

**D.C. SUPERIOR COURT
PROBATE DIVISION**

**CUSTOMER SERVICE SURVEY
COMPARATIVE ANALYSIS of
FIRST (February 2004) and SECOND (September 2004)
SURVEY RESULTS**

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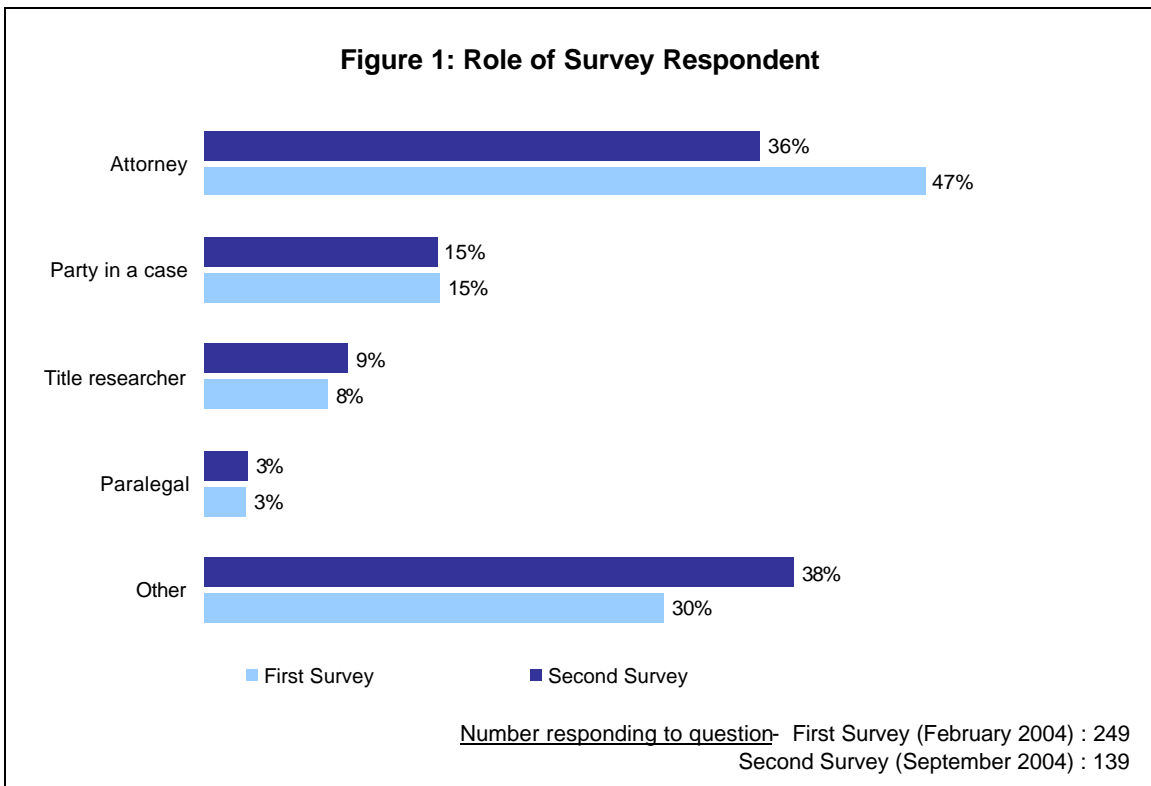
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Introduction

The D.C. Court Probate Division conducted a customer service survey in February 2004, and repeated the survey in September 2004 to observe any changes in responses. In both February and September, the surveys were administered by the Division staff for a period of three to five days. There were 286 responses to the first survey in February 2004, and 155 to the second survey in September 2004 (almost half as many respondents as in the first survey).

The surveys, which used the same questionnaire included questions on timeliness of response (wait time), overall experience, courtesy and responsiveness in a number of service areas in the Division, opinions about helpfulness of brochures provided by the Division, suggestions for improvement, and demographic information on the purpose of the visit and the role of the respondent when visiting the Probate Division.

