



TRS Ombuds Annual Report 2025



**Enabling the Flow
of Communication**

Independent Insight into
Member Experience, Service Trends
and Accountability

Jan. 1–Dec. 31, 2025



TABLE OF CONTENTS

Ombuds Message	1
Key Objectives	2
About the Ombuds	3
Mission and Vision	4
Guiding Principles and Standards of Practice	5
Communications Touchpoints	6
Multi-Year Communications Trends	7
Demographics of Visitors Served	8
Social Media Comments (“Hot Topics”)	9
Ombuds Collaboration with Business Units	10
Point-in-Time (PIT) Complaints Overview (2024-25)	11
PIT Complaints Received	11
PIT Complaint Category Comparison	12
PIT Complaint Category Analysis	13
Member Outreach and Engagement	14
Member Experience Survey Results	15
Professional Development: An Opportunity to Connect and Engage	16
Observations for 2025 and Key Findings	17
Ombuds Strategic Goals for 2026	19
How to Contact the TRS Ombuds	20

TRS Ombuds Message



Lori LeBrea
TRS Ombuds

The TRS Ombuds Office is pleased to present its 2025 Annual Report, offering an independent, data-driven perspective on member concerns and service trends. This report underscores the office's commitment to the International Ombuds Association (IOA) Standards of Practice and Code of Ethics, as well as TRS' core values.

Throughout 2025, the Ombuds Office continued to serve as an independent and impartial resource for TRS members and retirees seeking assistance beyond traditional service channels.

In 2025, the overall level of member communication remained consistent, totaling **636** interactions. Similar to 2024, the majority of submissions — **537** in total — were made via email, which remained the preferred method for members engaging with the office.

Aligned with TRS' values, the Ombuds Office collaborates with various business units to ensure member concerns are addressed. When necessary, the office acts as an intermediary, providing status updates where possible, answering general questions and ensuring that member concerns are promptly presented to the appropriate business unit for review and follow-up.

For the first time since the office's inception in 2021, we have completed our initial year of Ombuds Experience survey results. Thirteen individuals reported overall satisfaction with the services provided, while six respondents indicated that their needs were not met. Feedback shows that member satisfaction is highest when the Ombuds role is clearly understood and when communication is timely. These findings are informing improvements in follow-up, clarity, and cross-department coordination. The office commits to the following mitigation strategies: (1) clearly communicate the ombuds role, its scope and limitations; (2) enhance follow-up communication; (3) use dissatisfaction feedback as an early warning signal; and (4) continue collaborating with the business units.



Key Objectives



Provide an annual report to the TRS Board of Trustees, executive team and members to meet TRS and IOA's reporting standards.



Offer insights into ongoing member interactions with the Ombuds Office, detailing how members have benefited from the office's assistance and the nature of their concerns.



Demonstrate, with supporting data, how the Ombuds Office serves its members through counseling, administrative support and outreach.

About The Ombuds

Establishment and Purpose

The Ombuds Office was created in 2021, in response to HB 1585, to promote transparent, fair and clear communication between TRS and its members.

Independent Support Resource

The ombuds acts as an independent, impartial and informal resource for both active and retired TRS members.

Collaboration and Advocacy

The office collaborates with business units to improve member experience, perform outreach to members and assist and advocate for their needs.

Mission & Vision

Mission

The Ombuds Office focuses on earning members' trust by gaining their confidence, focusing on accountability and delivering excellence daily.

Vision

The Ombuds Office aspires to be a trusted, independent resource that advances fairness, transparency and accountability for all members. We are committed to integrity, objectivity and reliability in serving active members and retirees. Through clear communication and equitable resolution of concerns, we promote confidence in the retirement system and strengthen trust among members, leadership and stakeholders.



Guiding Principles



Independence
The ombuds is independent and reports directly to the trustees.



Impartiality
The ombuds is a neutral resource that avoids conflicts of interest and does not advocate for any party.



Informality
The ombuds is an unbiased and informal resource that does not participate in legal proceedings.



Confidentiality
All communication is confidential as allowed by law. Information may be disclosed if permission is granted.

