Teacher Retirement System of Texas Reporting Employer Satisfaction Survey 2022

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Contents

Executive Summary

The Teacher Retirement System (TRS) Reporting Employer Satisfaction Survey (RESS) is designed to provide critical feedback to the Teacher Retirement System of Texas on the services provided to Reporting Employers (REs). Each year, REs are provided with the opportunity to evaluate TRS services and give feedback on how the Reporting Employer Portal (RE Portal), their interactions with TRS Reporting Employer Coaches (RE Coaches), and overall TRS system are functioning from the perspective of REs. This information is used to improve the services TRS provides to REs.

In this year's survey, the initial population of contacts provided by TRS included 1,346 REs. Because the same individual can represent multiple REs, the population included only 1,226 unique email addresses. Thirty-six of these email addresses were invalid, meaning the emails bounced and were not delivered, leaving 1,190 valid email addresses. For emails that bounced due to an invalid email address or for respondents who did not respond to the survey after four contact attempts, alternative emails were used in an effort to improve response rates. The final results for the 2022 are based on 766 individual respondents representing 845 REs. For comparison purposes, the 2021 results were based on 797 respondents representing 874 REs. Overall, the response rate to the survey declined from 68 percent in 2021 to 64 percent in 2022. This can be interpreted to mean that 64 percent of REs with a valid email address completed the survey. Major findings from the survey are noted below.

Decline in Ratings of TRS Services: In the 2022 survey, ratings for overall TRS services declined, indicating less satisfaction with the services provided. In 2022, 23 percent of REs rated overall services as "excellent" compared to 29 percent in 2021. Notably, the decline brings the ratings back in line with the results from previous years (e.g., 2020).

More Contact with Reporting Employer Coaches: One reason overall TRS ratings may have declined is that REs representing higher education reported more contact with their RE Coaches. In 2022, 27 percent of REs representing higher education reported contacting their RE Coach "regularly" compared to 21 percent in 2021. REs typically contact their RE Coaches when they need support with the RE Portal. As we note below, this may also reflect RE perceptions of the reasonableness of the two-day standard for responses.

Decline in Perceived Reasonableness of Two-Day Time Period: Previous surveys demonstrated the success of establishing a service standard and expectations for a two-day turnaround time. This year, however, there was a decline in the perceived reasonableness of the two-day response. In 2022, 56 percent of REs said the two-day response time was reasonable compared to 64 percent in 2021 and 61 percent in 2020. In the 2021 survey, 58 percent of REs reported receiving a response within 24 hours. In the 2022 survey, this dropped to 45 percent. As indicated in the open-ended responses, response times become particularly important when reporting deadlines are looming and REs face penalties for failing to meet those deadlines.

Reporting Employer Coaches: Despite some of these other shifts, ratings for RE Coaches continue to be overwhelmingly positive and even increased slightly over the previous year. As we have noted in previous reports, RE Coaches are largely perceived as allies helping REs as they navigate the RE Portal. REs report there are not enough RE Coaches and RE Coaches are unable to respond quickly to phone calls and emails. They attribute this lack of availability to TRS and not to their individual RE Coaches. One theme that

emerged in the open-ended comments was the turnover of RE Coaches and the variance in performance across RE Coaches.

Within this context, evaluations of RE Coaches across dimensions of performance have mostly remained consistent with a few notable exceptions – availability by phone and communication via email, both of which declined over the past year.

Support for Online Chat Continues to Increase: Support for an online chat function has been strong across surveys, and continued to increase in this year's survey. In 2022, 86 percent of REs indicated they would be willing to use online chat, an increase from 83 percent in 2021 and 77 percent in 2020. Support for online chat also emerged in the open-ended survey responses, particularly in response to specific improvements TRS could make to services.

Attendance at Training Remains Low: Prior to COVID, approximately 70 percent of REs attended some form of training. In the 2021 survey, the percent of REs attending training dropped to 53 percent. In the 2022 survey, 50 percent of REs reported attending training. While COVID is unquestionably important to this decline, only 13 percent of employers referenced the pandemic when asked why they did not attend training. More commonly, REs noted demands on their schedule, inability to get away from the office, and a lack of awareness of training opportunities.

Awareness and Use of the Employer Toolkit: REs are largely unaware of the new Employer Toolkit. Of those who are aware, only a handful of REs have actually used it. Even so, evaluations of the toolkit are mostly positive; REs generally found the toolkit to be a helpful resource.

Areas for Improvement: Last year's report was generally positive. Ratings for TRS services had improved and contact with RE Coaches had declined. The 2022 RESS provides less good news. Ratings for services have declined, RE contact with RE Coaches has increased, response times have declined, and frustrations with reporting deadlines have increased. Suggestions for improvement follow from this assessment. First, REs note the need to increase response times, especially when they are confronted with pressing deadlines. Second, REs note the need for better communication from TRS, specifically on steps to correct errors, and for better understanding of the challenges confronting REs. Overall, the challenge from the RE's perspective is the need for quick response in the face of looming deadlines. As potential solutions, they see a need for additional RE Coaches and/or new tools like a 24/7 online chat function made available in the RE Portal.

Methodology

The TRS Reporting Employer Satisfaction Survey was designed by research staff at Texas A&M's Public Policy Research Institute (PPRI) and the Teacher Retirement System of Texas. The online survey was programmed using Qualtrics, a state-of-the-art survey research platform that tracks data collection and provides real-time updates regarding completed surveys.

The survey methodology for the 2022 survey was similar, though not identical, to previous RESS surveys. First, additional questions were added to make the survey comparable to other agency reporting requirements and to better understand RE awareness and use of a new Employer Toolkit. Second, we used multiple email contacts, provided by TRS, in an effort to increase survey response. In previous years, TRS provided a single email contact for a payroll contact, where available, or a web administrator, as an alternative contact, where a payroll contact was unavailable. In this year's survey, TRS provided multiple contacts for each RE including a payroll contact, web administrator, and reporting officer. As noted below, most REs had two unique email contacts available.

Data Collection

The initial population for the survey was provided by TRS and included 1,226 unique email addresses representing 1,346 organizations, including public schools, charter schools, and colleges and universities. The survey methodology was designed to target payroll employees who serve as the primary TRS contacts for their organization. For organizations without a payroll contact, a reporting officer was substituted as the organization's contact. This was a change over previous years when a web administrator was used as the alternate contact. In those cases, if a reporting office was unavailable, a web administrator served as the organization's contact. Of the 1,346 REs included in the survey, 221 REs had at least one contact available, 561 had two contacts available (e.g., a payroll contact and a web administrator), and 576 had three contacts available. Breaking this out by type of contact, 1055 had a payroll contact, 1047 had a reporting officer, and 969 had a web administrator available.

Invitation emails were sent to each unique email address asking potential respondents for help in completing the survey. The invitations included language assuring potential respondents that their responses would remain strictly confidential and that the survey results would only be used to improve TRS services. To ensure that the invitation was sent to the appropriate person, the invitation emails also asked the recipients to either forward the survey invitation to the appropriate individual at their organization (if the recipient was not the appropriate individual) or to respond with the appropriate individual's contact information so that the survey could be sent to them. Whenever an initial contact was provided, a link to the survey was sent to the new contact.

Thirty-six of the initial invitation emails "bounced," indicating they were sent to an invalid email address. Where available, an alternate email address was used for each of these "bounced" emails. Nine of these respondents completed the survey while six of these alternative emails bounced. Subsequent email reminders were scheduled to be sent at the beginning of each week, encouraging potential respondents to take the survey. Potential respondents received up to four unique reminders requesting their participation in the survey. Concurrently, TRS alerted potential respondents in their monthly newsletter to look for the survey

in their inboxes and spam folders. This type of official organizational endorsement has been found to increase survey response rates.

In cases where individuals do not respond to survey requests, PPRI researchers sent additional survey invitations and follow-up requests to the alternative email addresses provided by TRS. Overall, an additional 413 invitations were sent to alternative emails for non-respondents. This additional effort resulted in 110 completed surveys.

In addition, thanks to the information published in the TRS newsletter, PPRI staff also received emails and phone calls from individuals who indicated they should have received the survey as the organization's payroll contact, but did not. Each time a potential respondent contacted the PPRI, they were sent an email response with a link to the online survey.

Quality Review

The survey response data was reviewed by PPRI staff to determine the completeness of individual responses. Each response was reviewed to ensure that respondents took a reasonable amount of time to complete the survey, that they responded to enough of the items to provide meaningful content, and that their responses varied from one item to the next. Respondents who completed the survey too quickly (less than a minute), who answered less than a third of the survey questions, or who answered the same way across all items were removed from the final data. In addition, duplicate survey responses were removed from the survey. Out of the 820 respondents who began the survey, 766 respondents completed the survey representing 845 organizations. The overall response rate (64 percent) and the number of completed interviews is slightly lower than in previous years. By comparison, the 2021 RESS included 797 unique and valid responses representing 874 REs. The response rate for the 2021 survey was 68 percent.

For survey researchers, low response rates are generally less troubling than the potential for response bias. Response bias is the difference between respondents and non-respondents in their evaluations, attitudes, and behaviors. The representativeness of survey respondents, and not the overall response rate, is critical in determining a survey's accuracy. Table 1 provides insight into the representativeness of the 2022 RESS by comparing population parameters—based on the original sample data provided by TRS—to sample characteristics of survey respondents.

Table 1 includes a comparison of the original list of all REs provided by TRS (N=1,358) to individual survey respondents and to the organizations represented in the survey. For the data included in the column 3, it should be noted that an individual often represents multiple REs. The first column of Table 1 (All Reporting Employers) presents data for *all 1,358 REs*. The second column presents data for individuals who responded to the survey (N=766). The third and final column presents data for REs represented by the survey (N=845). The same individual respondent may represent multiple REs.

 As Table 1 shows, the survey respondents are representative of RE Coach color and RE type. There are only small differences between the REs represented by survey respondents and all REs on these key characteristics. This result gives us greater confidence that the final results reflect the larger population of REs.

Finally, surveys can be used to estimate population parameters or to provide strategic and actionable information to an organization or actor. Satisfaction surveys of this type typically yield responses from participants who have the strongest feelings on the subject at hand and, subsequently, have something to say. As such, the RESS should identity areas of concern and issues that need to be addressed. Perhaps stated differently, if there are biases in these responses, they should be toward more negative evaluations of TRS services because these would typically be the individuals most motivated to respond to the survey.

Table 1. Comparison of Population and Sample by RE Coach Color and RE Type

	All Reporting Employers		Survey Respondents		REs Represented	
RE Coach Color	N	%	N	%	N	%
Black	1	0.1	1	0.1	1	0.1
Brown	117	8.7	66	8.6	73	8.6
Coral	112	8.3	64	8.4	69	8.2
Gold	106	7.9	59	7.7	62	7.3
Gray	114	8.5	73	9.5	79	9.3
Green	118	8.8	67	8.7	71	8.4
Olive	111	8.2	62	8.1	64	7.6
Purple	120	8.9	72	9.4	81	9.6
Red	114	8.5	69	9.0	75	8.9
Silver	113	8.4	66	8.6	85	10.1
Violet	104	7.7	53	6.9	62	7.3
White	103	7.7	54	7.0	59	6.8
Yellow	113	8.4	60	7.8	65	7.7
RE Type						
Higher Education	108	8.0	53	6.9	60	7.1
Public Schools	1238	92.0	713	93.1	785	92.9
N	1346		766		845	

Survey Results

Overall Quality

Survey respondents were first asked to provide an overall rating of TRS services. The specific question wording is listed as follows:

"Overall, how would you rate the quality of service your organization receives from TRS?"

Figure 1: Ratings for Overall Quality of TRS Services, 2020-2022

| Rating	2020	2021	2022
Excellent	21%	29%	23%
Good	55%	55%	57%
Fair	21%	14%	16%
Not so good	3%	1%	3%
Poor	0%	0%	1%
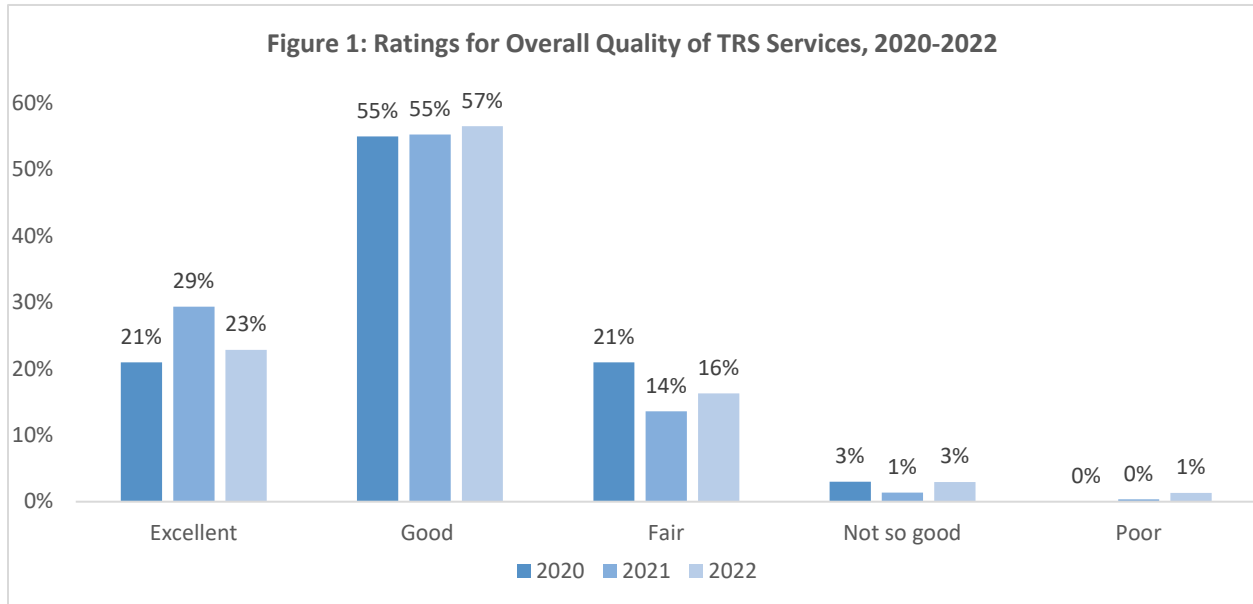
Due to rounding, percentages may not add to 100 percent.