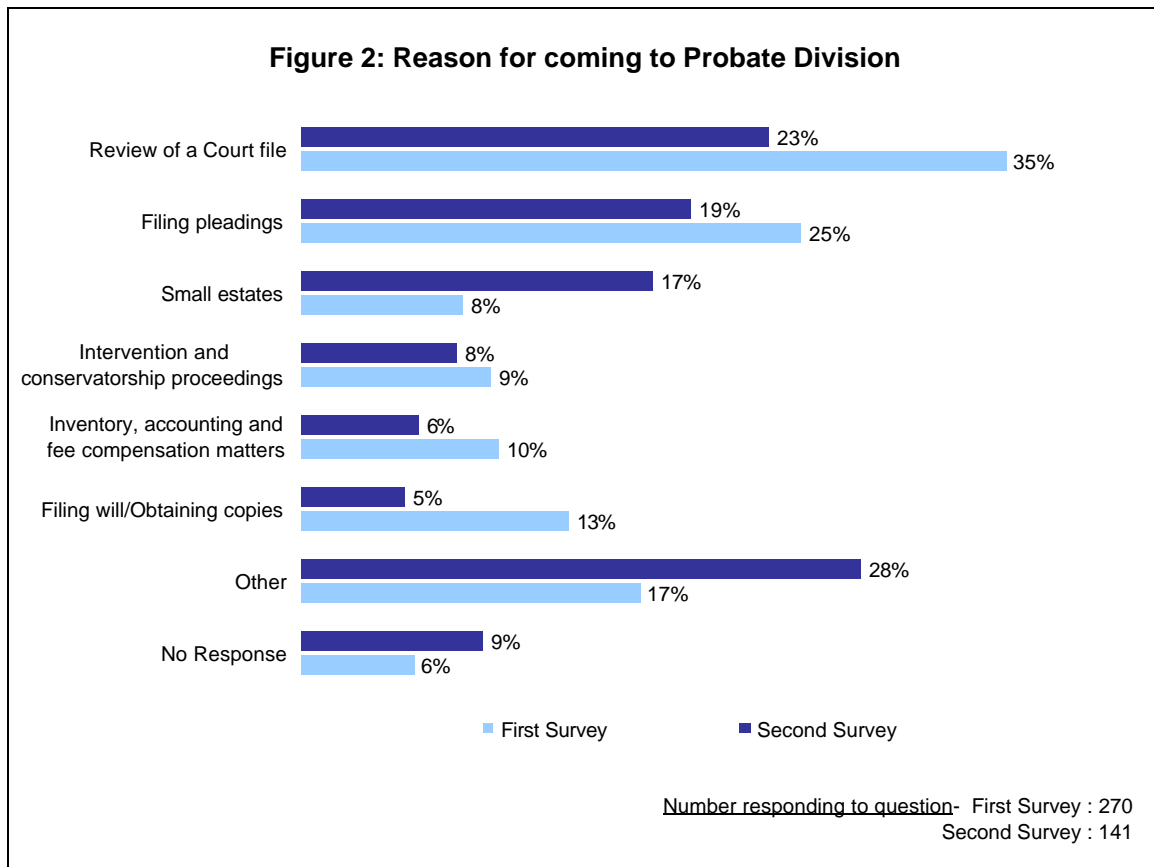
Overall, respondents reported improvements in satisfaction with Probate services between the first and second survey responses. However, the type of respondents differed between the two surveys. Among the respondents, attorneys constituted nearly half (47%) of the total in the first survey, but only slightly over a third (36%) in the second one. Other categories by role of the respondent did not change significantly, as shown below in Figure 1, with the exception of the “others” category. Nevertheless, the lower number of attorneys responding to the second survey may have introduced a slight respondent bias¹.



¹ Statistical significance tests were conducted and significant differences between response categories were noted in this analysis. A sample size of 155 corresponds to an average margin of error of $\pm 6.6\%$ at 90% confidence level.