Figure 2. IOA Code of Ethics and Standards of Practice

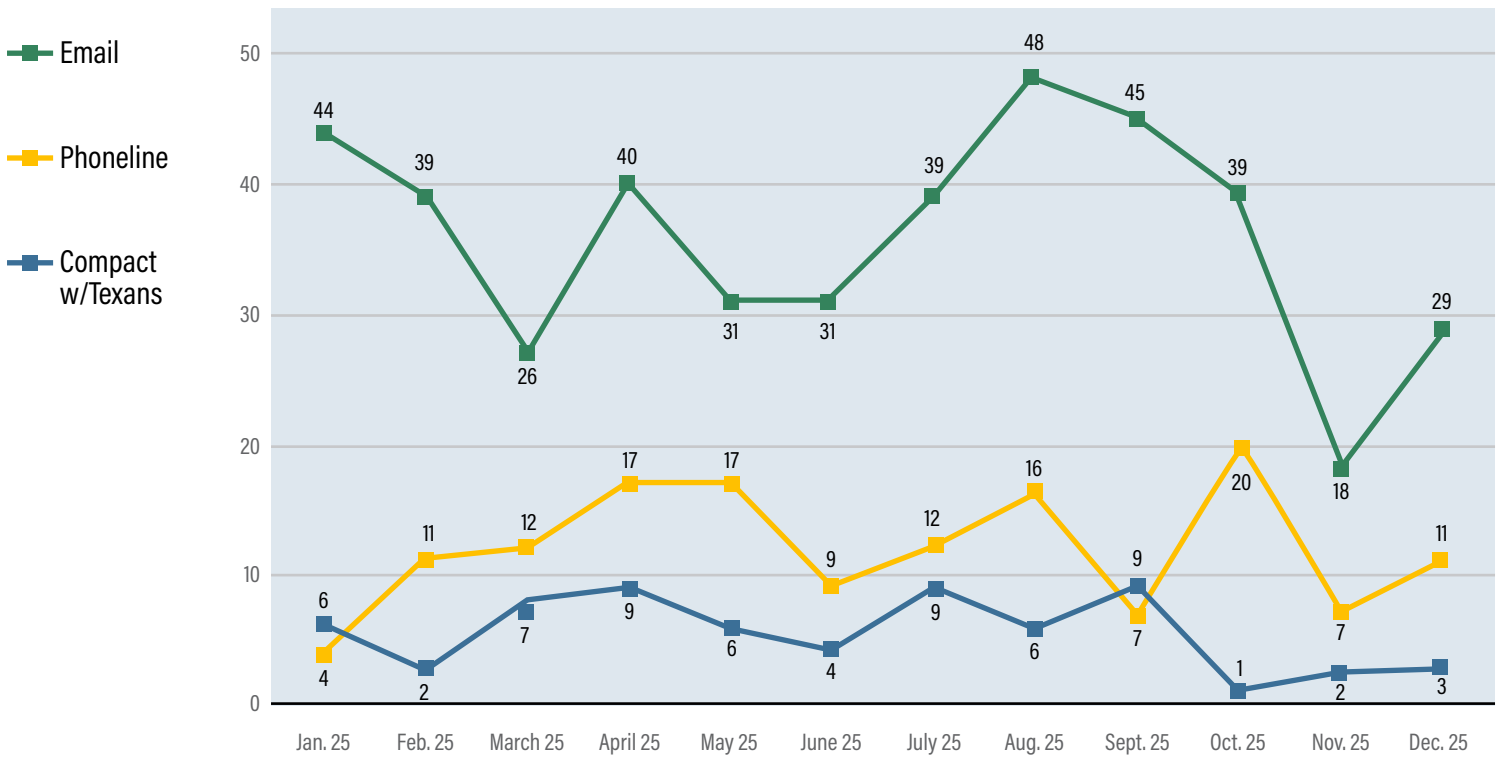
Communication Touchpoints

Volume of Visitor-Initiated Communications: A Year in Review

The value of the TRS Ombuds Office lies in its ability to turn member and retiree concerns into meaningful opportunities for improvement – grounded in the belief that we advance as an organization when issues are raised openly and resolved collaboratively in constructive dialogue.

Figure 3 shows that members contacted the office a total of **636** times throughout the year. Member outreach has remained consistent with previous years, with some increases attributed to typical seasonal trends, such as retirement processing, death claims, and health plan enrollment or changes. The communication channels remain unchanged, with email remaining the primary method used by members. The office recorded the highest number of communications in August (peak retirement time from May–August) with **70** contacts, and its lowest in November (moderately busy season October–November) with only **27**.

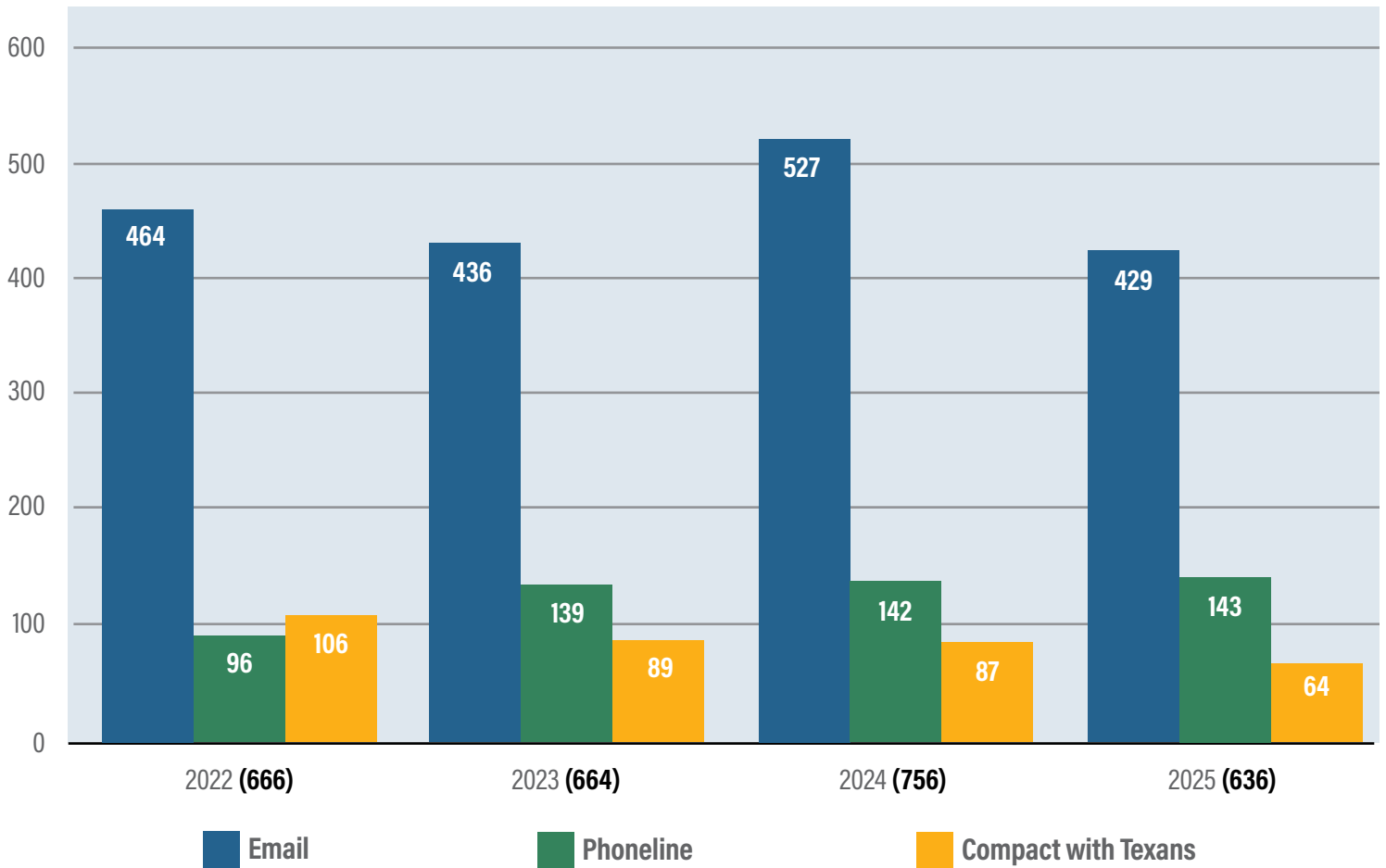
The total number of communications broken down by quarter is: Q1 **151**, Q2 **164**, Q3 **191**, and Q4 **130**. These data points serve to provide insight into member interactions and, in some cases, correlate with member experience concerns contained in the point-in-time complaints.