Placing this question first allows respondents to offer "top of the mind" impressions without taking into account additional considerations. Figure 1 presents a comparison of the 2022 results with 2021 and 2020. The 2022 results show a slight decline in RE evaluations of TRS services. The percent of respondents rating TRS as "excellent" declined from 29 percent in 2021 to 23 percent in 2022. Notably, the number of respondents rating TRS services as "good" increased slightly but not significantly, from 55 percent to 57 percent, relative to 2021. Overall, the results look less similar to 2021 when evaluations were more positive and more similar to the 2020 survey results.

In previous years, we found significant differences in ratings based on the type of institution the survey respondent represented. In 2022, we found no significant differences, meaning we cannot conclude that respondents representing higher education differed significantly in their evaluations of TRS services from those representing public schools.

Figure 2: Rating for Experience with Agency
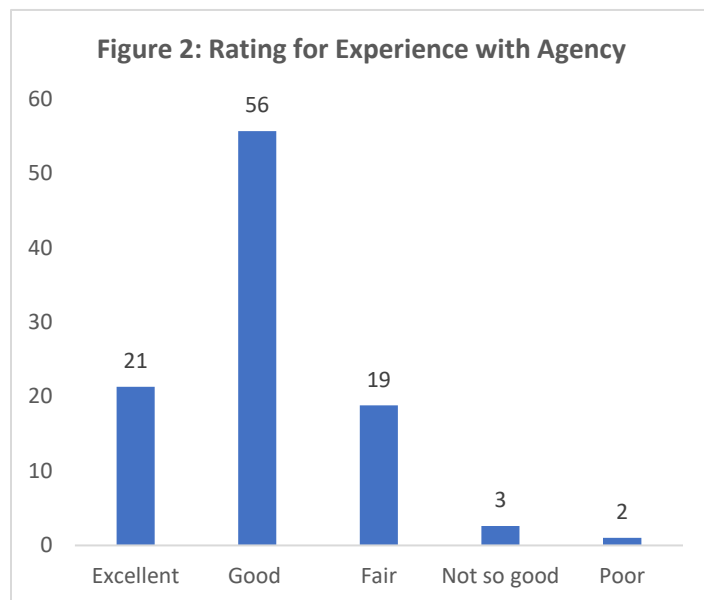
Due to rounding, percentages may not add to 100 percent.

The second question is new and asks respondents to "Please rate your overall experience with the agency." The results (presented in Figure 2) are similar to those presented in Figure 1. Not surprisingly, the responses to this question are highly correlated with responses to Q1 (r=.86). This means ratings of overall services largely correspond with ratings of one's experiences with the agency, and respondents are not making much of distinction between these two items. We see no differences by institutional type, meaning that respondents representing public schools responded similarly to respondents representing higher education.

Changes to TRS Services

To gain insight into the evaluation of the quality of TRS services, respondents were asked the following open-ended question: "What, if anything, would you change about the services TRS provides to its REs?" This is asked early in the survey and immediately following the ratings questions to get unstructured "top of mind" responses. Overall, 40 percent of the 2022 survey respondents provided a response. This is a significant increase over 2021 when only 22 percent of respondents provided a response. Because they require more effort on the part of survey respondents, open-ended comments in satisfaction surveys typically reflect dissatisfied customers who offer more detailed comments and suggestions for improvement.

Figure 3: Percent of Coded Open-Ended Responses for How TRS Could Improve Services
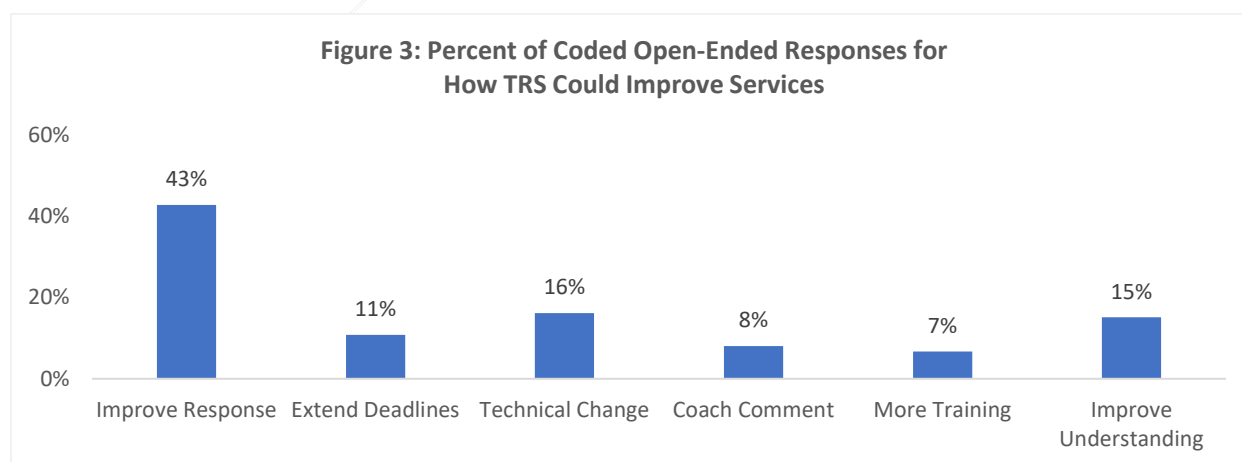
Due to rounding, percentages may not add to 100 percent.

To analyze the results, we read through each comment and coded the responses according to themes present in the individual's answer. Responses were coded for multiple themes. For example, a respondent might note the need for quicker response times from TRS while also questioning the reporting deadlines. The themes identified were based both on previous year's survey results and our close reading of the responses in the 2022 survey. These include: (1) improving response times; (2) extending deadlines; (3) making technical changes, including improving the RE Portal; (4) making comments about their RE Coach or about the need for additional RE Coaches; (5) providing training; and (6) being more understanding of REs or providing better communication to those REs. In Figure 3, we present the open-ended comments coded to capture the themes present in individual responses. It is important to note that each bar represents the percent of survey respondents who answered this question rather than the percent of total survey respondents.

Of the open-ended responses, the themes remain similar to those expressed in previous surveys. Forty-three percent of respondents who offered a comment noted the need for quicker response times and more availability of RE Coaches as deadlines approach. Respondents also state that the reporting system is unnecessarily complicated. A related theme that emerges in some comments is the need for TRS to hire additional staff to support REs. Much of the frustration expressed in response to this question (and later in the report) reflect the need for resources and support as reporting deadlines approach. We did see an increase in respondents asking for better communication from TRS or better understanding of the demands on REs' time and energy. Representative comments by theme are included below.

Improve Response Times

Forty-three percent of respondents who offered a suggestion for improving TRS services said something about improving response times. The challenge with response times remains similar to previous surveys. REs think that a two-day response is unreasonable when pressing deadlines approach and that there should be a faster response time when dealing with issues that need to be addressed urgently. Below we include examples (*in italics*) of the verbatim responses from survey respondents.

- *While I understand that the call volume and email volume is overwhelming, it would be nice to have someone available for the quick answers. Or not always a delayed response.*
- *We know they need more coaches for turnaround time of response. When you are down to the deadlines of reporting and have an issue, it's frustrating having to wait a day or two for help.*
- *The turnaround time to respond to voice mails and emails. It should be within 24 hours as we are usually waiting on an answer to complete our reports.*
- *The TRS staff members aren't the problem. It is the lengthy delays in being able to communicate with them or getting a response from that communication is the issue. Once you are talking to them, they are extremely helpful and provide great customer service.*
- *The ability to contact assigned RE Coach by phone. In some instances, certain questions require a verbal dialogue that an email response does not provide a clear understanding.*
- *I understand the agency is undergoing staffing changes, but the response time from the coaches needs to be reduced from 2 days to 24 hours.*

Extend Reporting Deadlines

Eleven percent of responses speak to issues regarding reporting deadlines. It is important to note that concerns about reporting deadlines go hand-in-hand with concerns about response times. Any issues that need to be resolved in reporting are difficult to address with a two-day standard response. In addition, deadlines often fall on holidays or weekends that make reporting even more difficult.

- *The unreasonable deadlines. TRS request information based on the prior month by the 6th of the following month. This MAY give the RE 5 days to process. Even if there are issues in the reports that require help from a coach who has 2 days to respond, the RE is still required to submit payment NLT the 6th based on a guesstimate. Some districts do not and will not give TRS funds based on a guess.*
- *The TRS deadline can be hard to meet on certain months when the district has shorter months of work, summer months. In order to avoid penalty and interest, we sometimes have to submit payment without completing the actual reporting so it can cause for us to have to submit additional payments or make adjustments in the following month's reports. It would be much better if TRS possibly extended the deadlines.*
- *It would be nice if TRS would take into account due dates for reporting in regards to holidays and school districts being closed.*
- *I think the 6th due date is near impossible if I want to have days/hours reported anywhere close to accurate. I certainly understand the need to have the month submitted as soon as possible but even without the issue of your 2 day turnaround response time. It could be there is a need to have TRS and software companies work together to create a smoother process for our software?*

Technical Changes or Frustrations with the Reporting Employer Portal

Sixteen percent of REs report frustration with the reporting system. Some of these concerns are very specific (e.g., needing to resubmit files because of system lags), others are more general (e.g., the system is cumbersome or not very user-friendly). Regardless, an ongoing concern across surveys involves the ease of use of the RE Portal, the ability to find information within the system, and to correct errors when they occur during the reporting process.

- *I would focus on updating the system TRS uses. During the first week of the month (when RE reports are due), the system lags when submitted files. There has been several occasions of me having to re-submitting the RP file until it gets locked for validation.*
- *I would change the reporting platform. It is outdated and the access is cumbersome. Also, the historical access to view TRS/ORP eligibility dates is not accurate. Last but not least, the number of support individuals for customer service and coaches is limited (many employers per coach) making it difficult to get immediate response to institutional needed.*
- *First, I would make the TRS portal more user friendly. I would enhance the portal by adding the following: add a pop up confirmation message every time the "delete" button is pressed (deleting a report), I would add a sort option to allow sorting of reports, I would align the order of accounts listed under ledger summaries with the account order when submitting payments, and I would fix glitches such as money paid into a CI account posting into a different account.*
- *When we, as experienced TRS Reporting Employees, know for a fact that we need an override, we should be able to do the override ourselves and TRS should be able to keep track of them the same way they keep track of Deleted RP20 files. Our school processes payroll twice per month so it is*

very difficult to have to wait for an answer to an email and then wait on the override when I don't get to start working on TRS reporting until the 30th of the month.

Reporting Employer Coach Comments

Comments about TRS RE Coaches, made in 8 percent of responses, generally fall into one of two categories: (1) Positive comment about a specific RE Coach, including comments noted variance in performance across RE Coaches; (2) More general comments about the need for more RE Coaches and/or the need for less turnover and more consistency across RE Coaches.

- *Our reporting coach is awesome. Its the overall agency expectations that are unrealistic. Ie. We have a part time employee who works FT in Trs at another school. We are tasks with chasing down that info. The member look up doesn't give enough information. Wasting valuable time for the reporting agency*
- *The only issue I've had recently with TRS is that our coach changed 4 times within 3 months. Our current coach is extremely responsive and helpful, as was the first. The two that we had in the interim were not as responsive causing our TRS reports to be late and thus we incurred P&I feed even though we were waiting on overrides from the coach.*

More Training

Seven percent of REs noted the need for additional training, especially one-on-one training. Given that the percent of REs attending training has declined over the past two years, this suggest that the training that is being provided does not fit the needs of REs.

- *Perhaps 1:1 training for those that may need additional help/guidance when the RP reports are being processed. Online training is good but everyone learns differently and it may be beneficial to have hands on with an experienced person who can explain the what/why and how's of the TRS processing and how it relates to the school's internal software.*
- *I would like to have more training opportunities offered by TRS. We fill many hats and sometimes processes gets forgotten. There needs to be more offered to refresh or introduce new changes. Would also like to have consistency with the timeliness of email responses when there's an issue with the Portal.*
- *For new employees handling the reporting, I wish TRS offered in person training 2-3 times a year. Although we have a designated coach to reach out to for questions, at times the answers are not clear or require clarification because of the lack of experience in reporting.*

Better Communication/Understanding and Flexibility with Reporting Deadlines

One of the themes that emerged in the 2022 survey was the need for TRS to better understand the demands placed on REs and for better communication. Fifteen percent of responses noted the need for better understanding or better communication.

