



# Teacher Retirement System of Texas Reporting Employers Survey 2021



## Table of Contents

Teacher Retirement System Employer Satisfaction Survey .....	3
Executive Summary.....	3
Methodology.....	5
Data Collection.....	5
Quality Review .....	6
Survey Results .....	8
Overall Quality .....	8
Changes to TRS Services.....	9
Contact with RE Coach.....	11
Quality of Service Received by RE Coach .....	12
Rating of RE Coach by Dimension of Service .....	13
Rating of the Importance of Services Provided by RE Coaches .....	14
Intended Use of Online Chat.....	15
Ranking of TRS Services.....	15
Standard Coach Response Time.....	16
Reported Coach Response Time .....	16
Training Attendance.....	17
Training Effectiveness .....	17
Evaluations of TRS Resources .....	19
Preference for Receiving Training Materials.....	20
Open-Ended Comments.....	21
TRS Reporting Employer Survey 2021.....	24

# Teacher Retirement System Employer Satisfaction Survey

## 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). The initial population of contacts provided by TRS included 1,338 reporting employers. Because the same individual can represent multiple REs, the population included only 1,217 unique email addresses. Forty-five of these email addresses were invalid, meaning the emails bounced and were not delivered, leaving 1,172 valid email addresses. Final results are based on 797 individual respondents representing 874 REs. The overall response rate to the survey was 68 percent, meaning that 68 percent of REs with a valid email address completed the survey. Major findings from the survey are noted below.

**Improved Ratings of TRS Services:** Ratings of TRS services continue to improve. In the 2021 survey, 84 percent of respondents rated TRS services as “excellent” (29 percent) or “good” (55 percent) compared to 76 percent in 2020 and 62 percent in 2019. Over the past year, the improved ratings reflect an increase in the percent of respondents rating TRS services as “excellent” and in an increase in excellent ratings among respondents representing higher education.

**Less Contact with TRS Coaches:** The improvement in ratings occurred as respondents reported less contact with their reporting employer coaches. Since 2019, the percent of survey participants reporting “rarely or never” contacting their TRS coach has increased from 66 percent to 76 percent. Ratings of coaches continues to improve, so the decrease in contact likely reflects other changes at TRS to simplify the reporting process. TRS management reports that it continues to resolve defects to the TRS reporting system and that RE staff are becoming more familiar with the system. Both improvements may be reasons for lower reported contact with RE coaches.

**TRS Coaches Rated More Positively:** One of the consistent findings of this survey has been that TRS coaches are rated more positively than the overall quality of TRS services. While there are exceptions, TRS coaches are seen by survey participants as allies helping REs submit reports accurately and timely. Since 2019, ratings of TRS coaches have improved. In the 2021 survey, 53 percent of respondents rated their TRS coach as “excellent.” This is an increase from 45 percent in 2020 and 38 percent in 2019.

Reporting employer coach evaluations have also improved across various dimensions of performance. In the 2021 survey, TRS coaches were rated more positively for “understanding questions and responding appropriately,” “directing REs to appropriate resources,” “explaining the steps to correct errors,” and “responding within two business days.” Coaches were rated less positively for “being available to speak to by phone” while evaluations for “communicating by email” remained flat.

In the open-ended comments, respondents note a need for greater access and availability of RE Coaches. However, REs typically do not blame TRS coaches for inaccessibility, as the survey participants perceive their coaches as busy and overworked.

**Reported Response Times Improve:** Ratings for coaches and services may have partly improved because response times have improved. Fifty-eight percent of survey participants reported receiving a response from their RE Coach within 24 hours during 2021. This is an increase of 11 percent relative to 2020 and 19 percent relative to 2019. Response times are an ongoing concern for respondents. When confronted with a reporting issue to resolve and a looming deadline, survey participants often note that receiving a response within two days (the TRS standard response time) is too slow.

**Support Increases for Online Chat:** One mechanism for improving response times involves the creation of an online chat for communicating with coaches. The percent of respondents in 2021 saying they would use online chat increased from 77 percent to 83 percent. An online chat feature also shows up in the open-ended responses as a potential solution to concerns about response time.

**Attendance at Training Declines:** In the midst of the COVID-19 pandemic, attendance at TRS training sessions declined significantly. In previous surveys, more than 7 in 10 respondents reported having attended training. In the 2021 survey, the percent of survey participants that reported that they attended training dropped to slightly more than half (53 percent). Despite the decline, training sessions continue to be evaluated positively both in terms of improving understanding and providing useful resources and information.

