



**2009
Customer Satisfaction Survey**

**How Has The
Office of Personnel Management
Served You?**

U.S. Office of Personnel Management



Form Approved:
OMB Number: 3206-0236



UNITED STATES OFFICE OF PERSONNEL MANAGEMENT
Washington, DC 20415

Human Resources
Products and Services
Division

A Message from the Associate Director of Human Resources Products & Services Division

Dear Friend:

The U.S. Office of Personnel Management serves over 2.5 million Federal annuitants and survivor annuitants, and is aware of our responsibility to provide quality retirement benefit services to our customers. You earned these benefits by serving your country, and we must provide services that match the commitment you made to public service.

This survey collects feedback on satisfaction with our retirement program products and services. You were selected from a random sample of Federal annuitants and survivor annuitants. Your participation is voluntary, and any information you provide will be kept confidential. This information will help us determine areas that need improvement.

We will report the survey results to the President and Congress so they can assess how we are doing on meeting our goals and carrying out our mission to ensure the Federal Government has an effective civilian workforce. One way we do this is by maintaining a world-class benefits program. Your participation in this survey will help us retain and build that workforce. This means you continue to serve your country, and for that, we thank you.

Sincerely,

A handwritten signature in black ink, appearing to read "Kay T. Ely".

Kay T. Ely
Associate Director
Human Resources Products and Services

U.S. Office of Personnel Management Center for Retirement and Insurance Services FY 2009 Customer Satisfaction Survey

Purpose of this Survey

Every year the Office of Personnel Management (OPM) sets new goals for improving the retirement services we provide to Federal annuitants. To reflect how well we meet these goals, our survey focuses on retirees who had a transaction with us during the last year (*from October 1, 2008*). This includes **Long-Time Retirees** (*retired before October 1, 2008*) who contacted us for service regarding their retirement accounts, and **New Retirees** (*retired on or after October 1, 2008*) who initially applied for retirement benefits or contacted us for service regarding their new accounts.

Instructions

Please read the instructions carefully. Respond directly in the survey booklet, using pen or pencil. If you wish to change a response, erase it or cross it out. Some questions may not pertain to you; please mark these with the “No Basis to Judge” response. For most of the questions, you will mark only one response, but a few questions noted as “Mark ALL that apply” allow for multiple responses. The last section of this survey is for **New Retirees**; **Long-Time Retirees** should not answer questions in the last section. If you wish to make written comments for any question, space is provided at Question 51, page 12.

Please return the completed questionnaire in the postage-paid envelope within 14 days to:

U.S. Office of Personnel Management
Customer Satisfaction Survey
Retirement Operations Center - Mail Prep
Attn: MIB - TRB, Room 4316
PO Box 45
Boyers, PA 16020-9981

Questions

If you have questions about this survey, we will be happy to help you. Please call collect at 202-606-0283 (8:30 a.m. to 5 p.m., EST, Monday through Friday), or email us at: mib_survey@opm.gov.

Questions about your retirement claim or benefits should be directed to our Retirement Information Office at our toll-free number: 1-888-767-6738. You can also visit us at our Web site: www.opm.gov/retire.

Please continue 

Public Burden Statement

We estimate providing this information takes an average 25 minutes per survey, including the time for reviewing instructions, getting the needed data, and reviewing the requested information. Send comments regarding our estimate or any other aspect of this survey, including suggestions for reducing completion time, to the U.S. Office of Personnel Management, OPM Forms Officer (3206-0236), Washington, DC 20415-7900. The OMB Number, 3206-0236, is currently valid. OPM may not collect information, and you are not required to respond, unless this number is displayed.

Privacy Act Statement

In accordance with Public Law 93-579 (Privacy Act of 1974), the providing of personal information is completely voluntary. Collection of this information is authorized by Sections 1002, 3301, and 3304 of Title 5, U.S. Code.

Your responses to this survey are voluntary and there is no penalty for not responding. However, maximum participation is encouraged so that the data will be complete and representative.

The principal purpose in collecting this information is to study and report attitudes and perceptions of Federal annuitants regarding the retirement services provided to them by the U.S. Office of Personnel Management (OPM). Your responses will be used to improve these services.

Only OPM staff involved in collecting or preparing this information for analysis will have access to completed surveys. The information you provide will be analyzed and reported for the whole Federal annuitant population.

In any public release of survey results, no data will be disclosed that could be used to identify specific individuals and your individual responses will be treated confidentially.

Customer Satisfaction Survey

When answering the following questions, refer only to your monthly Federal annuitant or survivor annuitant payments, and your experiences since October 1, 2008.

