

PERSPECTIVES

Active
Member
Edition

Customer service survey results and strategies

PERS' 2007 customer service survey shows improvement in every category compared to the 2006 results. More than 2,500 people responded online and via hard copy during August.

Participants rated PERS in eight areas: timeliness of services, ability to provide services correctly the first time, helpfulness, knowledge and expertise of PERS' employees, availability of information, the overall quality of service PERS provides, the PERS website, and how our service in the past year compared to previous years.

We identified the main issues from the comments we received as shown below. Also provided are PERS' strategies to address the issues.

1. The wait to speak with a PERS Customer Service agent is sometimes long.

Strategies: To address this issue, we have revamped the telephone messaging to direct callers to the PERS website for answers to programmatic questions (how old do I have to be to retire, what is the Individual Account Program, etc.).

We recently added staff to the Information Center to cut down on the wait to speak with a Customer Service agent.

In periods when we anticipate telephone call volumes may increase (mailing of member annual statements, annual cost-of-living adjustments, etc.) we are drawing staff from other divisions so more people are available to answer calls.

2. The time to receive a response to an email or letter can sometimes be long.

Strategies: We recently made more staff available

to answer correspondence (emails and letters). As of September 10, 2007, we are answering most emails within three working days (unless the inquiry involves a complex issue requiring research). We are also current on the backlog of letters and are working to provide answers to letters within 10 working days (unless the inquiry involves a complex issue requiring research).

3. It is sometimes difficult to get consistent, accurate answers to questions.

Strategies: To address this issue, we are:

- Continuing to offer core staff training in features of the PERS Tier One/Tier Two and Oregon Public Service Retirement Plan programs;
- Increasing customer service training for all Customer Service Division staff, including training designed specifically for staff who answer telephone calls;
- Using the incoming telephone message to encourage callers to use the website and the A-Z topic listings;
- Distributing internal newsletters to keep staff abreast of changes in business rules, Oregon Administrative Rules, policy decisions, and Board actions; and
- Ensuring Information Center response staff use the same terms as publications and the A-Z topic listings to provide consistent answers.

Numerical results and a comparison of 2006 and 2007 responses are shown on the next page. We will continue to conduct annual surveys that measure and trend improvement in our customer service.

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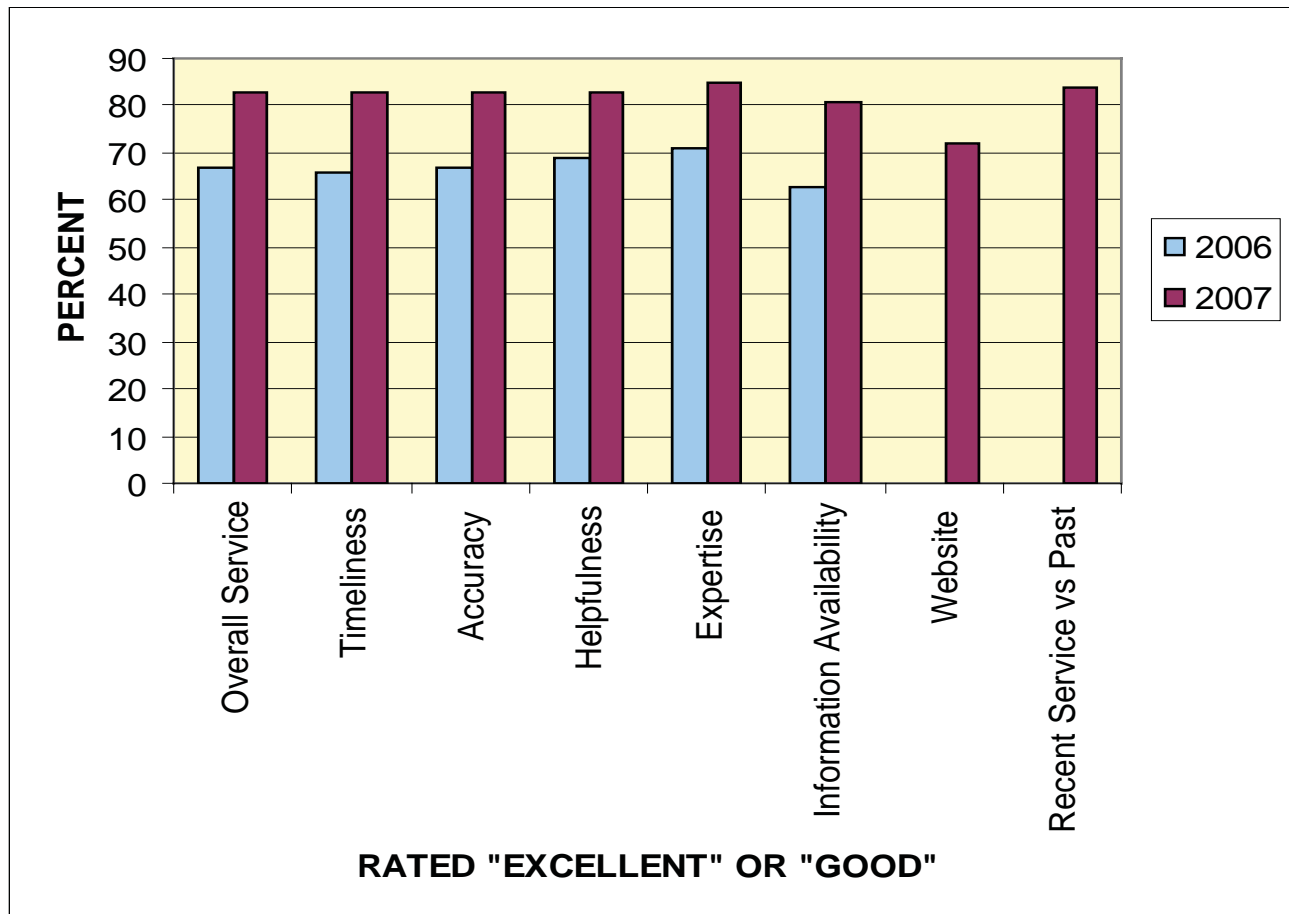
- Online Benefit Estimate Calculator 3
- Group Counseling sessions. 4