**Areas for Improvement:** Overall, the 2021 survey provides good news for TRS. Ratings and response times have improved, and survey participants appreciate the work done by TRS coaches. Even so, many of the concerns raised in previous surveys remain.

Survey participants would like quicker coach response times and greater availability of coaches as deadlines approach. Respondents continue to find the reporting system complex and see a need for additional training. Improving communication, simplifying reporting processes, and providing flexibility with respect to deadlines would further improve the services provided to reporting employers.

## 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 2021 survey was similar, though not identical, to previous RESS surveys. First, the survey was conducted during the ongoing COVID-19 pandemic with many potential respondents working from home or in alternative work locations. Second, the launch of the survey coincided with snowstorms and power outages throughout the State of Texas the week of February 15-19, 2021. As a result, data collection was interrupted and had to be continued following the restoration of power the following week. This context is important to keep in mind in evaluating the survey results as it may have affected survey responses and response rates.

### Data Collection

The initial population for the survey was provided by TRS and included 1,217 unique email addresses representing 1,338 organizations, including public schools, charter schools, and colleges and universities. The survey methodology was designed to target payroll employees who serve as the contacts for their organization. For organizations without a contact, a web administrator employee was substituted as the organization's contact.

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.

Forty-five of the initial invitation emails "bounced," indicating they were sent to an invalid email address. Subsequent email reminders were scheduled to be sent every 3-4 days encouraging potential respondents to take the survey. Because of the snowstorms and power outages (noted above), data collection was paused during the week of February 15-19, 2021 and resumed the following week.

Potential respondents received up to six 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.

After the initial wave of data collection, PPRI researchers began: (1) looking online for alternative/payroll contact information for non-respondents and bounced emails; and (2) calling organizations with non-respondents to request an alternative contact when one was not found online. This was done to provide every opportunity for organizations to respond to the survey. Overall, PPRI staff identified 77 alternative email addresses for non-respondents and bounced email addresses.

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 that they did not. Each time a potential respondent contacted the PPRI, they were sent an email response with an anonymous 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.

The final data set includes 797 valid responses representing 874 organizations. The overall response rate (68 percent) and the number of completed interviews is slightly lower than in 2019 and 2020. Given the context in which the survey was conducted, the lower response rate was not unexpected.

For survey researchers, low response rates are generally less troubling than the potential for response bias. Response bias is the differences between respondents and non-respondents in their evaluations, attitudes, and behaviors. The representativeness of respondents, and not the overall response rate, is critical in determining a survey's accuracy. Table 1 (see next page) provides insight into the representativeness of the 2020 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 population provided by TRS to individual respondents, and to the organizations represented in the survey. For the data included in the table, it should be noted that a single individual often represents multiple REs; "Sampled Respondents" represents individual responses; and "Organizations Represented" represents the number of REs represented.

In a small number of cases, data were missing on RE Type, Coach Color, and Contact role. As Table 1 shows, the original sample of all potential respondents and the completed interviews are representative of coach color and reporting employer type. There are only small differences between respondents and non-respondents on these key characteristics. This finding gives us greater confidence that the final results reflect the larger population of reporting employers.

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 identify areas of concern and issues that need to be addressed.

**Table 1.** Comparison of Population and Sample by Coach Color and Reporting Employer Type

	<b>Original Contact List</b>		<b>Survey Respondents</b>		<b>Organizations Represented</b>	
<b>Reporting Employer Type</b>	Count	Percent	Count	Percent	Count	Percent
Higher Education	107	8.0%	54	6.8%	62	7.1%
Public School	1,231	92.0%	739	92.7%	808	92.4%
Missing RE Type			4	0.5%	4	0.1%
<b>Contact Role</b>						
Payroll Contact	1,122	83.9%	664	83.3%	735	84.1%
Web Administrator	216	16.1%	128	16.1%	134	15.3%
Missing Contact Role			5	0.6%	5	0.6%
<b>Coach Color</b>						
Aqua	76	5.7%	48	6.0%	63	7.2%
Blue	79	5.9%	48	6.0%	50	5.7%
Bronze	85	6.4%	55	6.9%	55	6.3%
Brown	110	8.2%	69	8.7%	76	8.7%
Coral	51	3.8%	29	3.6%	35	4.0%
Gold	86	6.4%	51	6.4%	57	6.5%
Gray	96	7.2%	56	7.0%	56	6.4%
Green	108	8.1%	72	9.0%	77	8.8%
Olive	50	3.7%	26	3.3%	30	3.4%
Pink	80	6.0%	36	4.5%	38	4.3%
Purple	109	8.1%	64	8.0%	69	7.9%
Red	86	6.4%	50	6.3%	54	6.2%
Silver	86	6.4%	52	6.5%	63	7.2%
Violet	65	4.9%	39	4.9%	44	5.0%
White	85	6.4%	45	5.6%	46	5.3%
Yellow	86	6.4%	52	6.5%	56	6.4%
Missing Coach Color			5	0.6%	5	0.6%