- *TRS does not take into consideration the challenges the districts face in filling position and they also do not realize that every district does not function exactly the same with distribution of duties. I believe there are numerous ways TRS could alleviate some of the stress of reporting and I also believe when the TRS reporting portal has glitches or when there are not enough* TRS coaches available *to assist in a timely manner, penalties/fines should be waived. As time progresses, TRS is*

moving more and more of the work to the district rather than helping to process.
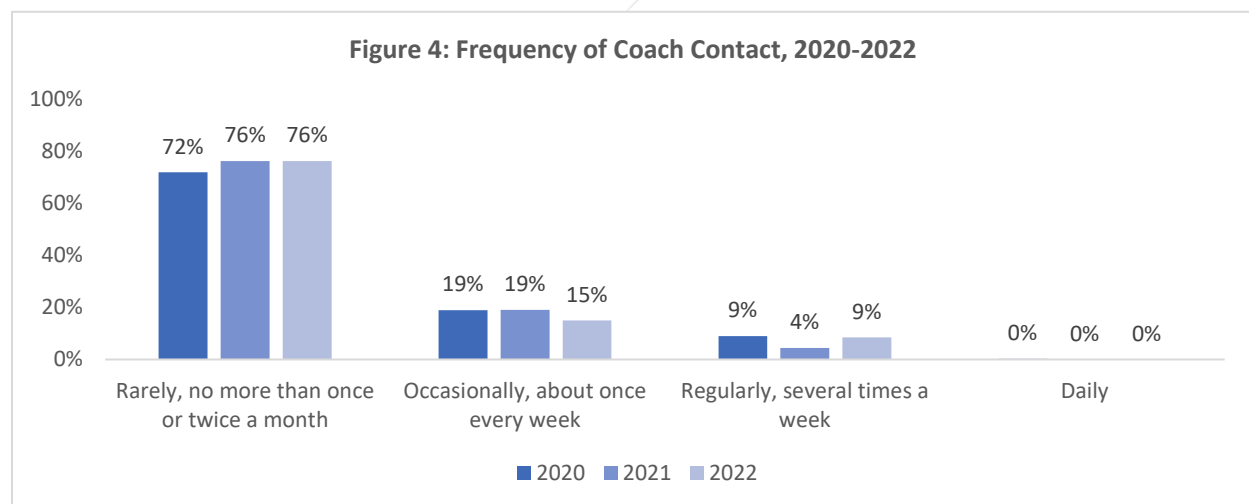
- *Understanding that all districts operate differently and that most cannot meet the deadlines that are currently set by TRS for reporting purposes. Districts that only pay out once a month have it much easier then those who have multiple pay periods in one month. Even extending the TexNet payment and RP Reports to be due the 10th would be helpful.*
- *Overall TRS does a good job supporting the districts. every now and again, there is a communication issue through email. It starts by us not being able to fully explain the issue well enough for you to understand in an email and rather than a phone call at that point their is an assumption as to what the issue is and we both spend a lot of time going back and forth trying to resolve.*
- *Allow for clearer directions on what information is needed and how to report the required items*

Contact with Reporting Employer Coach

To gauge the level of interaction respondents have with their RE Coaches, survey participants were asked about the frequency of contact with their RE Coach. The specific question wording is as follows:
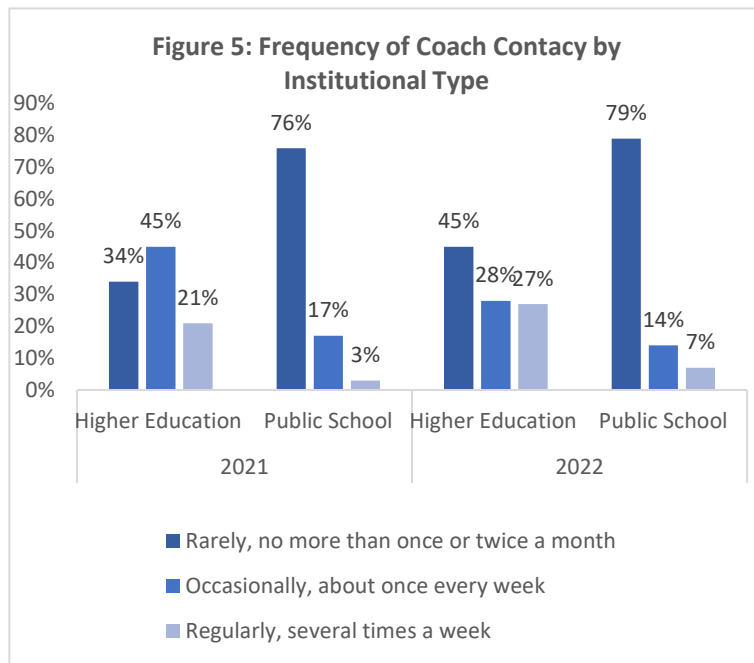
"In the typical month, how often does your organization call or email a TRS Reporting Employers Coach?"

In the 2021 survey, respondents were given the option to select "never" as a response. For purposes of comparison, these responses are included in the "rarely" category in Figure 4. Less than three percent of respondents said they "never" contacted their RE Coach in the 2021 and 2022 surveys.

Figure 4: Frequency of Coach Contact, 2020-2022

	Rarely, no more than once or twice a month	Occasionally, about once every week	Regularly, several times a week	Daily
2020	72%	19%	9%	0%
2021	76%	19%	4%	0%
2022	76%	15%	9%	0%

Due to rounding, percentages may not add to 100 percent.

As can be seen in Figure 4, most respondents (76 percent) reported "rarely" or "never" contacting their RE Coach and the percent of REs reporting "rarely" or "never" remained similar to the 2021 survey. In the 2022 survey, however, there was an increase in the percent of REs that reported they "regularly" contact their RE Coach. In 2021, only four percent of REs reported "regularly" contacting their RE Coach. In 2022, this increased to nine percent. Keep in mind that as contact increases, satisfaction often decreases because REs typically contact TRS when they have a problem or a concern.
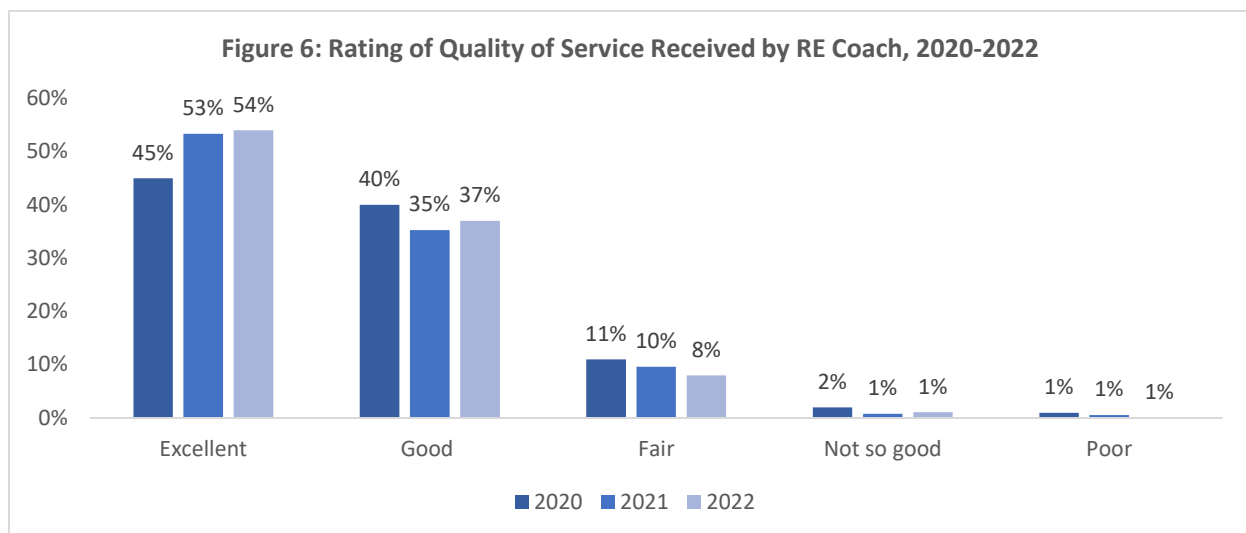
Figure 5: Frequency of Coach Contacy by Institutional Type

Higher Education 2021: Rarely 34%, Occasionally 45%, Regularly 21%
Public School 2021: Rarely 76%, Occasionally 17%, Regularly 3%
Higher Education 2022: Rarely 45%, Occasionally 28%, Regularly 27%
Public School 2022: Rarely 79%, Occasionally 14%, Regularly 7%

Legend:
■ Rarely, no more than once or twice a month
■ Occasionally, about once every week
■ Regularly, several times a week

Due to rounding, percentages may not add to 100 percent.

As in previous years, there are consistent differences in contact by RE type (Figure 5). Respondents representing higher education report contacting their RE Coach more often than respondents representing public schools. While reported contact rates for public schools are similar to previous years, reported contact rates for higher education shifted relative to 2021. First, there is an increase, from 76 percent to 79 percent, in the number of public schools that "rarely" or "never" contact their RE Coach. Second, the percent of REs representing higher education "rarely" or "never" contacting their RE Coach increased from 34 percent in 2021 to 45 percent in 2022.

At the same time, the percent of REs regularly contacting their RE Coach also increased for both RE types. In 2021, 21 percent of higher education respondents reported contacting their RE Coach "regularly" compared to 27 percent in 2022.

Quality of Service Received by Reporting Employer Coach

Figure 6: Rating of Quality of Service Received by RE Coach, 2020-2022

Excellent: 2020 45%, 2021 53%, 2022 54%
Good: 2020 40%, 2021 35%, 2022 37%
Fair: 2020 11%, 2021 10%, 2022 8%
Not so good: 2020 2%, 2021 1%, 2022 1%
Poor: 2020 1%, 2021 1%, 2022 1%

Legend: ■ 2020 ■ 2021 ■ 2022

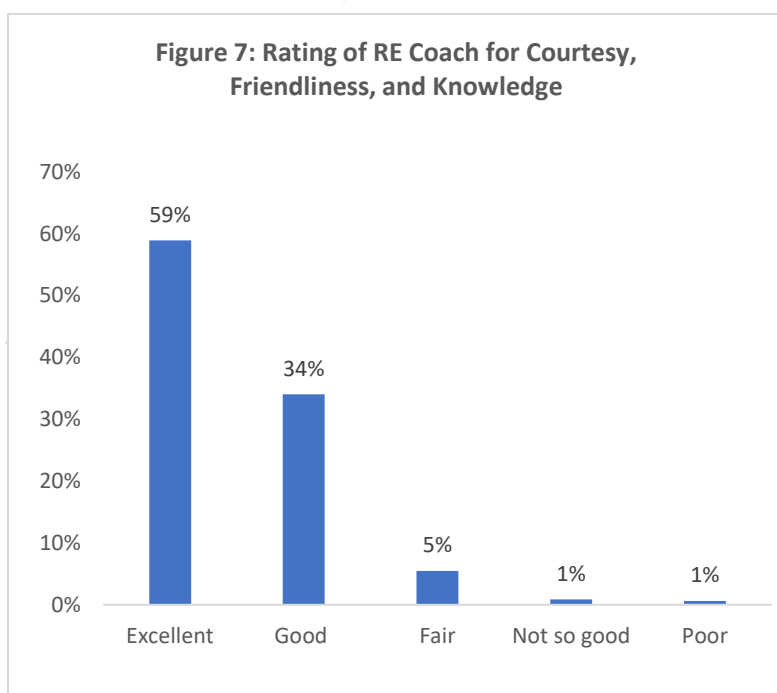*Due to rounding, percentages may not add to 100 percent.*

REs were asked to rate their RE Coach on various attributes. The first question asks respondents to rate the "quality of services" received by their RE Coach. The specific question wording is as follows:

"How would you rate the quality of service you receive from your TRS Reporting Employer Coach?"

One of the consistent patterns from previous years is that respondents generally rate their RE Coach more favorably than overall TRS services. This pattern continues in the 2022 data. Indeed, the percent of REs rating their RE Coach as "excellent" or "good" increased slightly in 2022, even as ratings for overall service declined. Ninety-one percent of REs rated their RE Coach as "excellent" (54 percent) or "good" (37 percent) in 2022 compared to 88 percent in 2021. This improvement continues the trend of positive RE Coach evaluations.

As noted in previous reports, this set of findings suggest that RE Coaches are perceived as allies in dealing with the complexities of the RE Portal and meeting reporting deadlines. There are no notable differences by employer type, meaning that representatives of colleges and universities evaluate their RE Coaches similarly to representatives from public schools.

One of the new questions included in the 2022 survey asked respondents to rate their RE Coach "for courtesy, friendliness, and knowledge, and whether your RE Coach adequately identifies themselves by name?" The results, presented in Figure 7, reveal generally positive evaluations of RE Coaches on these dimensions. Fifty-nine percent of REs rated their RE Coach as "excellent" for courtesy, friendliness and knowledge, 34 percent as "good", and 5 percent as "fair". Not surprisingly, ratings for overall service and for courtesy, friendliness, and knowledge are highly correlated (r=.85). There is no difference in ratings by RE type (public schools versus higher education).

Figure 7: Rating of RE Coach for Courtesy, Friendliness, and Knowledge

Due to rounding, percentages may not add to 100 percent.

Rating of Reporting Employer Coach by Dimension of Service

Figure 8 presents the results of the evaluation of RE Coaches by dimension of performance. In this section of the survey, respondents were asked a series of questions evaluating specific dimensions of their RE Coach's service.