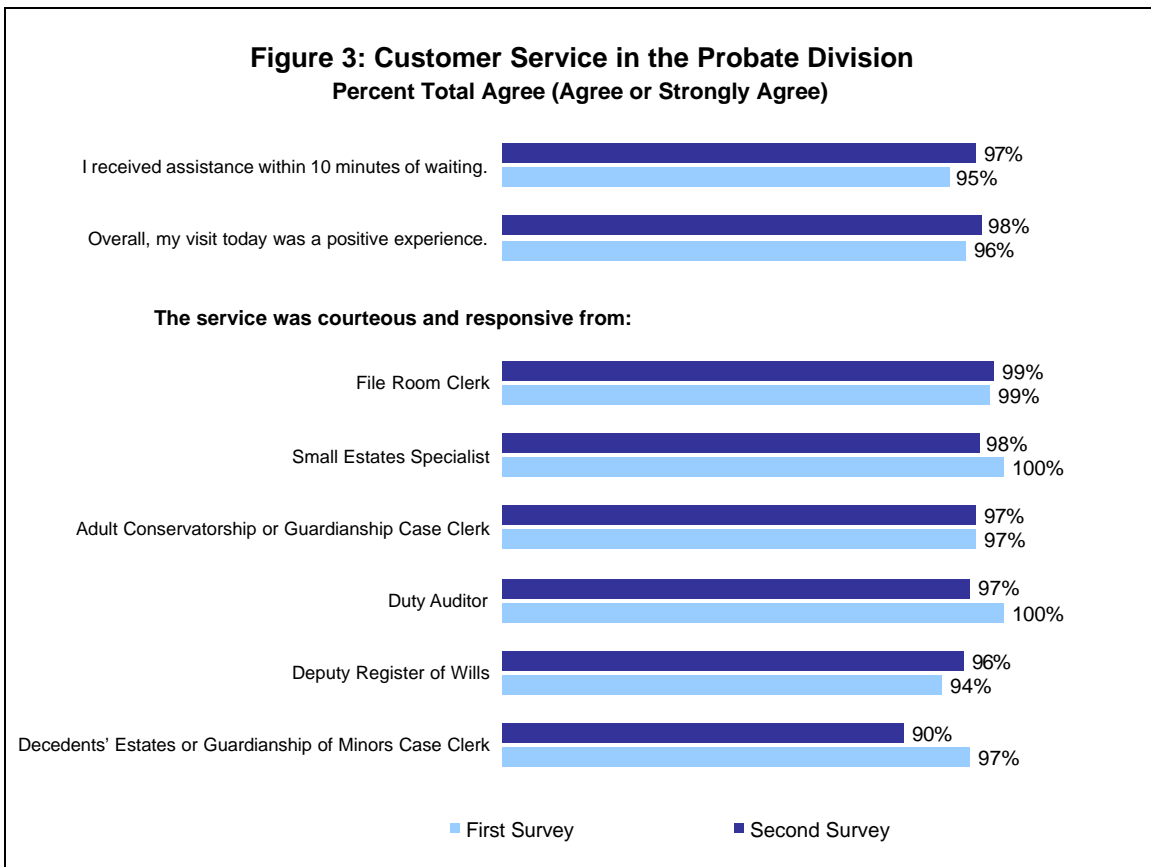
Reasons for Visit

Nearly one quarter of the respondents to the second survey (23%) came to the Probate Division to review a file, nearly one fifth (19%) to file pleadings, and over one quarter (28%) for a variety of other matters. Corresponding numbers for the first survey were 35%, 25%, and 17%, respectively. There were fewer respondents among those responding to the second survey who came to the Division to review a file, or file pleadings, but more who came for small estates and “other” matters, including obtaining forms, information, or documents, and filing an extension, as displayed in Figure 2.



Overall Customer Service

Over 90% of those responding to both first and second surveys agreed or strongly agreed that the service they received in various areas of the Probate Division was *courteous and responsive* (Figure 3). In the second survey, 97% agreed or strongly agreed they *received assistance within 10 minutes of waiting*, and 98% agreed or strongly agreed their *visit was a positive experience*. These results correspond to further improvements from the first survey results of 95% and 96%, respectively. The greatest improvement was for service from the *Deputy Register of Wills* (from 94% to 96% in agree or strongly agree, and from 73% to 86% in strongly agree), and the largest decline was for service from the *Decedents’ Estates or Guardianship of Minors Case Clerk* (from 97% to 90%). Figure 3 below displays percent total agree (agree and strongly agree combined) to service related questions, and Table 1 illustrates differences between the first and second surveys, including number of responses to each question.



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Table 1: Summary Table for Overall Service Questions	Total Valid Response to Second Survey	Total Valid Response to First Survey	Percent Total Agree Second Survey	Percent Total Agree First Survey	Percentage point change from First to Second Survey
Q. I received assistance within 10 minutes of waiting.	143	274	97.2	94.5	2.7
Q. Overall, my visit today was a positive experience.	128	235	97.7	96.2	1.5
Q. <i>The service was courteous and responsive from:</i>					
File Room Clerk	104	225	99.0	98.7	0.4
Adult Conservatorship or Guardianship Case Clerk	35	72	97.1	97.2	-0.1
Decedents' Estates or Guardianship of Minors Case Clerk	30	60	90.0	96.7	-6.7
Deputy Register of Wills	50	114	96.0	93.9	2.1
Duty Auditor (Inventory, Accounting and Fee Compensation)	30	72	96.7	100.0	-3.3
Small Estates Specialist	40	46	97.5	100.0	-2.5