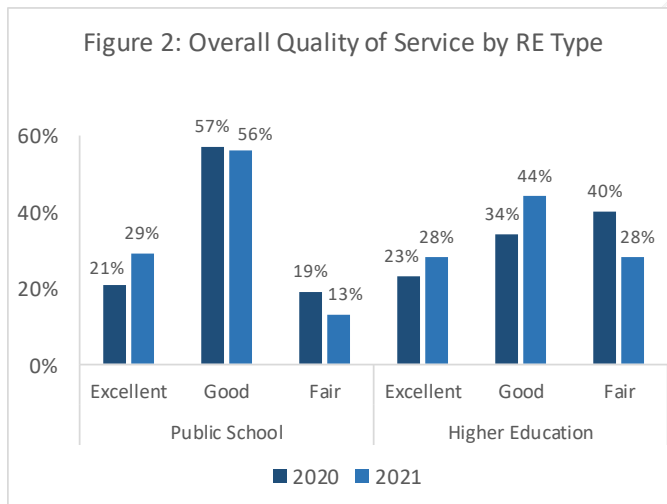
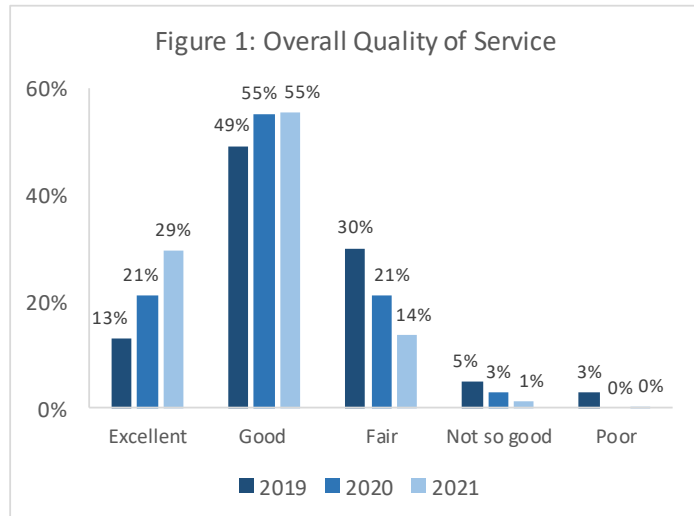
## Survey Results

### Overall Quality

Survey respondents were 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?”

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 2021 results with 2020 and 2019. The results show a steady improvement in evaluations of TRS. The percent of respondents rating TRS “excellent” increased from 13 percent in 2019 to 29 percent in 2021. There is also an offsetting decrease in the percent of respondents rating TRS as “fair.”



Consistent with previous years, there are notable differences in ratings based on the type of institution the survey participant represents. Respondents representing higher education are generally positive in their evaluations (Figure 2). Thirteen percent of respondents representing public schools rated overall quality of service as “fair” compared to 28 percent of respondents representing higher education. While these distinctions are consistent with previous years, they are less pronounced. In 2020, for example, 40 percent of respondents representing higher education rated TRS services as “fair” while 34 percent rated TRS

