

Pension Benefit Guaranty Corporation (PBGC) Retiree Satisfaction Questionnaire 2009

(Items in **BOLD** are interviewer instructions, and are not intended to be read to the Client)
(Items marked *i.e. or e.g.* should only be read if respondent needs clarification)

Introduction (Do not read)

Hello, my name is _____ calling from PGM on behalf of the Pension Benefit Guaranty Corporation. May I please speak with _____?

- 1 Yes > **(Continue to INTRO2)**
- 2 Person not available > **(Schedule a callback)**
- 3 No such person > “Thank you and have a nice day!”
- 99 Refusal/Hung Up > “Thank you and have a nice day!”

(Programmer instructions: Read when the person named in INTRO1 comes to the phone)

Hello, my name is _____ calling from PGM on behalf of the Pension Benefit Guaranty Corporation. We are conducting research on how satisfied users are with services provided in partnership with the federal government as part of the American Customer Satisfaction Index. The Pension Benefit Guaranty Corporation is committed to premier customer service and is conducting this research to help improve its services to you and others like you. Your answers are voluntary and we will not ask any questions about confidential information. If at any time you do not feel comfortable answering a question, please say so. Your responses will be held completely confidential, and you will never be identified by name. This interview is authorized by Office of Management and Budget Control No. **1090-0007**. This interview will take approximately 10 minutes. Is this a good time?

- 1 Yes **(Continue)**
- 2 No “Can we schedule a time that is more convenient for you?”

Screening Question (Do not read)

Q1. Are you currently receiving monthly benefit payments from the Pension Benefit Guaranty Corporation?

- 1 Yes
- 2 No **(TERMINATE)** “I am sorry but you will not be eligible for this survey at this time. Thank you for your time and have a nice day/evening!”)
- 98 Don’t Know **(Don’t read) (TERMINATE)**
- 99 Refusal/Hung up **(TERMINATE)**

Demographic Question (Do not read)

- Q2. Which of the following categories best describes your relationship with PBGC? **(Interview: Read list and record one answer)**
- 1 I am a participant in a pension plan PBGC took over
 - 2 I am the beneficiary of a deceased participant
 - 3 I receive benefits as part of a domestic relations order
 - 98 Don't Know **(Don't read)**

Customer Care (Do not read)

- Q3. Have you ever contacted the Pension Benefit Guaranty Corporation by telephone?
- 1 Yes
 - 2 No **(SKIP TO NEXT SECTION)**
 - 98 Don't Know **(Don't read) (SKIP TO NEXT SECTION)**

Consider your most recent phone conversation with the Pension Benefit Guaranty Corporation. Using a 10-point scale, in which "1" means "poor" and "10" means "excellent," how would you rate...

- Q4. The ease of reaching the appropriate person
- Q5. The respect shown by the PBGC staff
- Q6. PBGC staff knowledge of the issue you called about
- Q7. Follow-up provided by the PBGC staff

Concern Resolution (Do not read)

- Q8. Have you ever contacted the Pension Benefit Guaranty Corporation to update personal information, such as your name, address, phone number, deductions, or banking information?
- 1 Yes
 - 2 No **(SKIP TO NEXT SECTION)**
 - 98 Don't Know **(Don't read) (SKIP TO NEXT SECTION)**

Consider your most recent experience updating information with the Pension Benefit Guaranty Corporation. Using a 10-point scale, in which "1" means "poor" and "10" means "excellent," how would you rate the Pension Benefit Guaranty Corporation on ...

- Q9. Ease of updating your information
- Q10. Timeliness of updates to your record
- Q11. Accuracy of updates to your record

Written Communication (Do not read)

Consider the written information you have received from the Pension Benefit Guaranty Corporation. Using a 10-point scale, in which “1” means “poor” and “10” means “excellent,” how would you rate...

- Q12. The timeliness of the correspondence you received from PBGC
- Q13. The clarity of the information provided
- Q14. The helpfulness of the PBGC correspondence
- Q15. Would you say you receive PBGC written communication... **(Interviewer: Read list and record one answer)**
- 1 Too often
 - 2 As often as needed
 - 3 Not often enough?
 - 98 Don't know **(Don't read)**

Receipt of Benefits Process (Do not read)

Thinking about the benefit payments you receive from the Pension Benefit Guaranty Corporation, please rate the following on a scale from 1 to 10 where 1 means “poor” and 10 means “excellent.”