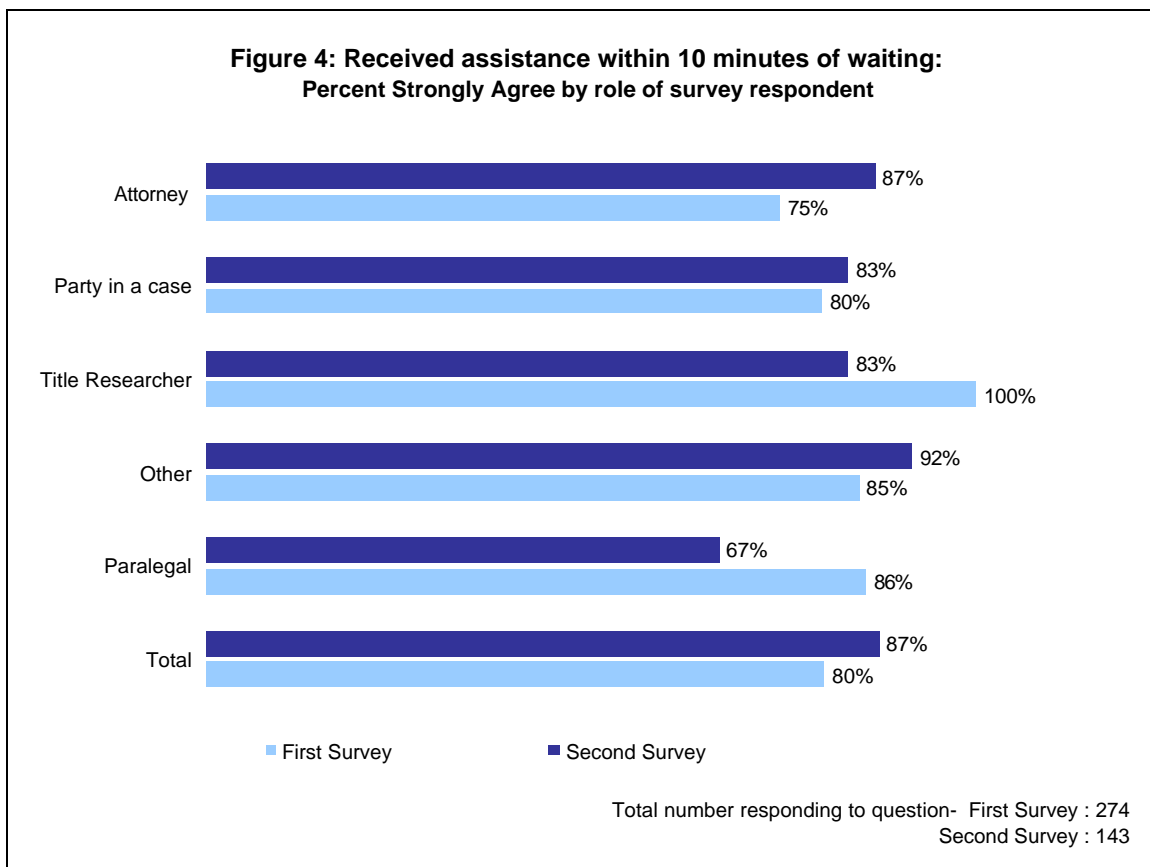
As noted in Figure 3 and Table 1, almost all responding (99%) in both first and second surveys agreed or strongly agreed "*the service from File Room Clerk was courteous and responsive*", and 97% in both surveys agreed or strongly agreed "*the service from Adult Conservatorship or Guardianship Case Clerk was courteous and responsive*". Moreover, all of the attorneys responding to the second survey agreed or strongly agreed (91% strongly agreed) "*the service from Adult Conservatorship or Guardianship Case Clerk was courteous and responsive*". Comparable numbers in the first survey among the attorneys for this service area were 96% agreed or strongly agreed (79% strongly agreed). In addition, percent of respondents strongly agreed "*service from Deputy Register of Wills was courteous and responsive*" showed a significant increase in the second survey from 73% to 86%.

On the other hand, the results in the area of "*courteous and responsive service from Decedents' Estates or Guardianship of Minors Case Clerk*" experienced greatest decline between the first and the second surveys, from 97% agreed or strongly agreed in the first to 90% agreed or strongly agreed in the second one. There were also slight declines between the two surveys on percent agree or strongly agree in two areas: "*the service from Duty Auditor (Inventory, Accounting and Fee Compensation Matters) was courteous and responsive*" (from 100% to 97%), and "*the service from Small Estates Specialist was courteous and responsive*" (from 100% to 98%).

Wait Time

Among those who responded, percent *strongly agreed* to receiving assistance within 10 minutes of waiting increased from 82% in the first survey to 87% in the second survey. In the first survey, there appeared to be significant differences among respondent types based on the role of the respondent in agreeing *they received assistance within 10 minutes of waiting*. As shown in Figure 4, the range of percent strongly agreed numbers varied from 75% among attorneys to 100% among title researchers. These differences were not observed in the second survey as higher percentages of respondents among most types *strongly agreed* with receiving timely assistance -- from 83% among title researchers and parties in a case to 87% among attorneys, and to 92% among others.