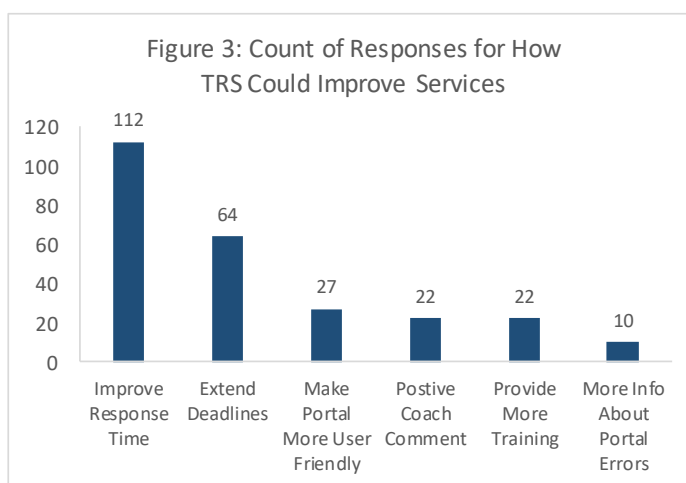
services as “good”. The improvements in Figure 1 mostly reflect improved ratings among higher education respondents.



## 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?” Overall, 22 percent of the 2021 survey respondents provided a response. This is a decline relative to 2020, when a third of respondents answered, and 2019, when half of respondents answered. Given the increases in overall satisfaction noted above, this is not unexpected. Open-ended comments in satisfaction surveys typically reflect dissatisfied customers who offer more detailed comments.

In Figure 3, we present the open-ended comments coded to capture the themes present in any individual response. These include: (1) improving response times; (2) providing generally positive comments about their TRS coach; (3) providing more information about portal errors; (4) providing more training; (5) making the portal more user friendly, and (6) extending or providing flexibility around deadlines. Responses were coded for multiple responses. For example, a respondent who said, “my coach is great, but hard to reach,” would be coded both as having made a positive comment about their coach and as needing to improve response times.



Of the open-ended responses, the themes remain similar to those expressed in previous surveys. Survey participants note 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. Representative comments by theme are included below.

### Response Times

- “A quicker response time would be appreciated. Responding within 48 hours is reasonable, but when you are having problems with your report waiting for two days feels interminable.”
- “Response time from coaches is too long when deadlines resulting in penalties and interest are possible.”
- “Still need quicker response times - it is frustrating to have TRS harp on getting reports done in a certain amount of time when much of what delays that is waiting on them to respond to emails or resolve issues on their side. Could use more individual guidance on interpreting / reviewing our ledger.”

### Availability and Access to Reporting Employer Coaches Before Reporting Deadlines

- “Coaches need to be working and available during the last and first week of each month during our reporting time. It seems to happen more times than not that when it comes time for reporting our coach is out of the office.”

- “It would be nice if it was not so hard to get someone on the phone to help or if emails were answered in a more timely manner. It seems TRS needs more staff. Sometimes we have an issue that needs to be fixed quickly in order to move on with reporting or to get them to complete in time and we are unable to get help quickly.”
- “Our specific TRS coach should be available every month from the 1st to the 6th no matter if it's a weekend or during the week or if a holiday is within those dates each month. If our life is tied to the 1st to the 6th each month, so should theirs.”
- “While my personal TEAM coach is good about responding to my emails, we are often told that it will be over a day before we might get a reply. With less than 6 days to bring our reports to "complete" status, It seems unrealistic for us to wait 24 hours (or more) to get an answer to what might be a simple solution. This creates a very stressful situation and often causes us to work after hours or from home to wrap up our monthly reporting.”

#### *Frustrations with Reporting System*

- “Actually, I think the reporting system is rather convoluted. I would like to see a simplified reporting system. It is more user friendly than it used to be, but it seems to have more errors and glitches than ever before!! The constantly changing features, errors and training required to utilize the system is also very time consuming and stressful.”
- “Communication with district coach can take too much time for responses. The system itself doesn't always work like it should and it requires the employee to spend extra time adjusting information due to the software we use and TRS no always working together well. TRS blames it on our software and our software blames it on TRS. The system is not always user friendly.”
- “I have worked at this school district for over 20 years, so I feel like I know how to get reports completed in a timely manner. However, TRS has made the reporting so difficult that it is a very cumbersome task every month. Regulations & processes are ever changing. An example would be: we have so many employees that become substitutes or substitutes that become full-time employees. This process requires several records created manually before reports can clear. The software companies are not able to keep up with this requirement. (I have talked to other districts on different software's and they have trouble as well.)”

