

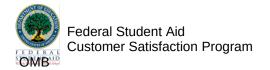
U.S. Department of Education 2009 Additional Servicers Customer Survey School Personnel

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

Introduction (Do not read)

- INTRO1. Hello, this is ______ calling from [data vendor] on behalf of the United States Department of Education. May I please speak to <u>(name from list)</u>? (If necessary: We're conducting a customer satisfaction survey and are trying to contact financial aid professionals who work with the Federal Family Education Loan Program.)
 - 1 (Named person is on the phone, continue at INTRO4)
 - 2 (Named person is available, proceed at INTRO3. when respondent comes to phone)
 - 3 (Named person is unavailable, schedule callback)
 - 4 (Named person is no longer this number, use INTRO2.)
 - 5 Refused/Hung Up
- INTRO2. Is there another number at which I could reach him/her? (If necessary: We're conducting a customer satisfaction survey and are trying to contact financial aid professionals who work with the Federal Family Education Loan Program.)
 - 1 (Will provide new number) >> Thank you and have a good day. (Contact new number)
 - 2 (Refused to provide new number) >> Thank you and have a good day!
- INTRO3. **(When respondent comes to phone)** Hello, this is *[interviewer name]* calling from [data vendor] on behalf of the United States Department of Education. **(Continue)**





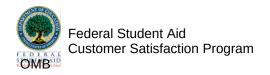
- INTRO4. The Department of Education is conducting this survey with financial aid professionals to measure satisfaction with [servicer from list] in their servicing of FFEL loans recently purchased by the Department. [Servicer] began servicing these loans as of September 1, 2009. For this survey we are interested in speaking with financial aid professionals who work with [servicer] on matters relating to their servicing of these particular loans. Does your work involve [servicer's] servicing of your students' FFEL loans that were recently purchased by the Department?
 - 1. Yes (go to Intro5)
 - 2. No (go to Intro6)
 - 3. Don't know
- INTRO5. This interview will take less than 10 minutes. Your comments will remain strictly confidential. Is now a good time for us to speak? (If necessary: this survey is authorized by Office of Management and Budget Control No. XXXX-XXXX).
 - 1 Yes (Skip to background questions)
 - 2 No (When would be a more convenient time for you to complete this study?)
- INTRO6. Is there someone else in your office I could speak to specifically regarding their experiences with [servicer] servicing of the FFEL loans recently purchased by the Department? (capture name/number if yes; else thank and terminate).

Background Questions (Do not read)

To begin I'd like to ask you a few questions about your role and experiences with FFEL loan servicing administration.

- BACK1 What is your current job title? (listen and code per below, confirm)
 - 1 Financial Aid Director
 - 2 Associate Director of Financial Aid
 - 3 Assistant Director of Financial Aid
 - 4 Loan Specialist
 - 5 Counselor
 - 6 Other (specify)
- BACK2 How long have you been in your current position? (listen and code per below)
 - 1 Less than 1 year
 - 2 1 year to less than 5 years
 - 3 5 years or more
 - 4 Refused
- BACK3 Have you worked with [servicer] prior to September 1, 2009?
 - 1 Yes
 - 2 No (skip to BACK4)
- BACK3.1 Did you work with them on lending issues, servicing issues, or other areas prior to September 1, 2009? (select all that apply)
 - 1 Lending
 - 2 Servicing
 - 3 Other





- BACK3.2 How long had you worked with them on these issues prior to September 2009?
 - 1 Less than 1 month
 - 2 1 month to less than 3 months
 - 3 3 months to less than 6 months
 - 4 6 months to 1 year
 - 5 More than 1 year

BACK4 Do you work with FFEL servicers other than [servicer]?

- 1 Yes
- 2 No (skip to BACK5)
- 3 Don't know (skip to BACK5)
- BACK4.1 How many other servicers do you work with? (capture number)
- BACK5 How frequently do you interact with [servicer] on loan servicing issues in your work? (listen and code per below, clarify if needed)
 - 1 Daily
 - 2 Less than daily but at least once per week
 - 3 Less than once per week but at least once per month
 - 4 Less than once per month but several times per year
 - 5 Only a few times per year or less

Now I'd like to ask you a series of questions about various aspects of your interactions with **[servicer]**. As we go through these questions, please consider your experiences with **[servicer]** only with regard to the *servicing* of Department of Education purchased *FFEL loans beginning September 1, 2009*; please set aside any thoughts about **[servicer]** except those concerning their servicing of these loans.

Customer Service (Do not read)

CSERV1 When was the last time you contacted (e.g., called, emailed, etc.) [servicer] about a FFEL servicing issue? (listen and code per below)

- 1 I have never contacted [servicer] (skip to next section)
- 2 Less than 1 month ago
- 3 One month to less than 3 months ago
- 4 Three months to less than 6 months ago (skip to next section will remove this skip in 3/2010)
- 5 Six months to less than 1 year ago (skip to next section will remove this skip in 6/2010)
- 6 More than one year ago (skip to next section)
- 8 Don't Know (skip to next section)
- 9 Refused (skip to next section)
- CSERV2 How did you contact them about this most recent issue? (listen, code all that apply)
 - 1 Phone call
 - 2 Email
 - 3 Fax
 - 4 Other (specify)

Please think about your experiences contacting **[servicer]**. On a scale from 1 to 10 where 1 is "poor" and 10 is "excellent", please rate **[servicer]** on:

CSERV3 Providing clear points of contact for inquiries

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- CSERV4 Responsiveness to your inquiries
- CSERV5 Their effectiveness in resolving issues
- CSERV6 The courtesy of their staff
- CSERV7 Their staff's knowledge
- CSERV8 Their follow-through to issue resolution

Web Site (Do not read)

