

A close-up, vertical view of the American flag, showing the stars and stripes. The stars are in the upper left corner, and the stripes run diagonally from the bottom left towards the top right.

New covers for 2012 Survey

**2011**  
**Customer Satisfaction Survey**

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

Form Approved:  
OMB Number: 3206-0236



Retirement Services

UNITED STATES OFFICE OF PERSONNEL MANAGEMENT  
Washington, DC 20415

## A Message from the Associate Director of Retirement Services

Dear Friend:

The U.S. Office of Personnel Management serves over 2.5 million Federal annuitants and survivor annuitants, and we work to provide high quality retirement benefit services to you, 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. One way we do this is by maintaining a world-class benefits program. Your participation in this survey will help us retain and build the workforce. This means you continue to serve your country, and for that, we thank you.

Sincerely,

A handwritten signature in cursive script that reads "William Zielinski".

William Zielinski  
Associate Director  
Retirement Services

# U.S. Office of Personnel Management Retirement Services FY 2011 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, 2010*). This includes *Long-Time Retirees* (*retired before October 1, 2010*) who contacted us for service regarding their retirement accounts, and *New Retirees* (*retired on or after October 1, 2010*) 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 41, page 10.

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: MI - 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](mailto: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](http://www.opm.gov/retire).

Please continue 

# Frequently asked questions about the Customer Satisfaction Survey

## What is the cost of doing the survey?

Printing and mail/return postage costs about \$3,000. This is mostly a one-person task, with a GS-13 program analyst devoting about ten percent of annual staff hours to producing the survey and analyzing the results.

## Why can't the survey be taken on-line via the OPM web site?

We know from one of the survey questions that about 67 percent of our customers use the internet. We do not want to exclude the considerable number of non-internet users from the survey. To keep it simple, we rely on one method, a mailed survey. The percentage of internet users grows each year; in the near future we plan to do a survey completely online.

## How is the validity of the survey results assured?

The survey results are subject to random audits by OPM's Office of the Inspector General.

## 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, Retirement Services Publications Team (3206-0236), Washington, DC 20415-3430. 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, 2010.

## 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, 2010, please answer the following questions regarding how well OPM Retirement Services served you.*

1. Since October 1, 2010, 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/Agree
- D. Agree
- E. Strongly Agree

3. Assistance from OPM Retirement Services is provided at a time that is convenient to me (Monday - Friday, 7:30 a.m. to 7:45 p.m. Eastern Standard Time).

- A. Strongly Disagree
- B. Disagree
- C. Neither Disagree/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/Agree
- D. Agree
- E. Strongly Agree
- F. No Basis to Judge

Please continue 

5. **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. Phone messages not returned
- D. Phone calls transferred multiple times
- E. Left on hold for a long time on the phone
- F. Automated phone service difficult to use
- G. E-mail was forwarded multiple times
- H. E-mail was not answered
- I. Letters not answered in a timely manner
- J. Letters not answered
- K. I have not tried to find someone
- L. Other (*specify*):

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

- A. Telephone
- B. E-mail
- C. Internet
- D. Postal mail

7. **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. Postal mail

8. **OPM's automated phone system (1-888-767-6738) is easy to use.**

- A. Strongly Disagree
- B. Disagree
- C. Neither Disagree/Agree
- D. Agree
- E. Strongly Agree
- F. No Basis to Judge

9. Do you use the Internet?

- A. No
- B. Yes

10. To learn about retirement related services, have you accessed OPM's Web site [www.opm.gov/retire](http://www.opm.gov/retire) since October 1, 2010?

- A. No
- B. Yes

11. I would like to see the following features added to the retirement web site ([www.opm.gov/retire](http://www.opm.gov/retire)):

- A. File for retirement on-line
- B. Chat
- C. Sign up to receive selected emails
- D. Informational videos
- E. Not sure/Not interested
- F. Other (specify):

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12. To make an on-line customer service transaction, have you accessed OPM's web site [www.servicesonline.opm.gov](http://www.servicesonline.opm.gov) since October 1, 2010?

