

*Bringing sides together*

**OMBUDS ANNUAL REPORT 2024**

Jan. 1 – Dec. 31, 2024



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# ABOUT THE OMBUDS

TRS established the Ombuds role in response to the enactment of HB 1585, recognizing the need for an additional resource where members and retirees can address their concerns. This role serves as a vital contact point that promotes open communication and provides support to members dissatisfied with the information or customer service received through normal TRS channels.

The Ombuds is responsible for compiling and submitting detailed quarterly reports to the board, which include insights, trends, and member feedback. These reports highlight concerns raised by members and include recommendations for operational enhancements aimed at improving overall member satisfaction and service delivery.

In line with these responsibilities, the Office is pleased to submit its third report to the trustees, executive management, and members. This report has been prepared to meet the standards set forth by the International Ombuds Association (IOA) and aims to foster transparency and continuous improvement within the organization.



*The Ombuds role recognizes the need for an additional resource where members and retirees can address their concerns.*

## MISSION & VISION

### Mission

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

### Vision

We aim to be a trusted advocate for fairness and transparency for our members. We strive to remain accountable, honest, and reliable for active members and retirees. By adhering to these values, we ensure everyone receives fair treatment, clear information, and reasonable resolutions of their concerns. This commitment builds confidence in the retirement industry and strengthens trust among all stakeholders.

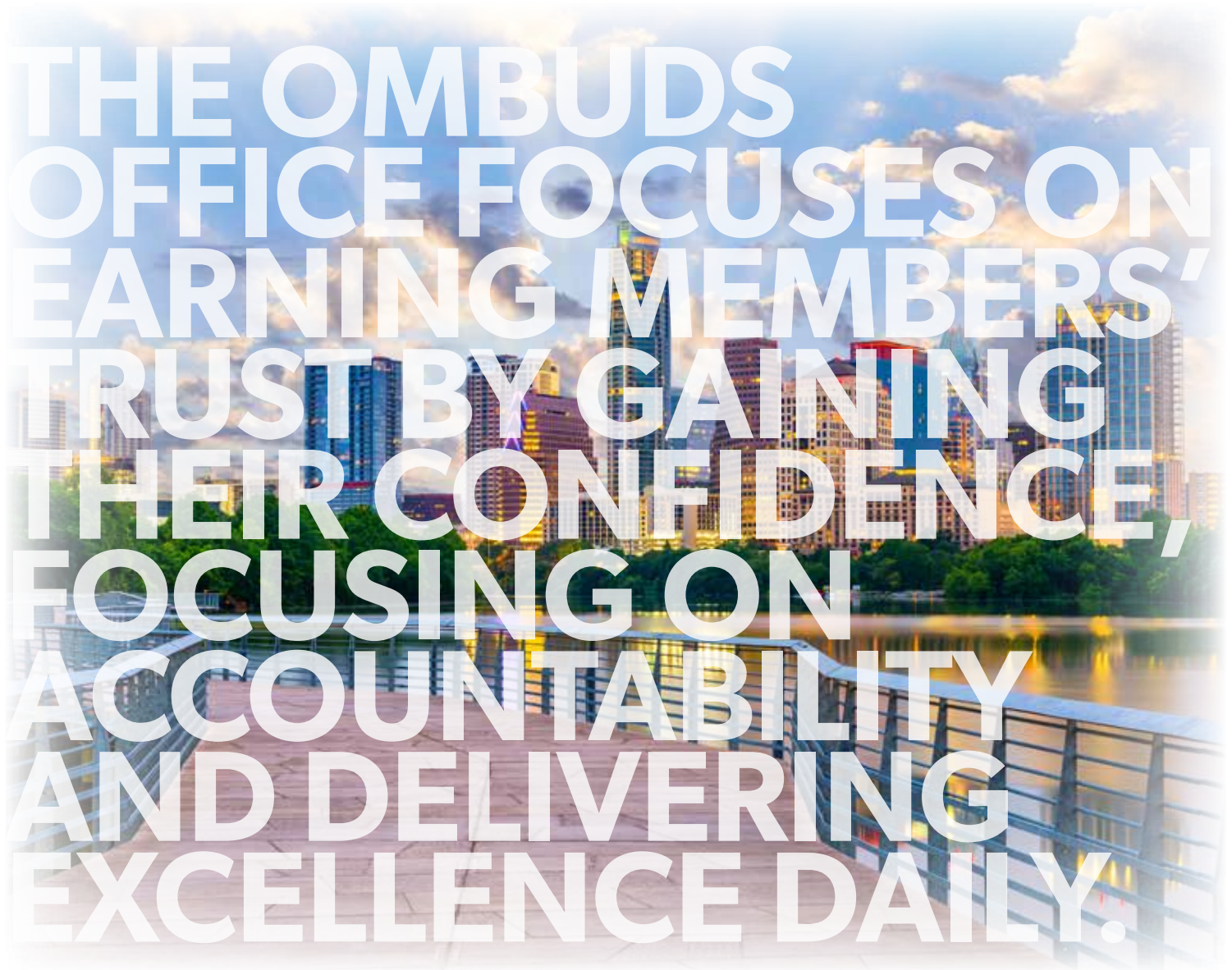


Fig.1

# MISSION & VISION *continued*

## Standards of Practice

The Office of the Ombuds operates consistent with the IOA Code of Ethics and Standards of Practice for all Ombuds across the globe.

## Ethical 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 any evaluative or legal proceedings related to concerns brought to the Ombuds attention.

### Confidentiality

The Ombuds will protect confidential information as allowed by law. Information may be disclosed if permission is granted.



Fig. 2: TRS Ombuds Guiding Principles



# KEY OBJECTIVES

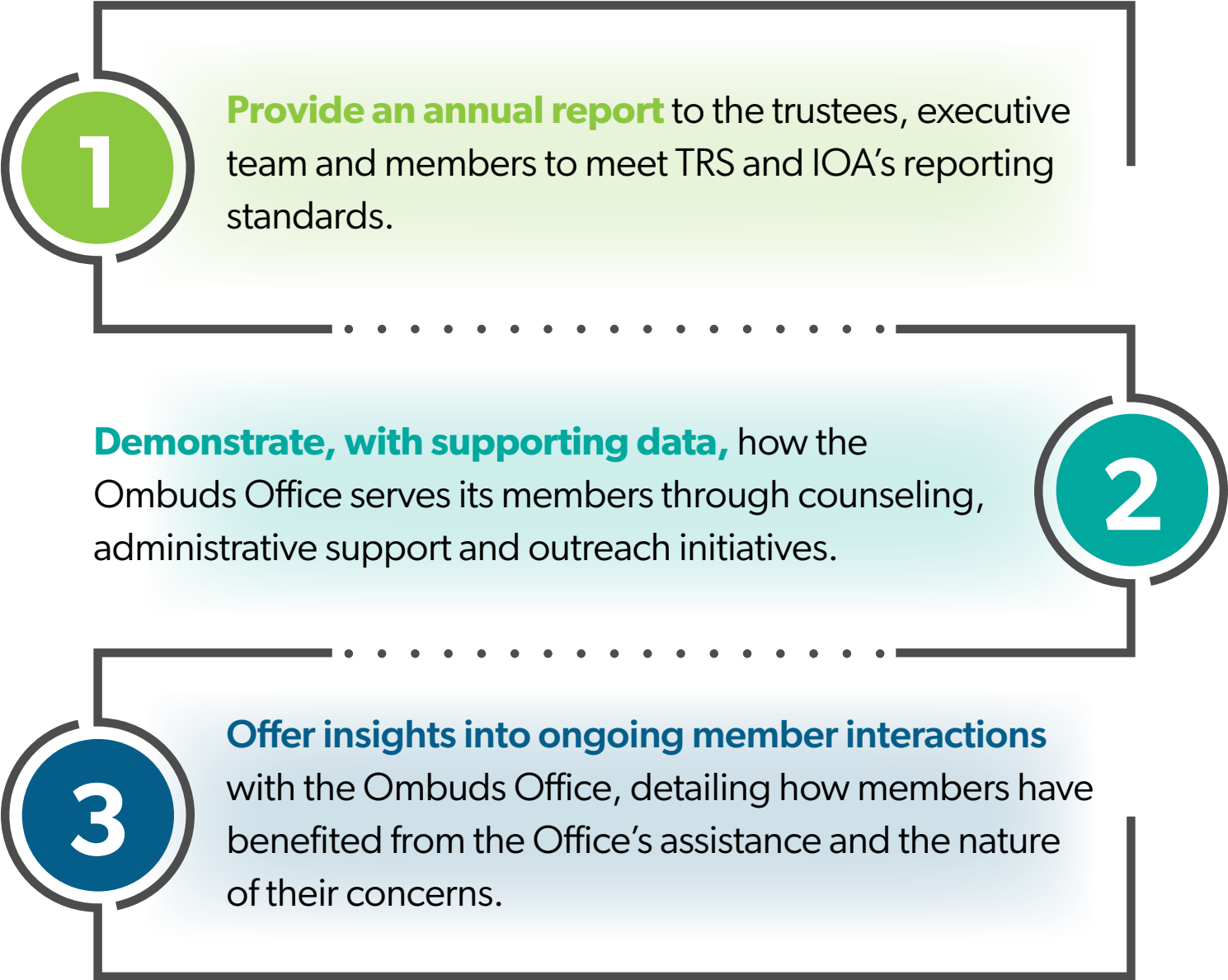


Fig. 3

# OMBUDS WORKFLOW PROCESS

TRS systematically tracks and manages member communications, which include complaints, comments, and routine inquiries received through various channels. The business units assess whether these communications qualify as a “complaint” and have their established internal processes for resolution. Key departments, such as the Health Division, Benefit Services, Governmental Relations, the SAO Process, the Communications Department, and the Ombuds, serve as primary point of contact for members.