Total Ombuds Communications Received: **636**

Figure 3

Communication Touchpoints *continued*



Annual Total Communications Received: 2022- (666); 2023- (664); 2024- (756); 2025- (636)

Figure 4. Multi-year Ombuds Communication Trends (2022-25)

Multi-Year Communication Trends (2021-25)

Figure 4 illustrates communication trends over the past four years. In 2022, we recorded a total of **464** communications, followed by a decrease to **436** in 2023. The following year, 2024, marked a modest increase, with communication peaking at **527**, after which there was a slight decline to **429** in 2025.

A notable change has occurred in communication methods, as evidenced by a moderate rise in phone call activity. In contrast, the reduction in “Compact with Texans” emails may suggest changing preferences among members regarding their communication channels. The office will continue to monitor these trends to determine whether they reflect a temporary fluctuation or a more lasting change in member behavior. Emerging patterns will be documented, and any noteworthy developments will be reported accordingly.

Communication Touchpoints *continued*

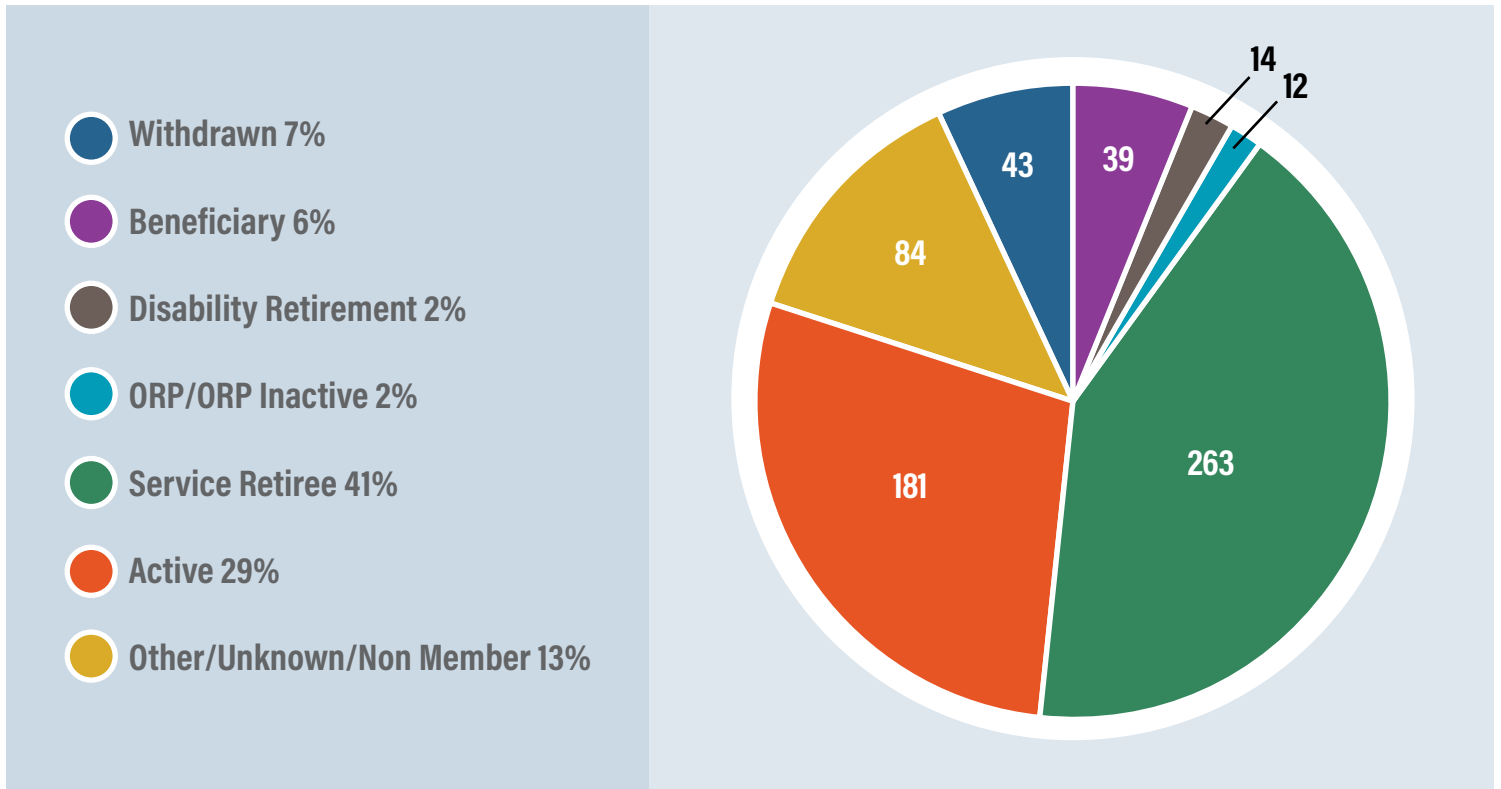


Figure 5. Demographics of Visitors Served

Demographics of Visitors Served

In 2025, the majority of visitors served by the ombuds were Service Retirees, totaling **263**, followed by Active Members with **181**. The “Other/Unknown/Non-member” group includes employers, third-party vendors, and family or friends of members, totaling **84** visitors. The “Withdrawn” members category includes **43** individuals, while the “Beneficiaries” category comprised **39** individuals. Additionally, there were **14** “Disability Retirees” and **12** individuals in the ORP/ORP Inactive category.

The office’s primary focus was on providing support by answering questions, status updates, offering counseling, and helping them navigate the agency’s resources. While most inquiries from all groups were general in nature, the data highlights the necessity of ensuring the office maintains a comprehensive understanding of all processes within the business units and remains updated on any changes through training, professional development, and continued participation in the business units’ outreach efforts. The office is committed to this effort and has continued to include it in its annual goals since its establishment in 2021.

