

**CUSTOMER SATISFACTION SURVEY AND CONFERENCE  
EVALUATION CLEARANCE FORM**

**A. SUPPLEMENTAL SUPPORTING STATEMENT**


<b>A.1. Title:</b> <p align="center"><b>EBSA Participant Assistance Program Customer Survey</b></p>	
<b>A.2. Compliance with 5 CFR 1320.5:</b> Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	<b>A.3. Assurances of confidentiality:</b> No confidential data will be collected, however, the interviewer reads the following statement of assurance: <b>“I want to assure you that Gallup and EBSA will protect your confidentiality and privacy. Your voluntary cooperation is requested to make the results of this study complete and accurate. Gallup will not share your individual responses with EBSA and your data will only be used in aggregate with responses of others like you.”</b>
<b>A.4. Federal cost:</b> \$731,000 Based on the cost for research contractor, contract oversight and IT contractor for support	<b>A.5. Requested expiration date (Month/Year):</b> 03/2016
<b>A.6. Burden Hour estimates:</b> a. Number of Respondents: 11,000 a.% Received Electronically 0% b. Frequency: Once c. Average Response Time: 8 minutes d. Total Annual Burden Hours: 1,467 hours	<b>A7. Does the collection of information employ statistical methods?</b>  _____ Yes (Complete Section B and attach BLS review sheet).

**A.8. Abstract:**

This survey will collect customer satisfaction data for a sample of private citizens who call into the participant assistance program to ask about their private sector employer provided benefits such as pensions, retirement savings, and health benefits. Three types of callers will be queried: 1. Those who need benefit claim assistance 2. Those who have a valid benefit claim and 3. Those who have an invalid benefit claim.

**Changes:** This is a submission for a revision to the survey instrument to bring it in line with the approved burden hours. Due to changes in inquirers' experience, the original estimated per item response time and frequency is being exceeded. Therefore, this packet outlines a series of item cuts to bring the survey into compliance with the 8 min time burden per respondent. Below is a summary of the proposed changes to the attached survey:

- Deleted **Q6** and **Q6AA-Q6AC** Did you share any information from EBSA with anyone else? If so, with whom? – as trended analysis shows little variance over the past 5 years and data are not actionable (*Survey Attachment, pp. 18*)
- Deleted **Q7**- How did you first find out about EBSA - as trended analysis shows little variance over the past 5 years and data are not actionable. (*Survey Attachment, pp. 20*)
- Deleted **CE9B**-open ended question asking what EBSA could do differently to make them extremely satisfied as it is similar to item Q13 asking what specific benefit advisor could do differently. (*Survey Attachment, pp. 14*)
- Added split sample form programming note at QS-to allow for split sampling
- Split sampled **Q2** (among form 1 respondents) – as question is mostly analyzed at national level. (*Survey Attachment, pp. 17*)
- Split sampled **Q9** (among form 1 respondents) – as question is mostly analyzed at national level. (*Survey Attachment, pp. 23*)
- Split sampled **Q3A, Q3B** (among form 2 respondents) – as question is mostly analyzed at national level. (*Survey Attachment, pp. 18*)
- Added **CE8** - I am proud to have used EBSA's services and **CE10**- EBSA is the perfect federal agency for people with needs like mine- we will test that these two items work for EBSA, and once confirmed, we will drop 4 survey items (**CE4, CE6A, CE7A, and CE9A**) and move to Gallup's new customer engagement metric with database comparisons beginning in FY16 (**CE5, CE8 and CE10**) (*Survey Attachment, pp. 13*)

Program Official  MARK B. CONNOR	Date 3/30/2015	Departmental Clearance Officer	Date
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