Customer service survey results (continued from page 1)

Ratings for the eight survey questions

How do you rate...	Excellent (1)	Good (2)	Fair (3)	Poor (4)	Don't Know (5)
The overall quality of service?	49%	29%	8%	8%	6%
The timeliness of services PERS provides?	51%	28%	7%	9%	5%
PERS' ability to provide services correctly the first time?	49%	28%	6%	10%	7%
PERS' helpfulness?	52%	26%	8%	9%	5%
The knowledge and expertise of PERS employees?	46%	30%	7%	6%	10%
The availability of information at PERS?	46%	28%	9%	10%	7%
The PERS website?	16%	19%	7%	5%	53%
Our service in the past year compared to previous years?	33%	24%	6%	8%	29%

Percent of respondents rating “excellent” or “good” (the State’s Key Performance Measures do not include the “Don’t Know” responses; the numbers in the graph have been rebaselined to exclude those responses)



Estimate your retirement benefit online: oregon.gov/PERS



Benefit Estimate Calculator

Use the online PERS Benefit Estimate Calculator to plan for your retirement.

Your 2006 Tier One/Tier Two Annual Statement (mailed in May 2007) and a recent pay stub will be useful in helping you complete your benefit estimate.

The information you need from your Annual Statement is:

- Tier
- Membership date
- Job classification
- Termination date (if applicable)
- Regular account balance as of 12/31/2006
- Variable account balance as of 12/31/2006 (if applicable)

The information you need from your pay stub is:

- Unused vacation time
- Unused sick leave

YOUR DATE OF BIRTH *Month* *Day* *Year*
December ▼ 7 ▼ 1942 ▼
RETIREMENT DATE January ▼ 1 ▼ 2008 ▼
LAST DAY WORKED December ▼ 31 ▼ 2007 ▼
PERS MEMBERSHIP DATE November ▼ 1 ▼ 1981 ▼

PERS SERVICE TIME *Years* *Months*
26 ▼ 2 ▼
TIER 1 (PERS member before 1/1/96) ▼
JOB CLASSIFICATION 1 (General Service) ▼

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The Oregon PERS Benefit Estimate Calculator provides an estimate only. PERS is not bound by any figures produced by this estimator.

Retiring within 90 days?