Long-Time and New Retirees

Whether you retired many years ago or just recently, and if you contacted us for service or information on your Federal retirement account on or after October 1, 2008, please answer the following questions regarding how well OPM Retirement Services served you.

1. **Since October 1, 2008, how many times did you contact OPM Retirement Services (telephone, letter, Internet, etc.)?**

- A. Once
- B. Twice
- C. Three times
- D. Four or more times
- E. Not at all

2. **It is easy to do business with OPM Retirement Services.**

- A. Strongly Disagree
- B. Disagree
- C. Neither Disagree nor Agree
- D. Agree
- E. Strongly Agree

3. **Assistance from OPM Retirement Services personnel is provided at a time that is convenient to me.**

- A. Strongly Disagree
- B. Disagree
- C. Neither Disagree nor Agree
- D. Agree
- E. Strongly Agree
- F. No Basis to Judge

4. **It is easy to find someone from OPM Retirement Services who can answer my questions.**

- A. Strongly Disagree
- B. Disagree
- C. Neither Disagree nor Agree
- D. Agree
- E. Strongly Agree
- F. No Basis to Judge

Please continue 

5. I have adequate access to OPM Retirement Services personnel for advice and assistance.

- A. Strongly Disagree
- B. Disagree
- C. Neither Disagree nor Agree
- D. Agree
- E. Strongly Agree
- F. No Basis to Judge

6. What difficulties, if any, have you experienced in trying to find someone in OPM Retirement Services to assist you? (Mark ALL that apply)

- A. No difficulties
- B. Telephone rang without answer or stayed busy
- C. Telephone messages were not returned
- D. Telephone calls were transferred multiple times
- E. I was left on hold for a long time
- F. Automated phone service proved difficult to use
- G. E-mail was forwarded multiple times
- H. E-mail was not answered
- I. Letters were not answered in a timely manner
- J. Letters were not answered
- K. I have not tried to find someone
- L. Other (specify):

7. **How do you usually request OPM Retirement Services information, services, or products? (Mark only ONE response)**

- A. Telephone
- B. E-mail
- C. Internet
- D. Fax
- E. Postal mail
- F. I have not requested anything from OPM Retirement Services since October 1, 2008.

8. **How do you prefer to receive OPM Retirement Services information, services, or products? (Mark only ONE response)**

- A. Telephone
- B. E-mail
- C. Internet
- D. Fax
- E. Postal mail
- F. Other (specify):

9. **OPM's automated phone system (202-606-0500 or 1-888-767-6738) is easy to use.**

- A. Strongly Disagree
- B. Disagree
- C. Neither Disagree nor Agree
- D. Agree
- E. Strongly Agree
- F. No Basis to Judge

10. **Do you use the Internet?**

- A. No
- B. Yes

11. **Have you accessed OPM's Web site (www.opm.gov/retire) since October 1, 2008?**

- A. No
- B. Yes

12. **OPM Retirement Services personnel are willing to help me.**

- A. Strongly Disagree
- B. Disagree
- C. Neither Disagree nor Agree
- D. Agree
- E. Strongly Agree
- F. No Basis to Judge

Please continue 

13. OPM Retirement Services personnel are courteous.

- A. Strongly Disagree
- B. Disagree
- C. Neither Disagree nor Agree
- D. Agree
- E. Strongly Agree
- F. No Basis to Judge

14. OPM Retirement Services personnel give individual attention to my requests for information or service.

- A. Strongly Disagree
- B. Disagree
- C. Neither Disagree nor Agree
- D. Agree
- E. Strongly Agree
- F. No Basis to Judge

15. OPM Retirement Services personnel are knowledgeable.

- A. Strongly Disagree
- B. Disagree
- C. Neither Disagree nor Agree
- D. Agree
- E. Strongly Agree
- F. No Basis to Judge

16. Explanations of technical issues by OPM Retirement Services personnel are understandable.

- A. Strongly Disagree
- B. Disagree
- C. Neither Disagree nor Agree
- D. Agree
- E. Strongly Agree
- F. No Basis to Judge

17. OPM Retirement Services personnel are able to explain their products and services.

- A. Strongly Disagree
- B. Disagree
- C. Neither Disagree nor Agree
- D. Agree
- E. Strongly Agree
- F. No Basis to Judge

18. **When someone in OPM Retirement Services does not know the answer, they refer me to an expert who does.**

- A. Strongly Disagree
- B. Disagree
- C. Neither Disagree nor Agree
- D. Agree
- E. Strongly Agree
- F. No Basis to Judge

19. **In general, OPM Retirement Services provides timely service.**

- A. Strongly Disagree
- B. Disagree
- C. Neither Disagree nor Agree
- D. Agree
- E. Strongly Agree
- F. No Basis to Judge