The business units respond to complainants through secure mail, formal letters, or telephone calls. **Figure 4** below outlines the internal procedures of the Ombuds office for managing and disseminating the information it receives. This includes the sources of communication, the process for determining if a submission is a general concern or one that requires further review by the business units, and the final reporting.

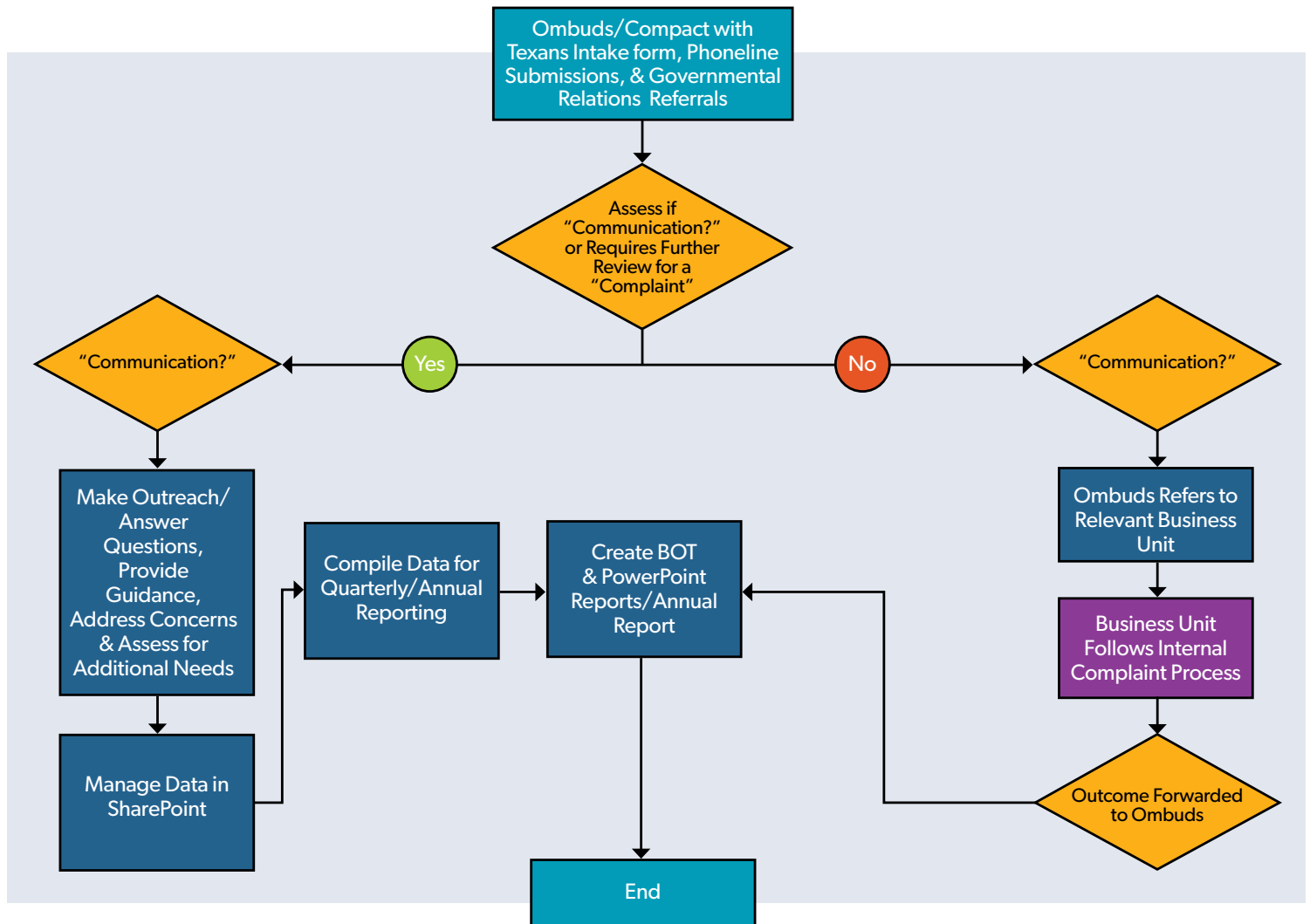


Fig. 4: Communications/Complaints Workflow

# OMBUDS COMMUNICATIONS

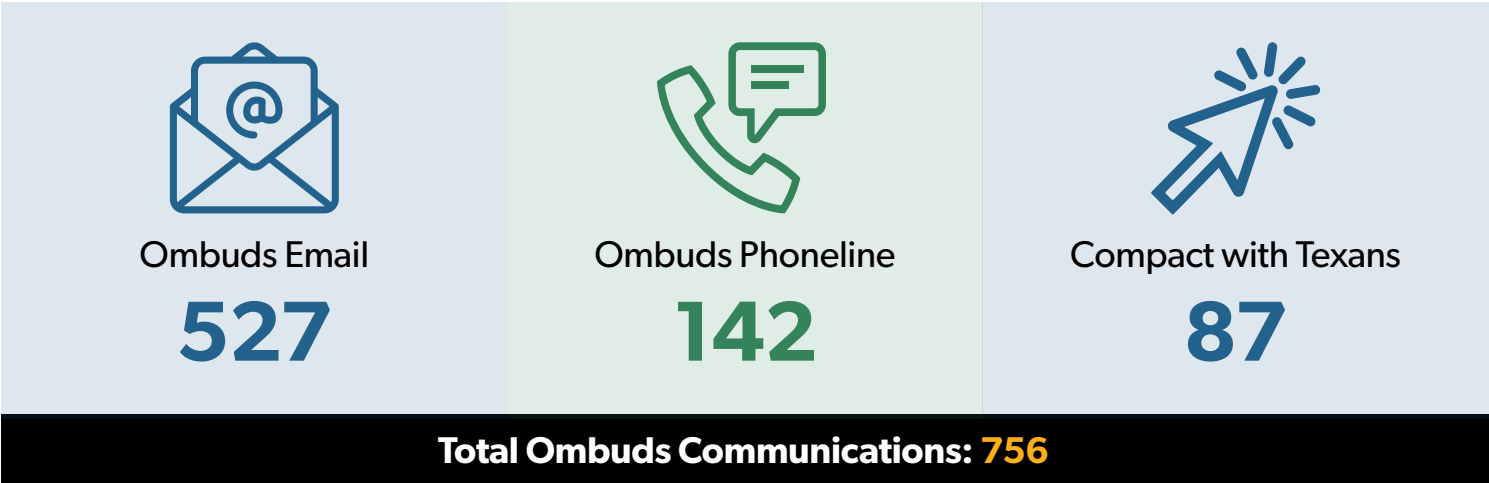


Fig. 5

## Total Contacts

In 2024, the Office of the Ombuds received **756** communications from members, representing a slight increase from the **664** communications recorded in 2023 and **666** in 2022. This gradual rise in member submissions since the establishment of the Office in 2021 indicates its growing visibility. Although the increases are modest, they are reflective of the ongoing efforts of the agency and the Ombuds’ to raise awareness about its services and to educate members on the operational aspects of the office.

An analysis indicates that the majority of communications, totaling **527**, were submitted directly through the Ombuds email. This trend may suggest a possible preference among members for maintaining a documented record of their inquiries. Additionally, the Office received **142** inquiries via telephone calls, providing a convenient option for individuals who may not be technologically inclined, are unfamiliar with it, or require an alternative method. Furthermore, **87** communications were submitted through the state’s Compact with Texans portal, an important platform also managed by the Ombuds and offers members yet another way to submit their concerns.

It is essential to acknowledge that these figures do not encompass the volumes of communication touchpoints managed by the respective business units.



