

**Request for Approval under the "Generic Clearance for Improving
Customer Experience: OMB Circular A-11, Section 280
Implementation"
(OMB Control Number: 3245-0404)**

TITLE OF INFORMATION COLLECTION: Surety Bond Guarantee Program
Customer Experience Survey

PURPOSE OF COLLECTION:

The SBG Survey will support the President's Management Agenda goal of Delivering Excellent, Equitable, and Secure Federal Services and Customer Experience. The survey has the following objectives:

- Analyze the overall underwriting experience of a Surety/Agent.
- Identify opportunities to recapture inactive Agents and Sureties.
- Identify underwriting and claims staff knowledge gaps.
- Identify underwriting and claims process improvement opportunities.
- Collected data will be summarized in an internal performance dashboard for trend identification.
- Utilize summary feedback to formulate policy- and procedure-based program enhancements.

TYPE OF ACTIVITY: (Check one)

- Customer Research (Interview, Focus Groups)
- Customer Feedback Survey
- User Testing

ACTIVITY DETAILS

1. How will you collect the information? (Check all that apply)

- Web-based or other forms of Social Media
- Telephone
- In-person
- Mail
- Other, Explain

2. Who will you collect the information from?

The SBA will survey surety bond agents and sureties that work with, or who have in the past worked with, the SBA to provide surety bonds to small businesses.

The SBA will use a combination of bulk distribution (through existing distribution lists) and post-transactional distribution

(following specific interactions with the SBA) to reach both active and inactive SBG program participants.

- Bulk distribution: Quarterly for the first year, Semiannual thereafter over a 2-year period.
 - Distributed by:
 - OSG email distribution list
 - Active program user
 - National Association of Surety Bond Producers
 - Surety and Fidelity Association of America
- Transactional distribution: Per interaction and transaction with SBA.
 - Distributed by inclusion in program activity emails and SBA staff signatures.

3. How will you ask a respondent to provide this information?

The survey will be hosted on a web platform (e.g., SurveyMonkey). An invitation to complete the survey will be sent to the relevant distribution lists at an established cadence, as described above. Additionally, an invitation to complete the survey will be included in program activity emails and SBA staff signatures.

4. What will the activity look like?

The web-based survey consists of seven questions and follows the format provided in A-11, Part 6, Section 280. The questions are presented over the course of four screens, to allow for branching logic. The survey interface is responsive and is compatible with mobile devices.

5. Please provide your question list.

- I am
 - Active SBA agent
 - Active customer service representative with an SBA-authority agency
 - Active Preferred Surety Partner underwriter
 - Active Prior Approval Surety Partner underwriter
 - Active Preferred Surety Partner claims professional
 - Active Prior Approval Surety Partner claims professional
 - Former SBA Agent
 - Former Preferred Surety Partner underwriter
 - Former Prior Approval Surety Partner underwriter
 - None of the above or not sure.
- Location selection (state/territory)
- Please indicate the last time you worked with SBA's Surety Bond Guarantee program. (Select one)
 - Today.

- o Within the last 30 days.
- o Within the last 3 months.
- o Within the last 6 months.
- o Within the last 12 months.
- o Within the last 3 years.
- o Over 3 years.
- This interaction, or experience, with the SBA's Office of Surety Guarantees increased my trust in the SBA.
 - o Thumbs up
 - o Thumbs down
- [For thumbs up only] What about your experience made the difference? (Select all that apply)
 - o My needs were met.
 - o It was easy to complete what I needed to do.
 - o It took a reasonable amount of time to do what I needed to do.
 - o I understand what was being asked of me throughout the submission process.
 - o I was treated fairly.
 - o Employees I interacted with were helpful.
 - o None of the above.
- [For thumbs down only] What could have been better? (Select all that apply)
 - o My need was not addressed.
 - o It was difficult to complete what I needed to do.
 - o It took too long to do what I needed to do.
 - o I did not understand what was being asked of me throughout the process.
 - o I was not treated fairly.
 - o Employees I interacted with were not helpful.
 - o Something else (please specify).
- If your response is to a specific SBG, please enter that SBG number below.
- Is there anything else you want us to know about your selection(s) or your experience?

Please make sure that all instruments, instructions, and scripts are submitted with the request.

See attached instrument.

6. When will the activity happen?

Describe the time frame or number of events that will occur (e.g., We will conduct focus groups on May 13,14,15, We plan to conduct customer intercept interviews over the course of the Summer at the field offices identified in response to #2 based on scheduling logistics concluding by Sept. 10th, or "This survey will remain on our website in alignment with the timing of the overall clearance.")

This survey will remain available in alignment with the timing of the overall clearance. The SBA will send email invitations to complete the survey to targeted distribution lists on a quarterly basis for the first year, then semi-annually thereafter. Additionally, a link to the survey will be included in program activity emails and SBA staff signatures for the duration of the overall clearance.

7. Is an incentive (e.g., money or reimbursement of expenses, token of appreciation) provided to participants?

Yes No

If Yes, describe:

Not applicable.

BURDEN HOURS

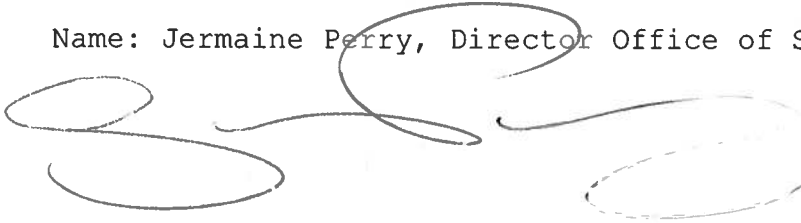
Surety Partners - Agents and Surety Employees	No. of Respondents	Participation Time	Burden Hours
Private Sector	4,819	5 minutes	402
Totals	4,819	5 minutes	402

CERTIFICATION:

I certify the following to be true:

1. The collections are voluntary;
2. The collections are low-burden for respondents (based on considerations of total burden hours or burden-hours per respondent) and are low-cost for both the respondents and the Federal Government;
3. The collections are non-controversial and do not raise issues of concern to other Federal agencies;
4. Any collection is targeted to the solicitation of opinions from respondents who have experience with the program or may have experience with the program in the near future;
5. Personally identifiable information (PII) is collected only to the extent necessary and is not retained;
6. Information gathered is intended to be used for general service improvement and program management purposes
7. Upon agreement between OMB and the agency aggregated data may be released as part of A-11, Section 280 requirements only on performance.gov. Summaries of customer research and user testing activities may be included in public-facing customer journey maps.
8. Additional release of data will be coordinated with OMB.

Name: Jermaine Perry, Director Office of Surety Guarantees



All instruments used to collect information must include:
OMB Control No. 3245-0404
Expiration Date: 02/28/2025