Communication Touchpoints *continued*

Social Media Comments on Large-Scale Agency Issues (“Hot Topics”)

Jan.-25	Feb.-25	Mar.-25	Apr.-25	May-25	Jun.-25	Jul.-25	Aug.-25	Sept.-25	Oct.-25	Nov.-25	Dec.-25
Social Security (80)	Health Care (29)	Social Security (164)	Social Security (43)	Health Care (8)	Health Care (10)	Health Care (32)	Health Care (32)	Health Care (19)	Health Care (29)	Health Care (9)	Health Care (10)
Misc. (39)	Beneficiary (22)	Health Care (22)	Cost-of-Living Adjustment (COLA) (14)	Beneficiary (7)	Investments (10)	Employment After Retirement (EAR) (4)	Retirement (7)	Beneficiary (27)	MyTRS (11)	Retirement (7)	COLA (7)
Health Care (30)	Political (11)	Political (19)	Health Care (13)	COLA (5)	Social Security (3)	Careers (10)	Investments (22)	Investments (14)	COLA (15)	Annuity Payment (5)	Annual Statements (5)

Figure 6. Social Media Comments (“Hot Topics”)

The agency, through its Communications Department, maintains a presence on various social media platforms, including X, Facebook, LinkedIn, and Instagram. This presence serves as an additional way to connect with members and the community, share important information, correct misinformation, answer common questions, and direct members to the appropriate resources for assistance when needed.

The communication team compiles comments from TRS’s Facebook page (**see Figure 6**), organizes them by topic and number of comments, and shares the information with the office to be included in the ombuds quarterly and annual reports. In the report, these insights are categorized under “Social Media Comments on Large-Scale Agency Issues” or “Hot Topics.” While comments from Facebook are included in the quarterly and annual reports, their totals are not part of the office’s official communication statistics. Instead, these comments are reviewed to gauge member sentiment, which can help inform future communication strategies.

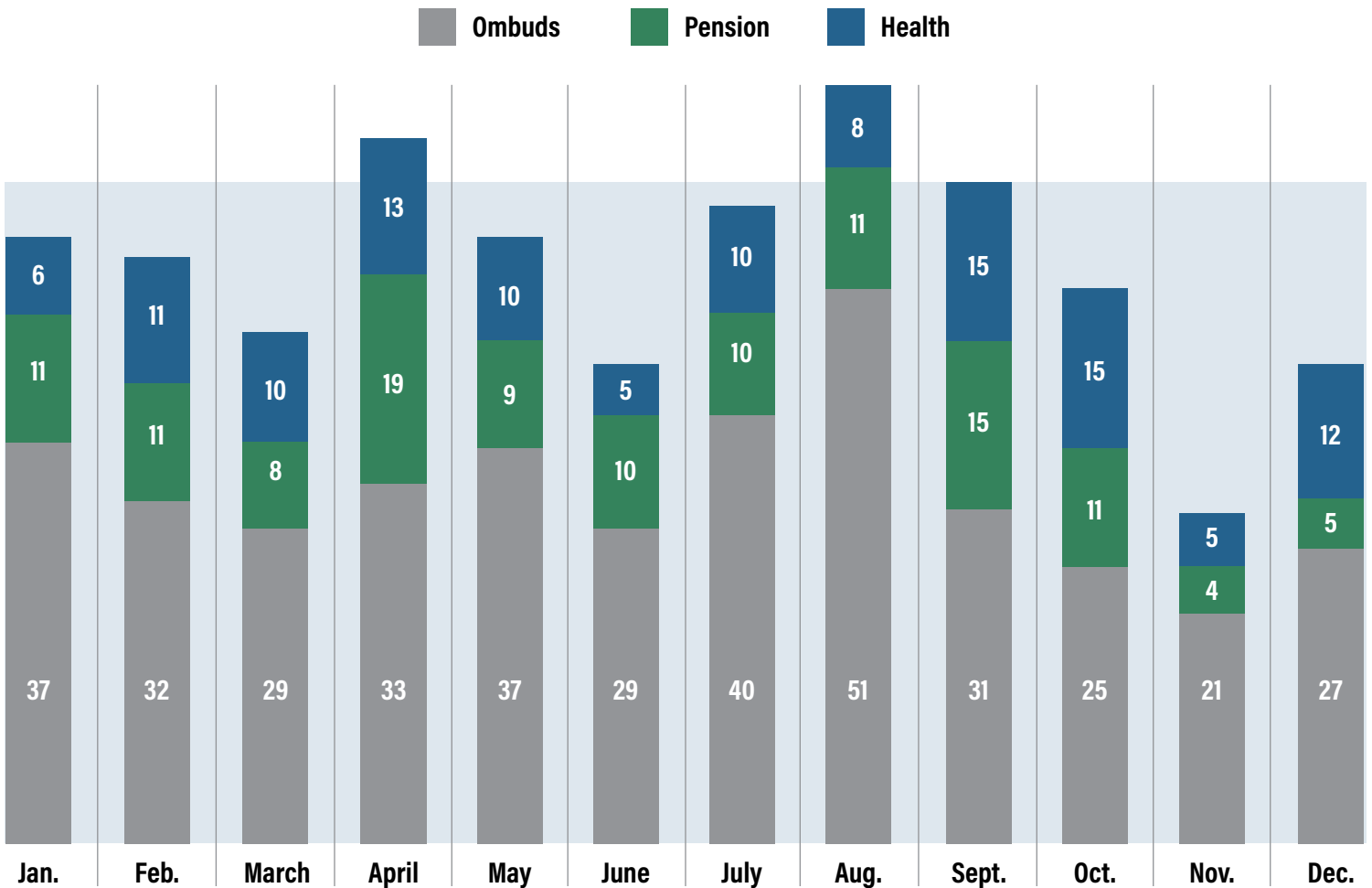
Communication Touchpoints *continued*

Ombuds Collaboration with Business Units

Collaboration: Service Delivery & Operational Excellence Focus

The Ombuds Office, in partnership with the Pension Services and Health business units, adds value by turning everyday challenges into insights that enhance service delivery. When members and retirees express their concerns to the Ombuds Office, it creates an opportunity to refine processes, improve communication channels, and achieve better outcomes through collaborative, solution-oriented discussions.

The chart in **Figure 7** illustrates the **636** member communications submitted to the Ombuds Office, with a focus on those referred to Pension Services and Health for further review. In 2025, of the **244** communications referred to the business units, only **20 (8.2%)** were determined as valid complaints, while **91.8%** did not meet the criteria for a valid complaint.



Point-in-Time (PIT) Complaints Overview (2024-25)

PIT Complaints are written concerns from members or retirees about TRS actions, staff or contractors that require action and meet TRS’ benchmarks for a valid complaint.

During the 2025 reporting period, the office noted a slight increase in the total number of PIT complaints, which rose to **116** from **111** in 2024 (see **Figure 8**). While this shows an upward trend compared to the previous year, it’s important to highlight that these numbers still account for less than **1%** of the overall volume of member submissions across all three service divisions — Pension Services, Health and Ombuds.

