	<b>No Opinion</b>	<b>Total</b>
I received quality service by ERS staff.	99.3%	0.2%	0.5%	100%
I received courteous service by ERS staff.	99.3%	0.2%	0.5%	100%
The ERS staff member I visited was knowledgeable.	98.7%	0.2%	1.1%	100%
The ERS staff member I visited was receptive to my questions.	98.5%	0.2%	1.3%	100%
The materials I received were useful.	98.7%	0.0%	1.3%	100%
The waiting area was clean and comfortable.	99.1%	0.2%	0.7%	100%
The office was clean, comfortable and private.	99.1%	0.0%	0.9%	100%
The receptionist was polite.	99.5%	0.4%	0.1%	100%
The receptionist provided assistance.	99.1%	0.4%	0.1%	100%
The receptionist was sensitive to confidential matters.	96.6%	0.2%	3.2%	100%
I am pleased with the overall quality of service.	99.4%	0.2%	0.4%	100%



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## MISSION STATEMENT

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ERS offers competitive benefits to enhance the lives of its members.

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## PHILOSOPHY

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ERS prudently and professionally manages the trust funds and programs on behalf of its members. Benefits are an important part of the compensation of State of Texas employees, contributing to their financial security and well-being throughout their lives. We operate in an ethical, cost-effective manner, providing valuable and reliable service delivered by highly qualified staff.

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## PRINCIPLES

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### **Trust**

Earn and maintain the confidence of our stakeholders.

### **Integrity**

Make ethical and prudent decisions.

### **Service**

Deliver quality and respectful service to all participants.

### **Adaptability**

Able to adjust to different conditions.

### **Communication**

Exchange information in a consistent, concise and clear manner.

### **Stewardship**

Prudently manage resources.

### **Innovation**

Embrace new ideas and concepts.

### **Collaboration**

Exhibit teamwork in accomplishing the task at hand



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