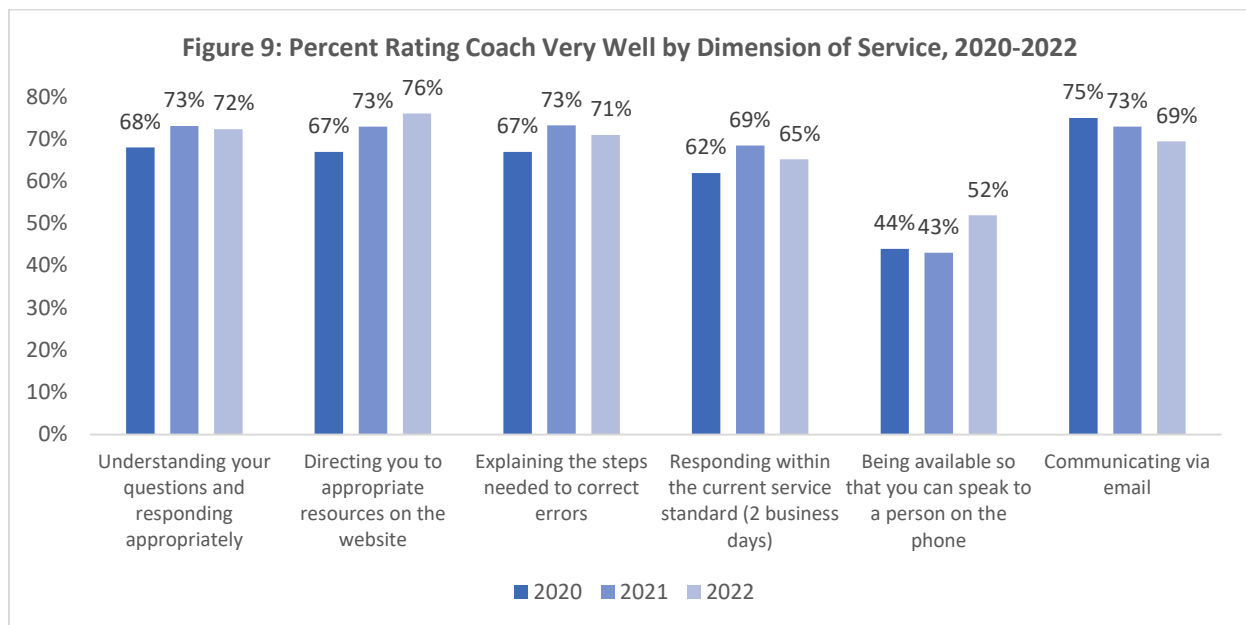**Figure 8: Rating of RE Coach by Dimension of Service**
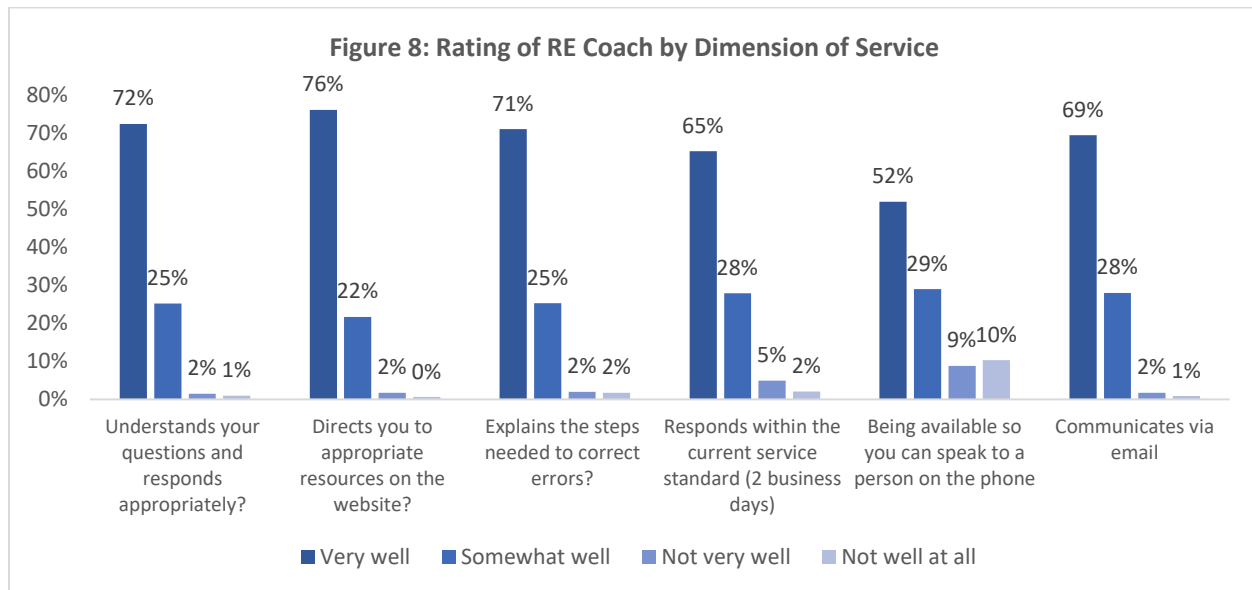
Due to rounding, percentages may not add to 100 percent.

The results presented in Figure 8 are mostly consistent with previous years. RE Coaches are given positive marks for each dimension of service. "Being available so that you can speak to a person on the phone," remains the least positively evaluated service. Even here, however, 52 percent of REs rate their RE Coaches as performing "very well" in terms of their availability and another 29 percent rate their RE Coach as performing "somewhat well." By most standards, this is good overall rating. This also represents a significant increase when compared to the 2021 results when 43 percent of REs rated their RE Coach as performing "very well" for being available by phone (Figure 9).

For each of the other dimensions, respondents were positive in their evaluations. REs rated their RE Coaches as performing "very well" when it comes to understanding and responding appropriately to questions (72 percent), directing respondents to appropriate online resources (76 percent), explaining the steps needed to correct errors (71 percent), responding within the current service standard (65 percent), being available to speak on the phone (52 percent), and communicating via email (69 percent). In 2022, the ratings remained positive and were comparable to previous years. The two exceptions were responding within the current service standard, which declined from 69 percent in 2021 to 65 percent in 2022 and communicating by email which declined from 73 percent to 69 percent. These declines may explain the concerns with communication and response times noted in the open-ended responses.
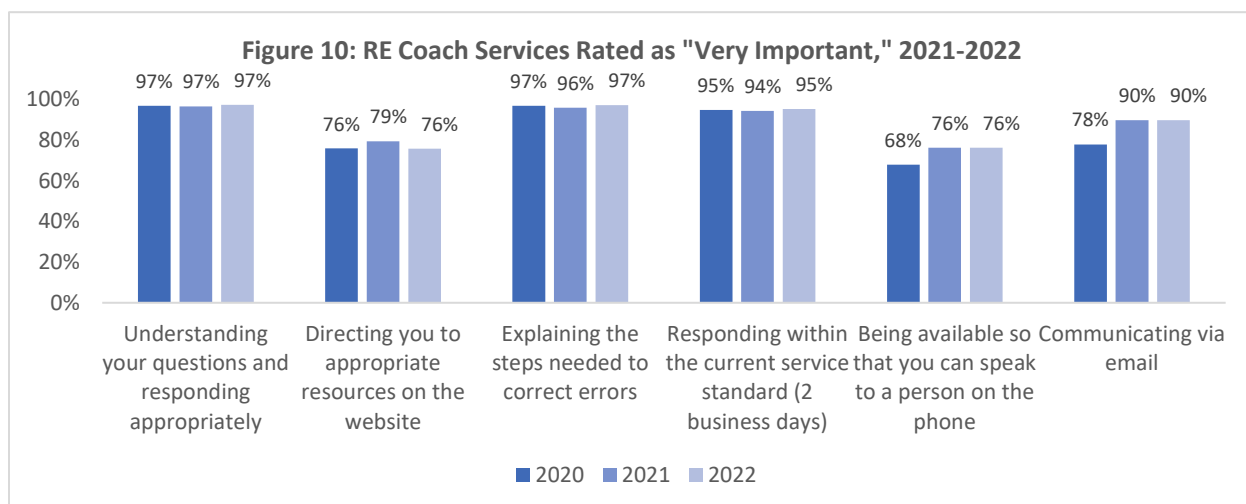
Figure 9: Percent Rating Coach Very Well by Dimension of Service, 2020-2022

Dimension	2020	2021	2022
Understanding your questions and responding appropriately	68%	73%	72%
Directing you to appropriate resources on the website	67%	73%	76%
Explaining the steps needed to correct errors	67%	73%	71%
Responding within the current service standard (2 business days)	62%	69%	65%
Being available so that you can speak to a person on the phone	44%	43%	52%
Communicating via email	75%	73%	69%

Due to rounding, percentages may not add to 100 percent.

Rating of the Importance of Services Provided by Reporting Employer Coaches

Survey participants were also asked to rate the importance of the services provided by RE Coaches. Consistent with previous years, REs rated all of the services as "very important," though some services are clearly more important than others. The importance of these services has not changed much over time. As shown in Figure 10, "understanding your questions and responding appropriately", "explaining the steps needed to correct errors", "responding within the current service standard", and "communicating via email" are considered almost universally important.

Figure 10: RE Coach Services Rated as "Very Important," 2021-2022

| Dimension	2020	2021	2022
Understanding your questions and responding appropriately	97%	97%	97%
Directing you to appropriate resources on the website	76%	79%	76%
Explaining the steps needed to correct errors	97%	96%	97%
Responding within the current service standard (2 business days)	95%	94%	95%
Being available so that you can speak to a person on the phone	68%	76%	76%
Communicating via email	78%	90%	90%

Due to rounding, percentages may not add to 100 percent.

Directing REs to appropriate online resources and being available to speak to someone on the phone are considered somewhat less important than the other areas of service but are both considered important by 76 percent of REs. Comparing the importance of various services to evaluations of RE Coaches, RE Coaches perform well on those areas of services considered most important to the RE.

Intended Use of Online Chat

Survey participants were asked the following question to gauge their willingness to use online communication: "If chat was offered as another way to communicate with your TRS Reporting Employers Coach, would you use it?"

Figure 11: Willingness to Use Online Chat

Don't Know, 12%

No , 3%

Yes, 86%
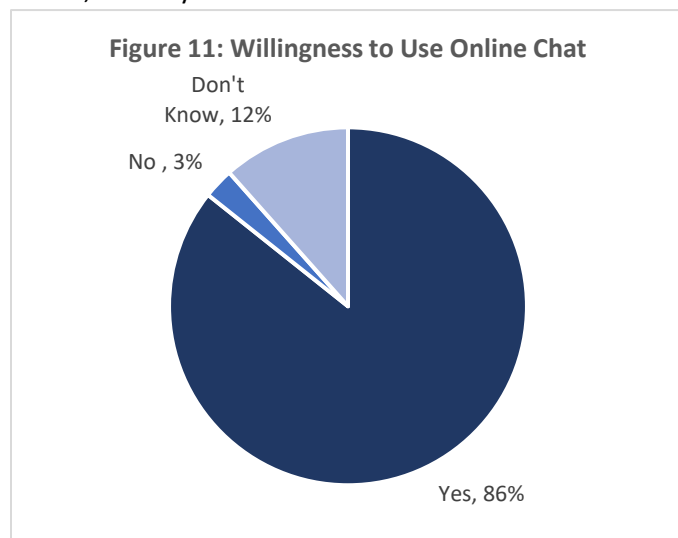
The results are presented in Figure 11. Eighty-six percent of respondents said they would use online chat compared to only 3 percent who said they would not use online chat. An additional 12 percent said they did not know or were unsure.

The percent rating that they would use online chat has increased over time. In 2021, 83 percent of REs said they would use online chat compared to 77 percent in 2020. Additionally, in the open-ended responses, a number of respondents mentioned the availability of online chat as an improvement they would like to see in the services provided by TRS.

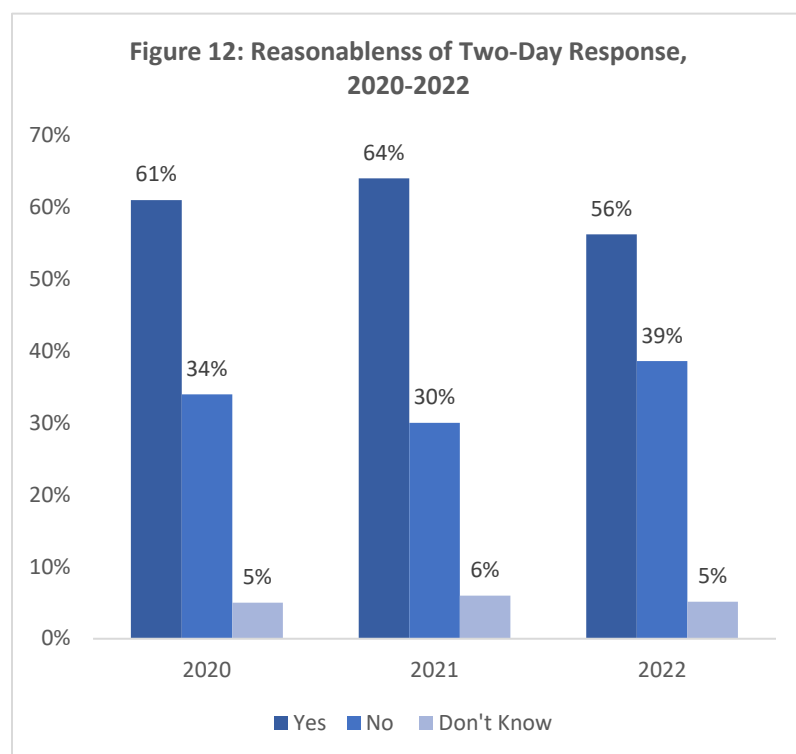*Due to rounding, percentages may not add to 100 percent.*

Ranking of TRS Services

Finally, survey respondents were asked to rank the top three most important services provided by RE Coaches. Table 2 presents the results ordered by the number of respondents who ranked each service in the top three. For example, 719 respondents ranked "explain the steps needed to correct errors" as one of the most important services that RE Coaches provide while 663 respondents ranked "understand your questions and respond appropriately" in their top three for TRS services. The order of rankings did not change from previous years, suggesting the importance of various services is relatively stable.

Table 2. Ranking of TRS RE Coach Services (Number Ranking Services in Top 3)

	2022	**2021**	**2020**
Explain the steps needed to correct errors	719	747	799
Understand your questions and respond appropriately	663	673	717
Responds with current service standard (2 business days)	454	475	590
Call so you can speak to a person on the phone	306	302	220
Communicate via email	171	152	142
Communicate via chat	98	88	65
Direct you to appropriate resources on the website	46	47	51
Something else (specify)	26	18	19

Standard Reporting Employer Coach Response Time

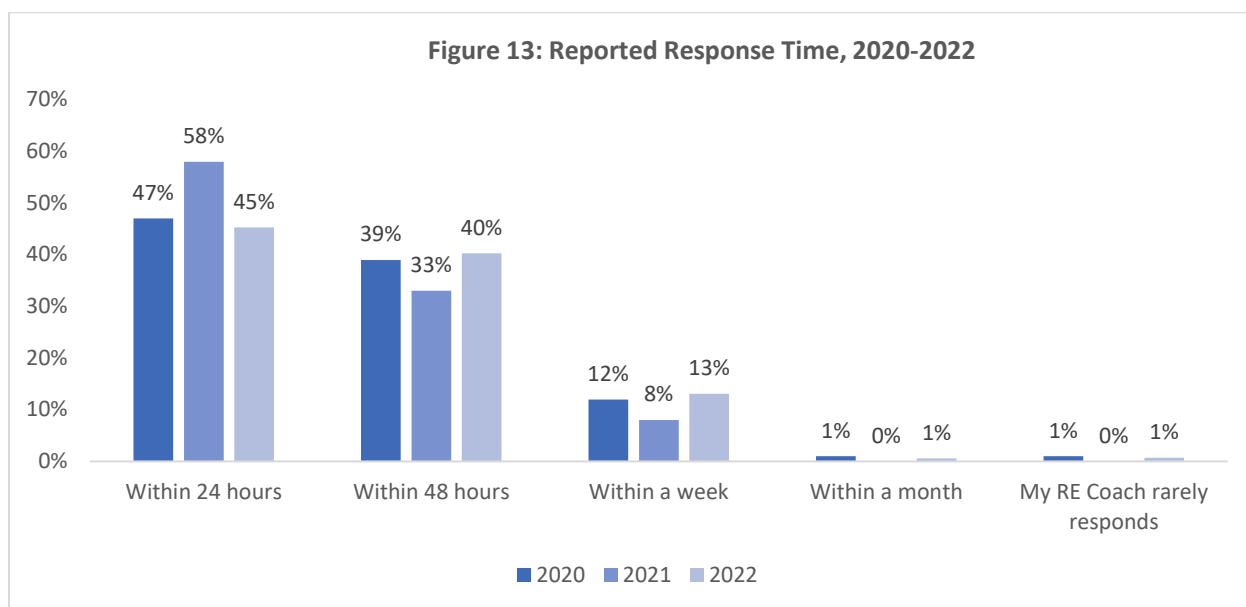**Figure 12: Reasonablenss of Two-Day Response, 2020-2022**

To gauge response time expectations respondents were asked the following question: "Our goal is to respond to you within two business days. Do you think this is reasonable?"

