

## Public Agenda Item #19

### Presentation and Discussion of Agency Performance Measures

February 23, 2016

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# Data Dashboard

*Focus on performance and service*



- **Provide strategic decision support**

- Centralize key program statistics to help identify program priorities and resource needs
  - **Right data** – vetted, accurate, consistent
  - **Right time** –dedicated team and technological supports; scheduled reporting
  - **Right format** – pre-designed, easily adaptable handouts and dashboards

- **Triage and tracking of data requests**

- Active management of agency response to ad hoc data requests from external stakeholders

- **Reporting of key performance data**

- What gets measured, gets managed
- Engage board of trustees in discussing program trends as they evolve
- Identify simple metrics with a clear purpose
- Tie measures back to the strategic plan
- Show the impact of changes in policy or other interventions
- Establish standards and benchmark against peers

# Data Dashboard

*Shared responsibility for shared goals*



## Cross-divisional Roadmap Project

- **Content Management Team**

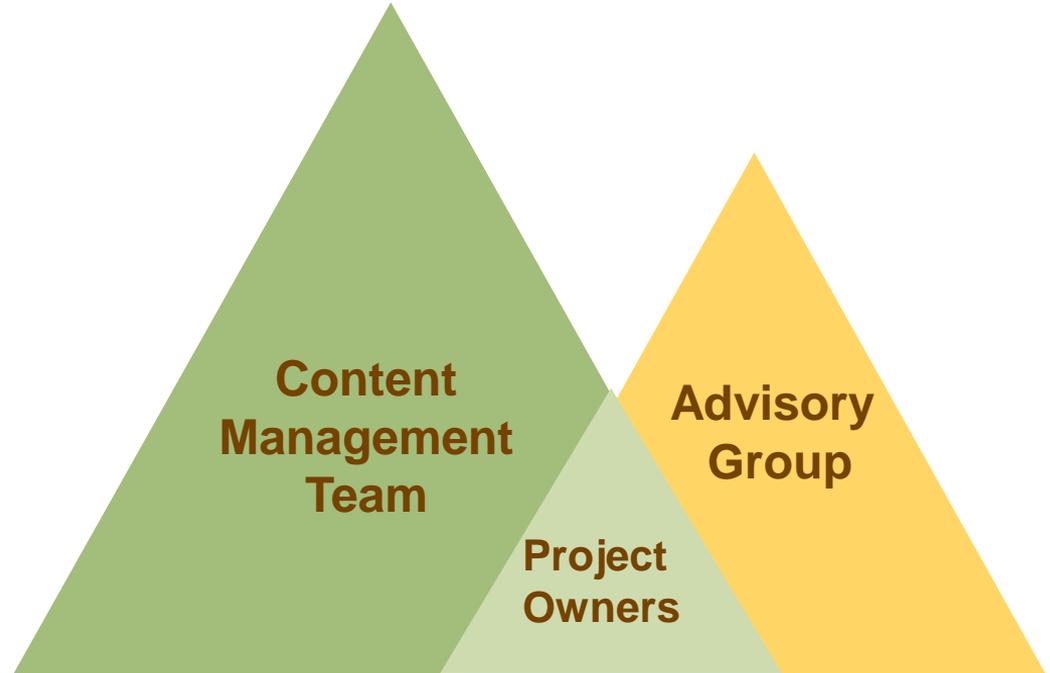
- Data, technology and subject matter experts from Benefit Contracts, Finance, Investments, Customer Benefits, and Information Systems

- **Project Owners**

- Governmental Affairs

- **Advisory Group**

- Directors / executive ambassadors
- Policy and governance



# Data Dashboard Phase II – FY16



- **Integrate with other strategic priorities**

- Coordinate with other data-intensive team projects to build an overall data management vision for the agency

- **Content management system**

- Manage appropriate content with the right tools – is SharePoint the right tool?