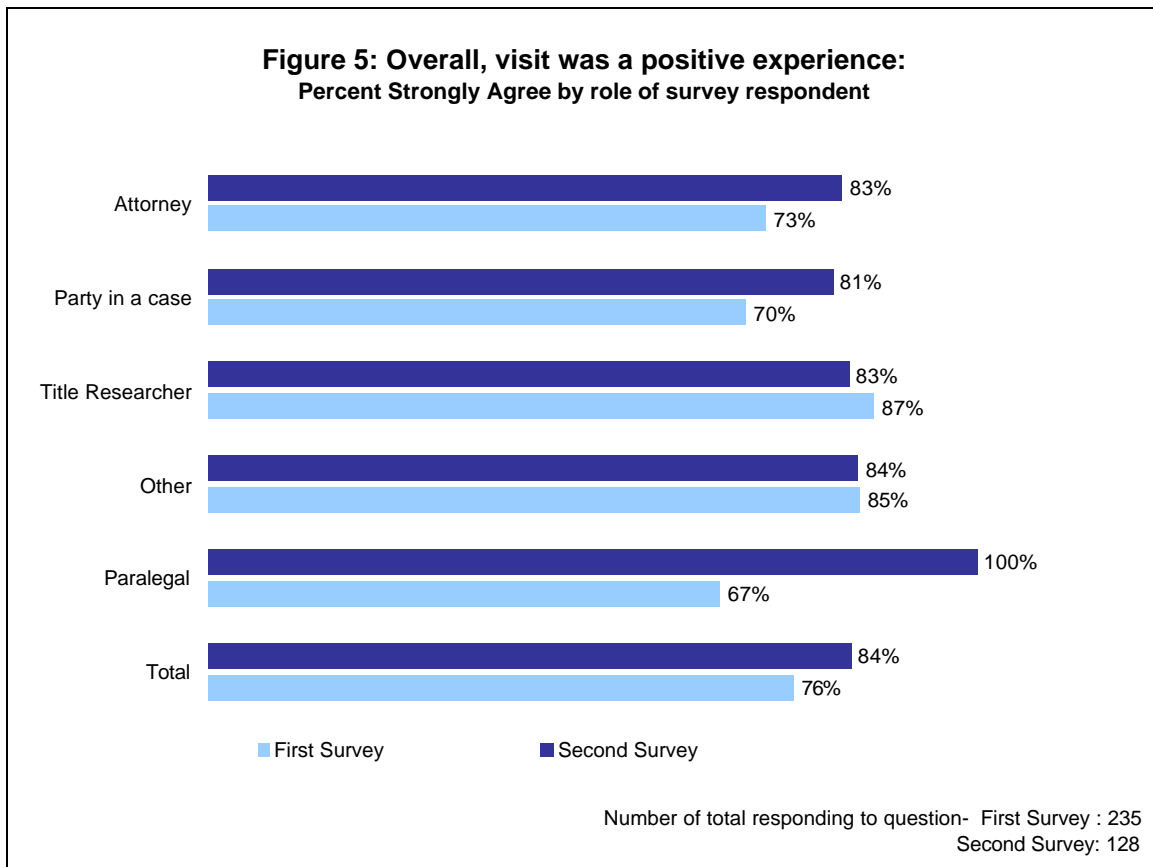
All of the attorneys responding to this question in the second survey agreed or strongly agreed (87% *strongly agreed*) that they *received assistance within 10 minutes of waiting*. Comparable numbers in the first survey were 90% of the attorneys agreed or strongly agreed (75% *strongly agreed*). Additionally, all of the title researchers and parties in a case responding to this question in the second survey agreed or strongly agreed they *received assistance within 10 minutes of waiting*. Figure 4 illustrates percent strongly agreed to receiving assistance within 10 minutes of waiting by role of the respondent².



² The number of paralegal respondents answering this question is only three in the second survey, and seven in the first survey; hence, very small to make any general comments.

