

PUBLIC EMPLOYEE RETIREMENT SYSTEM

II. KEY MEASURE ANALYSIS

Agency Mission: We are a well-respected organization that serves our members by enabling informed retirement and health benefits decisions and delivering retirement and health benefits effectively and efficiently.

KPM #7	CUSTOMER SATISFACTION	Measure since: 2006
Percent of customers rating their satisfaction with the agency's customer service as "good" or "excellent": overall, timeliness, accuracy, helpfulness, expertise, availability of information		
Goal	To improve customer satisfaction through effective and efficient delivery of retirement benefits.	
Oregon Context	#35: Public Management Quality - Citizen satisfaction with government services.	
Data source	Agency-administered survey (Survey Monkey online tool was used, along with a hard copy provided in the retiree newsletter).	
Owner	CSD Administrator, 503-603-7703 (currently vacant) & BPD Administrator Patrick Teague, 503-431-8259	

1. OUR STRATEGY

PERS is committed to providing high-quality, low-cost customer service. The goal is to deliver effective and efficient service to PERS members, employers and stakeholders.

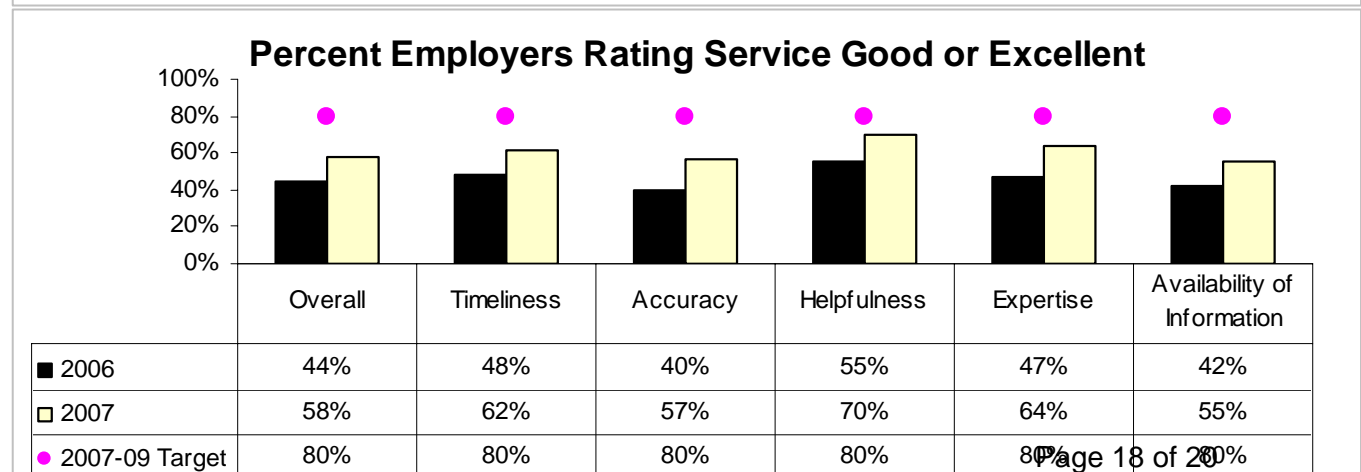
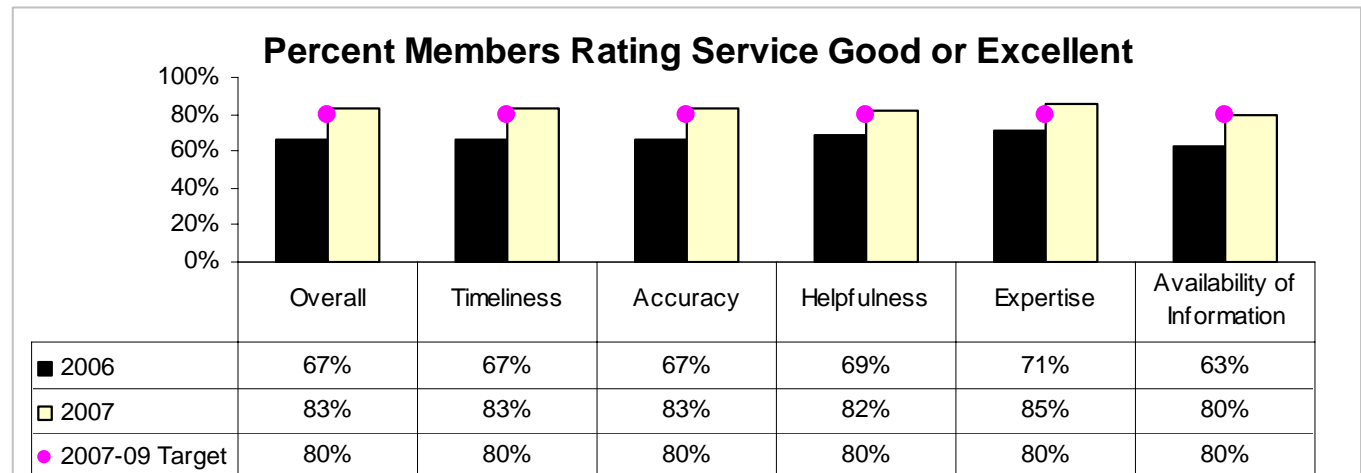
The customer satisfaction surveys help to determine areas of strength and needed improvement. PERS management will make strategic decisions based on the results to place resources and effort where improvement is needed.