- **Automated workflows**

- Upgrade the manual tracking system for ad hoc data requests from external stakeholders.
- Automate scheduled reports updates

- **Build true “dashboards”**

- Integrate data discovery tools to make technical information interesting and accessible for non-technical users

# Benefits Communications

## *Member and Employer Engagement*



- Member communications
  - [www.ers.state.tx.us](http://www.ers.state.tx.us)
  - *News About Your Benefits* monthly e-newsletter
  - Printed and online publications
  - Presentations and events
  - Facebook and YouTube



# Benefits Communications

## Member and Employer Engagement



- Employer communications
  - Benefits Coordinator Community Group (BCCG)
  - *Update-express* biweekly e-newsletter

Monday, February 1, 2016

### ERS Coordinator's Update-express

News and tips for benefits coordinators and HR professionals  
Due to enhanced security features, you must sign in to the BC Community Group before you can see processing information given in some of the articles below. [Sign in now.](#)

#### New health insurance option coming September 1, 2016

Introducing the consumer-directed health plan  
The 84th Texas Legislature tasked ERS with providing an alternative health insurance option to HealthSelect(SM) of Texas (HealthSelect) and the regional HMOs. Specifically, they directed ERS to create a consumer-directed health plan (CDHP) that includes a high-deductible health plan coupled with a health savings account. [More>>](#)

#### Report your agency or institution's CSA participation to ERS

As we informed you in an earlier article, the new monthly Commuter Spending Account Agency file layout provides you with information you need to report your agency's or institution's CSA contributions to ERS. Please forward this message to your agency or institution's Information Technology support team. [More>>](#)

The Employees Retirement System of Texas (ERS) sends the **Coordinator's UPDATE-express** each Monday. **UPDATE-express** is a publication for state agency and higher education benefits coordinators that provides the latest information from ERS regarding benefits, policy and procedures.

Contact Information  
Employees Retirement System of Texas,  
200 East 18th Street  
Austin, Texas 78701  
(877) 275-4377 toll-free

#### DISCOUNT Purchase Program

administered by BENPLACE

Your Discount Purchase Program website has exclusive discounts and limited-time offers – everything you need to ring in the New Year! Your resolution to get in shape will be a breeze with great savings on gym memberships, diet programs and exercise apparel. Save with Corporate Fitness Discounts, Jenny Craig, Body & Brain Yoga and many more. Start planning your next vacation – book one of the select vacation brands with Cruise & Vacation Perks and double your standard 4% vacation reward to 8%! [Click here](#) for these deals.

APR 15

### IT'S TAX TIME!

Save on tax preparation services and maximize your refund.

JACKSON HEWITT | TurboTax | H&R BLOCK

<http://www.benplace.com/discountramspx>

# Member Website

*Growth in use – and efficiency*



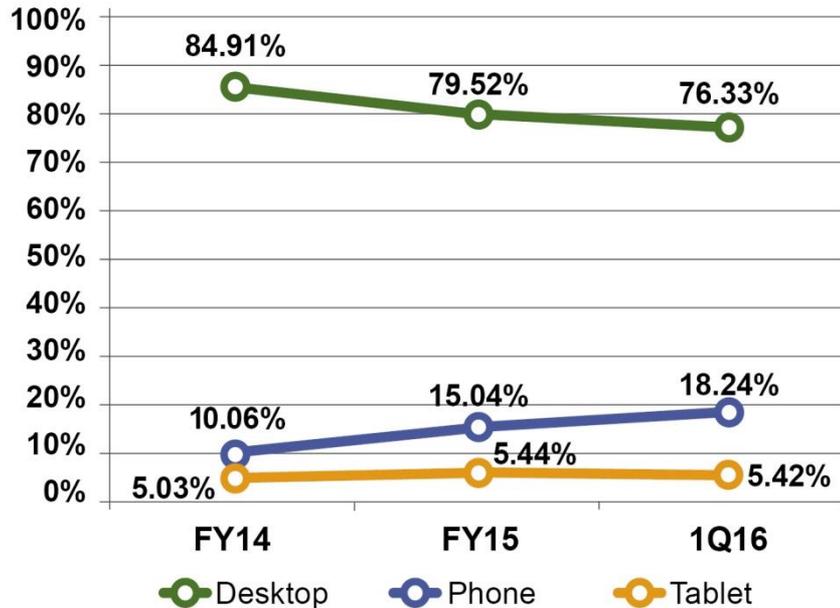
	FY14	FY15
 <b>Unique visitors</b>	<b>961,598</b> (80,133 per month)	<b>988,915</b> (82,410 per month)
 <b>Page views</b>	<b>9,211,506</b> (767,626 per month)	<b>7,857,798</b> (654,817 per month)
 <b>Average time on site</b>	<b>4:19 minutes</b>	<b>3:47 minutes</b>
 <b>Most-searched terms</b>	<ul style="list-style-type: none"><li>• TexFlex: 2,488</li><li>• Vision: 1,529</li><li>• 401(k): 1,244</li></ul>	<ul style="list-style-type: none"><li>• TexFlex / Payflex: 3,380</li><li>• 401(k): 1,196</li><li>• Rates: 1,191</li></ul>