# OMBUDS COMMUNICATIONS *continued*

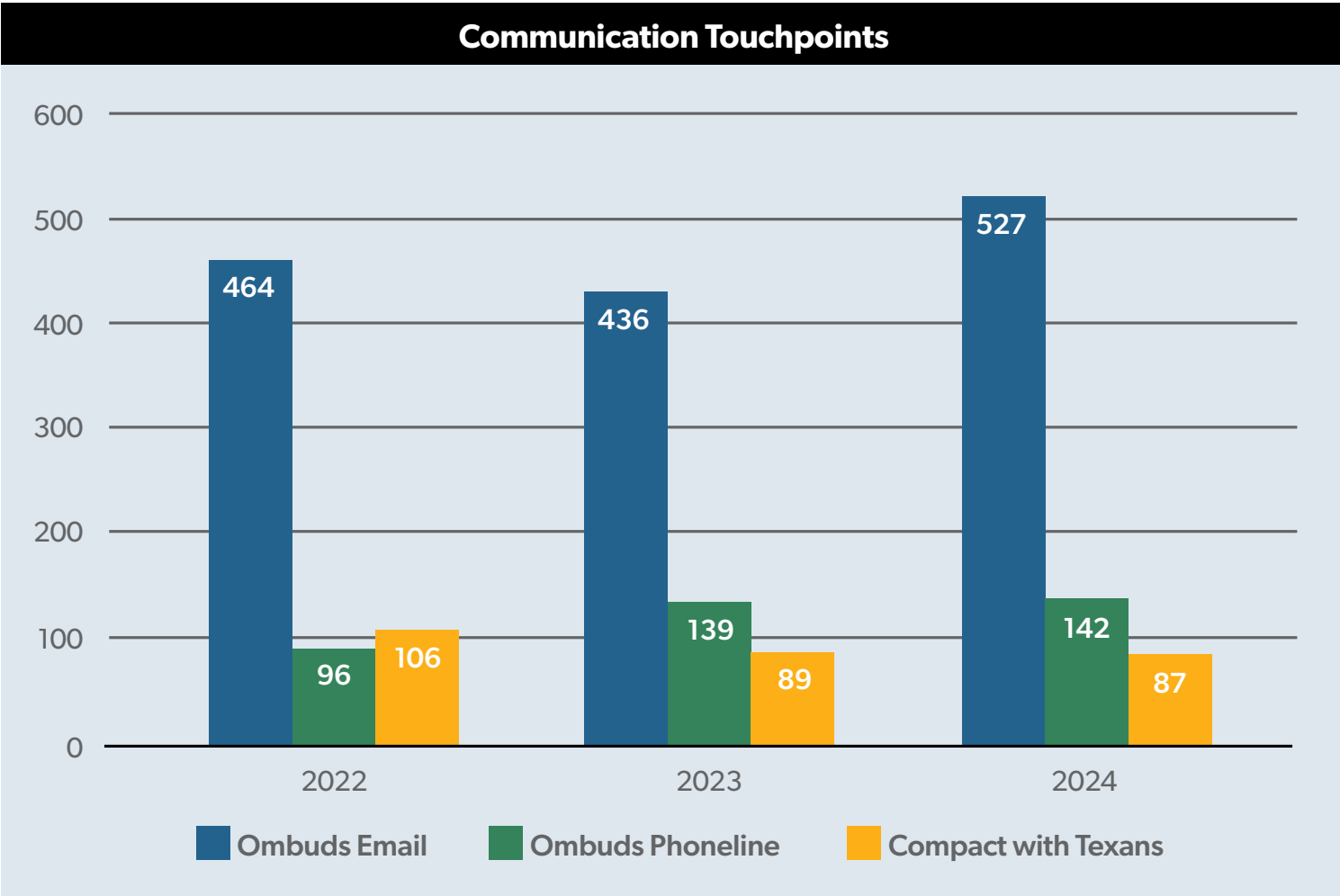


Fig. 6

## Communication Touchpoints

**Figure 6** presented above, provides an analysis of the emails and phone calls received by the Ombuds office in 2024, compared with data from the preceding two years. The figure details a notably high volume of emails, a trend that gained momentum in 2022, following the global health crisis of 2020, which necessitated a shift from traditional in-person interactions to remote communications methods. Despite a marginal increase in the volume of phone calls received, this figure remains in line with trends observed in prior years and remains significantly lower than the volume of email by individuals seeking assistance from the Ombuds office. Furthermore, an examination of the demographics of individuals seeking help indicates that service retirees represent the largest segment of visitor traffic. This insight may suggest a preference for convenient and efficient communication methods, as retirees may prioritize the accessibility and speed of email over the commitment associated with phone calls. Overall, this analysis illustrates the evolving communication landscape and the distinct preferences of individuals engaging with the Ombuds office.

# OMBUDS COMMUNICATIONS *continued*

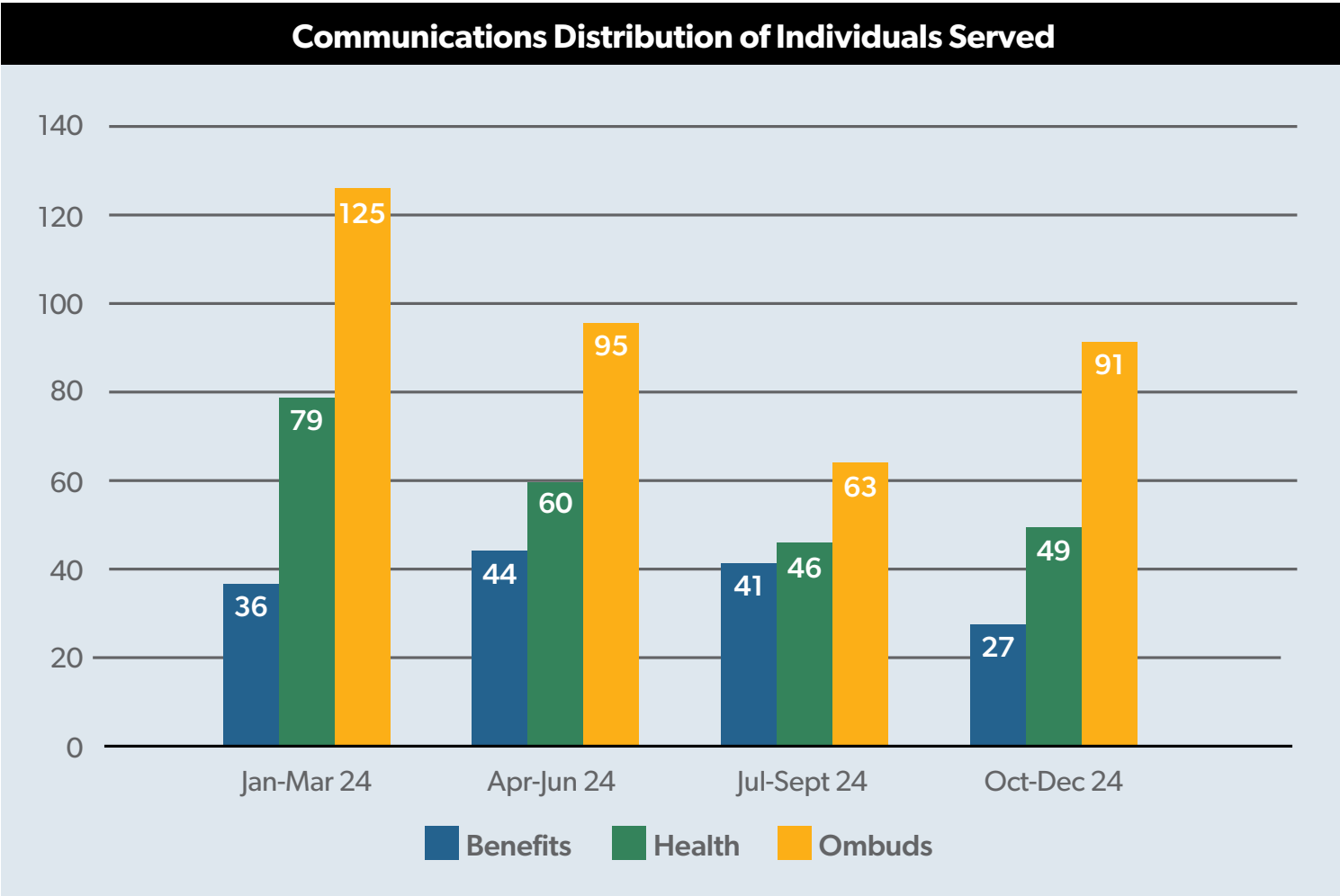


Fig. 7

## Servicing Departments

The effectiveness of any Ombuds depends on the support system surrounding it. The role of an Ombuds is informal and neutral; it does not involve participating in formal investigations or engaging in formal issue-resolutions processes. The Ombuds does not create policies or establish formal relationships with those seeking its services.

The primary objective of the Ombuds is to actively listen to individuals and assist them in comprehending their options for resolution. The Office provides guidance through the agency’s processes and policies, makes appropriate referrals as needed, offers timely updates, and shuttles diplomacy and facilitates information resolution processes.