Overall Experience

The percent of those *strongly agreed* that their visit was a positive experience increased from 79% in the first survey to 83% in the second one. In the first survey, there were significant differences among respondents based on the role of the respondent in agreeing their visit was a positive experience. As shown in Figure 5 below, the percent strongly agreed varied from 70% among the parties in a case to 87% among title researchers. These significant differences disappeared in the second survey as higher percentages of respondents almost across the board *strongly agreed* their visit was a positive experience - from 81% among parties in a case to 83% among attorneys and title researchers, and to 84% among others. All of the attorneys in the second survey responded agreed or strongly agreed (83% *strongly agreed*) their visit was a positive experience. Comparable numbers in the first survey were 94% of the responding attorneys agreed or strongly agreed (73% *strongly agreed*). There was a slight decline among title researchers from all responding to this question agreed or strongly agreed that their visit was a positive experience in the first survey to 91% in the second one. Figure 5 shows percent strongly agreed that their visit was a positive experience by role of the respondent³.



³ The number of paralegal respondents answering this question is only two in both first and second surveys; therefore, very small to make any general comments.

What Impacts Overall Positive Experience

An additional analysis was conducted on combined first and second survey data to identify what factors influence positive customer experience. The results of this analysis, which are shown in Table 2 below, indicate that agreement on "receiving service within 10 minutes of waiting," and "courteous and responsive service from Deputy Register of Wills" have the strongest impact on having a positive experience with the visit, followed by "courteous and responsive service from Small Estates Specialist" and "from File Room Clerk," and helpful information in brochures "When Someone Dies" and "Small Estate Proceedings".

In addition, agreement with "the information in the Guardianship of Minor brochure was helpful" and "the service from Decedents' Estates or Guardianship of Minors Case Clerk was courteous and responsive" affects positive experience. However, service in the area Decedents' Estates or Guardianship of Minors Case Clerk received the lowest percent total agree rating (percent agree and strongly agree combined) in the second survey, with the largest drop in percent total agree numbers from the first survey among all service areas surveyed. Improvements in this area can help further improve overall customer satisfaction.

Table 2: Results of Regression Analysis- Key Drivers of Positive Customer Experience	
Dependent Variable: Overall, my visit today was a positive experience.	
Independent Variables	Beta Scores from Regression Analysis
I received assistance within 10 minutes of waiting.	35%
The service from Deputy Register of Wills was courteous and responsive	32%
The service from Small Estates Specialist was courteous and responsive	20%
The service from File Room Clerk was courteous and responsive	17%
Information in the When Someone Dies brochure was helpful	14%
Information in the Small Estate Proceedings brochure was helpful	11%

Brochures

Regarding the brochures provided by the Probate Division, about a quarter of all respondents to the second survey (23%) received a brochure in advance of the visit (an increase from 16% in the first survey), and only one brochure was requested in Spanish. Number of respondents answering questions about helpfulness of brochures was relatively small and should be used with caution in making generalizations.

Those who reported on the helpfulness of information in the brochures indicated *Small Estate Proceedings*, *Opening a Probate Proceeding*, *When Someone Dies*, and *Record Keeping and Filing Duties* brochures were the most helpful (Figure 6 and Table 3 below). The greatest increase in agreed or strongly agreed that *the information in the brochure was helpful* between the first and second surveys was for *Opening a Probate Proceeding* brochure (from 90% to 96%), followed by *Small Estate Proceedings* and *When Someone Dies* brochures (from 92% to 96% and from 92% to 95%, respectively). As noted in the

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previous section, helpfulness of information in these two brochures mentioned affects overall satisfaction with the services of the Probate Division. Therefore, improvements in these brochures can help improve overall satisfaction with the Division services.

Among the brochures evaluated, the largest decline in percent agree or total agree numbers between the first and second surveys was for the *Guardianship and Conservatorship of Adults* brochure. Furthermore, helpfulness of information in *Guardianship of Minor* brochure received a relatively low percent agree rating in both surveys (86% agree or strongly agree in the second survey and 88% in the first one). Since the helpfulness of information in *Guardianship of Minor* brochure has an impact on overall customer satisfaction, any improvements in this brochure can help further improve the overall satisfaction with the Probate Division.