# Member Website

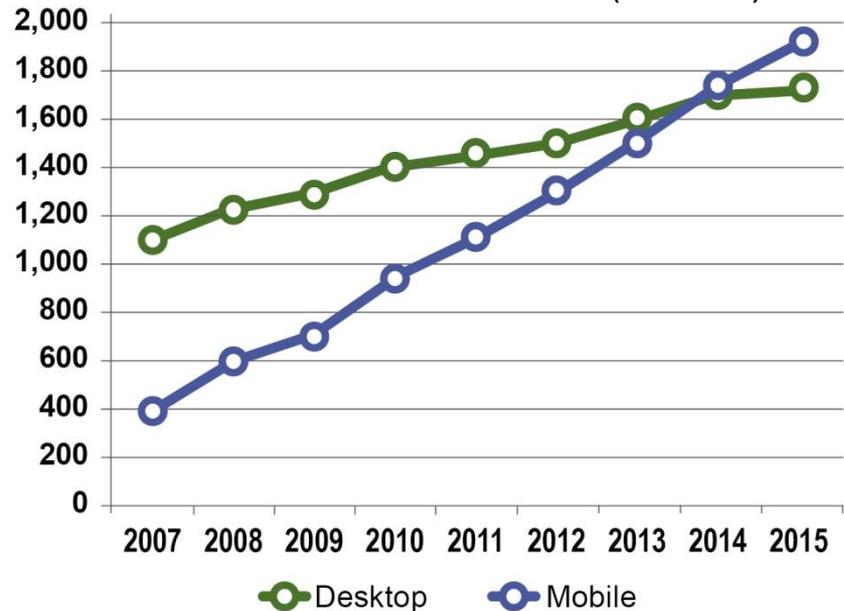
*Increased access via mobile devices*



## ERS Website Access



## Worldwide Internet Access Number of Global Users (Millions)



# Member Publications

*Broad reach*



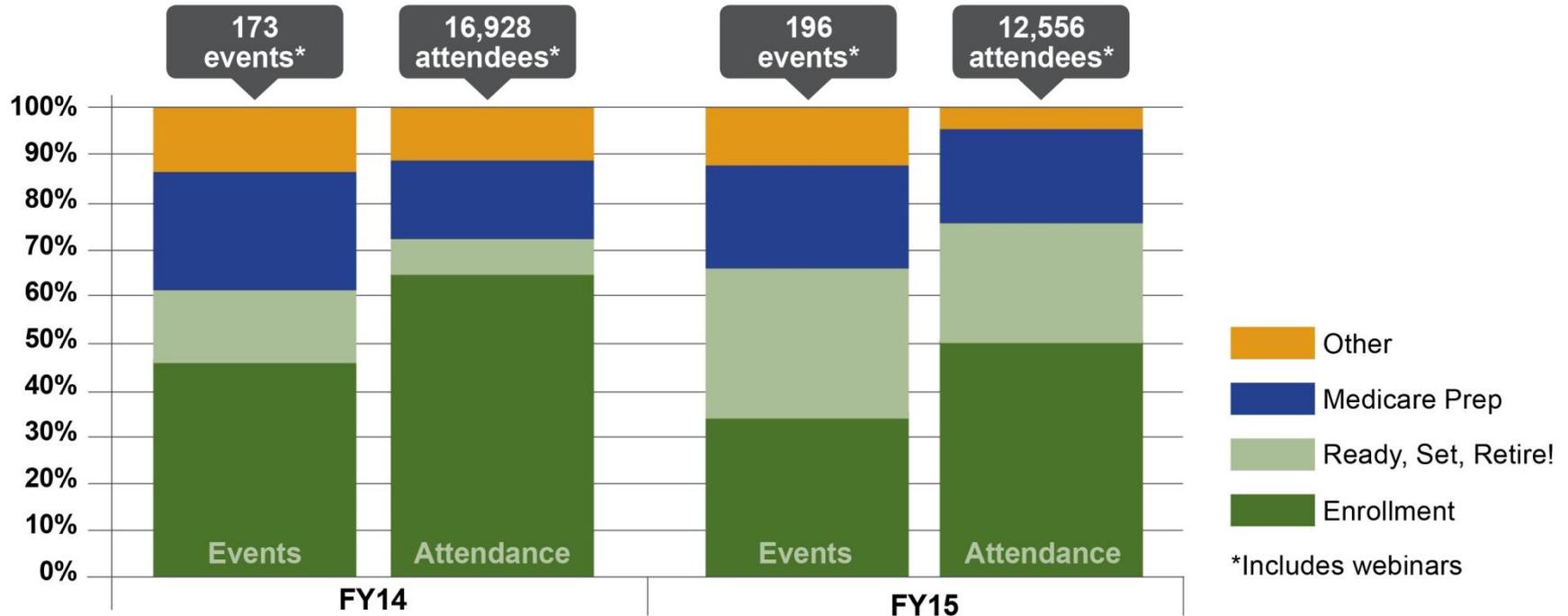
Publication	Frequency	Distribution (*average per issue)	Cost Per Recipient† (*average per issue)
<b>News About Your Benefits</b> active employee newsletter	Monthly	284,010 email subscribers* (includes some former employees)	2¢*
		27% open rate*	-
<b>Your ERS Connection</b> retiree newsletter	Quarterly	121,659 mail recipients*	39¢*
		89,277 email subscribers*	2¢*
		43% open rate*	-
<b>New Employee Benefits Guide</b>	Annual	50,000 to agencies/institutions	71¢
<b>Annual Enrollment Packets</b>	Annual	343,395 mail recipients	94¢

†Costs for electronic newsletters include email delivery service. Costs for print publications include external printing and postage/delivery.

*Agenda item 19, Meeting book dated February 23, 2016*

# Presentations and Events

*Appreciation for personal interaction*



# Social Media

*Another option for information and interaction*



<b>facebook</b>	<b>FY14</b>	<b>FY15</b>
 <b>Likes</b>	3,443	6,466
<b>You Tube</b>	<b>FY14</b>	<b>FY15</b>
 <b>Views</b>	36,527	41,268
 <b>Average time watching</b>	3:14 minutes	2:49 minutes
 <b>Most popular</b>	<ul style="list-style-type: none"><li>• Benefits Tutorial</li><li>• Retirement Estimate Tutorial</li><li>• Medicare Prep</li></ul>	<ul style="list-style-type: none"><li>• ERS Retirement Fund</li><li>• Top Retirement Questions</li><li>• ERS and TRS Funds</li></ul>