#### *The Need for More Training*

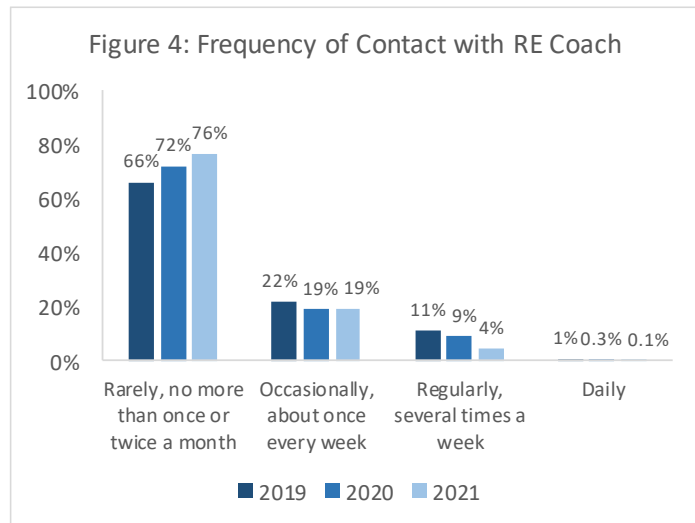
- “More training for people who have been doing reporting for a while....trainings usually state they are for people with less than 2 years experience, which is great but there have been MANY changes and updates to TRS reporting that affect all of us who have been doing reporting for years...also, the wait time for coaches response could be improved. I realize they are busy, but maybe need to hire more people. If I contact someone other than my coach, I get an email from my coaching stating I should have waited for them to respond - frustrating!”
- “The coach is helpful. The trainings that have been provided have been too far after the updates are made. It would be better if the trainings coincided with the updates or changes in the website.”
- “We need more education and training on the constant changes to reporting”

## Contact with RE Coach

To gauge the level of interaction respondents have with their coaches, survey participants were asked about their frequency of contact with their RE coach. The specific question wording is as follows:

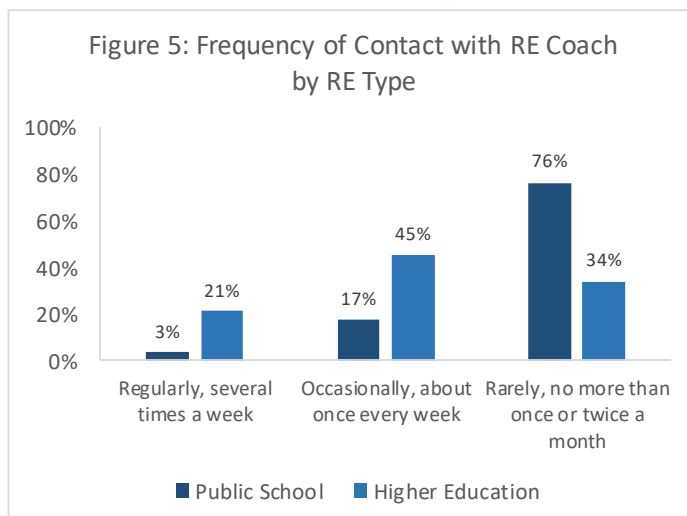
“In the typical month, how often does your organization call or email a TRS Reporting Employers Coach?”

As a minor change in question wording, respondents were given the option of “never” in the 2021 survey. For purposes of comparison, these responses are included in the “rarely” category in Figure 4. Three percent of respondents said they “never” contact their RE coach.



As can be seen in Figure 4, respondents reported contacting their RE coach less often in 2021 compared to 2020 and 2019. Seventy-six percent of respondents reported “rarely or never” contacting their RE coach in 2021. This likely reflects changes to TRS reporting processes, including the continued resolution of defects in the TRS portal as well RE staff becoming more familiar with the portal, that make contact with RE coaches less necessary.

While survey respondents report that they are contacting their coaches less often and that they are more satisfied with TRS services, it should be reiterated that frustration with availability and support from coaches to when deadlines are looming remains an issue (as noted in the open-ended responses above).