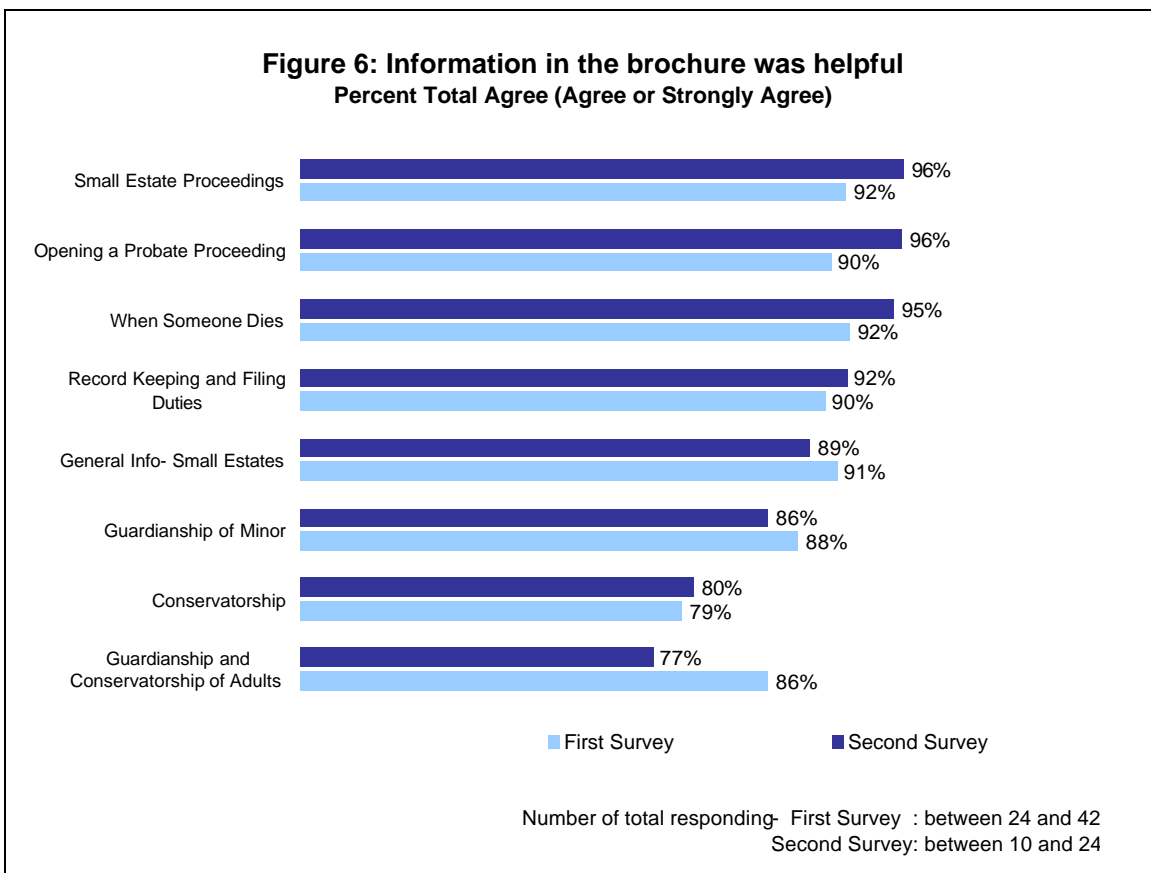


Table 3: Summary Table for Information in the Brochure was helpful:	Total Valid Response	Total Valid Response	Percent Total Agree	Percent Total Agree	Percentage point change from Feb to Sep
	Sep 2004	Feb 2004	Sep 2004	Feb 2004	
When Someone Dies	21	37	95.2	91.9	3.3
Opening a Probate Proceeding	24	42	95.8	90.5	5.4
Guardianship of Minor	14	25	85.7	88.0	-2.3
Small Estate Proceedings	25	36	96.0	91.7	4.3
General Info- Small Estates	18	33	88.9	90.9	-2.0
Guardianship and Conservatorship of Adults	13	28	76.9	85.7	-8.8
Conservatorship	10	24	80.0	79.2	0.8
Record Keeping and Filing Duties	12	30	91.7	90.0	1.7