# Employer Engagement

*BCCG and Update-express*



## FY15 Benefits Coordinator Community Group and Biweekly Newsletter



**Registrants /  
subscribers**

**1,838**



**Page views**

**7,857,798  
(654,817 / month)**



**Most-searched  
terms**

**TexFlex/Payflex: 3,380  
401(k): 1,196  
Rates: 1,191**



**Average  
time on site**

**3:47 minutes**



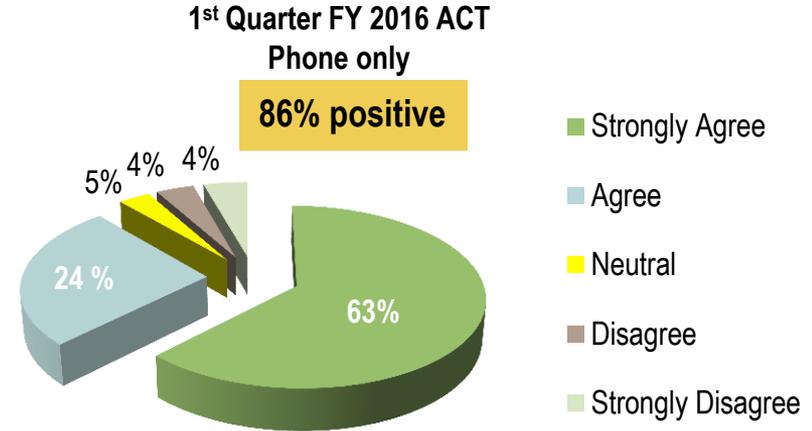
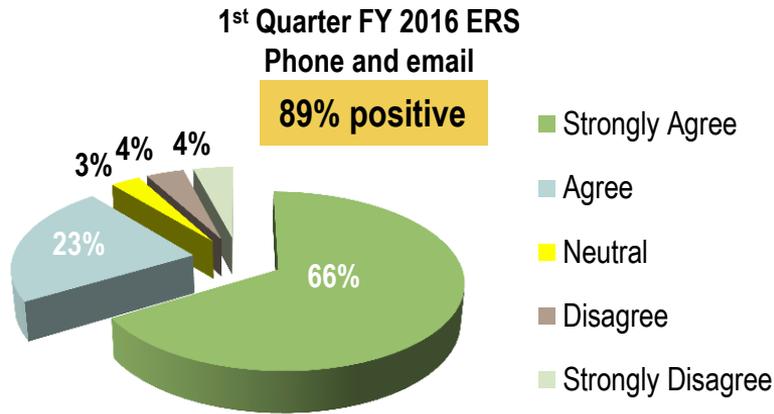
**Average  
newsletter  
open rate**

**30.5%**

# Customer Service Surveys



*Member satisfaction with contact center service is high*



**100% of customers expressed strong satisfaction with on-site visits**

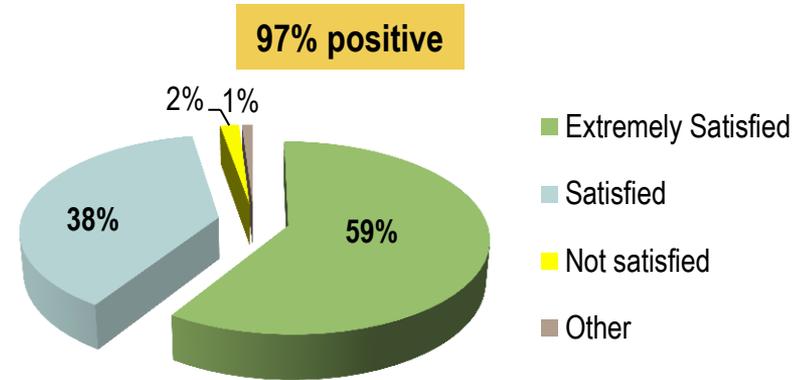
# ERS processes nearly 6,000 retirements a year

*97% of retiring state employees are happy with their retirement experience*



Retirees by class	FY14	FY15
Regular state employees	4,817	4,744
Commissioned peace officers or custodial officers	1,078	932
Elected state officials	8	27
Judicial plan 1	0	1
Judicial plan 2	15	45
<b>Total</b>	<b>5,918</b>	<b>5,749</b>

**FY15 and FY16, 1<sup>st</sup> Quarter Annuity Survey**



ERS administers a monthly survey to new retirees to ask about their retirement and payment process. Survey results were identical in FY15 and FY16.

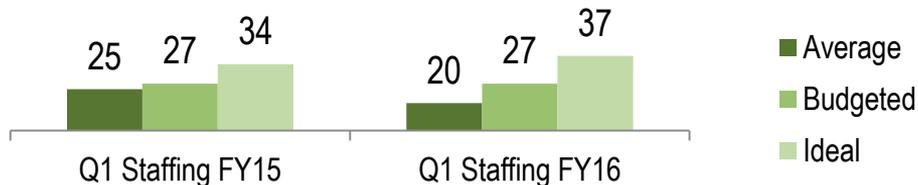
# Customer Service Performance

Goal is to answer 70% of calls in 60 seconds



	Customer Service / ACT		ERS totals		ERS + ACT totals	
	FY15	FY16	FY15	FY16	FY15	FY16
1 <sup>st</sup> quarter comparison						
Call volume	61,257	43,511	37,654	41,497	98,911	85,008
Service level	65%	70%	76%	27%	69%	49%
Avg. speed of answer	01:14	01:00	00:51	05:34	04:38	05:34
Avg. handle time	05:51	06:01	09:28	09:20	08:17	07:55
Cost per interaction	\$3.20	\$3.29	\$4.53	\$4.61	\$3.59	\$3.80