- WEBSCR Does **[servicer]** provide a website for you to access information about their processes or other general FFEL servicing information?
 - 1 Yes
 - 2 No (skip to next section)
 - 3 Don't know (skip to next section)
- WEBSL Does [servicer]'s website provide access to student/loan-level data?
 - 1 Yes
 - 2 No
 - 3 Don't know

WEB1. When was the last time you accessed [servicer]'s website? (listen and code per below)

- 1 I have never accessed the web page (skip to next section)
- 2 Less than 1 month ago
- 3 One month to less than 3 months ago
- 4 Three months to less than 6 months ago (skip to next section will remove this skip in 3/2010)
- 5 Six months to less than 1 year ago (skip to next section will
 - remove this skip in 6/2010)
- 6 More than one year ago (skip to next section)
- 7 Don't Know (skip to next section)
- 8 Refused (skip to next section)

Think about the web site they provide. On a scale from 1 to 10, where "1" means "poor" and "10" means "excellent", how would you rate the...

- WEB2. Ease of logging into the site
- WEB3. Clarity of the web site organization
- WEB4. Ease of navigating the web site
- WEB5. Accuracy of information provided on the web site
- WEB6. Your ability to find the information you needed on the site
- WEB7. Usefulness of the tools on the web site

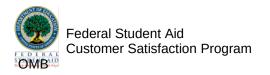
WEB8. (IF ANY WEB2 – WEB7 < 7) What could [servicer] do to improve their website? (capture open end)

Information/Communications (Do not read)

- INFOTYPE Please think about any information you receive from [servicer] regarding FFEL loan servicing. What mode of communication does [servicer] use to communicate this information to you? (listen and code all that apply)
 - 1 Phone
 - 2 Email
 - 3 Mail

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- 4 Text message
- 5 Online chat

Now please think about any communications or information you receive from **[servicer]** regarding FFEL loan servicing. On the same 1 to 10 scale please rate the information you receive on:

INFO1UsefulnessINFO2ClarityINFO3Convenience of the formatINFO4Timeliness

Systems/Tools (Do not read)

Think about the systems or tools you use in your FFEL work with **[servicer]**. On a scale from 1 to 10, where "1" means "poor" and "10" means "excellent", how would you rate their systems on...

- SYS1 Reliability (i.e., the percentage of the time "up and running")
- SYS2 Ease of submitting information
- SYS3 Ease of retrieving information you need
- SYS4 Clarity of instructions/documentation
- SYS5 Flexibility
- SYS6 Your level of comfort using the system/tools
- SYS7 Reporting capabilities
- SYS8 Have you had any formal training from **[servicer]** on how to use their systems and tools for FFEL servicing?
 - 1 Yes
 - 2 No (skip to next section)
- SYS9 What kind of training did you receive? (listen and code per below)
 - 1 In-person seminar/group training session
 - 2 One-on-one training with [servicer] representative
 - 3 Internet-based self-guided training
 - 4 Webinar or facilitated on-line training (e.g., via WebEx, GoToMeeting, etc.)
 - 5 Videotape or DVD
 - 6 Other (specify)
- SYS10 On the 1 to 10 scale, please rate the usefulness of the training you received.

SYS11 (IF ANY SYS1-SYS7,SYS10 <7) What could [servicer] do to improve their systems, tools or training? (capture open end)

Working Relationship (Do not read)

Now please think more generally about **[servicer]**'s performance with respect to FFEL servicing. On the 1 to 10 scale, please rate **[servicer]** on:

- RELA1 Their responsiveness to the needs of financial aid professionals such as yourself
- RELA2 The service and support they provide to students with FFEL loans in servicing
- RELA3 Their receptiveness to input and suggestions for improvements
- RELA4 Providing innovative tools and approaches to servicing FFEL loans



ACSI Benchmark Questions (Do not read)

Now please think about your interactions with **[servicer]** regarding servicing of Federal Family Education Loans *only*.

- ACSI1. Using a 10-point scale on which "1" means "very dissatisfied" and 10 means "very satisfied", how satisfied are you with your experiences with [servicer]?
- ACSI2. Using a 10-point scale on which "1" now means "falls short of your expectations" and "10" means "exceeds your expectations," to what extent has **[servicer]** fallen short of or exceeded your expectations?
- ACSI3. Imagine what an ideal interaction with an organization servicing Federal Family Education Loans would be like for you. How well do you think your interactions with **[servicer]** compare with that ideal? Please use a 10-point scale on which "1" means "not very close to the ideal," and "10" means "very close to the ideal."

Outcome Measures (Do not read)

- COMP1. In the past three months, have you complained to **[servicer]** about any aspect of their servicing of Federal Family Education Loans?
 - 1 Yes
 - 2 No
 - 8 Don't know
 - 9 Refused
- COMP2. (IF COMP1=1) What was the nature of your complaint? (capture open end)

COMP3. Was the issue resolved to your satisfaction? (IF COMP1=1)

- 1 Yes
- 2 No
- 9 Resolution still pending
- COMP4. In the past three months, have you complained to the U.S. Department of Education about any aspect of **[servicer]**'s performance servicing Federal Family Education Loans?
 - 1 Yes
 - 2 No
 - 8 Don't know
 - 9 Refused
- COMP5. (IF COMP4 =1) What was the nature of your complaint? (capture open end)
- COMP6. Was the complaint resolved to your satisfaction? (IF COMP4=1)
 - 1 Yes
 - 2 No
 - 9 Resolution still pending

Closing (Do not read)

CLOSE1. In your own words, what could [servicer] do to improve their processes or practices for servicing Federal Family Education Loans? (enter verbatim response)

That's all the questions I have for you. Thank you for your time, and have a good day.

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