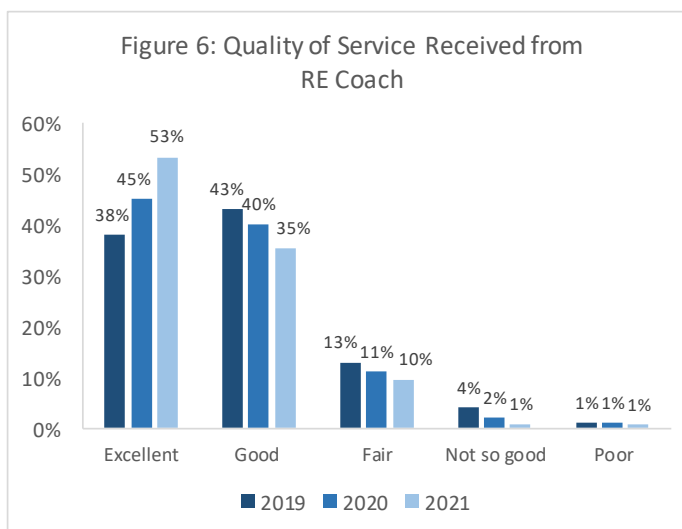
As in previous years, there are also consistent differences in contact by RE type (Figure 5). Respondents representing higher education report contacting their RE coach more often than respondents representing public schools. While reported contact rates for public school are similar to previous years, reported contact rates for higher education declined over the past year. In 2021, 21 percent of higher education respondents reported contacting their coach “regularly” compared to 38 percent in 2020. The decline in contact displayed in Figure 4 largely reflects a decline in contact from higher education respondents.

### Quality of Service Received by RE Coach

Respondents generally rated their coach more favorably in 2021. This improvement continues the positive trend from 2019 to 2020. The specific question wording is as follows:

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

Across previous years of the survey, TRS coaches are routinely rated more positively than TRS services. This year is no exception. Fifty-three percent of respondents rated their TRS coach as excellent in the 2020 survey compared to 29 percent who rated the overall quality of TRS services as excellent (Figure 1).

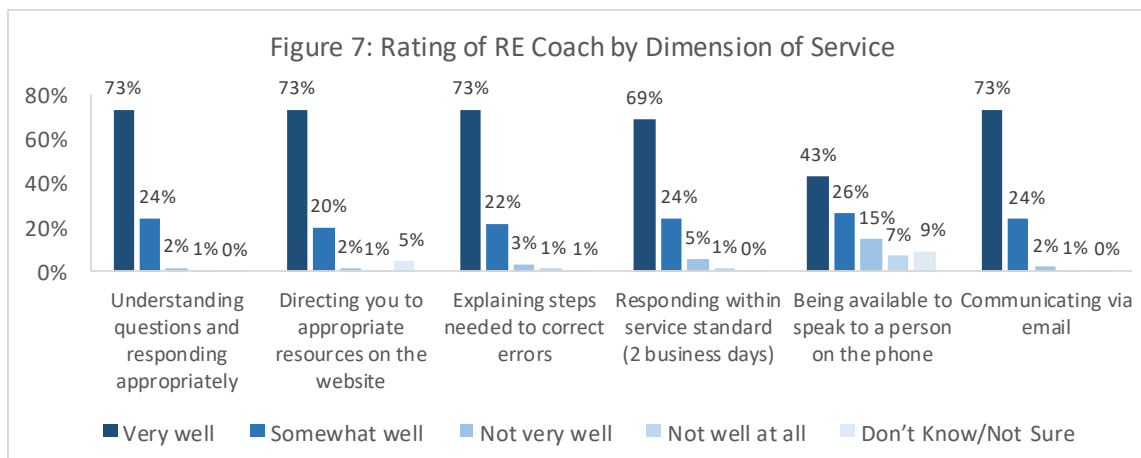


As the ratings for TRS services have increased and as contact with TRS coaches has decreased, coaches are rated more positively (see Figure 6). In 2021, 53 percent of survey participants rated their TRS coach as “excellent” compared to 45 percent in 2020 and 38 percent in 2019. Part of this improvement may be attributable to TRS hiring additional RE coaches since 2019. TRS management reports that hiring additional coaches has resulted in a reduction in the number of REs assigned to coaches from 114 to 89.

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

## Rating of RE Coach by Dimension of Service

Figure 7 presents the results of the evaluation of coaches by dimension of performance. In this section of the survey, respondents were asked a series of questions evaluating specific dimensions of their coach's performance.