**Customer Service is at 67% of ideal staffing levels**



## Challenges

### 1. Staffing

- Attracting/retaining quality staff
- Low-pay positions with high burnout
- Lengthy learning curve = lower productivity
- Employees frequently promoted into other jobs outside of the contact center

### 2. Demanding workload

- Multi-skilled employees and environment
- Retirement & Insurance volume and complexity have increased
- Daily work is not deferrable

# Customer Service Performance



*Email and onsite visitors are serviced by multi-skilled contact center staff.*

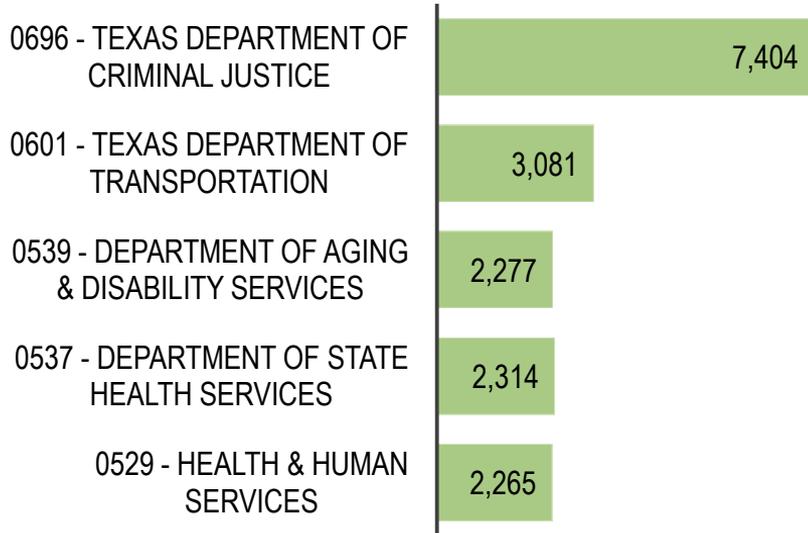
1 <sup>st</sup> quarter comparison	Emails: answer 70% of emails within 24 business hours		Onsite visits: meet with 90% of customers within 10 minutes	
	FY15 total	FY16 total	FY15	FY16
<b>Volume</b>	2,440	2,460	1,041	1,023
<b>Service level</b>	<b>65%</b>	<b>13%</b>	<b>88%</b>	<b>89%</b>
<b>Avg speed of answer (hrs:mins:secs)</b>	<b>19:17:07</b>	<b>51:23:03</b>	<b>00:04:53</b>	<b>00:05:49</b>
<b>Avg handle time (mins:secs)</b>	08:29	08:45	36:58	34:58
<b>Cost per interaction</b>	\$4.06	\$4.32	\$17.70	\$17.27

# First Retirement Eligibility

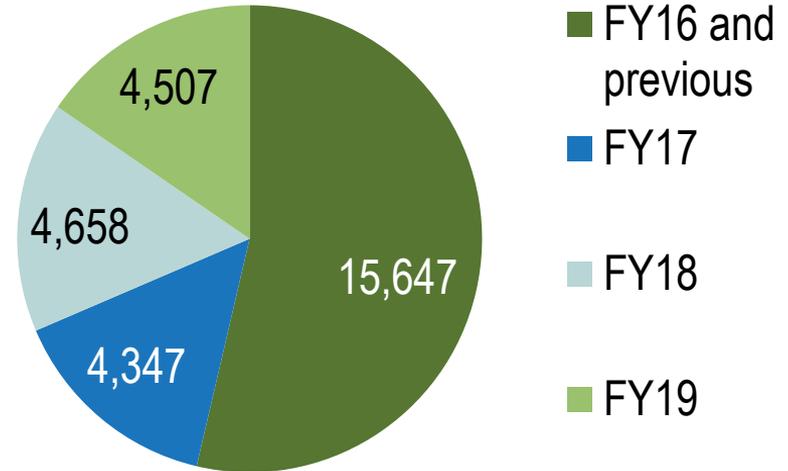
More than 15,000 active employees (11% of the workforce) are eligible to retire this year