The results are presented in Figure 12. Relative to 2020 and 2021, there was a decline in the perceived reasonableness of a two-day response time. In the 2022 survey, 56 percent of REs thought two days was reasonable compared to 64 percent in 2021. Thirty-nine percent of respondents said they did not think two days was reasonable. As we note below, responses to this question may reflect increasing response times over time.

Due to rounding, percentages may not add to 100 percent.

Respondents who said a two-day response was not reasonable were asked in an open-ended follow-up question, "what response time would be reasonable?" Of the respondents who said that two days was not reasonable, most provided a written response to the follow-up question. Among those respondents who provided a written response, 45 percent said they should get a response within one day or within 24 hours. Twenty-eight percent of these respondents thought they should have a response from their RE Coach within a few hours or within the same business day (or less than 24 hours).

## Reported Reporting Employer Coach Response Time

Survey respondents reported slower response times in 2022 compared to 2021, though responses to the 2022 survey parallel results from the 2020 survey. In the 2022, 45 percent of REs reported receiving a response from their RE Coach within 24 hours while 40 percent reported receiving a response with 48 hours. Only 15 percent of REs reported waiting longer than 48 hours for a response. This is a decline relative to 2021 when 58 percent of REs reported receiving a response within 24 hours. It is unclear why response times declined over the past year, but consistent with other results that reflect results from the 2022 survey appear to be more consistent with the 2020 than with 2021 results. Slower reported response times, especially after improved response times in 2021, may explain the decline in overall ratings for TRS services. One might expect, however, that we would also see a decline in RE Coach ratings. This has not happened, largely because REs perceive that RE Coaches are confronting too many demands on their time.
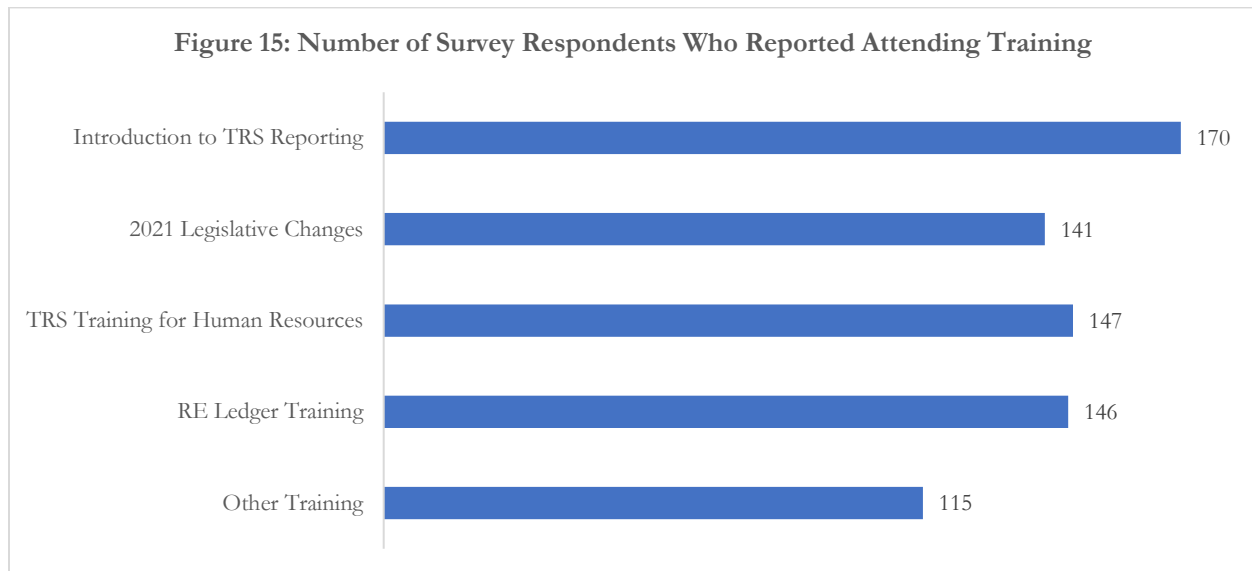
17

Figure 13: Reported Response Time, 2020-2022

Response Time	2020	2021	2022
Within 24 hours	47%	58%	45%
Within 48 hours	39%	33%	40%
Within a week	12%	8%	13%
Within a month	1%	0%	1%
My RE Coach rarely responds	1%	0%	1%

Due to rounding, percentages may not add to 100 percent.

Training Attendance

One of the more notable shifts in the 2021 survey, due largely to the COVID-19 pandemic, was a decline in respondents who reported attending training (Figure 14). In 2022, this decline appears to have persisted. 50 percent of REs reported attending training in the past year. This is much lower than in pre-COVID years (72 percent in 2020) and likely reflects the effects of the ongoing pandemic on in-person attendance. Given that REs stated a need for more training in their open-ended responses, this result presents something of a puzzle. Why aren't more REs attending training?

Figure 14: Percent Reporting Attending Training, 2020-2022

Year	Percent
2020	72%
2021	53%
2022	50%
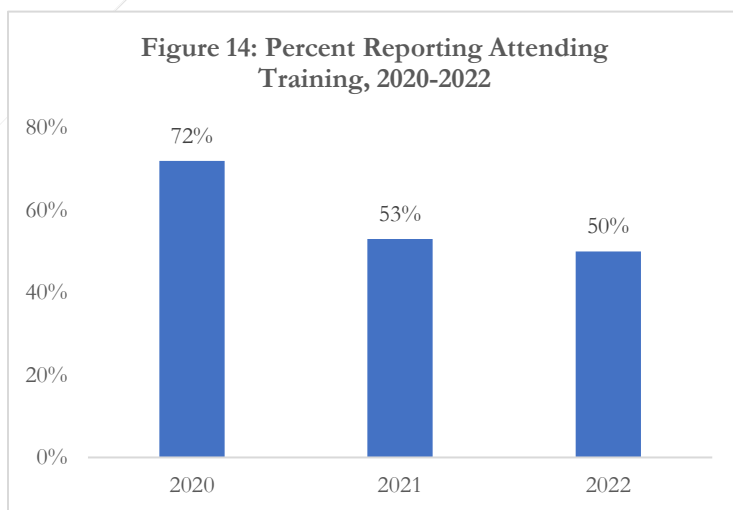
To gain insight into this question, we first asked REs what training they had attended over the past year. These results are presented in Figure 15. As Figure 15 reveals, the most common response (N=170) was the "Introduction to TRS Reporting" followed by "TRS Training for Human Resources" and "RE Ledger Training."

Figure 15: Number of Survey Respondents Who Reported Attending Training

Training	Respondents
Introduction to TRS Reporting	170
2021 Legislative Changes	141
TRS Training for Human Resources	147
RE Ledger Training	146
Other Training	115

Another way to gain insight is to ask REs why they did not attend training in the past year. The most common response (26 percent) was that they lacked the time to attend training due to scheduling or other demands on their time. The second most common response (16 percent) reflected ambiguity on when respondents last attended training, uncertainty as to why they did not attend training, or reluctance to provide a reason for not attending training. The third most common response (16 percent) was REs who said they did not need training. Either they could get the information elsewhere (online or through the update newsletter) or they had been in the position for a number of years and did not think the training would provide new information. Fourth, a slightly smaller number (15 percent) of REs said they were unaware that training was available while 7 percent said they were new to job or had just assumed responsibility for reporting and would attend training in the near future. Finally, COVID was stated as a reason for not attending training, but was not the most commonly cited reason. Thirteen percent of respondents who did not attend training said it was because of COVID.
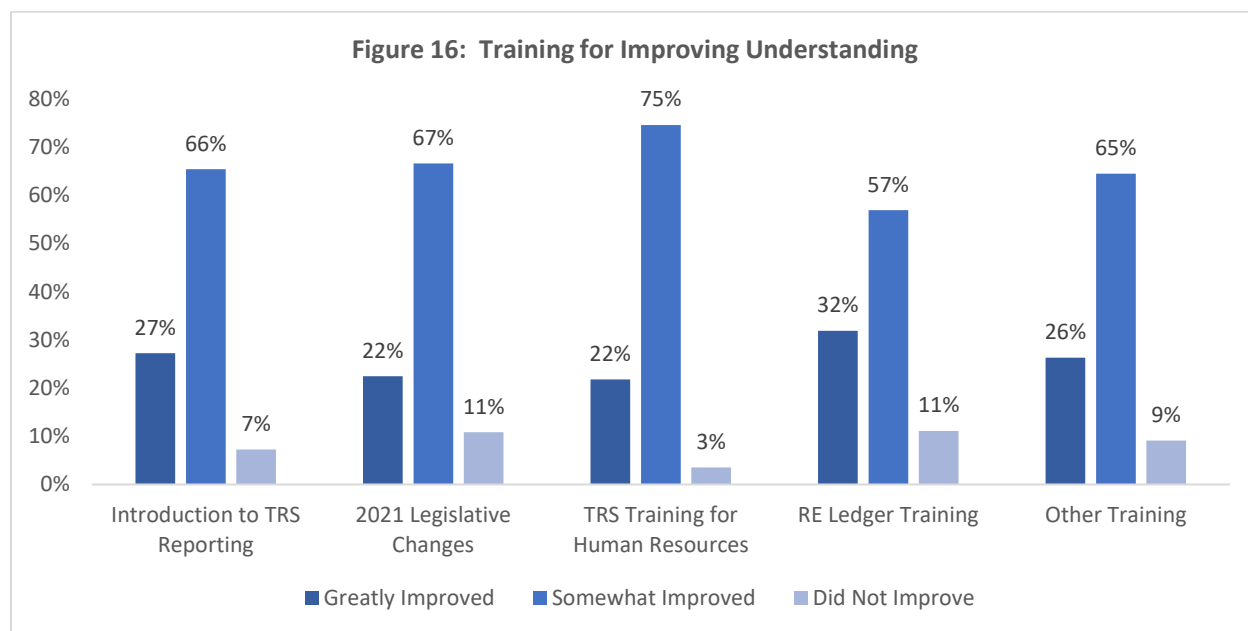
Despite these concerns, only a small percentage of REs (7 percent) indicated that there were training sessions or resources they would like to see that are currently not available. Other than potential training for more experienced REs or one-on-one training that addresses specific concerns, it is not clear that the content of training is the issue. REs need more time for training, greater availability of training opportunities, and they need to be made more aware of the opportunities that are available.
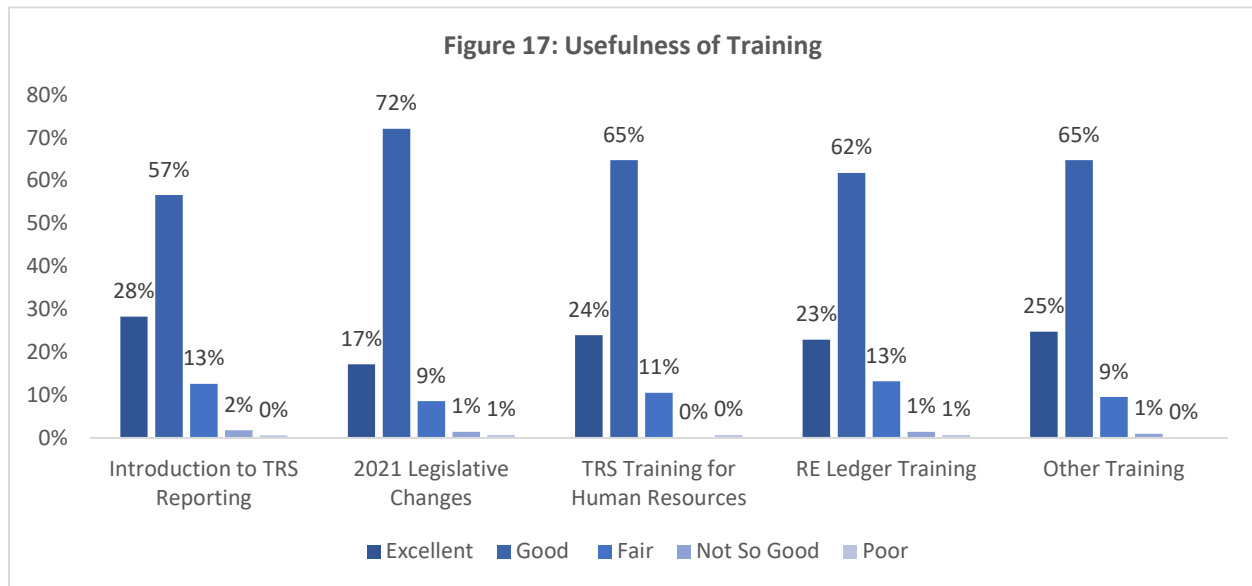
Training Effectiveness

To evaluate the effectiveness of the training, respondents were asked the following two questions about each training session they attended:

1. "How much did attendance at your training session improve your understanding of the <enter training topic here>?"
2. "Please rate the usefulness of the resources and information provided to you during your training session?"