20. **I am satisfied with the amount of time it took OPM Retirement Services to respond to the letter(s) I wrote on or after October 1, 2008.**

- A. Strongly Disagree
- B. Disagree
- C. Neither Disagree nor Agree
- D. Agree
- E. Strongly Agree
- F. No Basis to Judge

21. **I usually receive my monthly annuity or survivor annuity payment by the first business day of the month.**

- A. Strongly Disagree
- B. Disagree
- C. Neither Disagree nor Agree
- D. Agree
- E. Strongly Agree

22. **OPM Retirement Services personnel give me accurate information.**

- A. Strongly Disagree
- B. Disagree
- C. Neither Disagree nor Agree
- D. Agree
- E. Strongly Agree
- F. No Basis to Judge

23. **OPM Retirement Services personnel keep accurate records.**

- A. Strongly Disagree
- B. Disagree
- C. Neither Disagree nor Agree
- D. Agree
- E. Strongly Agree
- F. No Basis to Judge

Please continue 

24. **OPM Retirement Services provides services when promised.**

- A. Strongly Disagree
- B. Disagree
- C. Neither Disagree nor Agree
- D. Agree
- E. Strongly Agree
- F. No Basis to Judge

25. **The communications materials I received from OPM Retirement Services were clear and understandable (e.g., letters, written information).**

- A. Strongly Disagree
- B. Disagree
- C. Neither Disagree nor Agree
- D. Agree
- E. Strongly Agree
- F. No Basis to Judge

26. **I am satisfied with the appearance of manuals, brochures, reports, and other communications materials (e.g., OPM Retirement Services Web site, account statements) prepared by OPM Retirement Services.**

- A. Strongly Disagree
- B. Disagree
- C. Neither Disagree nor Agree
- D. Agree
- E. Strongly Agree
- F. No Basis to Judge

27. **Problems and complaints are resolved quickly by OPM Retirement Services personnel.**

- A. Strongly Disagree
- B. Disagree
- C. Neither Disagree nor Agree
- D. Agree
- E. Strongly Agree
- F. No Basis to Judge

28. **Problems and complaints are resolved with minimal effort on my part.**

- A. Strongly Disagree
- B. Disagree
- C. Neither Disagree nor Agree
- D. Agree
- E. Strongly Agree
- F. No Basis to Judge

29. OPM links my customer feedback and complaints to the OPM Retirement Services personnel who can act on this information.

- A. Strongly Disagree
- B. Disagree
- C. Neither Disagree nor Agree
- D. Agree
- E. Strongly Agree
- F. No Basis to Judge

30. OPM Retirement Services personnel are flexible in finding solutions to problems.

- A. Strongly Disagree
- B. Disagree
- C. Neither Disagree nor Agree
- D. Agree
- E. Strongly Agree
- F. No Basis to Judge

31. I am satisfied with the way OPM Retirement Services personnel handle problems or mistakes.

- A. Strongly Disagree
- B. Disagree
- C. Neither Disagree nor Agree
- D. Agree
- E. Strongly Agree
- F. No Basis to Judge

32. Overall, how satisfied were you with the content of the response(s) to the letter(s) you wrote to OPM since October 1, 2008?

- A. Very Dissatisfied
- B. Generally Dissatisfied
- C. Neither Dissatisfied nor Satisfied
- D. Generally Satisfied
- E. Very Satisfied
- F. No Basis to Judge

Please continue 

33. Since October 1, 2008, I experienced a customer service problem with my annuity account in the following areas: *(Mark ALL that apply)*.

- A. Initial claim for retirement benefits
- B. Initial claim for survivor benefits
- C. Allotment
- D. Cost of living increase
- E. Federal tax withholding
- F. State tax withholding
- G. Change in health benefits plans or option(s)
- H. Change in life insurance option(s)
- I. Change in mailing address
- J. Direct deposit of annuity payment
- K. Adjust annuity payment after change in marital status
- L. I have not experienced a problem
- M. Other *(specify)*:

34. If you applied for survivor annuitant benefits on or after October 1, 2008, as the result of the death of a Federal retiree, how satisfied were you with the assistance you received from OPM Retirement Services in filing the paperwork needed to obtain benefits?

- A. Very Dissatisfied
- B. Dissatisfied
- C. Neither Dissatisfied nor Satisfied
- D. Satisfied
- E. Very Satisfied
- F. No Basis to Judge

35. Overall, how satisfied are you with the services you received from OPM Retirement Services since October 1, 2008?

- A. Very Dissatisfied
- B. Dissatisfied
- C. Neither Dissatisfied nor Satisfied
- D. Satisfied
- E. Very Satisfied

36. If you had a choice of service providers, would you use OPM Retirement Services again?

- A. No
- B. Not Sure
- C. Yes

37. How important was the availability of retirement and insurance benefits in your decision to accept a job with the Federal Government?