**Figure 7** illustrates the collaborative efforts between the Ombuds and the business units. While the Ombuds strives to address all matters presented by members to the office, the complex nature of most issues often necessitates the collaboration of the Benefit Services and the Health Divisions for resolution.

# OMBUDS COMMUNICATIONS *continued*

## Servicing Departments *continued*

Of the **756** communications received by the Ombuds, many involved basic inquiries related to retirement, withdrawals, death benefits, direct deposits, insurance coverage, and more. Some communications included member requests to accept documents typically mailed or faxed directly to the relevant units. Additionally, some inquiries came from members who chose to bypass customer service counselors and contacted the Ombuds directly.

Among the total communications received, three hundred seventy-four (**374**) were managed by the Ombuds, while one hundred forty-eight (**148**) required the involvement of Benefits Services. In contrast, the Health Division addressed two hundred thirty-four (**234**) requests for assistance pertaining to insurance-related matters.

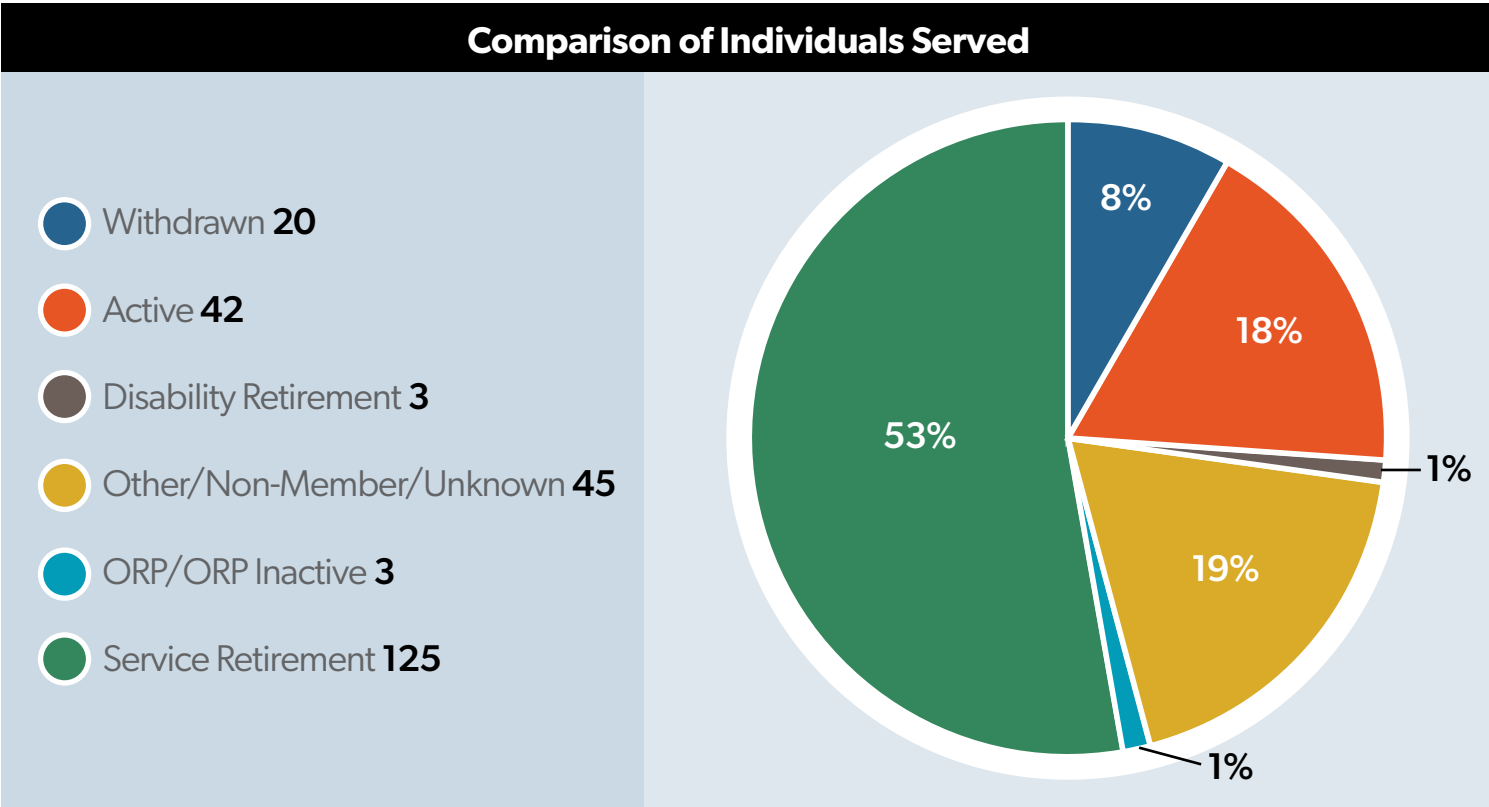


Fig. 8

## Who Contacted the Ombuds Office?

An analysis of the 756 communications found that service retirees made up the largest percentage of contacts with the Ombuds office, accounting for **53%** of the inquiries received via calls and emails. The second largest category, representing **19%**, was classified as “unknown,” “non-member,” or “other.” This group included family members, friends, healthcare representatives, or school administrators who reached out on behalf of a member. Meanwhile, **18%** of the calls and emails came from active members.



# SOCIAL MEDIA COMMENTS

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

TRS has a strong presence on social media platforms such as Facebook, LinkedIn, X, Instagram, and YouTube, which the communications department monitors and reviews daily. These posts, labeled as the agency’s “Hot Topics,” aim to disseminate accurate information quickly while directing stakeholders—including active members, retirees, and the media—to the agency’s website for more comprehensive details and encouraging important two-way communication.

The communications department collects observations from these platforms and compiles them into reports. For the second year, the Ombuds has included data from the Facebook posts to highlight the trending comments and critiques in the quarterly and annual reports presented to the board of trustees.

In 2024, health-related discussions emerged as the primary topic taken from the Facebook posts, generating **1,447** comments, an increase from **317** comments the previous year. Most responses focused on the new dental and vision plans, enrollment processes, and deadlines.

The second most popular topic was labeled “Miscellaneous,” with **163** comments that included reactions to various posts and off-topic messages unrelated to TRS. The third most discussed topic centered on political views, with **99** comments discussing the local and national elections and opinions on repealing the Windfall Elimination Provision (WEP) and Government Pension Offset (GPO).

The communications team noted that while some posts contained negative views, the overall tone of the comments across all topics was predominantly neutral.

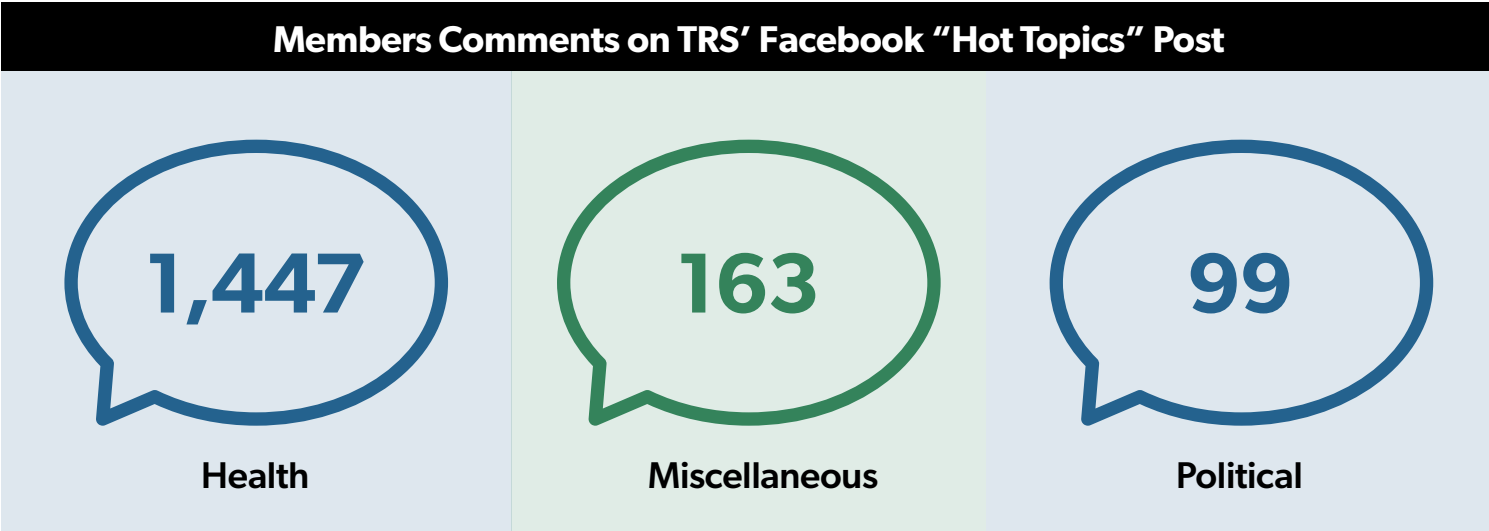


Fig. 9

# COMPLAINT REVIEW PROCESS

## The Complaint Review Process

- The Office of the Ombuds provides TRS members and retirees with an additional contact to address their concerns or issues.
- The Ombuds may be contacted when a member or retiree cannot obtain information or assistance through normal TRS channels or is dissatisfied with the customer service received through normal channels.
- The Ombuds serves as an escalated resource for members, primarily intended for issues already reviewed by the business units, such as the telephone counselors. Before reaching out to the Ombuds, members are strongly encouraged to contact customer service counselors.
- The Ombuds is an independent office that offers a neutral and impartial review of member and retiree concerns. It will respond to member and retiree inquiries within five (5) business days.