The majority of survey participants reported the training they attended improved their understanding of the applicable training topic (Figure 16). For each of the training sessions, respondents were more likely to report the training they attended only "somewhat" improved their understanding rather than "greatly" improved their understanding. Even so, across training sessions, very few respondents said training did not improve their understanding of the topic. Comparisons to previous years are problematic because the training sessions are not identical across years and the evaluations are based only on the limited subset of respondents who attended training. Having said that, these results are remarkably consistent with the surveys conducted in previous years.
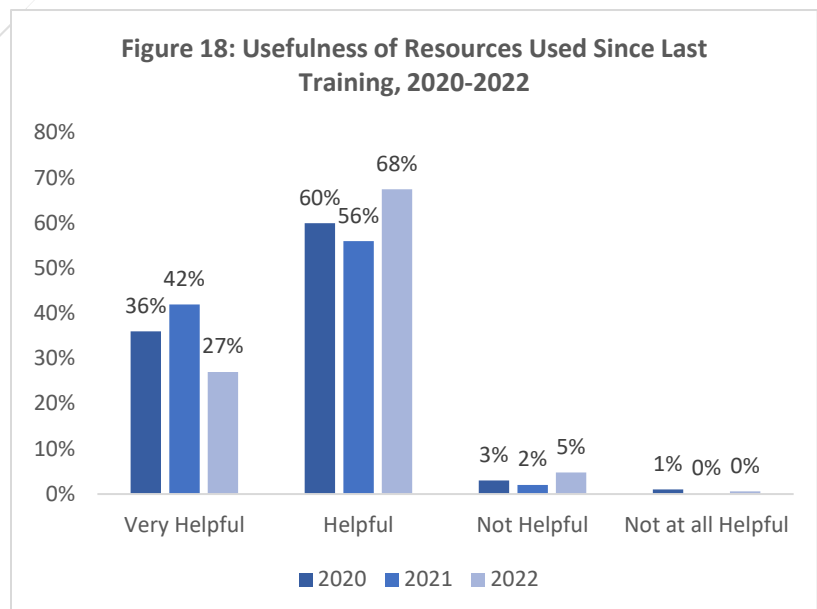
Figure 16: Training for Improving Understanding

Training	Greatly Improved	Somewhat Improved	Did Not Improve
Introduction to TRS Reporting	27%	66%	7%
2021 Legislative Changes	22%	67%	11%
TRS Training for Human Resources	22%	75%	3%
RE Ledger Training	32%	57%	11%
Other Training	26%	65%	9%

Due to rounding, percentages may not add to 100 percent.

Figure 17: Usefulness of Training

	Introduction to TRS Reporting	2021 Legislative Changes	TRS Training for Human Resources	RE Ledger Training	Other Training
Excellent	28%	17%	24%	23%	25%
Good	57%	72%	65%	62%	65%
Fair	13%	9%	11%	13%	9%
Not So Good	2%	1%	0%	1%	1%
Poor	0%	1%	0%	1%	0%

Due to rounding, percentages may not add to 100 percent.

When asked to rate the usefulness of training (Figure 17), respondents were more likely to rate the information provided during training as "good" rather than "excellent". RE evaluations provided during training are generally positive with the percent of respondents rating the training's usefulness as "excellent" or "good" ranging from 85 percent for "Introduction to TRS Reporting" and "RE Ledger Training" to 89 percent for "TRS Training for Human Resources" and "2021 Legislative Changes", and 90 percent for "Other Training." Overall, survey participants value the information provided during training.

When asked to rate the resources used since their last training session (Figure 18), respondents were mostly positive. Twenty-seven percent of respondents rated the resources as "very helpful" while 68 percent rated the resources as "somewhat helpful." Very few respondents rated the resources as "not very helpful" or "not at all helpful." Despite general positive evaluations, there was a decline in the percent of respondents rating their training session as "very helpful." In 2021, 42 percent of REs evaluating training as "very helpful" compared to 27 percent in 2022. This shift is largely captured by a parallel increase in the percent of REs who described their training as "helpful". Overall, while there is room for improvement, TRS

Figure 18: Usefulness of Resources Used Since Last Training, 2020-2022

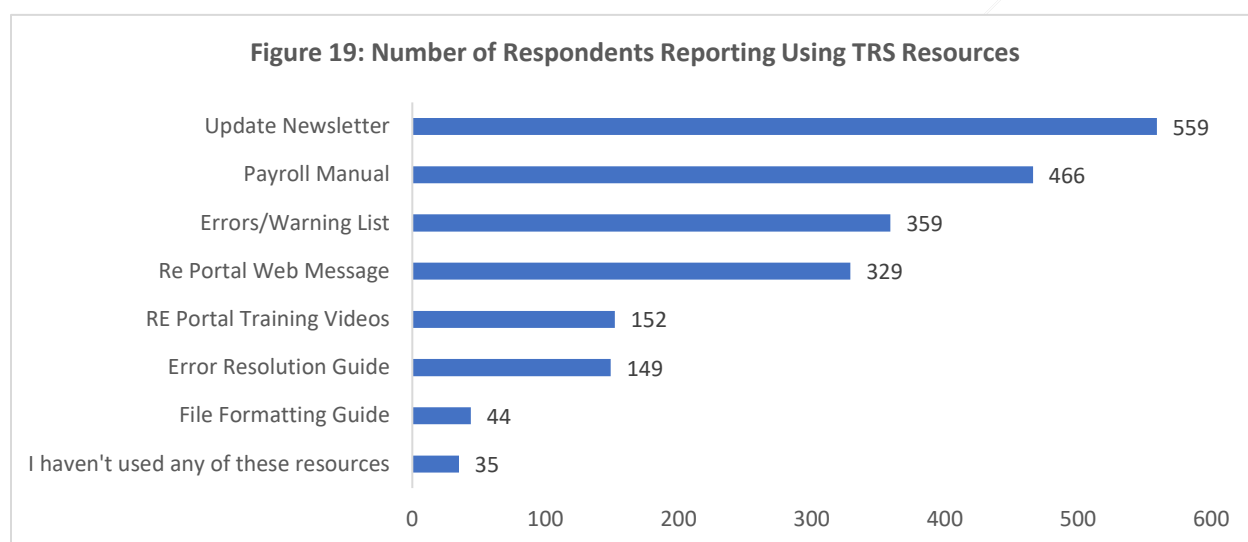|	Very Helpful	Helpful	Not Helpful	Not at all Helpful
2020	36%	60%	3%	1%
2021	42%	56%	2%	0%
2022	27%	68%	5%	0%

Due to rounding, percentages may not add to 100 percent.

training sessions help to improve understanding and provide helpful resources to the participants who attend.
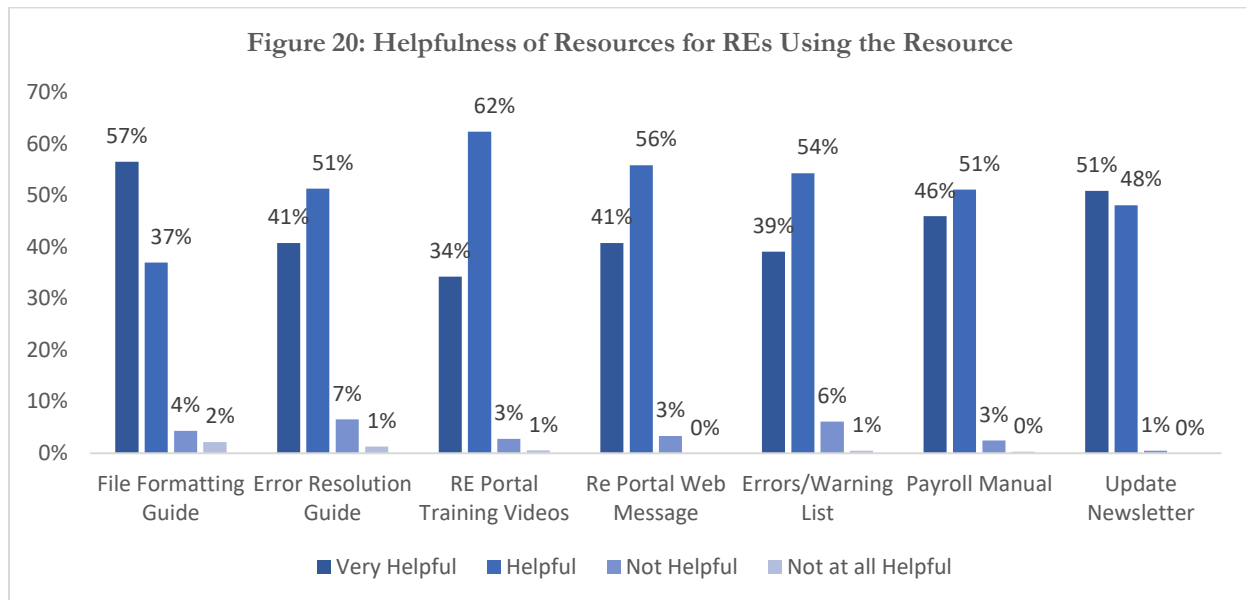
Evaluations of TRS Resources

To gauge evaluations of TRS resources, respondents were asked which resources they used (Figure 19). For the resources that respondents reported as using, respondents were asked how helpful they found each resource. Figure 19 first presents the frequency of resources used. Consistent with previous years, respondents reported using the "Update Newsletter" most frequently (N=559) followed by the "Payroll Manual" (N=466), "Errors Warning List" (N=359), and "RE Portal Web Message" (N=329). The least frequently used resources are the "File Formatting Guide" (N=44) and the "Error Resolution Guide (N=35).

Figure 19: Number of Respondents Reporting Using TRS Resources

Resource	Count
Update Newsletter	559
Payroll Manual	466
Errors/Warning List	359
Re Portal Web Message	329
RE Portal Training Videos	152
Error Resolution Guide	149
File Formatting Guide	44
I haven't used any of these resources	35

Survey respondents were then asked about the helpfulness of those resources they reported using. Overall, REs were positive in their evaluations of TRS resources (Figure 20). Most respondents find the resources either "very helpful" or "helpful." Differences across categories are mostly in degree with some resources considered "very helpful" by a majority of respondents (File Formatting Guide, Update Newsletter) and other resources considered "helpful" (Error Resolution Guide, RE Portal training videos, RE Portal web messages, Errors/Warning list, and Payroll Manual). Very few respondents consider the resources not helpful or not at all helpful.
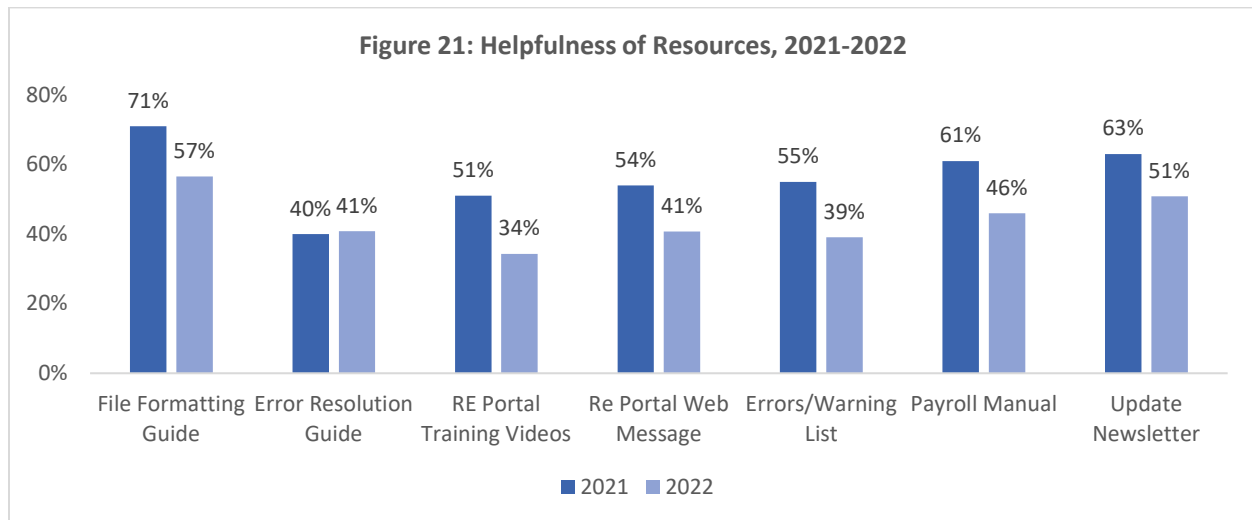
Figure 20: Helpfulness of Resources for REs Using the Resource

Legend: Very Helpful | Helpful | Not Helpful | Not at all Helpful

Data by resource (Very Helpful, Helpful, Not Helpful, Not at all Helpful):
- File Formatting Guide: 57%, 37%, 4%, 2%
- Error Resolution Guide: 41%, 51%, 7%, 1%
- RE Portal Training Videos: 34%, 62%, 3%, 1%
- Re Portal Web Message: 41%, 56%, 3%, 0%
- Errors/Warning List: 39%, 54%, 6%, 1%
- Payroll Manual: 46%, 51%, 3%, 0%
- Update Newsletter: 51%, 48%, 1%, 0%

Due to rounding, percentages may not add to 100 percent.

Compared to 2021, respondents tended be less positive about the helpfulness of TRS resources (Figure 21). With the exception of the Error Resolution Guide, each of these changes was statistically significant. Seventy-one percent of REs said the File Formatting Guide was "very helpful" in 2021 compared to 57 percent in 2022. Fifty-one percent of REs said the RE Portal Training Videos were "very helpful" in 2021 compared" to 34 percent in 2022. Fifty-four percent of REs said the RE Portal Web Message was very helpful in 2021 compared to 41 percent in 2022. Fifty-five percent of REs said the Errors/Warning List was "very helpful" in 2021 compared to 39 percent in 2022. Sixty-one percent of REs said the Payroll Manual was very helpful in 2021 compared to 46 percent in 2022. Sixty-three percent of REs said the Update Newsletter was "very helpful" in 2021 compared to 51 percent in 2022.

While these shifts are notable, it is important to keep in mind that these ratings are based on the number of people who used the resource. For example, the shift in the helpfulness of the File Formatting Guide is based on 44 survey respondents, so there will likely be a fair amount of movement from year-to-year. Evaluations of these resources may reflect which REs are using the resource in any given year, why they are using the resource, and what problem they are attempting to solve.