- Q16. Receiving your benefits at a regular time each month
- Q17. How well the amount you received matched the amount PBGC said you would receive
- Q18. Correctness of any requested deductions
- Q19. Efficiency of the payment process

Benefit Application Process (Do not read)

- Q20. Did you apply to begin receiving PBGC benefits within the last 2-3 years?
- 1 Yes
 - 2 No **(SKIP TO NEXT SECTION)**
 - 98 Don't Know **(Don't read) (SKIP TO NEXT SECTION)**

Please think back to when you applied for benefits with the Pension Benefit Guaranty Corporation. Please rate the following on a scale from 1 to 10 where 1 means “poor” and 10 means “excellent.”

- Q21. **(Ask only to those in the “final benefit” demographic.)** Clarity of the information in the benefit determination letter (i.e., the letter that explained what your benefit amount would be and when you could begin collecting)
- Q22. Clarity of the information in the benefit statement (i.e., the worksheet that showed how your benefit amount was calculated based on your salary and years of service)
- Q23. Ease of understanding the explanation of benefit payment options available to you (e.g., 50% surviving spouse benefit)
- Q24. Ease of applying for benefits
- Q25. Efficiency of application handling

Q26. How quickly did you receive an application from the time you requested it? **(Interviewer: Read list and record answer)**

- 1 1-15 days
- 2 16-30 days
- 3 More than 30 days
- 98 Don't know **(Don't read)**

Q27. How long did it take from when you sent your application to when you received your first payment? **(Interviewer: Read list and record answer)**

- 1 2 months or less
- 2 More than 2 months, up to 3 months
- 3 More than 3 months
- 98 Don't know (Don't read)

ACSI Benchmark Questions (Do not read)

Now, please think about your overall experiences with PBGC...

Q28. Using a 10-point scale on which "1" means "very dissatisfied" and "10" means "very satisfied," how satisfied are you with the services provided by the Pension Benefit Guaranty Corporation?

Q29. Using a 10-point scale on which "1" now means "falls short of your expectations" and "10" means "exceeds your expectations," to what extent have the services provided by the Pension Benefit Guaranty Corporation fallen short of or exceeded your expectations?

Q30. Forget for a moment your experience with the Pension Benefit Guaranty Corporation. Now, imagine what an ideal institution distributing pension benefits would be like. **(Interviewer: Pause momentarily.)** How well do you think the Pension Benefit Guaranty Corporation compares with that ideal institution you just imagined? Please use a 10-point scale on which "1" means "Not very close to the ideal," and "10" means "very close to the ideal."

Benefit Amount (Do not read)

Q31. Are you receiving your full benefit promised by your employer?

- 1 Yes (go to questions 35)
- 2 No **(SKIP TO Q32)**
- 98 Don't Know **(Don't read) (SKIP TO Q35)**

Q32. Given the information provided by PBGC, how satisfied were you with the final amount? Use a 10-point scale, in which "1" means "very dissatisfied" and "10" means "very satisfied."

[RECORD RATING 1-10]

- 98 Don't know (Don't read)

Outcome Measures (Do not read)

Q33. In the last two months, have you formally contacted the Pension Benefit Guaranty Corporation to complain?

- 1 Yes
- 2 No (SKIP TO Q37)
- 98 Don't Know (Don't read) (SKIP TO Q37)

Q34. How was your most recent complaint handled? Please use a 10-point scale on which "1" means "handled very poorly" and "10" means "handled very well".

- [RECORD RATING 1-10]
98 Don't Know (Don't read)

Q35. How would you rate the responsiveness of the Pension Benefit Guaranty Corporation personnel to your complaints? Please use a 10-point scale on which "1" means "not at all responsive" and "10" means "very responsive."

- [RECORD RATING 1-10]
98 Don't Know (Don't read)

Q36. Using a 10-point scale, on which "1" means "not very confident" and "10" means "very confident," how confident are you that the Pension Benefit Guaranty Corporation will do a good job the next time you interact with the agency?

- [RECORD RATING 1-10]
98 Don't Know (Don't read)
99 Refusal/Hung up

Q37. What could PBGC do differently to better meet your needs? (Interviewer: Do not read list. Categorize response or capture verbatim if it does not fit in a category.)

- 1 Nothing/I can't think of anything.
 - 2 Give me more money/cost-of-living adjustment
 - 3 Insure other benefits (medical, life insurance)
- 98 Don't Know (Don't read)
99 Refusal/Hung up

Closing Statement: Thank you for your time. The Pension Benefit Guaranty Corporation appreciates your input and will use this feedback to better serve its customers. Have a nice day!