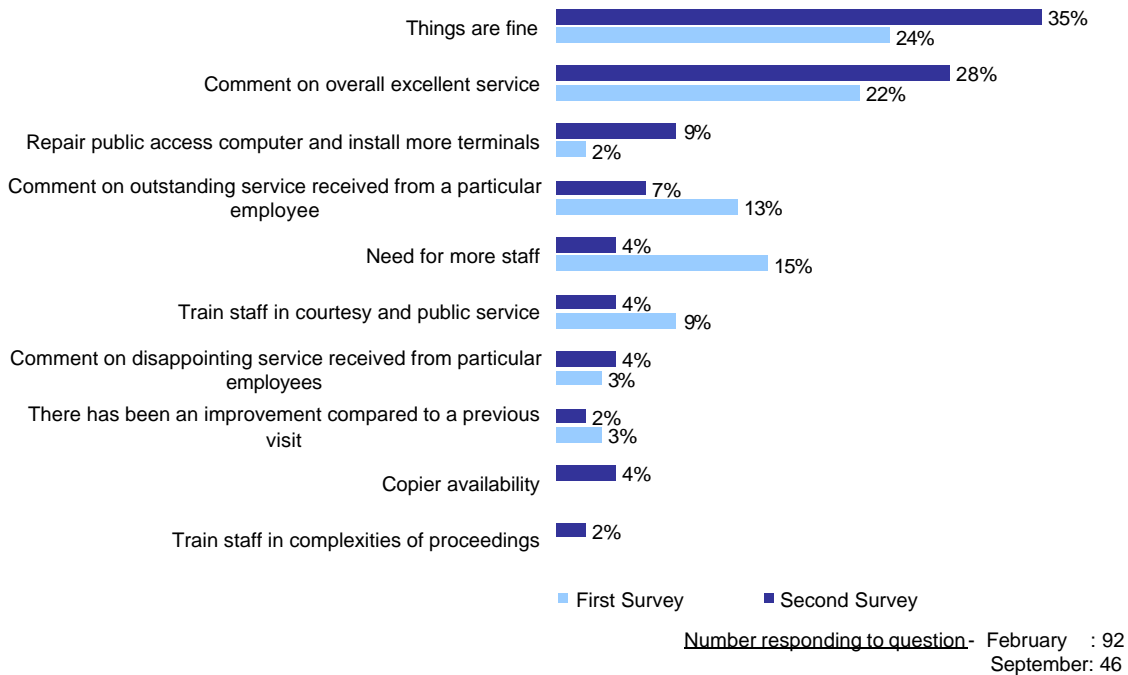
Suggestions for Improvement

About one-third of the total respondents (30% in the first survey and 32% in the second) offered suggestions for improvements. Among those, the most frequently mentioned suggestion in the first survey was *"the need to hire more deputies"* by five percent of all respondents, or 14% of those who made a suggestion, followed by *"the need to train staff in courtesy and public service,"* and *"streamline processes"*. Additionally, 7% of all respondents in the first survey (22% of those responding to this question) commented on overall excellent service, 4% commented on outstanding service from a particular employee, and 8% reported that everything was fine as it is (13% and 24% of those responding to this question, respectively).

In the second survey, the most frequently mentioned suggestion for improvement was *"public access to computers"* suggested by 9% of those who made a suggestion. Eight percent of total respondents commented on overall excellent service and 10% reported that *"everything was fine"* as it is (28% and 35% of those who responded to this question, respectively). Among those who commented on *overall excellent service* 25% was attorneys (same as the first survey), and 50% identified their role in the Division in the "other" category (45% in the first survey); of those who reported *everything was fine*, 43% was attorneys (27% in the first survey), and 43% was in the "other" role category (23% in the first survey).

The decline in suggestion for the need for additional staff from 15% in the first survey to 4% in the second one (the percentages of those who responded this question) was statistically significant, and may indicate improved efficiency in Division operations that respondents to the second survey observed. Figure 7 displays suggestions for improvements.

Figure 7: Suggestions for improvement (categorized)



Summary of Key Findings

Key findings from comparative analysis of the Probate Division customer service surveys are as follows:

- Over 90% of those responding to both first and second surveys agreed or strongly agreed that the service they received in various areas of the Probate Division was *courteous and responsive*, and overall respondents reported improvements in Probate services between the first and second surveys.
- The type of respondents differed between the two surveys. Attorneys constituted nearly half (47%) of the total in the first survey, but only slightly over a third (36%) in the second one.
- In the second survey, 97% agreed or strongly agreed they *received assistance within 10 minutes of waiting*, and 98% agreed or strongly agreed their *visit was a positive experience*. These results correspond to further improvements from the first survey (95% and 96%, respectively).
- In the area of courtesy and responsiveness, the largest improvement was in courteous and responsive service from the *Deputy Register of Wills*, and the largest decline was in courteous and responsive service from the *Decedents' Estates or Guardianship of Minors Case Clerk*.

- Almost all responding in both first and second surveys agreed or strongly agreed *the service from File Room Clerk was courteous and responsive*, and 97% in both surveys agreed or strongly agreed *"the service from Adult Conservatorship or Guardianship Case Clerk was courteous and responsive"*.
- Analysis to identify what factors influence positive customer experience indicates *receiving service within 10 minutes of waiting*, and courteous and responsive service from *Deputy Register of Wills* have the strongest impact on having a positive experience with the visit, followed by courteous and responsive service from *Small Estates Specialist, File Room Clerk, and Decedents' Estates or Guardianship of Minors Case Clerk*, and helpful information in brochures *When Someone Dies, Small Estate Proceedings, and Guardianship of Minor*. Improvements in these areas can help further improve overall customer satisfaction.
- In the second survey, the most frequently mentioned suggestions for improvement was *"public access to computers"*. There was a decline in suggestion for the need for additional staff, which may indicate improved efficiency in Division operations that respondents to the second survey observed.