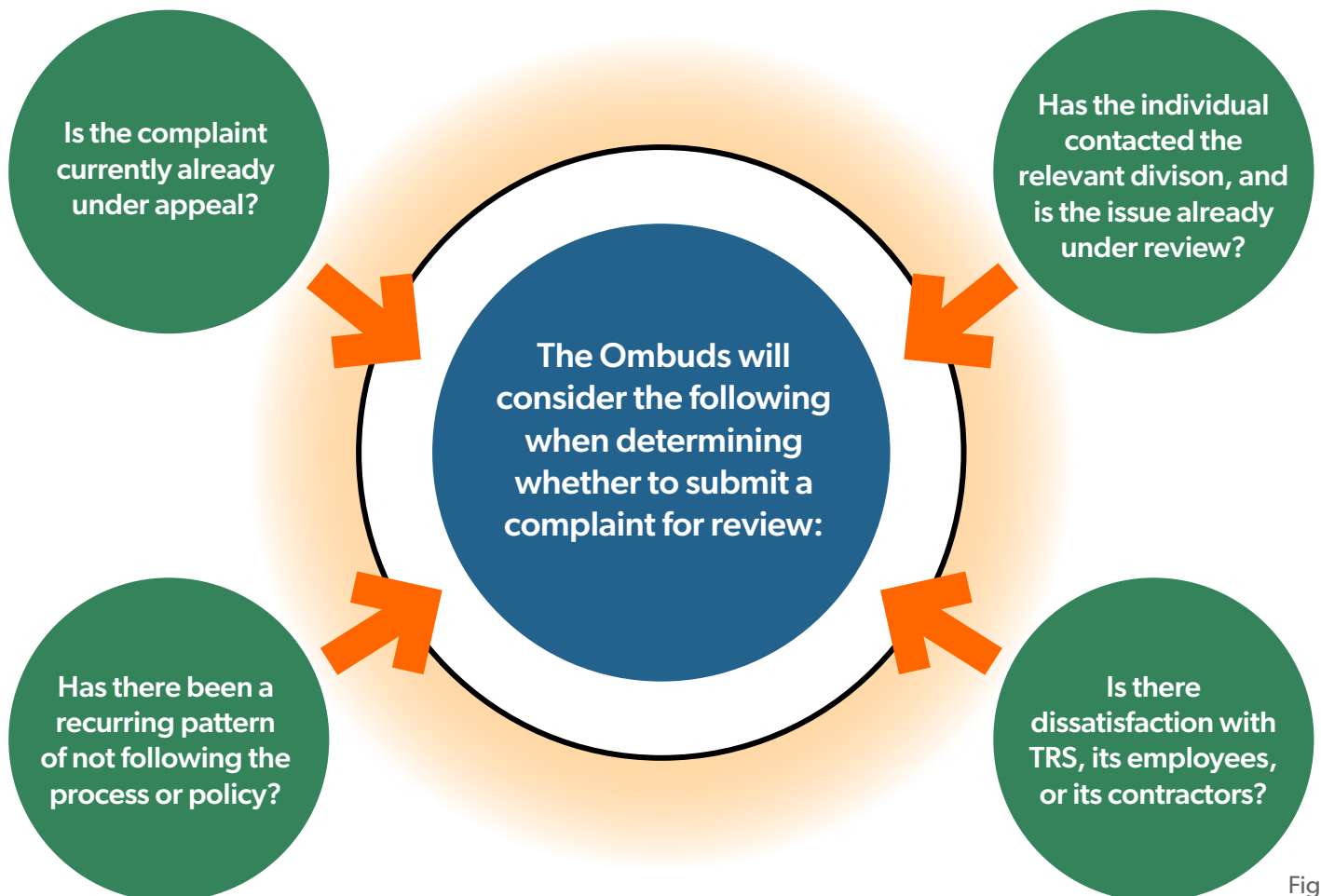


Fig. 10

# COMPLAINT REVIEW PROCESS *continued*

## Point-In-Time (PIT) Complaints

In accordance with TRS’ established complaint review process, a communication can only be classified as a complaint if it fulfills all specified criteria. A complaint is different from a general dissatisfaction with TRS regulations or statutes, such as statutory limitations on COLA disbursements. TRS recognizes two categories of complaints: Monthly Complaints and Communications and Point-in-time (PIT) Complaints.

Monthly “Complaints” are organized into comprehensive categories, which include appeals. Likewise, PIT Complaints are submitted on a rolling basis as they are received by TRS and are categorized into various classifications, including Quality of Service Provided (internal process failure), Observation/report of Improper Conduct (actions inconsistent with TRS ethics policies) by TRS, TRS employee or TRS contractor, Reporting Employers Customer Service, and Reporting Employers. Each category is further subdivided to provide additional specificity and guidance.

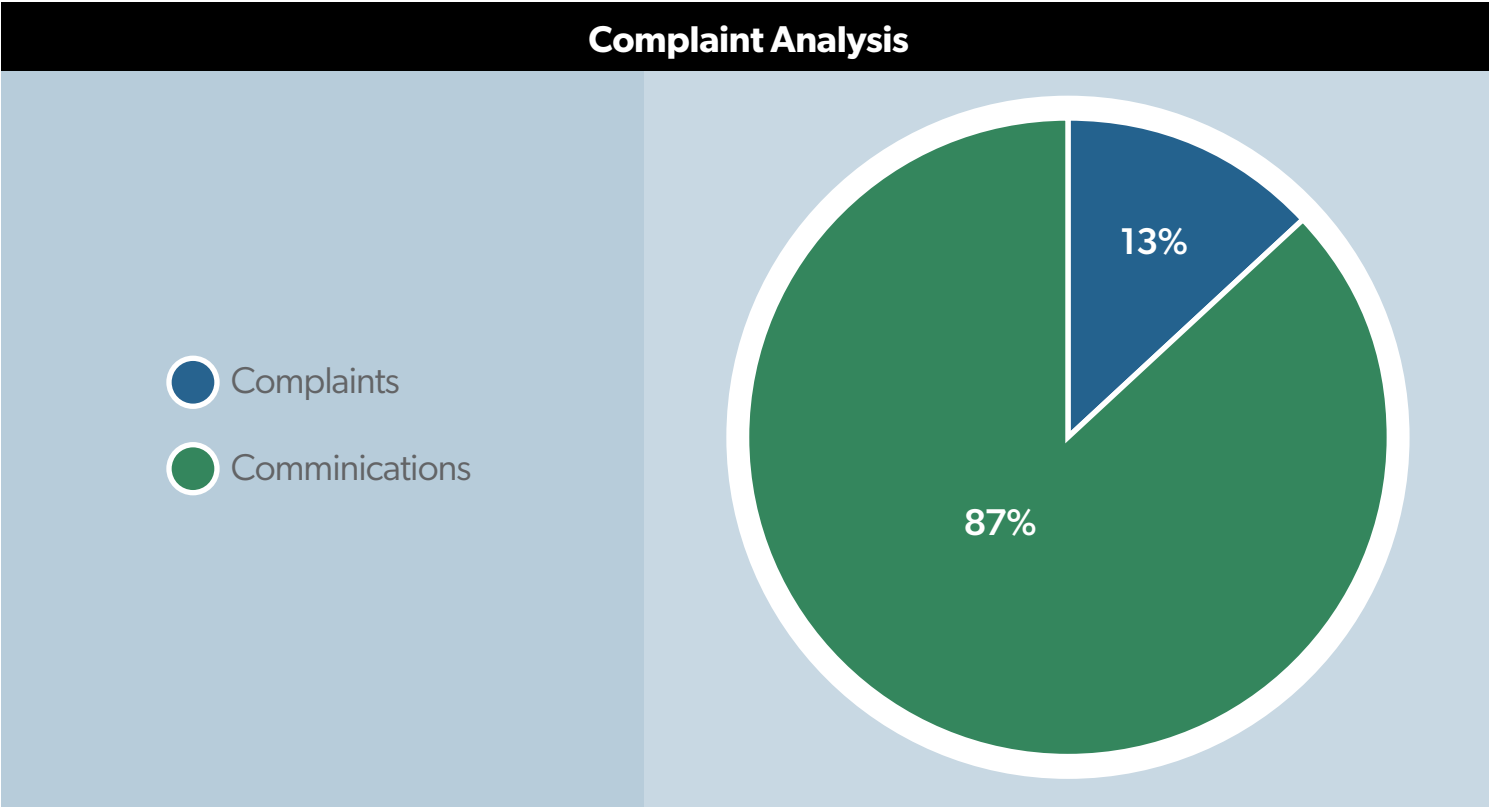


Fig. 11



# COMPLAINT REVIEW PROCESS *continued*

## Point-In-Time (PIT) Complaints *continued*

When an inquiry is deemed a valid complaint, the Ombuds refers the matter to the appropriate business unit for further assessment. Following the evaluation of the complaint’s validity, the business unit will contact the complainant to address the issue. The Ombuds remains engaged and ensures timely resolution.