- A. No
- B. Yes

13. OPM Retirement Services personnel are courteous.

now #. 16

- A. Strongly Disagree
- B. Disagree
- C. Neither Disagree/Agree
- D. Agree
- E. Strongly Agree
- F. No Basis to Judge

14. OPM Retirement Services personnel are knowledgeable.

- A. Strongly Disagree
- B. Disagree
- C. Neither Disagree/Agree
- D. Agree
- E. Strongly Agree
- F. No Basis to Judge

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

- A. Strongly Disagree
- B. Disagree
- C. Neither Disagree/Agree
- D. Agree
- E. Strongly Agree
- F. No Basis to Judge

**16. 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/Agree
- D. Agree
- E. Strongly Agree
- F. No Basis to Judge

**17. I am satisfied with the amount of time it took OPM Retirement Services personnel to respond to the correspondence I wrote on or after October 1, 2010.**

- A. Strongly Disagree
- B. Disagree
- C. Neither Disagree/Agree
- D. Agree
- E. Strongly Agree
- F. No Basis to Judge

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

- A. Strongly Disagree
- B. Disagree
- C. Neither Disagree/Agree
- D. Agree
- E. Strongly Agree
- F. No Basis to Judge

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

- A. Strongly Disagree
- B. Disagree
- C. Neither Disagree/Agree
- D. Agree
- E. Strongly Agree
- F. No Basis to Judge

**20. OPM Retirement Services personnel provides services when promised.**

- A. Strongly Disagree
- B. Disagree
- C. Neither Disagree/Agree
- D. Agree
- E. Strongly Agree
- F. No Basis to Judge

**21. 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/Agree
- D. Agree
- E. Strongly Agree
- F. No Basis to Judge



**22.** 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/Agree
- D. Agree
- E. Strongly Agree
- F. No Basis to Judge

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

- A. Strongly Disagree
- B. Disagree
- C. Neither Disagree/Agree
- D. Agree
- E. Strongly Agree
- F. No Basis to Judge

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

- A. Strongly Disagree
- B. Disagree
- C. Neither Disagree/Agree
- D. Agree
- E. Strongly Agree
- F. No Basis to Judge

**25.** Since October 1, 2010, 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 options
- H. Change in life insurance options
- I. Change in mailing address
- J. Direct deposit of annuity payment
- K. Adjust annuity after change in marital status
- L. I have not experienced a problem
- M. Other (specify):

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Please continue 

**26.** If you applied for survivor annuitant benefits on or after October 1, 2010, 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/Satisfied
- D. Satisfied
- E. Very Satisfied
- F. No Basis to Judge

**27.** Overall, how satisfied are you with the services you received from OPM Retirement Services since October 1, 2010?

- A. Very Dissatisfied
- B. Dissatisfied
- C. Neither Dissatisfied/Satisfied
- D. Satisfied
- E. Very Satisfied

*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, 2010)* 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, 2010, 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, 2010) should not answer these final questions.*

**28.** 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
- D. Not applicable; I did not need interim payments

**29.** 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

**30. 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. Dissatisfied
- C. Neither Dissatisfied/Satisfied
- D. Satisfied
- E. Very Satisfied

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

- A. Strongly Disagree
- B. Disagree
- C. Neither Disagree/Agree
- D. Agree
- E. Strongly Agree
- F. No Basis to Judge

**32. Were you offered retirement counseling?**

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

**33. Did you take retirement counseling?**

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

**34. 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/training
- H. Not sure

Please continue 

**35. 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

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

- A. Very Dissatisfied
- B. Dissatisfied
- C. Neither Dissatisfied/Satisfied
- D. Satisfied
- E. Very Satisfied
- F. No Basis to Judge

**37. 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. Dissatisfied
- C. Neither Dissatisfied/Satisfied
- D. Satisfied
- E. Very Satisfied
- F. No Basis to Judge

**38.** 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. Dissatisfied
- C. Neither Dissatisfied/Satisfied
- D. Satisfied
- E. Very Satisfied
- F. No Basis to Judge

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

- A. Estimate was close to OPM's
- B. Estimate was significantly different from OPM's
- C. Did not receive estimate from my agency
- D. Not sure

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

- A. Attended agency training
- B. Used agency provided resources
- C. Received individual counseling
- D. Used outside sources
- E. Did not plan for my retirement
- F. Not sure

Please continue 







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