23

Figure 21: Helpfulness of Resources, 2021-2022

Resource	2021	2022
File Formatting Guide	71%	57%
Error Resolution Guide	40%	41%
RE Portal Training Videos	51%	34%
Re Portal Web Message	54%	41%
Errors/Warning List	55%	39%
Payroll Manual	61%	46%
Update Newsletter	63%	51%

Preference for Receiving Training Materials

When asked how survey participants prefer to receive training materials, respondents reported a slight preference for "Live interaction/Webinar" (30 percent), followed by "Written Online" (28 percent), "In-Person" training (21 percent), and "Recorded Videos" (19 percent). The results reflect a shift, also noted in the 2021 survey, away from in-person training toward live interaction/webinar presentations.

Figure 22: Preference for Receiving Materials, 2020-2022

Preference	2020	2021	2022
Written Online	36%	26%	28%
Live Interaction/Webinar	24%	30%	30%
Recorded Videos	8%	22%	19%
In-Person	29%	19%	21%
Other	2%	2%	2%
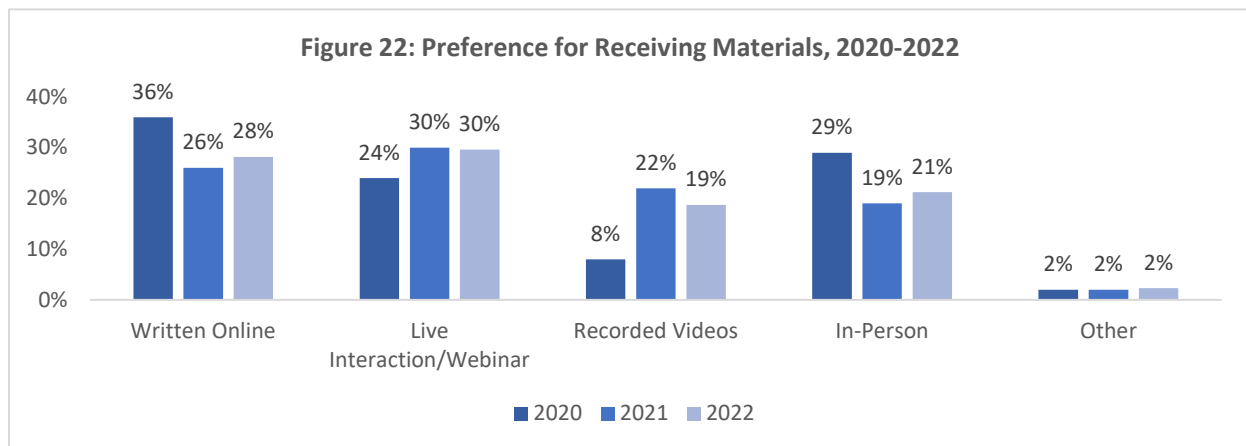
Due to rounding, percentages may not add to 100 percent.

In previous years, we noted differences by RE type. While those differences persist, they are not statistically significant in the 2022 survey. Respondents representing higher education were more likely to prefer "Written Online" materials (38 percent) than respondents representing public schools (27 percent). Respondents representing public schools are more likely to prefer "Live Interaction/Webinars" or "Recorded Videos". Thirty percent of respondents representing public schools preferred "Live Interaction/Webinars" compared to 22 percent representing higher education. Nineteen percent of respondents representing public schools preferred "Recorded Videos" compared to nine percent representing higher education.

Ratings for TRS Communications and the Reporting Employer Portal

Figure 23: Ratings for TRS Communication and TRS Portal
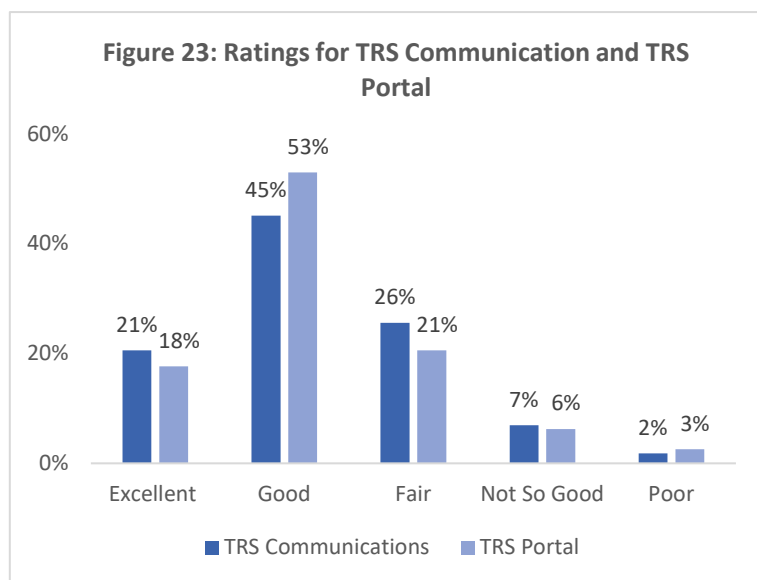
Due to rounding, percentages may not add to 100 percent

Two new questions included in the 2022 asked respondents to evaluate TRS communications and the RE Portal. The specific question wordings are as follows: (1) How would you rate TRS' communications, including toll-free telephone access, call transfers, access to a live person, letters, and electronic mail? (2) How would you rate the Reporting Employer Portal, including the ease of use of the site and information accessible through the site such as a listing of resource materials? The results are presented in Figure 23.

Ratings for TRS Communications and the RE Portal generally mirror the ratings for TRS services overall and RE experiences with the agency. First, REs generally rate TRS communications as "good" (45 percent) but not "excellent" (21 percent). Slightly more than a quarter of REs (26 percent) rate TRS communications as "fair." Few respondents rate TRS communications as "not so good" (7 percent) or "poor" (2 percent). Evaluations for the RE Portal follow a similar pattern. Eighteen percent of REs rate the RE Portal as "excellent" while 53 percent rated the RE Portal as "good" and 21 percent rate the portal as "fair." As with TRS communications, few respondents rate the RE Portal as "not so good" (6 percent) or "poor" (3 percent).

**Figure 24: Awareness & Use of Employer Toolkit**
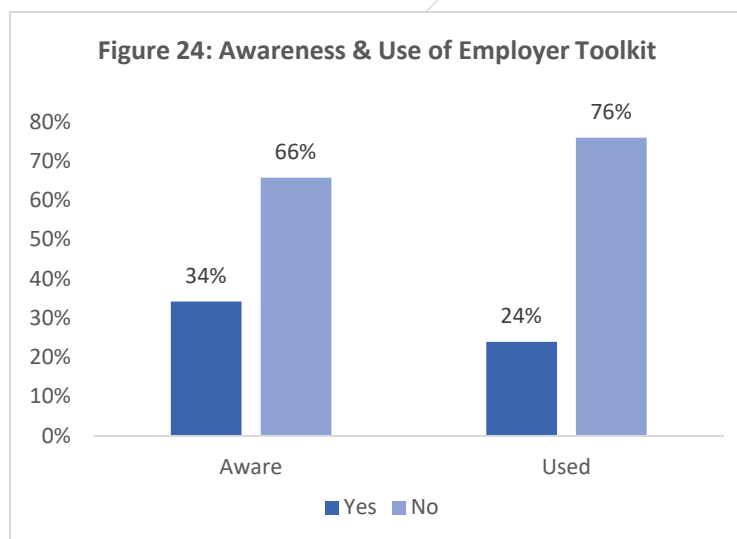
Due to rounding, percentages may not add to 100 percent.

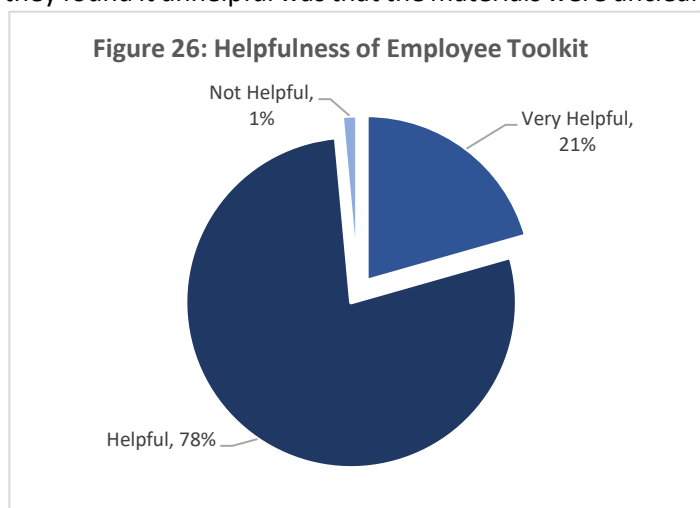## Awareness, Use, and Evaluations of the Employer Toolkit

Another set of new questions gauges awareness, use, and evaluations of a new Employer Toolkit provided to assist REs in their work. These questions work in sequence. The first question asked respondents whether they are aware of the Employer Toolkit and, if so, where they learned about it, and if they have used the Employer Toolkit. Figure 24 presents the results for awareness and use. Roughly, a third of REs reported that they were aware of the Employer Toolkit.

Of those respondents, 24 percent reported having used the Employer Toolkit. There were no significant difference in awareness or use by institutional type. When asked where they learned about the Employer Toolkit (Figure 25), responses were nearly evenly divided between email, message via RE Portal, and the Update Newsletter. Almost no REs indicated they learned about the Toolkit via Facebook. As a result, there is no single source that is likely best for increasing RE awareness.

Figure 25: Learn about Employer Toolkit

Facebook: 0.4%
Email: 30%
RE Portal: 29%
Update Newsletter: 34%
Other: 7%
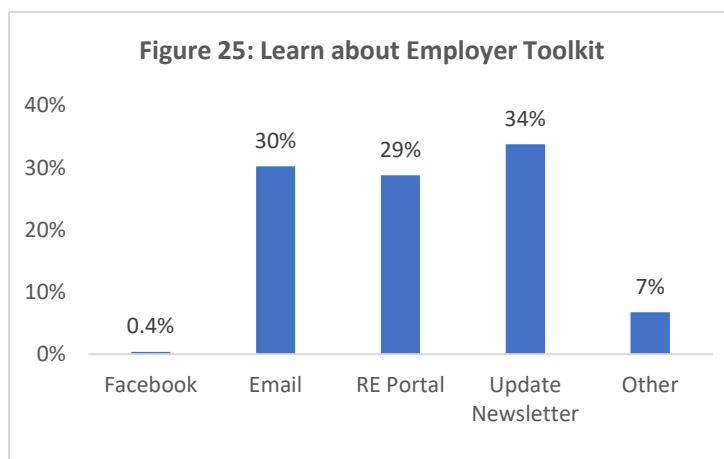
Due to rounding, percentages may not add to 100 percent.

The final question in this set asked respondents who have used the RE Portal whether or not they found it helpful. These results are presented in Figure 26. While the number of REs who reported having using the Employer Toolkit is not large (N=48), they are overwhelming positive in their assessment (Figure 26). Twenty-one percent said the Employer Toolkit was "very helpful" while 78 percent said it was "helpful." The one respondent who said they found the Employer Toolkit "not helpful" reported that the reason they found it unhelpful was that the materials were unclear. Respondents who found the Employer Toolkit "helpful" were asked what could be done to improve it. Because of the limited number of responses, it is difficult to categorize the results into themes. With that caution in mind, most respondents indicated the Employer Toolkit was informative and easy to understand, and the responses to this question were generally positive. A handful of responses noted that the Employer Toolkit was vague or not easy to navigate, and a few respondents asked for additional information about employment after retirement or the requirements (or steps) needed for retirement.

Figure 26: Helpfulness of Employee Toolkit

Not Helpful, 1%
Very Helpful, 21%
Helpful, 78%

Due to rounding, percentages may not add to 100 percent.

Open-Ended Comments

At the end of the survey, respondents were offered the opportunity to provide open-ended comments to the following two questions:
1. "What is the single most important thing TRS could do to improve its relationship with its Reporting Employers?"
2. "Is there anything else about your organization's work with TRS that you would like to tell us that is not covered elsewhere in this survey?"

Responses were coded based on the earlier coding system and reinforced earlier themes. Open-ended responses for how TRS could improve its relationship with its REs are presented in Figure 27.

Figure 27: Coded Open-Ended Responses of the Most Important Thing TRS could do to Improve Its Relation with Reporting Employers
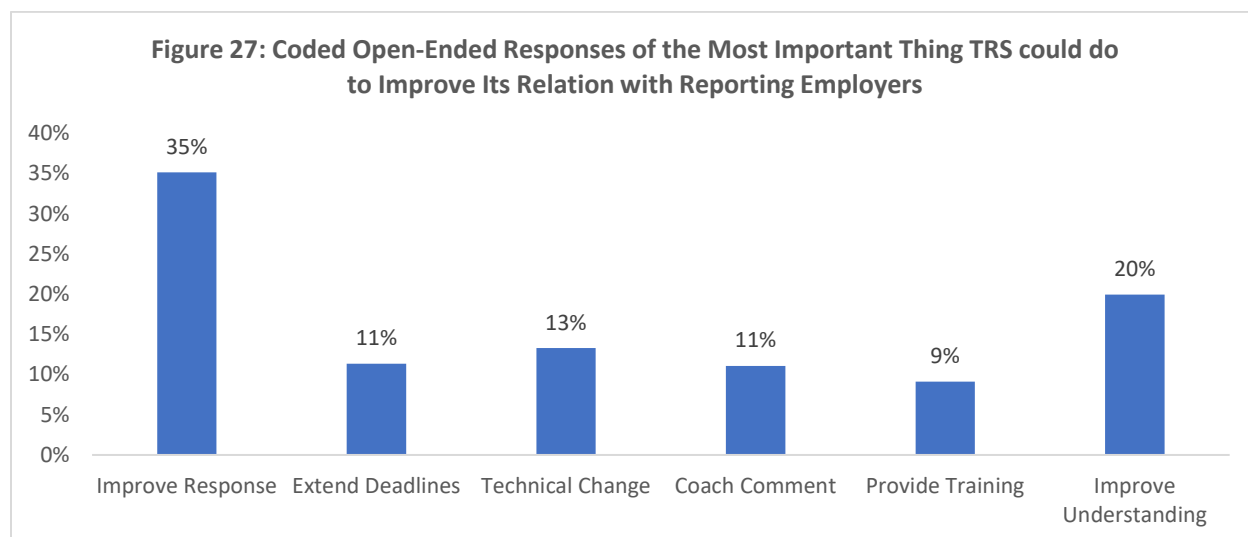
The overwhelming concern expressed throughout this report is the need for TRS to improve response times especially when REs are facing pressing or urgent deadlines. This includes hiring more RE Coaches or additional staff to assure questions are answered more quickly. The second major theme is the need to improve communication and understanding. Below are some illustrative quotes.

