

Cover redesigned
with current "OPM
Branding".

2016 Customer Satisfaction Survey





UNITED STATES OFFICE OF PERSONNEL MANAGEMENT
Washington, DC 20415

Retirement Services

A Message from the Associate Director of Retirement Services

Dear Friend:

The U.S. Office of Personnel Management serves nearly 2.6 million Federal annuitants and survivor annuitants. We work to provide our customers with high quality retirement benefit services. These benefits were earned through service to our country and we must provide services that match the commitment 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. Annuitants selected for this survey who registered their email address with us will receive the survey via email link. If you would like annual mailers, IRS 1099R's and electronic messages delivered securely to your email address, please visit www.ServicesOnline.OPM.gov to learn how to register.

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: Recruiting, Retaining, and Honoring a World-Class Workforce to Serve the American People. One way we do this is by maintaining a world-class benefits program. Your participation in this survey will help us build the workforce. This means you continue to serve your country, and for that, we thank you.

Sincerely,

A handwritten signature in black ink that reads "Kenneth Zawodny Jr." with a stylized flourish at the end.

Kenneth Zawodny
Associate Director
Retirement Services

Recruit, Retain and Honor a World-Class Workforce to Serve the American People

U.S. Office of Personnel Management Retirement Services FY 2016 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, 2015*). This includes **Long-Time Retirees** (*retired before October 1, 2015*) who contacted us for service regarding their retirement accounts, and **New Retirees** (*retired on or after October 1, 2015*) 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 42, page 9. If you would like to be interviewed by OPM Retirement Services to provide additional feedback about your response to this survey, please provide contact information on page 9.

Please return the completed questionnaire in the postage-paid envelope within 14 days to:

CUSTOMER SATISFACTION SURVEY
U.S. OFFICE OF PERSONNEL MANAGEMENT
RS/RM/BS, TRB ROOM 3316-U
1900 E STREET, NW
WASHINGTON, DC 20415

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.

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/retirement-services.

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.

Will the survey ever be available on-line?

The 2016 survey will be available on-line to some of our customers. Annuitants chosen for this survey by our random selection process and having a registered email address with OPM will receive an email link to the survey. Annuitants chosen but not having a registered email address will receive the survey via postal mail. To assure that only annuitants in the random selection process take the survey, we have not placed the survey on the OPM website. We may do so in the future.

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 20415-0001. 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, 2015.

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, 2015, please answer the following questions regarding how well OPM Retirement Services served you.

Contacting Retirement Services

1. How long have you been a customer of OPM Retirement Services (number of years)?

- A. Less than 5 years
- B. 5 to 10 years
- C. Over 10 years

2. Since October 1, 2015, 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

3. It is easy to do business with OPM Retirement Services.

- A. Strongly Agree
- B. Agree
- C. Neither Agree/Disagree
- D. Disagree
- E. Strongly Disagree

Please tell us why you disagree or agree:

4. Assistance from OPM Retirement Services is provided at a time that is convenient to me (Monday - Friday, 7:40 a.m. to 5:00 p.m. Eastern Standard Time).

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

Please tell us why you disagree or agree, and state the hours you would find convenient:

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 not answered
- H. Letters not answered in a timely manner
- I. Letters not answered
- J. I have not tried to find someone
- K. Other (specify):

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

9. Do you use the Internet?

- A. Yes
- B. No

10. To learn about retirement related services, have you accessed OPM's Web site www.opm.gov/retirement-services since October 1, 2015?

- A. Yes
- B. No

Question #11 is new and 2 questions were deleted.

11. Have you accessed OPM's web site www.servicsonline.opm.gov to make an on-line customer service transaction since October 1, 2015?

- A. Yes
- B. No

12. I would like to see the following features added to Retirement Services Online (www.servicessonline.opm.gov): (Mark ALL that apply)
- A. Make an insurance change outside of Open Season based on a Qualifying Life Event
 - B. Marital status change
 - C. Life Insurance Family Option C cancellation
 - D. Not sure/not interested
 - E. Other (specify):

13. If you read the OPM Retirement Services Twitter account at <http://twitter.com/fedretireinfo> since October 1, 2015, was the information useful?
- A. Yes
 - B. Not sure
 - C. No
 - D. Did not read

14. If you read the OPM Retirement Services blog (Retirement Info Center) at www.opm.gov/Blogs/Retire/index.aspx since October 1, 2015, was the information useful?
- A. Yes
 - B. Not sure
 - C. No
 - D. Did not read

15. If you viewed OPM Retirement Services Informational videos at www.opm.gov/retirement-services since October 1, 2015, was the information useful?
- A. Yes
 - B. Not sure
 - C. No
 - D. Did not view

16. The communications materials I received from OPM Retirement Services were clear and understandable (e.g., letters, written information).
- A. Strongly Agree
 - B. Agree
 - C. Neither Agree/Disagree
 - D. Disagree
 - E. Strongly Disagree
 - F. No Basis to Judge

17. I am satisfied with the appearance of manuals, brochures, reports, and other communications materials (e.g., OPM Retirement Services Website, account statements) prepared by OPM Retirement Services.
- A. Strongly Agree
 - B. Agree
 - C. Neither Agree/Disagree
 - D. Disagree
 - E. Strongly Disagree
 - F. No Basis to Judge

Overall Satisfaction

18. **OPM Retirement Services personnel are courteous.**

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

19. **OPM Retirement Services personnel are knowledgeable.**

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

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

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

21. **OPM Retirement Services provided timely responses to the inquiries I sent on or after October 1, 2015.**

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

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

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

23. **After you retired, OPM Retirement Services personnel kept accurate records of your retirement account.**

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

24. **OPM Retirement Services personnel provide services when promised.**

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

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

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

26. **Since October 1, 2015, 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*):

27. If you applied for survivor annuitant benefits on or after October 1, 2015, 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 Satisfied
- B. Satisfied
- C. Neither Dissatisfied/Satisfied
- D. Dissatisfied
- E. Very Dissatisfied
- F. No Basis to Judge

Please tell us why you were satisfied or dissatisfied:

28. Overall, how satisfied are you with the services you received from OPM Retirement Services since October 1, 2015?

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

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, 2015) 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, 2015, 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, 2015) should not answer these final questions.

Satisfaction with Retirement Services

29. 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. Yes
- B. Not Sure
- C. No

30. After your Interim Payments ended, was your first regular retirement check computed correctly?

- A. Yes, it was correct
- B. Not sure
- C. No, it was not correct

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

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

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

Satisfaction with Your Agency Actions

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

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

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

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

35. **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

36. **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

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

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

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

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

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

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

41. 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

This is the new
branded cover.



U.S. Office of Personnel Management

Retirement Services

1900 E Street, NW, Washington, DC 20415

MIB_SURVEY@OPM.GOV

Form Approved
OMB Number: 3206-0236

RI 10-72
Revised August 2016
Previous editions are not usable

RS-02579-08/2016