Figure 8 also captures the fluctuations in complaints on a quarterly basis and outlines the total number of complaints each month from Jan. 1–Dec. 31, 2025, compared to the same timeframe in 2024. Remarkably, all **116** complaints received in 2025 were resolved by the end of each quarterly reporting period, showcasing the strong follow-up efforts by the business units.

The primary concerns raised by members centered on delays in receiving retirement packets and appointment start times within the Pension Services and Benefit Counseling departments. For Health, many questions revolved around coverage details, prescription processing, and health plan reimbursements for transportation.

All concerns were appropriately reviewed, documented and, whenever needed, additional training was provided.

PIT Complaints Received:

Jan.–Dec. 2024 — **111** Jan.–Dec. 2025 — **116** Outstanding — **0**

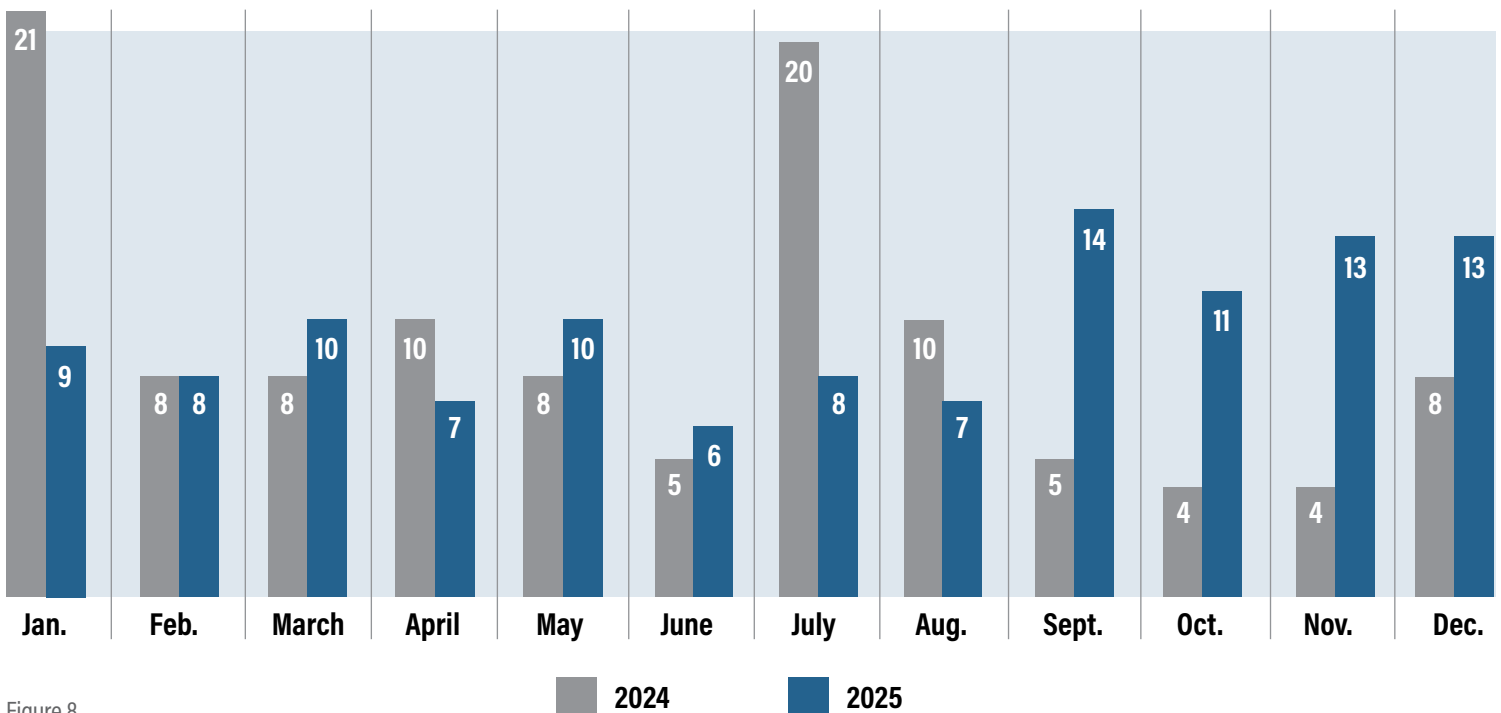


Figure 8

Point-in-Time (PIT) Complaints Overview

(2024-25) *continued*

PIT Complaint Category Comparison

Figure 9 summarizes the categories of complaints represented in the **116** PIT complaints identified by the business units. Although the figure highlights a subset of reporting categories, the agency maintains a comprehensive classification framework to capture the full range of member concerns, including issues related to vendors, misinformation and technology. The Ombuds Office conducts an annual review of the PIT categories to ensure they align with IOA and TRS requirements and reporting standards. This proactive approach includes collaboration with business units to verify that the categories accurately reflect current complaint trends, fostering an effective and responsive complaint management process.

