

Pension Benefit Guaranty Corporation (PBGC) Retiree Satisfaction Questionnaire 2018

(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 Discovery Research Group 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 the following when the person named in INTRO1 comes to the phone):

INTRO2. Hello, my name is _____ from Discovery Research Group calling on behalf of the Pension Benefit Guaranty Corporation. We are conducting a survey as part of the American Customer Satisfaction Index 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. Your responses will remain anonymous and will only be reported in aggregate. You will never be identified by name unless you request that someone from PBGC contact you about your response. If at any time you do not feel comfortable answering a question, please say so. This interview is authorized by Office of Management and Budget Control No. 1090-0007 which expires on May 31, 2018. This interview will take approximately 10 minutes. Is this a good time?

- | | | |
|---|-----|---|
| 1 | Yes | (Continue to Q1) |
| 2 | No | "Can we schedule a time that is more convenient for you?" [Collect information and go END 1-TERMINATE] |

Screening Question (Do not read)

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

- | | | |
|----|-----------------|--|
| 1 | Yes | (Go to Q2) |
| 2 | No | (Go to END2 and TERMINATE) |
| 98 | Don't Know | (Don't read) (Go to END1 and TERMINATE) |
| 99 | Refusal/Hung up | (Go to END1 and 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—Concern Resolution Q8**)
 - 98 Don't Know (**Don't read**) (**SKIP TO NEXT SECTION—Concern Resolution Q8**)

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—Written Communication Q12**)
 - 98 Don't Know (**Don't read**) (**SKIP TO NEXT SECTION—Written Communication Q12**)

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)**
- Q16. Have you visited PBGC's website, PBGC.gov, in the last six months?
- 1 Yes **(SKIP TO Q18)**
 - 2 No **(Continue to Q17)**
 - 3 Don't Know (Don't read) **(Continue to Q17)**
- Q17. What could PBGC do to interest you in visiting the website? **(Do not read list.)**
- 1 Nothing; don't have Internet/don't like computers **(Skip to Q19)**
 - 2 Nothing; prefer to call **(Skip to Q19)**
 - 3 Nothing; have no need **(Skip to Q19)**
 - 4 Other: _____ **(Probe for specifics; ask Q18 if appropriate, depending on response)**
 - 5 Don't know **(Skip to Q19)**
- Q18. PBGC wants to better address your needs by improving the information on its website. What information can PBGC add to improve its website? **[Open End]**

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.”

- Q19. Receiving your benefits at a regular time each month
- Q20. How well the amount you received matched the amount PBGC said you would receive
- Q21. Correctness of any requested deductions
- Q22. Efficiency of the payment process

Benefit Application Process (Do not read)

- Q23. Did you apply to begin receiving PBGC benefits within the last 2-3 years?
- 1 Yes **(CONTINUE TO Q24)**
 - 2 No **(Skip to Q31)**
 - 98 Don't Know **(Don't read) (Skip to Q31)**

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.”

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- Q24. **(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)
- Q25. 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)
- Q26. Ease of understanding the explanation of benefit payment options available to you (e.g., 50% surviving spouse benefit)
- Q27. Ease of applying for benefits
- Q28. Efficiency of application handling
- Q29. 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)**
- Q30. 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...

- Q31. 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?
- Q32. 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?
- Q33. 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)

- Q34. Are you receiving your full benefit promised by your employer?
- 1 Yes **(SKIP to Q36)**
 - 2 No **(CONTINUE TO Q35)**
 - 98 Don't Know **(Don't read) (CONTINUE TO Q35)**
- Q35. 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)

Q36. In the last two months, have you formally contacted the Pension Benefit Guaranty Corporation to complain?

- 1 Yes
- 2 No **(SKIP TO Q39)**
- 98 Don't Know **(Don't read) (SKIP TO Q39)**

Q37. 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)**

Q38. 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)**

Q39. 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

Q40. 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

Q41. Would you like PBGC to contact you regarding your response?

- 1 Yes **[Go to Q41.1]**
- 2 No **[Go to End3]**

Q41.1 Please provide the following information, and a PBGC representative will contact you.

Q42. How do you want PBGC to contact you?

(Read only if respondent expresses concern about leaving contact information)

*Note 1: Pursuant to 29 U.S.C. § 1302(b)(4), PBGC is authorized to collect the following personally identifiable information: name, telephone, number, and email address. **PBGC is collecting this information for the sole purpose of contacting you to follow up on your responses to the survey questions, as you are requesting.** This information will be used by PBGC personnel. Furnishing this information is voluntary and will not impact other business you may have with PBGC. The data will be maintained on our secure server.*

Name:

Telephone:

Email:

Best time to reach you:

Q43. What type of assistance would you like from PBGC? **(Open End--limit to 100 characters)**

END1. Thank you for your time and have a nice day/evening! **(TERMINATE)**

END2. 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! **(TERMINATE)**

END3. 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! **(TERMINATE)**