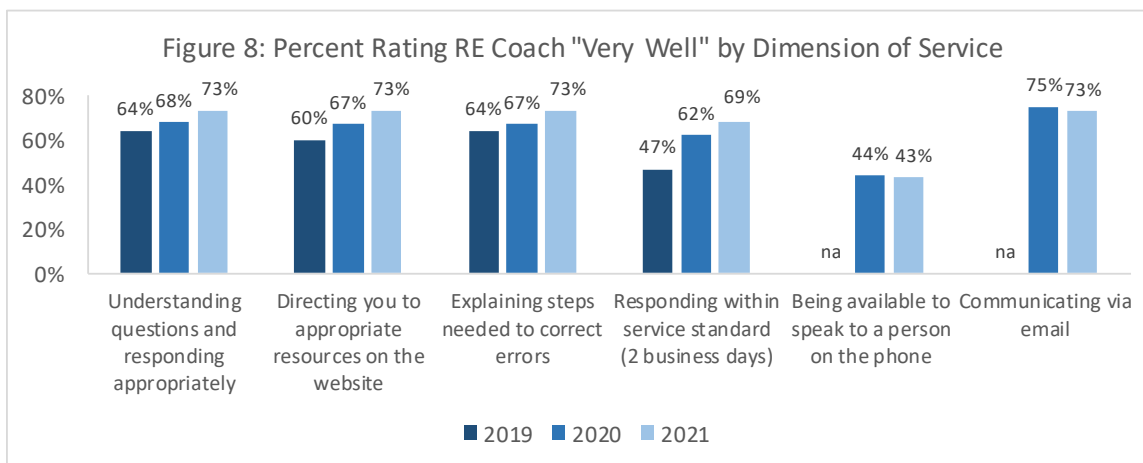


Overall, coaches are given positive marks for each dimension of service, with the one potential improvement area of “being available so that you can speak to a person on the phone.” For each of the other dimensions, respondents were overwhelmingly positive in their evaluations of their RE coaches with approximately 7 out of 10 respondents reporting their TRS coach performed “very well” when it comes to understanding and responding appropriately to questions, directing respondents to appropriate online resources, explaining the steps needed to correct errors, or communicating via email.

These ratings reflect improvement over the last several years. Figure 8 presents the percent of respondents who rated their TRS coach as performing very well on this set of services from 2019 to 2021. As Figure 8 shows, respondents to the 2021 survey evaluated their coaches more positively for understanding their questions and responding appropriately, directing respondents to appropriate online resources, and explaining steps to correct errors, as compared to previous years.

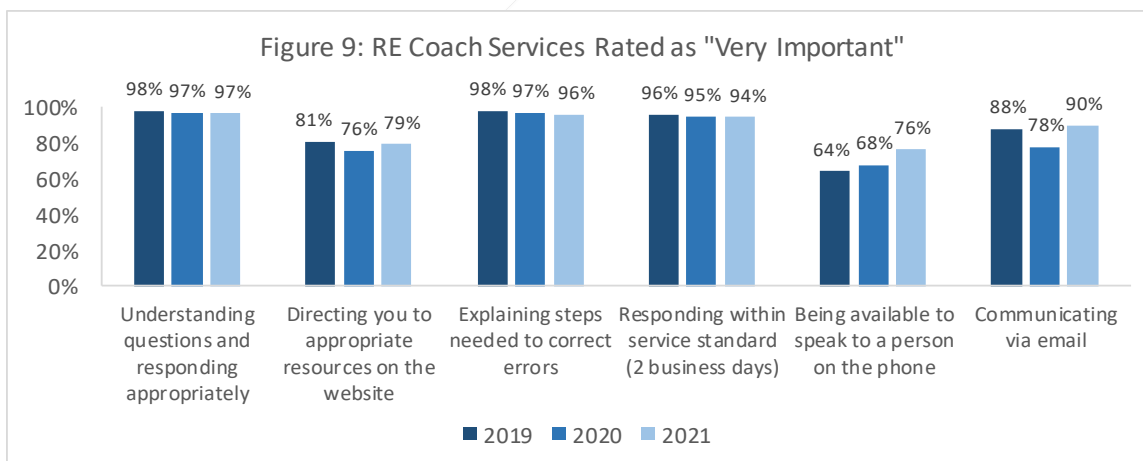
In addition, there was a positive improvement in responding within the current service standard, though at least some of this improvement reflects a question wording change. In 2019, respondents were asked to rate their TRS coach for “responding quickly.” After 2019, respondents were asked whether their coach responded within the current service standard of two days.

The last two items – being available to speak on the phone and communicating via email – were not asked in 2019. There is less variation in evaluations related to these questions between 2020 and 2021, and while the 2021 evaluations are more negative than in 2020, the shifts are small.