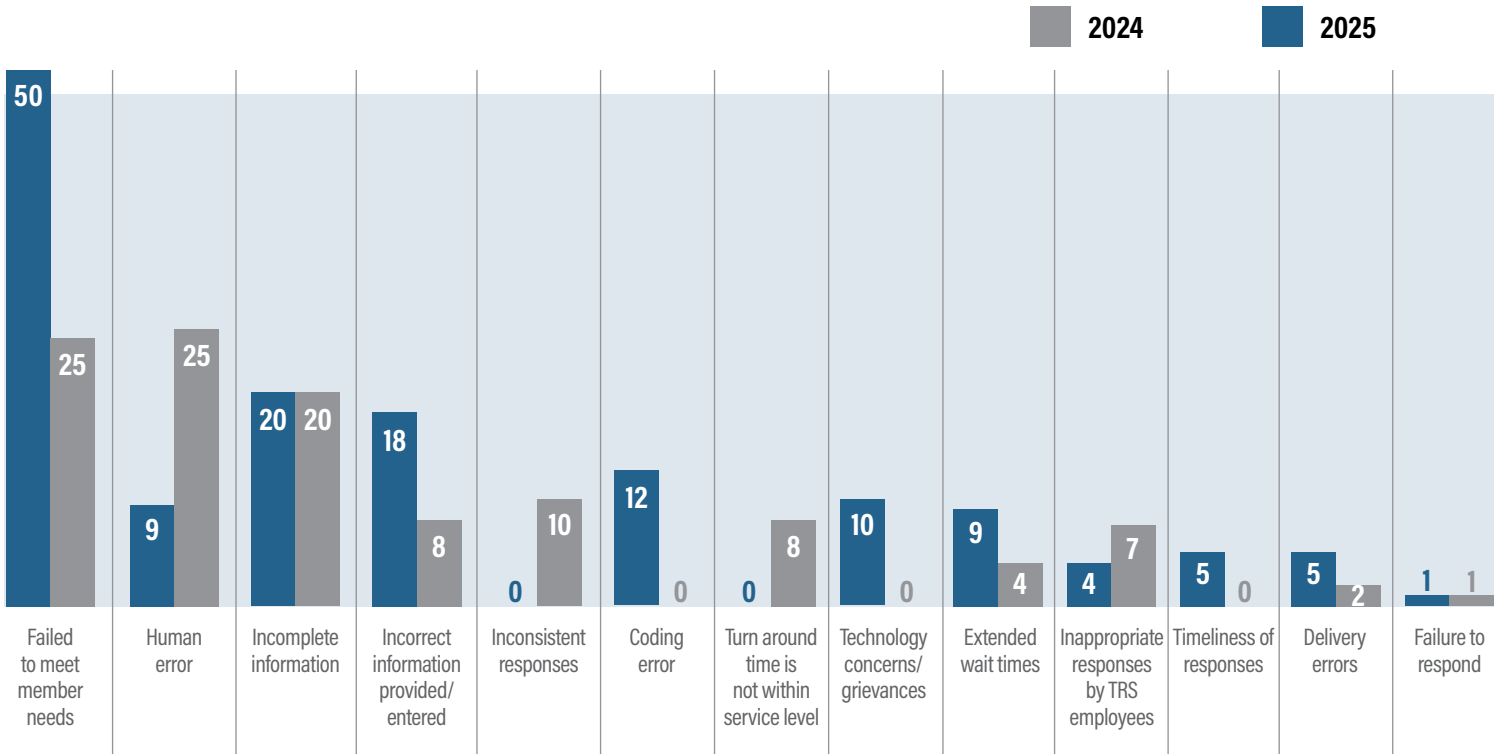


Figure 9. PIT Complaint Category Comparison (2024 vs. 2025)

Zero indicates no complaints recorded for that category for that year.

Point-in-Time (PIT) Complaints Overview

(2024-25) *continued*

PIT Complaint Category Analysis

If changes are requested, the ombuds shares the information with the legal and compliance teams, who then update the agency’s inventory and amend any necessary documents. If no changes are identified, the inventory remains unchanged, and this cycle restarts the following year.

For calendar year 2025, **Figure 9** shows that the agency received the most complaints in the following areas: Failed to meet member needs (**50 complaints**), Incomplete information (**20 complaints**), and Incorrect information provided/entered (**18 complaints**). This data is similar to last year’s top trending complaints, which included **25** instances of Failed to meet member needs, **25** Human error complaints, and **20** Incomplete information complaints. A further review of the numbers and categories highlights opportunities to improve communication accuracy, reduce errors, and enhance the overall member experience. While the number of member complaints increased in 2025, the agency has observed a downward trend overall for the past three years.

	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Failed to meet member needs	1	5	3	3	5	3	4		5	4	9	9	51
Incorrect information provided/entered	5	1	3			1		1	2	1	2	3	19
Incomplete information			4	1	1		2	4	2	2		1	17
Human error	5				3					1	1	1	11
Extended wait time	1		1	1					5	1			9
Technology concerns/grievances				1				2	4	1	1		9
Inappropriate responses/behaviours by TRS employees						1	1				3	3	8
Coding error				1	1		2			2		2	8
Timeliness of response		2		2		1							5
Delivery error			2						1	2			5
Inconsistent responses											1		1

Figure 10. PIT Complaint Category Analysis (2025)

One complaint may contain multiple complaint categories

Member Outreach & Engagement

Member outreach is crucial for establishing a positive rapport with our members and fostering mutual respect. With the constant support of the business units, the ombuds office can extend its reach beyond the agency’s walls, adding a personal touch that shows members we genuinely care.



Figure 11. Member Outreach & Engagement (2021-25)

Member Experience Survey Results

For the first time, the Ombuds Office completed a full year of member experience survey results. All-in-all, there were 13 member experience survey responses, reflecting a mix of positive, neutral, and dissatisfied perspectives. Approximately half of respondents reported positive experiences, citing the Ombud’s Office’s responsiveness, professionalism, and ability to help members feel heard during complex or stressful situations. This feedback affirms the value of the ombuds role when communication is clear and timely.

Neutral and dissatisfied responses indicate areas for improvement, especially regarding process delays, managing expectations, and follow-up communication. Often, dissatisfaction appears driven not by the ombuds interaction itself, but rather from the broader complexities members face across divisions or extended review timeframes.

