



CUSTOMER SERVICE SURVEY RESULTS - PERSI pleased, but will continue improvement efforts -

In January 2007, PERSI staff began giving customer service surveys to members who came into a PERSI office for assistance. If you're wondering why the survey results are being shared with employers, it's to assure you that when your employees visit PERSI, they will be treated professionally and given all the assistance they need by friendly, knowledgeable people.

Members with and without appointments were provided with a survey. Although members were asked to complete the survey before leaving the office, if that wasn't possible, they were provided with a postage-paid return envelope so the survey could be mailed back to PERSI. Nearly half the surveys were given out by the staff in the PERSI Answer Center (PAC), which was not surprising since PAC is the first point of contact for members visiting a PERSI office. The 2007 results are outlined below:

(1) The majority of members (73%) visited a PERSI office regarding a retirement issue. The next most frequent reason for visiting PERSI was to ask general questions. This was followed closely by the need for assistance with the Choice Plan 401(k).

(2) All members (100%) said PERSI staff met or exceeded expectations in terms of being courteous and helpful. This exceeded the 90% benchmark set by PERSI in its strategic plan.

(3) Members with appointments rarely had to wait once they arrived for their scheduled appointment with PERSI. Those without an appointment (walk-ins) waited, on average, fewer than 5 minutes before being assisted.

(4) Approximately two-thirds of the members who responded to the survey said they had previously contacted PERSI about the same problem or issue. PERSI is reviewing the data further to determine if the staff needs to clarify its responses to members, if the members had new questions about a previous issue, or if the questions should have been directed elsewhere initially because they were outside PERSI's area of responsibility (e.g., insurance).

(5) Most members (87%) responded it was very easy to make an appointment with PERSI.

(6) Of the members who responded, 99% said the knowledge of the PERSI Staff met or exceeded expectations.

(7) When rating their overall experience during the office visit, 99% of members who responded said PERSI met or exceeded expectations.

(8) Of members who expressed dissatisfaction with PERSI, the reasons varied. PERSI will review the comments and determine what action can be taken or what improvements can be made.

In the coming weeks, the survey's narrative responses will be reviewed to ensure PERSI understands what members want and/or expect in the future. This information will also help PERSI advance its Customer Service initiative during the coming year. PERSI's goal is to increase the number of surveys distributed in 2008 and reinforce the culture of service excellence within the organization.

POTENTIAL PERSI-RELATED LEGISLATION

Each year, PERSI does its best to keep employers updated on new legislation that could impact members. So far this legislative session, nothing has been published; however, there have been discussions regarding legislation in the following areas:

- **Volunteer Firefighter Longevity Award**

This plan would provide a benefit to volunteer firefighters at the time of termination. Some western states already have this type of plan in place, but they are not administered by a pension system. PERSI does not support placing this type of plan within Idaho's pension system.

- **Volunteer Firefighter Death Benefit**

This plan would provide a \$100,000 death benefit to volunteer firefighters killed in the line of duty. The proposed funding would remove part of the fire insurance premium tax from the Firefighters' Retirement Fund (FRF) funding formula. There is a federal program that already provides a \$300,000 death benefit for public safety officers, including volunteer firefighters, killed in the line of duty. PERSI does not support placing such a plan within Idaho's pension system, and opposes removal of funding from the FRF.

- **Lower Retirement In-Place Minimum Age**

This plan would lower the age for teachers to

"retire in place" from age 62 to age 59½. During last year's legislative session, a bill was passed to allow teachers to receive an "In-Service Distribution" (collect PERSI benefits but continue working, i.e., "retire in place") under certain circumstances. PERSI is neutral on this plan.

- **Medical Insurance for Police Officers Disabled in the Line of Duty.**

This plan would provide funding and a group insurance policy for police officers disabled in the line of duty and their families. PERSI does not support placing this plan within Idaho's pension system because it only involves a small number of members.

- **Remove Cap From State Retiree Medical (Sick Leave) Plan**

This plan would lift the cap on the amount of unused sick leave state employees can use to pay health care premiums at retirement. With a proposal to have retirees pay a larger portion of their health care costs, interest surrounding this issue has increased. Such a plan would make the state plan comparable to the current school district plan. PERSI is neutral on this plan.

PERSI will keep employers informed on any changes to potential legislation. Details are also available on the PERSI Web site at www.persi.idaho.gov.

Notes

PERSI Sr. Financial Specialist Debbie Buck graduated from the Certified Public Manager (CPM) program in December. At the ceremony, Governor Butch Otter addressed the 49 graduates and guests saying he appreciated the commitment the graduates had demonstrated towards leadership in Idaho government. Executive Director Alan Winkle and Deputy Director Don Drum attended the ceremony. The CPM program is a nationally accredited management development program for public sector managers. The program requires 300 hours of instruction and assignments over a three-year period. Debbie has previously earned the designation of Certified Government Financial Manager through the Association of Government Accounting and a degree in Management and Leadership from George Fox University.



Governor Otter (l) presents graduation certificate to Debbie Buck (r).