PERS is offering Retirement Application Assistance Sessions statewide for members retiring within 90 days. This is a one-hour meeting with a PERS Retirement Counselor and is for members who:

1. Have already attended a One-Year Group Counseling presentation,
2. Are within three months of retirement, and
3. Are prepared to submit their retirement application(s).

At the session, a Retirement Counselor will:

- Explain the retirement application process,
- Provide a comprehensive review of application(s), forms, and supporting documents for accuracy and completeness,
- Notarize forms (optional), and
- Answer your questions regarding the retirement process and forms.

To register, go to PERS website home page at <http://oregon.gov/PERS>.

Perspectives is published by the Oregon Public Employees Retirement System for the benefit of PERS/OPSRP members and employers. Address all correspondence to **PERS, P.O. Box 23700, Tigard, OR 97281-3700**. PERS headquarters office is at **11410 SW 68th Parkway, Tigard, Oregon**. **Phone 503-598-PERS** or toll-free **888-320-7377**; **TTY: 503-603-7766**. Telephone hours are 8:30 a.m. to 5:00 p.m., Monday through Friday, except holidays. PERS' Internet address is <http://oregon.gov/PERS>.

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PERS Presentations: December 2007- March 2008

Registration is required. Register through the PERS website (<http://oregon.gov/PERS>) in the Education Sessions section. All presentations are free, including the financial planning sessions. Space is limited.

One-Year PERS Presentations

For members within *one* year of retirement

Ashland/Med. Mar. 4, 7, 25*
Astoria Feb. 13*, 26
Bend Feb 1*; Mar. 24
Corvallis Jan. 11*; Mar. 18
Eugene/Spgfld Jan. 15* 16; Feb. 20; Mar. 19, 26*
Grants Pass Feb. 12*
Gresham Dec. 4; Jan. 15*; Feb. 5; Mar. 25
Hillsboro Dec. 11; Jan. 8; Mar. 11, 12*
Klamath Falls Mar 27
Medford Mar. 12*
Oregon City Jan. 8
Salem Dec. 12; Jan. 9, 10*; Mar 12, 15*
Tigard Dec. 1*, 8; Jan. 7, 12*, **14**,
26*, 28; Feb. 9*, 18, 23*, **25**; Mar.
3, 8*, 10, 24, 29* (dates in bold
type are for education staff;
underlined dates are for P&F staff)

These sessions cover:

Individual Account Program (IAP) // Retirement eligibility and calculating the retirement benefit // Review of benefit estimate // Retirement option choices // Variable account after retirement // Work after retirement provisions // Health insurance // Cost-of-living adjustments // Taxes // Review of retirement application forms.

Dates followed by an asterisk (*) add financial planning information presented by PERS' education partner, American General Financial Advisors (AGFA). Additional topics covered at these sessions include: Social Security and Medicare // Coordinating PERS benefits with other income sources // Planning for changing income and expense needs // Investment strategies for retirement.

Five-Year PERS Presentations

For members within *five* years of retirement

Ashland/Med. Jan. 30*; Mar. 3
Bend Mar. 25
Corvallis Jan. 22; Mar. 6*
Eugene/Spgfld Jan 16; Feb. 19*
Grants Pass Feb. 21*
Gresham Mar. 4, 20*
Hillsboro Feb. 12
Hood River Mar. 5
Oregon City Jan. 15
Salem Dec. 12; Jan. 19*; Feb. 12*, 13
Tigard Dec. 12, 15*; Feb. 13, 16*

These sessions cover:

Individual Account Program (IAP) // Review of Benefit Estimate Calculator // Retirement benefit information // Work after retirement provisions.

Dates followed by an asterisk (*) add financial planning information presented by PERS' education partner, American General Financial Advisors (AGFA). Additional topics covered at these sessions include: Social Security and Medicare // Coordinating PERS benefits with other income sources // Planning for changing income and expense needs.

Other group counseling sessions...

Early Career: retirement benefit information for PERS/OPSRP members hired January 1, 1996, or after.

Completing Your Retirement Forms: for those retiring within one year, this online session is an overview of the PERS and IAP service retirement application forms.

Oregon Savings Growth Plan Workshops: learn about the benefits of tax-deferred investing.

Visit the Education Sessions section of the PERS website (<http://oregon.gov/PERS>) for more information.