2. ABOUT THE TARGETS

Since this is the first biennium for customer satisfaction measurement, no targets were previously established. The current and ongoing goal is to maintain 80% of customers rating their PERS service as good or excellent.

3. HOW WE ARE DOING

In the 2007 member survey PERS scored in a fairly tight range between 80% and 85% across all categories, with 83% of member and retiree customers rating PERS overall service as Excellent or



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Good. These ratings are up significantly from the 2006 results falling between 63% and 71%. Member and retiree customers rated PERS highest in Expertise (85%), and lowest in Availability of Information (80%).

For the 2007 employer survey, the employers rated PERS between 55% and 70% Good or Excellent, with 58% of employers rating PERS overall service as Excellent or Good. The 2007 employer ratings are also up significantly from the 2006 scores falling between 40% and 55%. Employers rated PERS highest in Helpfulness (70%) and lowest in Availability of Information (55%).

4. HOW WE COMPARE

PERS does use the services of a benchmarking consultant (CEM Benchmarking, Inc.), but customer satisfaction ratings is not one of the comparators.

5. FACTORS AFFECTING RESULTS

Recent PERS reform plan changes and Oregon Supreme Court rulings in the *Strunk* and *Eugene* cases have reduced many members' current and future benefits, and in turn have impacted members' view of PERS. The recent implementation of mandatory electronic data reporting has also been a challenging transition for employers. These factors played a part in some of the lower responses in 2006. But the sharp increases in the 2007 responses reflect PERS' continual efforts to improve its customer service levels.

After seeing the results with the initial surveys in 2006, PERS went to great lengths to increase its focus on customer service agency-wide. One tactic PERS employed was bringing in a third-party service consultant and trainer to first evaluate the customer service standards and efforts, and then design and conduct customized training for all managers and staff with the intent of raising customer service awareness and delivery. A new slogan that was developed with the training is, "Customer-Focused, Customer-Friendly, Every Customer, Every Day." The results of this increased awareness and focus on service are apparent with the higher satisfaction ratings from the survey.

6. WHAT NEEDS TO BE DONE

PERS will need to continue to maintain its high level of awareness and focus on customer service. Establishing and maintaining effective communication modes and techniques will also ensure that its members receive all available information. Something that has helped is a clear plan in executing the *Strunk* and *Eugene* project. With the plan in place, it is easier to communicate the course of action to members. And a successful project completion (currently scheduled for 2009) will help PERS gain its members' trust in the information provided to them. Employer outreach and hands-on assistance with the electronic reporting function is also helping to improve service and satisfaction with employers.

7. ABOUT OUR CUSTOMER SERVICE SURVEY

The member satisfaction survey was conducted by PERS staff using the online Survey Monkey tool and hard copy surveys mailed to retirees. The survey was open from August 1 through 31. The population can be classified as consumers, since members and retirees are end users of PERS services. For the sampling frame, PERS left the survey open to all members (active and inactive) and retirees. The survey was advertised in the *Perspectives* newsletter (a PERS-produced newsletter sent to all members and retirees), which listed the web link to take part in the survey. Since PERS left the survey open to the full population of members and retirees, the sampling procedure could be considered a passive census. Out of 319,000 members and retirees PERS received 2,510 responses, a .8% response rate. There was no weighting involved with the tabulation of results.

The employer survey was also conducted by PERS staff using Survey Monkey online. The survey was open from August 1 through 31. The employer population could be considered clients, and for the sampling frame, PERS left the survey open to all employers. The survey link was emailed to all employers, and posted on the employer portion of the PERS website. The sampling procedure would be considered a census. Out of 880 employers, PERS received 227 responses, a 26% response rate.