- A. Not at all important
- B. Somewhat important
- C. No opinion/Not sure
- D. Important
- E. Very important

Long-Time Retirees have no further questions to answer. Thank you for answering these questions. We appreciate your participation. *New Retirees (retired on or after October 1, 2008)* should continue to answer the following questions.

New Retirees Only - Please Continue with the Survey

If you retired from Federal service on or after October 1, 2008, please answer the following questions regarding how well OPM and your agency served you during your initial retirement process. Long-Time retirees (retired before October 1, 2008) should not answer these final questions.

38. In most cases, Interim Payments are paid until an applicant's annuity claim is processed and regular payments begin. Was this the case for your initial annuity claim?

- A. No
- B. Not Sure
- C. Yes

39. After you applied for your annuity benefit, when did you receive your first Interim Payment from OPM Retirement Services?

- A. Much later than I expected
- B. A little later than I expected
- C. About when I expected
- D. A little sooner than I expected
- E. Much sooner than I expected
- F. I never received an Interim Payment

40. After your Interim Payments ended, was your first regular retirement check computed correctly?

- A. No, it was not correct
- B. Not sure
- C. Yes, it was correct

41. When you applied for retirement benefits, how satisfied were you with how well OPM Retirement Services handled all aspects of your retirement claim?

- A. Very Dissatisfied
- B. Generally Dissatisfied
- C. Neither Dissatisfied nor Satisfied
- D. Generally Satisfied
- E. Very Satisfied

Please continue 

42. OPM Retirement Services provided me with useful information regarding my retirement.

- A. Strongly Disagree
- B. Disagree
- C. Neither Disagree nor Agree
- D. Agree
- E. Strongly Agree
- F. No Basis to Judge

43. Did you receive retirement counseling?

- A. No
- B. Not sure
- C. Yes

44. At what point in your Federal career did your agency offer counseling or training about retirement planning? *(Mark ALL that apply)*

- A. New employee orientation
- B. Mid-career
- C. Annual training open to all employees
- D. More than 3 years before retirement
- E. 1 to 3 years before retirement
- F. Less than 1 year before retirement
- G. Agency did not provide retirement counseling or training
- H. Not sure

45. What did the counseling cover? *(Mark ALL that apply)*

- A. I did not receive retirement counseling
- B. Overview of retirement benefits
- C. Amount of annuity
- D. Survivor benefits
- E. Health insurance benefits
- F. Life insurance benefits
- G. Social Security benefits
- H. Thrift Savings Plan
- I. Taxes
- J. Long Term Care
- K. Need for retirement savings
- L. How to calculate savings needed for retirement
- M. Retirement life style
- N. Setting retirement goals

46. How satisfied were you that the information from your agency was accurate?

- A. Very Dissatisfied
- B. Generally Dissatisfied
- C. Neither Dissatisfied nor Satisfied
- D. Generally Satisfied
- E. Very Satisfied
- F. No Basis to Judge

47. How satisfied were you with how your agency helped you take appropriate actions (e.g., submitting retirement forms, decisions on health/life insurance, etc.)?

- A. Very Dissatisfied
- B. Generally Dissatisfied
- C. Neither Dissatisfied nor Satisfied
- D. Generally Satisfied
- E. Very Satisfied
- F. No Basis to Judge

48. How satisfied were you with how your agency helped you learn what to expect after you retired (e.g., how long until annuity payments begin, tax withholding, etc.)?

- A. Very Dissatisfied
- B. Generally Dissatisfied
- C. Neither Dissatisfied nor Satisfied
- D. Generally Satisfied
- E. Very Satisfied
- F. No Basis to Judge

49. How did your agency's estimate of your annuity compare to the annuity computed by OPM?

- A. The annuity estimate was close to the annuity computed by OPM
- B. The annuity estimate was significantly different from the annuity computed by OPM
- C. I did not receive an annuity estimate from my agency
- D. Not sure

50. Which of the following describes how you planned your retirement? (Mark ALL that apply)

- A. I attended agency training
- B. I used agency provided resources such as Web links, on-line training, brochures, etc.
- C. I received individual counseling
- D. I used outside sources such as a financial planner, books, workshops, etc.
- E. I did not plan for my retirement
- F. Not sure

Please continue 

51. Comments or suggestions about products or services provided by OPM Retirement Services?

This completes the survey. Thank you for your participation.



United States Office of
Personnel Management
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202-606-0283
mib_survey@opm.gov