In total, through the collaborative efforts of the Benefit and Health Divisions, **111** complaints were resolved in 2024, representing a **54%** decrease from **206** complaints in 2023, and a **49%** decrease from **225** complaints in 2022. The PIT chart below illustrates the **54%** reduction in total resolutions from 2023 to 2024.

Operational changes within the Health division and Benefit Services—such as personnel increases, the establishment of the El Paso Regional Office, and the implementation of process improvements, have significantly contributed to these outcomes. As a result, the agency experienced a consistent downward trend in overall complaints for the second consecutive year.

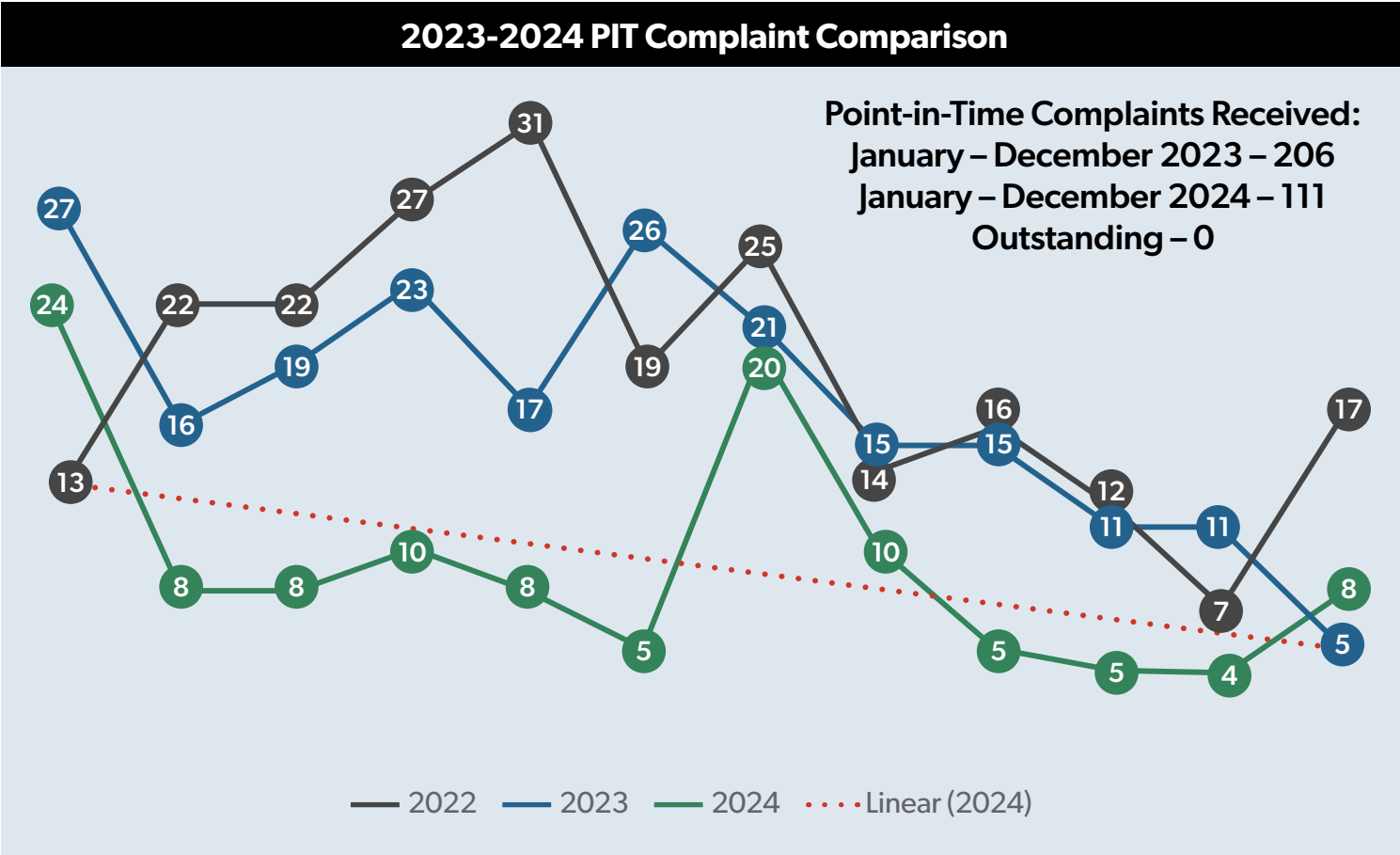


Fig. 12

# COMPLAINT REVIEW PROCESS *continued*

## Complaint Trends for 2024

In the process of collecting and analyzing data pertaining to member concerns and trends, the Ombuds seeks to identify consistent themes to include in the quarterly reports presented to the trustees. The accompanying graphs illustrate the three most common complaint categories that emerged in 2024. It is important to note that this is not a complete list of all types of complaints received; rather, it highlights those that consistently trended for that year.

A total of twenty-five complaints were categorized as “Failed to Meet Member Needs.” This category included issues such as a counselors inability to answer specific questions regarding processes and instances of tardiness in attending scheduled office visits. When these matters were submitted to the Ombuds, they were subsequently referred to Benefit Services, who successfully resolved the issues.

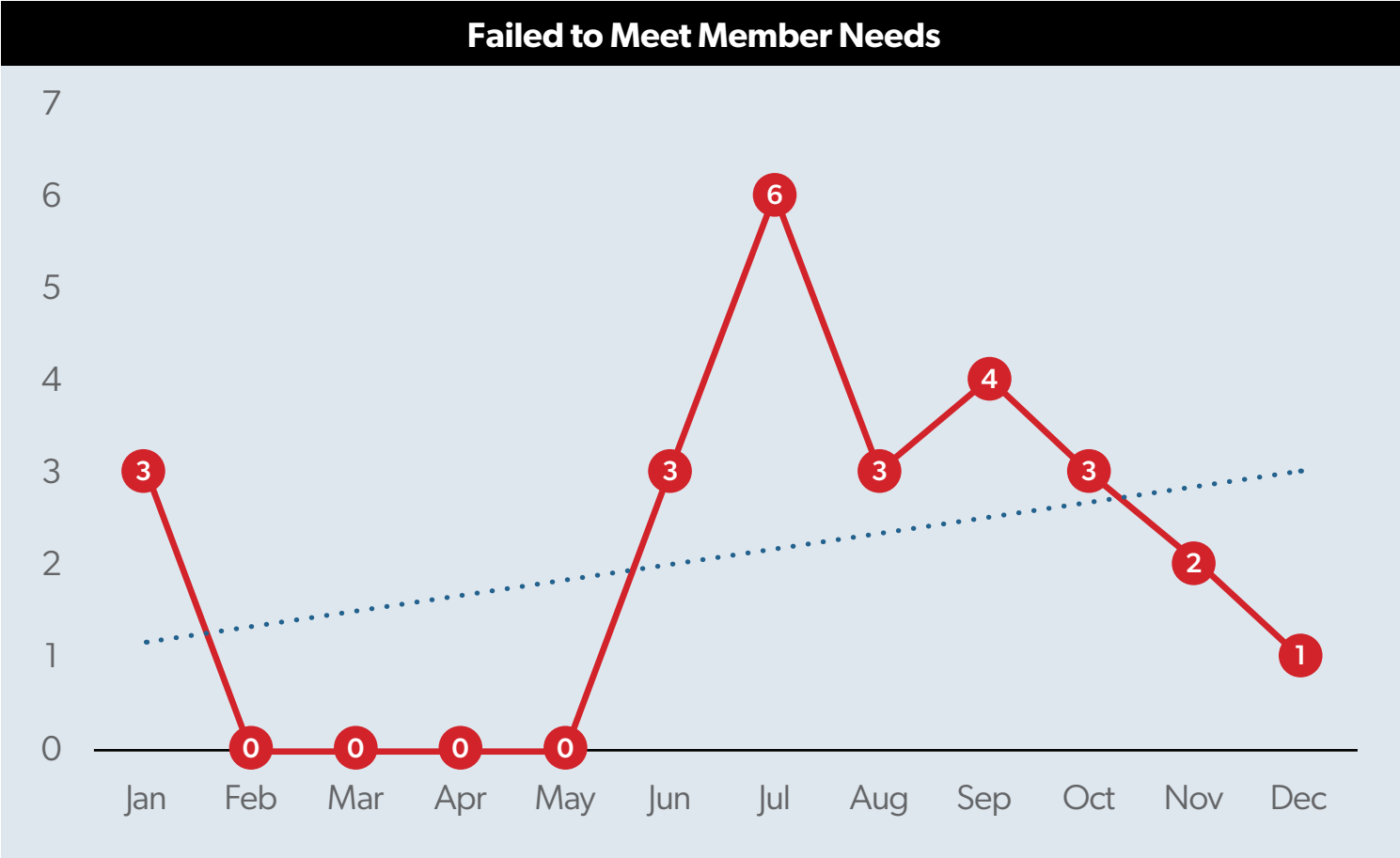


Fig. 13

# COMPLAINT REVIEW PROCESS *continued*

## Complaint Trends for 2024 *continued*

Complaints categorized as “Human Error” involved inaccuracies in members’ deductible amounts, erroneous billing, or mistakes made by vendors in processing medication refills. Furthermore, grievances labeled as “Incomplete Information Provided,” were noted by members who reported a lack of sufficient instructions to effectively carry out or complete critical processes, such as retirement, death benefits, or healthcare eligibility.

