Pension Benefit Guaranty Corporation (PBGC)
Participant Caller Customer Satisfaction Survey 2012

(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)

INTRO1.   Hello, my name is _____ calling from ASVA 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)

INTRO2.   Hello, my name is _____ from ASVA calling on behalf of the Pension Benefit Guaranty Corporation. We are conducting research on how satisfied users are with federal government services. This research is part of the American Customer Satisfaction Index, and its purpose is to determine how well PBGC is serving its customers. The Pension Benefit Guaranty Corporation will use this feedback to improve its services to you and others like you. Your answers are voluntary, but your opinions are very important for this research. 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?"

(If respondent inquires about the purpose or validity of the survey, please refer to the PBGC Customer Contact Center 1-800-400-PBGC (7242))

Screening Question (Do not read)

Q1. Have you contacted the Pension Benefit Guaranty Corporation by phone in the past 2 months?

1   Yes **(GO TO Q2)**
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)**

Q2.	What was the MAIN purpose of your most recent contact to the Pension Benefit Guaranty Corporation? **(Interviewer: Read list and record response)**

> 1	To request a benefit estimate
> 2	To update my personal information *(e.g., change of address, electronic direct deposit change, tax withholding change, seek clarification on correspondence I received, request a form)*
> 3	To apply for benefits
> 4	To follow up because you did not get a call back
> 5	To register a complaint
> 6	To inquire about my check or automatic deposit
> 7	To request information
> 8	Other (Please specify)
> 98	Don't know **(Don't read)**

Q3.	When you contacted the Pension Benefit Guaranty Corporation, you would have been in one of three categories. Which of the following categories were you in? **(Interviewer: Read list and record response)**

> 1	Receiving benefits from the Pension Benefit Guaranty Corporation
> 2	Not receiving benefits from the Pension Benefit Guaranty Corporation, but expecting to receive a benefit in the future
> 3	Not eligible to receive benefits from the Pension Benefit Guaranty Corporation
> 98	Don't know **(Don't read)**

Customer Care (Do not read)

Consider your most recent contact 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

Automated Phone System (Do not read)

Q7.	In the last 2 months, have you called PBGC and used your touchtone keypad to navigate the choices on the automated phone system?

> 1	Yes
> 2	No **(SKIP TO Q11)**
> 98	Don't Know (Don't read) **(SKIP TO Q11)**

Using a 10-point scale, in which "1" means "poor" and "10" means "excellent," how would you rate the…

Q8.	Ease of navigating through the menu options

Q9.	The ability to accomplish what you wanted to with the automated phone system

Q10.	Length of time it took to reach a representative if you pushed zero

Q10a.	IF Q9 is 6 OR LOWER ASK What would you like to accomplish through the automated phone system that you haven't been able to?

Consider your most recent contact with the Pension Benefit Guaranty Corporation. Still using the same scale, in which "1" means "poor" and "10" means "excellent," how would you rate the Pension Benefit Guaranty Corporation on …

Q11.   Responsiveness to resolving your concern or issue

Q12.   Timeliness of resolving your concern or issue

Q13.   Accuracy of the resolution

Q14.   Follow-up provided by the PBGC staff

Requests for Benefit Estimates (Do not read)

Q15.   In the past 2 months, have you asked PBGC for an estimate of your benefit amount?

        1   Yes **(GO TO 16)**
        2   No **(SKIP TO Q21)**
        98 Don't know **(Don't read) (SKIP TO Q21)**

Q16.   Have you received the estimate you requested?
        1   Yes **(GO TO 17)**
        2   No **(SKIP TO Q21)**
        98 Don't know **(Don't read) (SKIP TO Q21)**

Consider the benefit estimate you requested from the Pension Benefit Guaranty Corporation. Using a 10-point scale, in which "1" means "poor" and "10" means "excellent," how would you rate…

Q17.   The timeliness of receiving your benefit estimate

Q18.   The ease of understanding your benefit estimate

Q19.   Did your benefit estimate provide the information you needed?

        1   Yes   **(SKIP TO Q21)**
        2   No **(GO TO Q20)**
        98 Don't Know **(Don't read) (SKIP TO Q21)**

Q20.   What other information was needed? **(Record verbatim)**

Written Communication (Do not read)

Q21.   What was the most recent piece of written communication you remember receiving from PBGC?

        (Do not read list unless respondent doesn't remember or needs help.)

        1   Acknowledgment of documents submitted
        2   Benefit determination letter
        3   Benefit estimate
        4   Confirmation of change to personal info
        5   Forms or applications
        6   Notice of plan trusteeship (contains DVD)
        7   PBGC newsletter
        8   Pension check
        9   Other: _____
        10 Don't remember **(Skip to Q26)**
        11 None **(Skip to Q26)**

Please think about this written communication you have received from PBGC. Using a 10-point scale, in which "1" means "poor" and "10" means "excellent," how would you rate…?

Q22.   The timeliness of the correspondence you received from PBGC

Q23.   The clarity of the information provided

Q24.   The helpfulness of the PBGC correspondence

Q25.   What other information would you like to receive?

ACSI Benchmark Questions (Do not read)

Q26.   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?

Q27.   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?

Q28.   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)**

Q29.   Are you receiving your full benefit promised by your employer?

        1   Yes (**(SKIP TO Q31)**
        2   No **(SKIP TO Q30)**
        98   Don't Know **(Don't read) (SKIP TO Q31)**

Q30.   Given the information provided by PBGC, how satisfied were you with the final amount you received? 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)

External Factors (Do not read)

Please think about what you have read or heard about PBGC and the pension-insurance system. Using a 10-point scale, on which "1" means "Poor" and "10" means "Excellent," how would you rate…

Q31.   The accuracy of information you received from your company about what to expect from PBGC
Q32.   PBGC's ability to pay benefits in the future
Q33.   The reliability of companies' pension promises

Outcome Measures (Do not read)

Q34.   Have you formally contacted the Pension Benefit Guaranty Corporation to complain within the past 2 months?

        1   Yes
        2   No **(SKIP TO Q 37)**
        98   Don't Know **(Don't read) (SKIP TO Q 37)**

Q35.   How well or poorly 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)**

Q36.   How would you rate the responsiveness of the Pension Benefit Guaranty Corporation personnel to your complaint? Please use a 10-point scale on which "1" means "not very responsive" and "10" means "very responsive".

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

Q37.   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

Q38.   What could PBGC do differently to better meet your needs? **(Record verbatim)**

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!