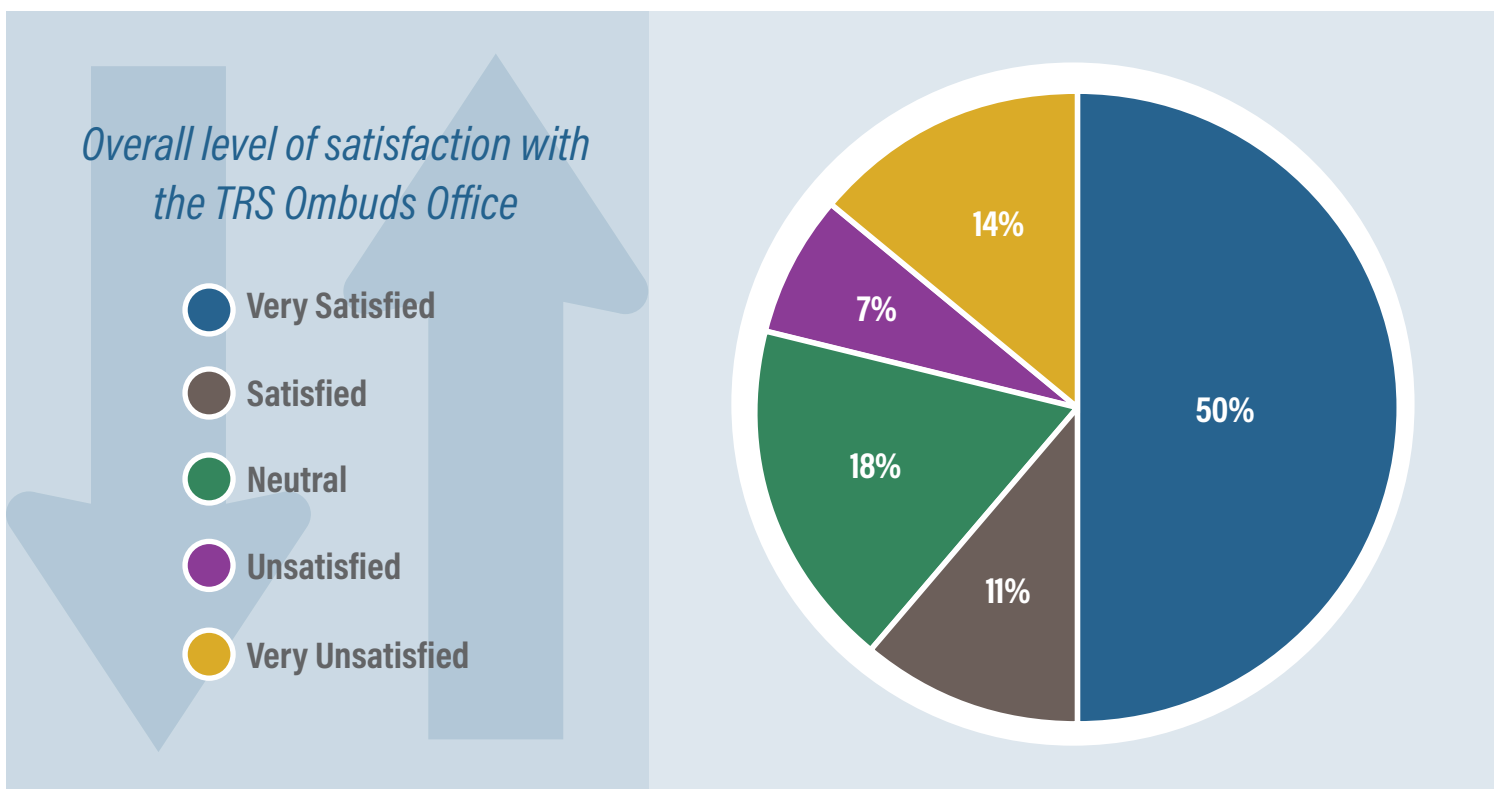


Figure 11. Member experience survey results

The feedback identified opportunities to improve follow-up, clarity around multi-step processes, and expectation-setting. In response, the office has committed to: (1) clearly articulate the ombuds role, its scope, and limitations; (2) stronger follow-through; (3) use dissatisfaction feedback as an early-warning signal; and (4) continued partnership with the business units to enhance the overall member experience.

Professional Development: An Opportunity to Connect and Engage

20th Annual International Ombuds Association Conference 2025



Figure 13. IOA Conference April 2025

The office participated in the International Ombuds Association's (IOA) 2025 Annual Conference, which serves as an important platform for ombuds who are representing various sectors to connect, exchange insights, engage in spirited discussions, and enhance their professional knowledge. The conference boasts a range of inspiring plenary speakers, interactive workshops, informative presentations, and dynamic panel discussions focused on global themes, thus providing a truly valuable experience for all participants.

Observations for 2025

Key Findings from Member Feedback

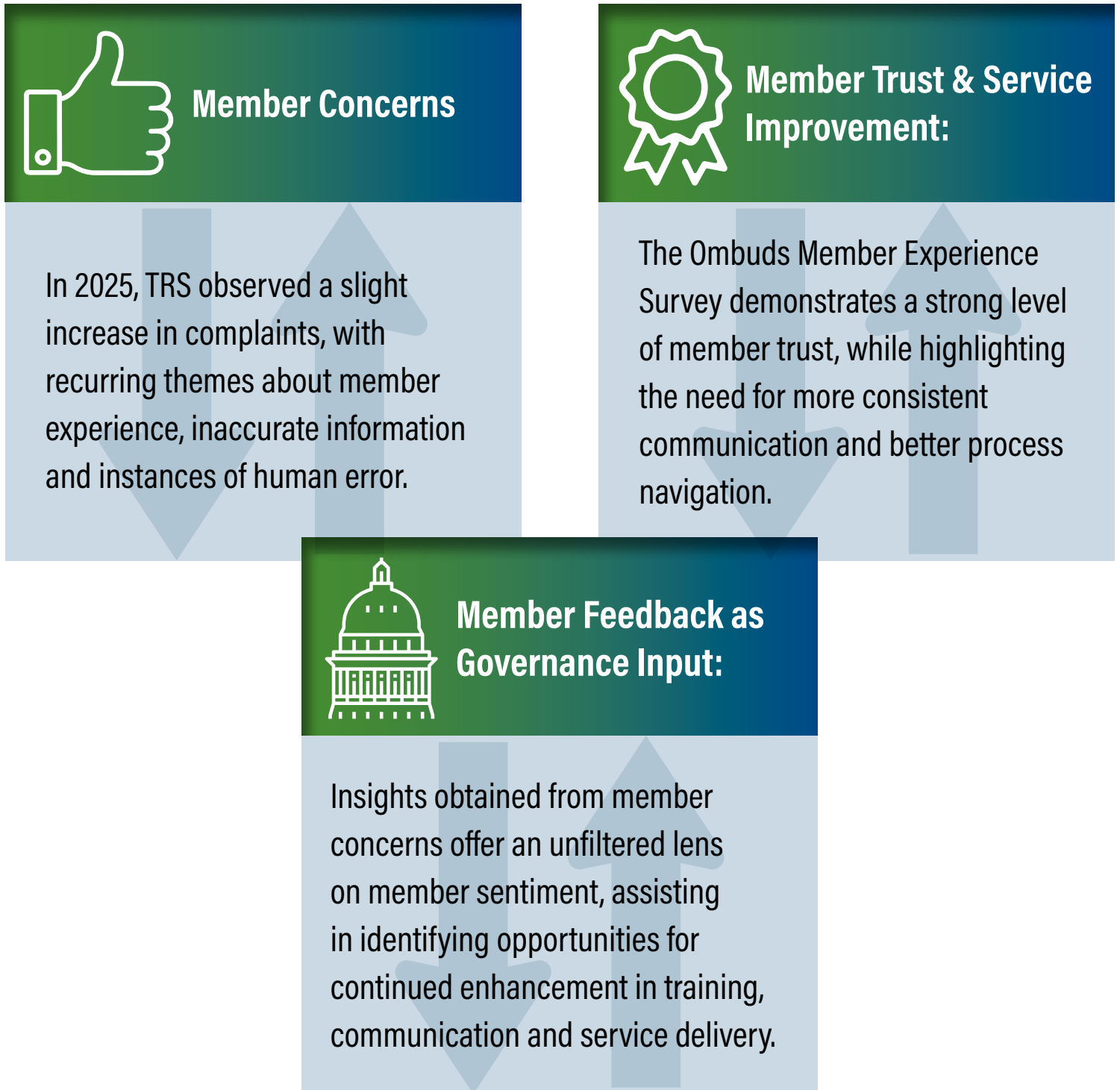
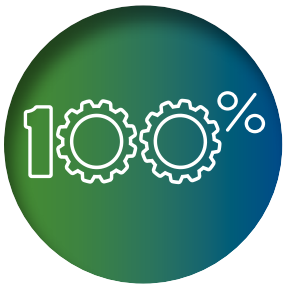