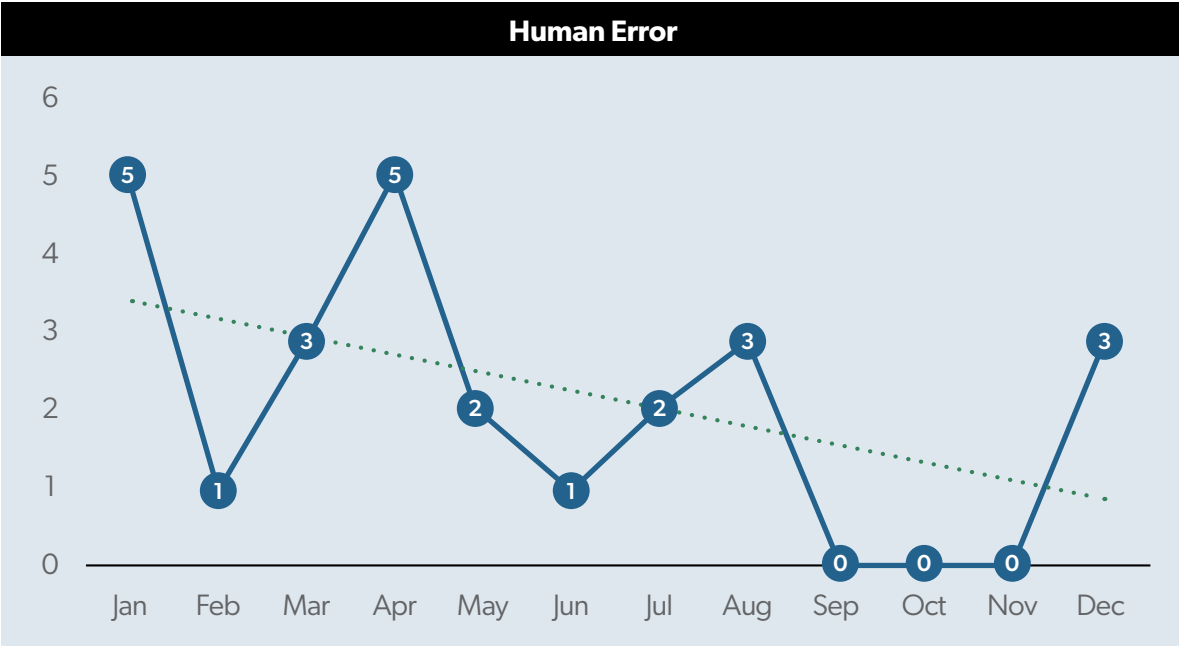


Fig. 14

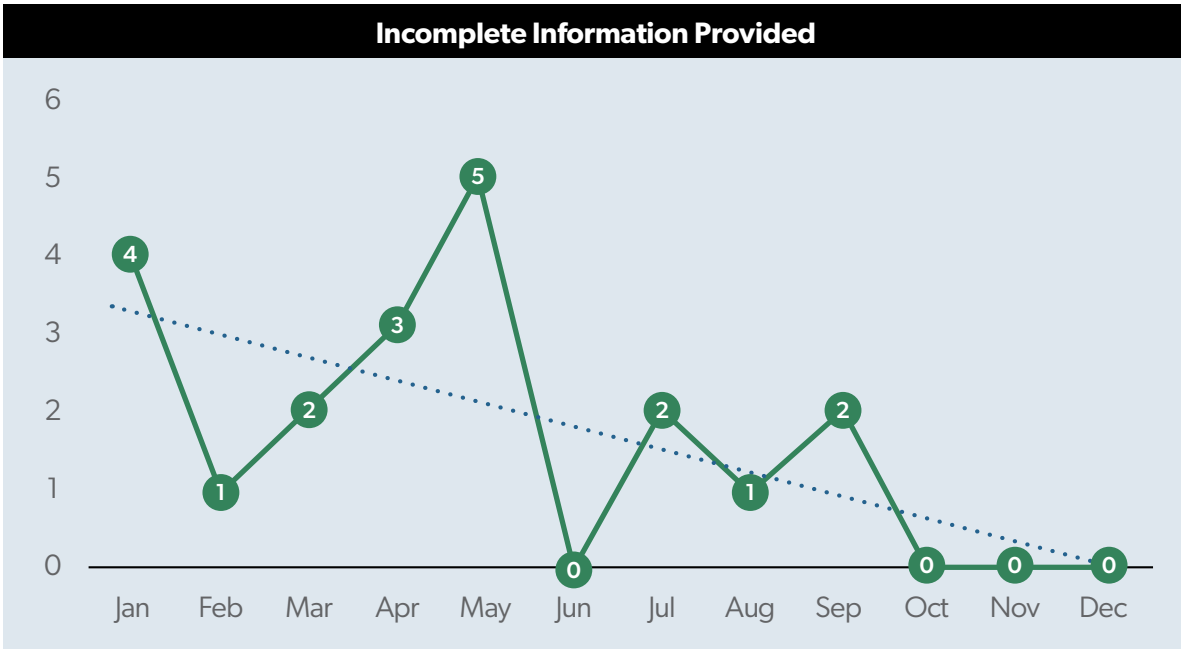


Fig. 15



# MEMBER OUTREACH AND PROFESSIONAL DEVELOPMENT

Over the past year, a central focus has been supporting the business units in various capacities to help educate members about established rules and regulations, answer questions, and assist them with navigating the grievance process. Additionally, the Office actively participated in several face-to-face and virtual sessions where counselors informed active members and retirees about their benefits and health coverage, explained critical steps to retirement, and equipped them with essential information to make informed decisions.

In the fall, the Ombuds accepted an invitation from the Texas Retired Teachers Association (TRTA) to speak at their annual conference. During the session, the Ombuds delivered greetings on behalf of the agency and shared essential updates with retirees. Earlier in the year, both the Ombuds and the Chief Health Care Officer participated in the TRTA convention held in Corpus Christi, TX.

These well-attended events provided an excellent platform to highlight the Office and engage with attendees. This interaction not only fosters new connections but also reinforces existing relationships and facilitates meaningful dialogue.

Benefits Virtual Sessions	Health Fairs/ Trainings	TRTA	IOA	NPEA
Pension Benefits Sesion	TRS-Care Health Education Fair, Round Rock, TX	Katy Ready to Retire, Katy ISD, Legacy Stadium, Katy, TX	IOA Annual Ombuds Conference, Indianapolis, IN	National Pension Education Association (NPEA) Annual Conference, Greenville, SC
Retirement Forms Session	TRS-Care Health Education Fair, West Houston, TX	TRTA Convention, Corpus Christi, TX	IOA Organizational Ombuds Webinar (Sources of Power & Influence)	
Ready to Retire	TRS-Care Health Education Fair, Beaumont, TX	TRTA District 5 Meeting, Beaumont, TX	IOA September Symposium	
Benefits Group Visit (GOV)				
TRS Employee Presentation				