### Current Retirement Eligibility by Highest Volume Agencies



### 20% of the active state workforce is eligible to retire by FY19



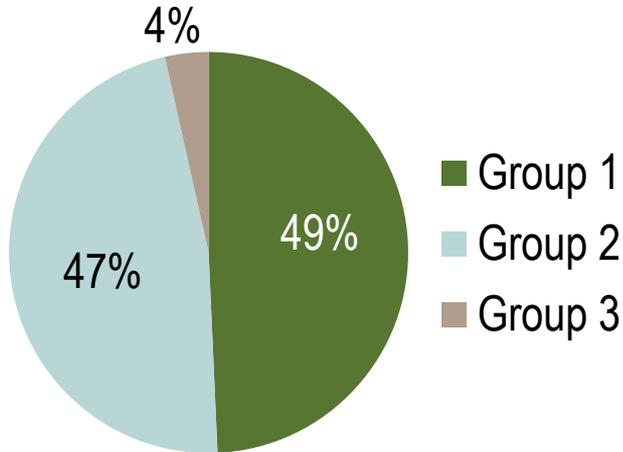
# Retirement Account Withdrawals

*Increased in FY14 due to a legislative change*



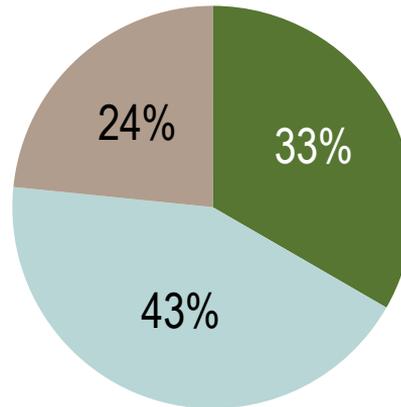
## FY14

14,139 withdrawals  
Average \$7,320  
2.9 service years



## FY15

9,484 withdrawals  
Average \$8,679  
3.4 service years



### 83<sup>rd</sup> Legislative Session change

On January 1, 2014 interest accrued on account balances decreased from 5% to 2% , leading to a spike in withdrawals in FY14.

# Retirement payout options

Retirees can choose to take a partial cash option, and survivor options

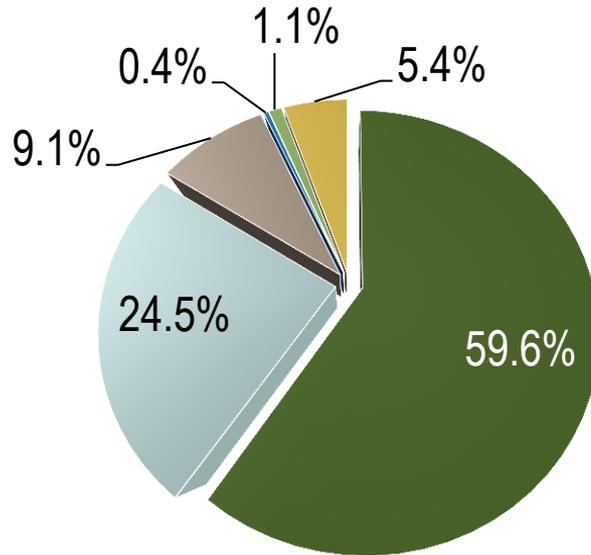


## Partial Lump Sum Option (PLSO)

1,555 retirees (27%) took a partial lump sum payment in FY15

(total of 5,749 retirees in FY15)

40% chose a survivor option



- Standard: No survivor benefits
- Option 1: 100% of monthly payment for life
- Option 2: 50% of monthly payment for life
- Option 3: Maximum of 60 monthly payments
- Option 4: Maximum of 120 monthly payments
- Option 5: 75% of monthly payment for life

Questions?