Figure 14. Key Findings from Member Feedback

Ombuds Observations 2025 *continued*



Business units **resolved all complaints** received in 2025, demonstrating a **commitment to member service**.



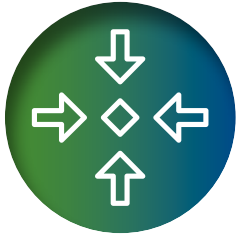
Overall **complaint trends point to a decrease** despite a recent increase in point-in-time numbers, indicating **continued progress**



Business units continue to **prioritize staff training and technology upgrades** to drive further improvements.

Figure 15. Ombuds Observations

Ombuds Strategic Goals for 2026



Expectation Alignment: Clear understanding of the ombuds role, authority and limitations to ensure members engage the office with appropriate expectations.



Timelier Communication: Proactive communication when outcomes are outside the office's control.



Improvements: Updating the ombuds web page to reflect the change in the response time from five days to one day, to align with current practices and member expectations.

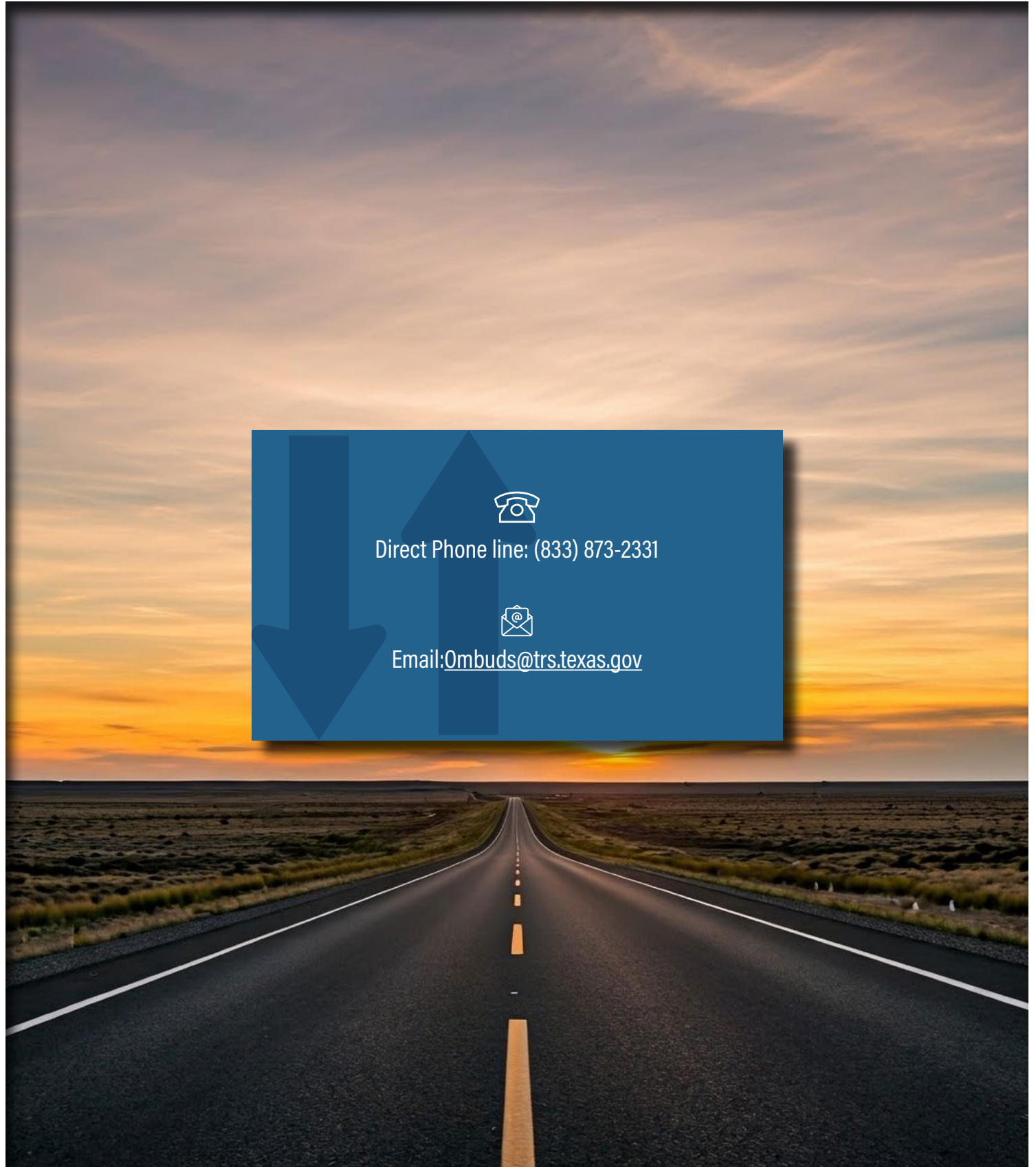


Noteworthy! The turnaround time from member submission to the ombuds, from the ombuds to the business units, and from the business units to the ombuds is approximately four and one-half days, well within the seven-day estimated processing timeframe.

Figure 16. Ombuds Strategic Goals for 2026



How to Contact the TRS Ombuds




Direct Phone line: (833) 873-2331


Email: Ombuds@trs.texas.gov



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