Fig. 16

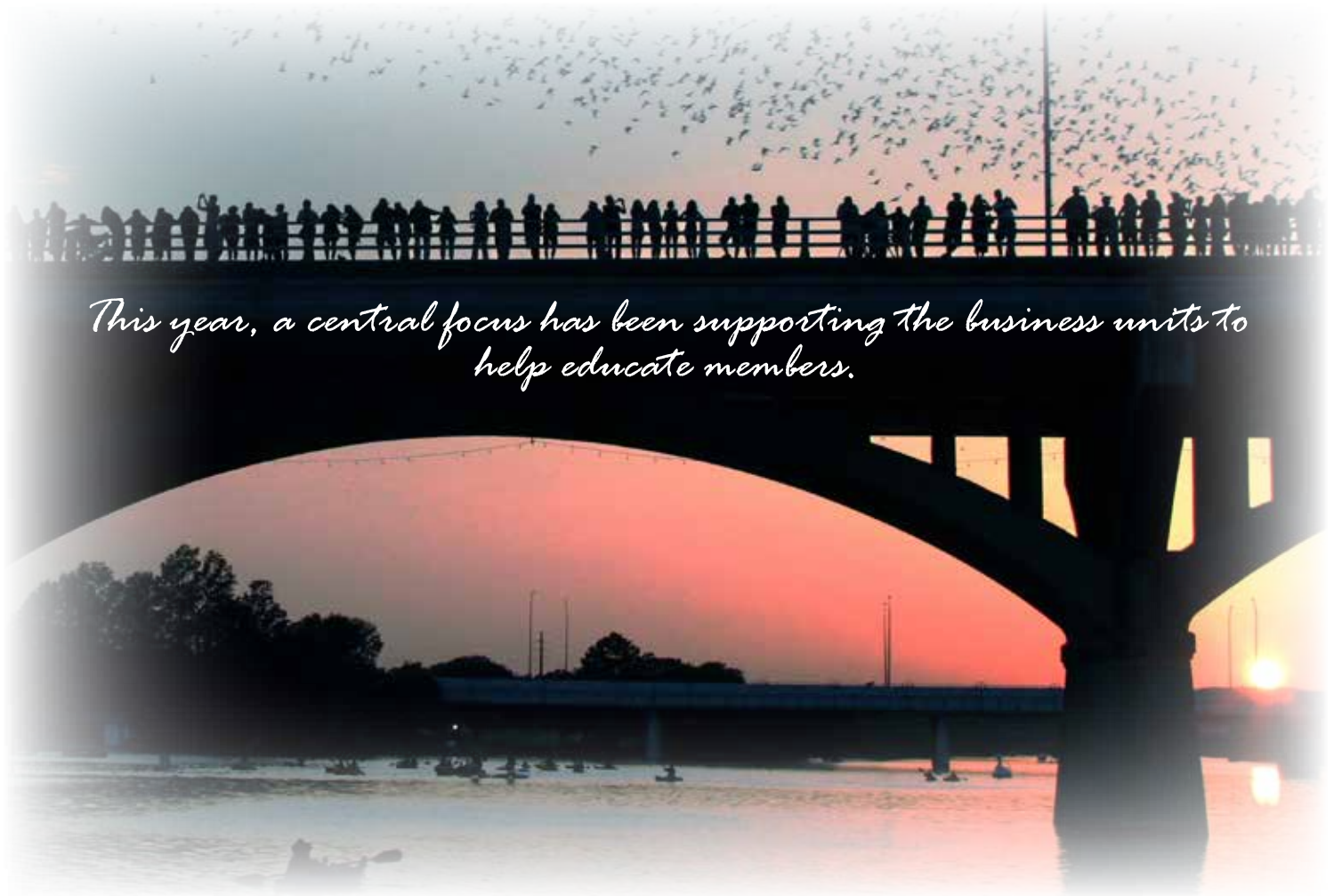
# MEMBER OUTREACH AND PROFESSIONAL DEVELOPMENT

*continued*

## Professional Development

The Office attended the International Ombuds Association's (IOA) 19<sup>th</sup> annual conference in Indianapolis, IN. Here, participants engaged in roundtable discussions covering topics such as "The Value of Contextualizing Case Categorization to Elevate your Ombuds Program" and "Using Positive Psychology to Help Ombuds—and our Visitors and Organizations—Flourish" as well as insights into data collection and analysis through the session "Getting Unstuck from Ombuds Data Collection and Analysis: Seven Simple Principles."

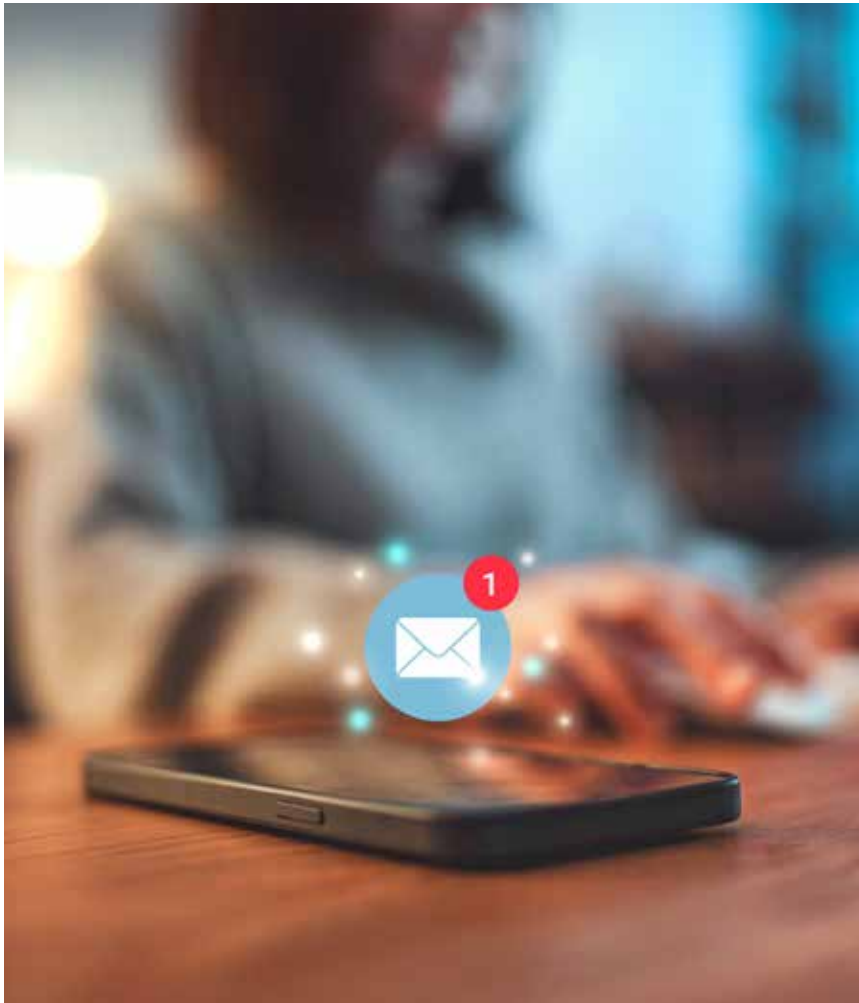
The year wrapped up successfully with an invitation from the Chief Benefit Officer and her team to join them at the National Pension Education Association's (NPEA) 2024 Annual Conference. This event provided valuable networking and professional development opportunities, allowing the Office to learn from other pension and retirement professionals nationwide and gain a deeper understanding of industry trends.



*This year, a central focus has been supporting the business units to help educate members.*

## OBSERVATIONS AND RECOMMENDATIONS FOR 2025

In accordance with the Texas Government Code, section 825.216(b), the following observation is based on member inquiries submitted to the Ombuds for 2024:



*Members have expressed the need for receipts or notifications to confirm the submission of documents to TRS via fax or mail. Additionally, they seek status updates or estimated timelines at the midpoint of the process, accompanied by an indication of the anticipated completion date.*

Throughout the year, the Ombuds documents questions and concerns frequently raised by members through the Ombuds and Compact with Texans intake forms as well as telephone communications. While these matters may not always escalate to the level of a formal complaint, the Ombuds communicates them to the relevant business units. These concerns outlined above represent the most consistently trending for 2024.

In response to these concerns, TRS is committed to maintaining transparent and effective communications regarding the receipt and processing of members' documents. We understand the importance of completing these processes promptly and are committed to ensuring both accuracy and efficiency.



# OBSERVATIONS AND RECOMMENDATIONS FOR 2025 *continued*

Due to the necessary procedural steps involved in completing specific tasks, TRS cannot modify its protocols at this time. Given the complexity and volume of these tasks, we have established service levels for each procedure to ensure the most prompt, efficient, and accurate service possible. When documents are submitted via upload through MyTRS or fax, the sender receives immediate confirmation of receipt. Additionally, once documents submitted by mail are processed, an acknowledgement letter is sent to the sender to confirm that processing is complete. Pausing document processing to provide status updates would negatively impact accuracy and prolong overall processing times.

The Ombuds supports a careful balance between timely processing and keeping members adequately informed. TRS is committed to an ongoing review of these processes to identify potential opportunities for future enhancements. This ongoing review aims to instill confidence in members regarding the improvements we strive to achieve.



*The Ombuds supports a careful balance  
between timely processing and keeping  
members adequately informed.*

# HOW TO CONTACT THE OMBUDS



Direct Phone line: (833) 873-2331



Email: [Ombuds@trs.texas.gov](mailto:Ombuds@trs.texas.gov)



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INFORMAL • SUPPORT  
JUSTICE • EMPATHY  
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