Improve Response (Availability)

- *I believe the TWO day turn around for communication is absolutely RIDICULOUS. EVERYONE completing TRS reports also has huge responsibilities and roles, no matter the district size. NO district in the state has a single employee ONLY completing TRS Reports. SO, with a two day turn around, and having to have our money posted the night before that is SOMETIMES if the days fall correctly 5 days to complete reports if we cannot start until the 2nd or 3rd day, then we are LATE .... it is not fair to us or the Agency. HOW hard would it be to have staggering due dates based on size of school through the 10th or the 15th of the month. That would make more RE Coaches available to smaller and mid-sized schools earlier in the month and more time for larger schools to complete their reports and more RE Coaches available to them towards the 2nd or 3rd week of the month. WHAT is so wrong with that?*
- *Have more reps available. Respond within a couple of hours. We are on a time limit to get our reports cleared, since we can't send in reports until the month is over, if we have questions, we may not have 2 days to wait on a rep to get back to us.*
- *Have someone available to answer questions more often that 2 days especially when trying to complete report and you don't get prior month timesheet until the 1st and everything has to be cleared and paid by the 6th. that is only 1 question and 1 answer with 2 day turn around.*
- *Have staff available to answer questions and help with issues when needed. Our Coach rarely answers emails within 2 days.*

Improve Communication and Understanding

- *When new laws are implemented, need a step-by-step breakdown so the Region Centers can relay to the districts they service the steps needed to process reports.*
- *When we get an error if it could tell us why, or what it is needing instead of just suspended, rejected. We don't know what TRS is wanting.*
- *Specific examples to explain how to resolve an issue. current information is too vague and since you can't get ahold of a coach promptly it causes longer delays when trying to get an issue resolved in the TRS imposed deadlines. What should take a day or two to resolve sometimes takes over a week because of the 2-day response time. If we send a question/request to the coach, trying to put all information needed in the request, they invariably come back with additional questions so you go back and forth for a week or more to finally get it resolved. Whereas if you could discuss over the phone, it could be resolved a lot quicker.*
- *Be more cognizant of everything going on in the District and keep the current report deadlines. It's unreasonable to expect a report like the RP to be complete by the 6th after the end of the month.*
- *Come shadow several of us to see what we actually do*
- *Remember that we do not deal with this every day. We do this once a month so we are not as proficient as TRS employees so when we need help, we need it quickly in order to get our reports completed and meet the deadline.*

TRS Reporting Employer Survey 2022

We need your help! We are collecting information for the Teacher Retirement System of Texas (TRS) to better understand the information, resource, and training needs of TRS' Reporting Employers. Any information you provide will be strictly confidential and will only be used to help improve the services TRS provides to its reporting employers. We are interested in your honest assessment of the services provided by TRS.

By clicking the link below, you are agreeing to participate in the survey.

Please note: *You have been identified as a point of contact for one of TRS' reporting employers. In some cases, the email address we have may not be the person most knowledgeable about TRS' reporting processes. The survey should be completed by the individual who submits reports to TRS. If you are not the person who submits reports to TRS, please forward this email to the appropriate contact or send that individual's contact information to Kirby Goidel (kgoidel*@*tamu.edu).*

If you have any questions about the survey, please contact Kirby Goidel by email (kgoidel@tamu.edu) or phone (979-458-0104).

Thanks for agreeing to participate in the TRS Reporting Employer Satisfaction Survey!

Overall, how would you rate the quality of service your organization receives from TRS?

○ Excellent (1)

○ Good (2)

○ Fair (3)

○ Not so good (4)

○ Poor (5)

○ Don't know/Not sure (7)

Please rate your overall experience with the agency.

○ Excellent (1)

○ Good (2)

○ Fair (3)

○ Not so good (4)

○ Poor (5)

○ Don't know/Not sure (6)

What, if anything, would you change about the services TRS provides to its Reporting Employers? *(Please limit your response to 1500 characters).*

_____

_____

_____

_____

_____

In the typical month, how often does your organization call or email a TRS Reporting Employer Coach?

○ Daily (7)

○ Regularly, several times a week (8)

○ Occasionally, about once every week (2)

○ Rarely, no more than once or twice a month (1)

○ Never (4)

How would you rate your Reporting Employer Coach for courtesy, friendliness, and knowledge, and whether your Reporting Employer Coach adequately identifies themselves by name?

○ Excellent (1)

○ Good (2)

○ Fair (3)

○ Not so good (4)

○ Poor (5)

○ Don't know/Not sure (6)

How would you rate the quality of service you receive from your TRS Reporting Employer Coach?

○ Excellent (1)

○ Good (2)

○ Fair (3)

○ Not so good (4)

○ Poor (5)

○ Don't know/Not Sure (6)

When you do contact your TRS Reporting Entity Coach, how would you rate them on:

	Very well (1)	Somewhat well (2)	Not very well (3)	Not well at all (4)	Don't Know/Not Sure (5)
Understanding your questions and responding appropriately (1)	○	○	○	○	○
Directing you to appropriate resources on the website (2)	○	○	○	○	○
Explaining the steps needed to correct errors (3)	○	○	○	○	○
Responding within the current service standard (2 business days) (4)	○	○	○	○	○
Being available so that you can speak to a person on the phone (5)	○	○	○	○	○
Communicating via email (6)	○	○	○	○	○

How important is it to you that your TRS Reporting Employer Coach:

	Very important (1)	Somewhat important (2)	Not very important (3)	Not at all important (4)	Don't know/Not sure (5)
Understands your questions and responds appropriately (1)	○	○	○	○	○
Directs you to appropriate resources on the website (2)	○	○	○	○	○
Explains the steps needed to correct errors (3)	○	○	○	○	○
Responds within the current service standard (2 business days) (4)	○	○	○	○	○
Is available so you can speak to a person on the phone (5)	○	○	○	○	○
Communicates via email (6)	○	○	○	○	○

Q10 If online chat was offered as another way to communicate with your TRS Reporting Employer Coach, would you use it?

○ Yes (1)

○ No (2)

○ Don't know/Not sure (3)

Please rank the three most important things your TRS Reporting Employer Coach can do for you and your organization. (*Click on the individual statements you consider most important and drag them into the box. The first statement in the box should be the statement you consider most important*).

Three Most Important

_____ Understands your questions and responds appropriately (1)

_____ Directs you to appropriate resources on the website (2)

_____ Explains the steps needed to correct errors (3)

_____ Responds within the current service standard (2 business days) (4)

_____ Is available so you can speak to a person on the phone (5)

_____ Communicates via email (6)

_____ Communicates via chat (7)

_____ Something else, please explain (Maximum of 100 characters) (8)

Our goal is to respond to you within two business days. Do you think this is reasonable?

◯ Yes (5)

◯ No (6)

◯ Don't know/Not sure (4)

If no, what do you think is reasonable? *(Please limit your response to 50 characters).*

_____

On average, how quickly does your TRS Reporting Employer Coach respond to your organization's calls or emails?

○ Within 24 hours (1)

○ Within 48 hours (2)

○ Within a week (3)

○ Within a month (4)

○ My Reporting Employer Coach rarely responds to calls or emails (5)

In the past year, have you attended a TRS training session?

○ Yes (1)

○ No (2)

○ Don't know/Not sure (3)

Is there any particular reason why you did not attend an employer reporting training session in the past year? (Minimum 25 characters; Maximum 100 characters)

_____

_____

_____

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_____

Which training session did you attend? (Check all that apply)

☐　　　Introduction to TRS Reporting (1)

☐　　　2021 Legislative Changes (6)

☐　　　TRS Training for Human Resources (7)

☐　　　RE Ledger Training (8)

☐　　　Other Conference Training Session (TASBO, TACCBO, Etc.) (10)

How much did attendance at the *Introduction to TRS Reporting* training session improve your understanding of TRS reporting processes?

○ Greatly improved (1)

○ Somewhat improved (2)

○ Did not improve (3)

○ Not sure (4)

How much did attendance at the *2021 Legislative Changes* training session improve your understanding of Reporting Employer Portal functionality?

○ Greatly improved (1)

○ Somewhat improved (2)

○ Did not improve (3)

○ Not sure (4)

How much did attendance at the *TRS Training for Human Resources* session improve your understanding of the topic?

    ◯ Greatly improved   (1)

    ◯ Somewhat improved   (4)

    ◯ Did not improve   (5)

    ◯ Not sure (6)

How much did attendance at the *RE Ledger Training* session improve your understanding of TRS reporting processes?

    ◯ Greatly improved (1)

    ◯ Somewhat improved (2)

    ◯ Did not improve (3)

    ◯ Not sure (4)

How much did attendance at the *Other Conference Training* session improve your understanding of TRS reporting processes?

    ◯ Greatly improved (1)

    ◯ Somewhat improved (2)

    ◯ Did not improve (3)

    ◯ Not sure (4)

Please rate the usefulness of the resources and information provided to you during the *Introduction to TRS Reporting* training session?

    ◯ Excellent (1)

    ◯ Good (2)

    ◯ Fair (3)

    ◯ Not so good (4)

    ◯ Poor (5)

    ◯ Don't know/Not sure (6)

Please rate the usefulness of the resources and information provided to you during the **2021 Legislative Changes** training session?

    ◯ Excellent (1)

    ◯ Good (2)

    ◯ Fair (3)

    ◯ Not so good (4)

    ◯ Poor (5)

    ◯ Don't know/Not sure (6)

Please rate the usefulness of the resources and information provided to you during the *TRS Training for Human Resources* session?

○ Excellent (1)

○ Good (4)

○ Fair (5)

○ Not so good (6)

○ Poor (7)

○ Don't know/Not sure (8)

Please rate the usefulness of the resources and information provided to you during the *RE Ledger Training* session?

○ Excellent (1)

○ Good (4)

○ Fair (5)

○ Not so good (6)

○ Poor (7)

○ Don't know/Not sure (8)

Please rate the usefulness of the resources and information provided to you during the **Other Conference Training** session?

○ Excellent (1)

○ Good (2)

○ Fair (3)

○ Not so good (4)

○ Poor (5)

○ Don't know/Not sure (6)

Which of the following resources have you used during the last year? (Check all that apply)

☐ Payroll Manual (1)

☐ Error Resolution Guide (2)

☐ Errors/Warnings List (3)

☐ RE Portal Training Videos (4)

☐ File Formatting Guide (5)

☐ RE Portal Web Message (7)

☐ Update Newsletter / TRS Emails (9)

☐ I haven't used any of these resources (6)

How helpful did you find the resources you have utilized during the last year?

	Very helpful (1)	Helpful (2)	Not helpful (3)	Not at all helpful (4)	Don't know/Not sure (5)
Payroll Manual (1)	○	○	○	○	○
Defects/Workaround List (2)	○	○	○	○	○
Errors/Warning List (3)	○	○	○	○	○
RE Portal Training Videos (4)	○	○	○	○	○
File Formatting Guide (5)	○	○	○	○	○
RE Portal Web Message (6)	○	○	○	○	○
Update Newsletter / TRS Emails (8)	○	○	○	○	○

How helpful did you find the resources you have utilized since your training session?

○ Very Helpful (1)

○ Helpful (4)

○ Not helpful (5)

○ Not at all helpful (6)

What is your preferred method for receiving training materials?

○ Written online (1)

○ Live interaction/Webinar (2)

○ Recorded Videos (3)

○ In-person (4)

○ Other, please specify: (5) _____

Q32 Are there any training sessions or materials that are not currently available that you would like to see offered by TRS?

○ Yes (8)

○ No (9)

○ Don't know/Not sure (10)

Q33 What training sessions or materials that are not currently available would you like to see offered by TRS? *(Please limit your response to 1500 characters).*

_____

_____

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How would rate TRS' communications, including toll-free telephone access, call transfers, access to a live person, letters, and electronic mail?

○ Excellent (1)

○ Good (2)

○ Fair (3)

○ Not so good (4)

○ Poor (5)

○ Don't know/Not sure (6)

How would you rate the Reporting Employer Portal, including the ease of use of the site and information accessible through the site such as a listing of resource materials?

○ Excellent (1)

○ Good (2)

○ Fair (3)

○ Not so good (4)

○ Poor (5)

○ Don't know/Not sure (6)

Are you aware of the new Employer Toolkit to assist your employees with TRS benefit questions?

○ Yes (1)

○ No (2)

How did you learn about the new Employer Toolkit?

○ Facebook (1)

○ Twitter (2)

○ Email (3)

○ RE Portal (4)

○ Update Newsletter (5)

○ Other, please specify (6) _____

Have you utilized the new Employer Toolkit to assist your employees with benefit questions?

○ Yes (1)

○ No (2)

Q39 How helpful did you find the Employer Toolkit?

○ Very helpful (1)

○ Helpful (2)

○ Not helpful (3)

○ Not at all helpful (4)

What about the new Employer Toolkit did you not find helpful? Do you have any suggestions for how the Employer Toolkit could be improved? *(Please limit your response to 1500 characters)*.

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What did you find helpful about the Employer Toolkit? Do you have any suggestions for how the Employer Toolkit could be improved? *(Please limit your response to 1500 characters).*

_____

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_____

How long have you been in your current position?

○ Less than 1 year (1)

○ 1-2 years (2)

○ More than 2 years (3)

What is the single most important thing TRS could do to improve its relationship with Reporting Employers? *(Please limit your response to 1500 characters).*

_____

_____

_____

_____

_____

Is there anything else about your organization's work with TRS that you would like to tell us that is not covered elsewhere in this survey? *(Please limit your response to 1500 characters).*

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