### Rating of the Importance of Services Provided by RE Coaches

Survey participants were asked to rate the importance of the services provided by RE Coaches. Consistent with previous years, REs rate all of the services as “very important,” though some services are more important than others. As shown in Figure 9, understanding your questions and responding appropriately, explaining the steps needed to correct errors, responding within the current service standard, and communicating via email are almost universally considered important.



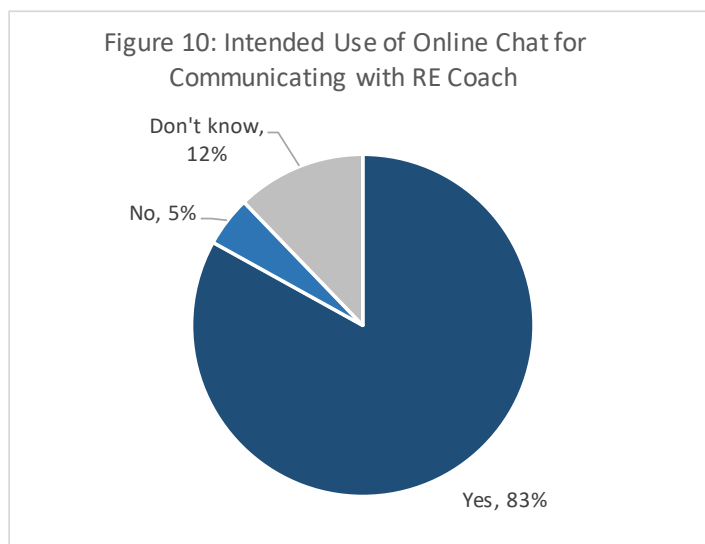
Directing REs to appropriate online resources is considered somewhat less important but is still considered very important by 79 percent of respondents. Being available to talk to someone on the phone is perceived as less important than other services, but was rated as having greater importance in 2021 (76 percent rating it as “very important”) compared to 2020 (68 percent rating it as “very important”). In addition, the percent of respondents rating communicating via email as “very important” increased from 78 percent in 2020 to 90 percent in 2021. It is possible that the need to work from home in 2020, which limited other sources of help, caused the increase in ratings of importance for these services.

### 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?”

The results are presented in Figure 10. Eighty-three percent of respondents said they would use online chat compared to only 5 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 is an increase over previous years, though it is not clear if the shift reflects a trend or year-to-year variance. In 2020, 77 percent of respondents said they would use online chat compared to six percent who said they would not use it. In 2019, 79 percent of respondents said they would use online chat and four percent said they would not. Additionally, in the open-ended responses (above) a number of respondents mentioned the availability of an online chat as an improvement they would like to see in the services provided by TRS.

### Ranking of TRS Services

Survey participants 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, 747 respondents ranked “explain the steps needed to correct errors” as one of the most important services that TRS coaches provide while 673 respondents ranked “understand your questions and respond appropriately” in their top three for TRS services. The order of rankings did not change from 2020 (included below) or 2019 (not shown).

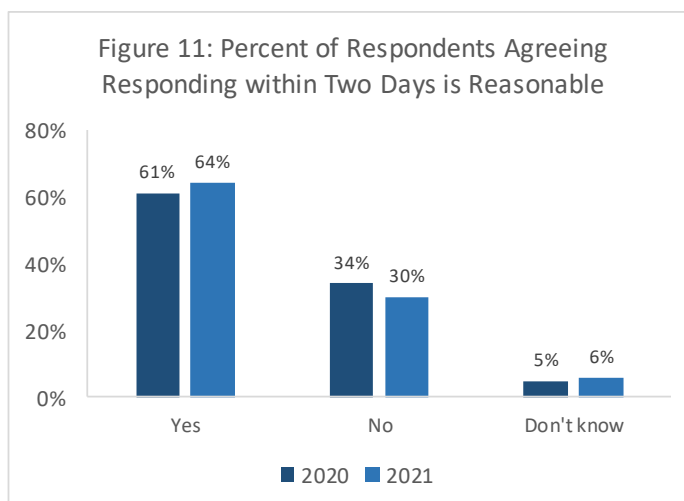
**Table 2.** Ranking of TRS RE Coach Services (Number Ranking Services in Top 3)

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

### Standard Coach Response Time

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?”

Sixty four percent of respondents believe that two days is a reasonable response time while approximately 30 percent say that it is not. The percent saying a two-day response is reasonable has increased over the past year, suggesting that the expectation of a two-day response may have taken root.

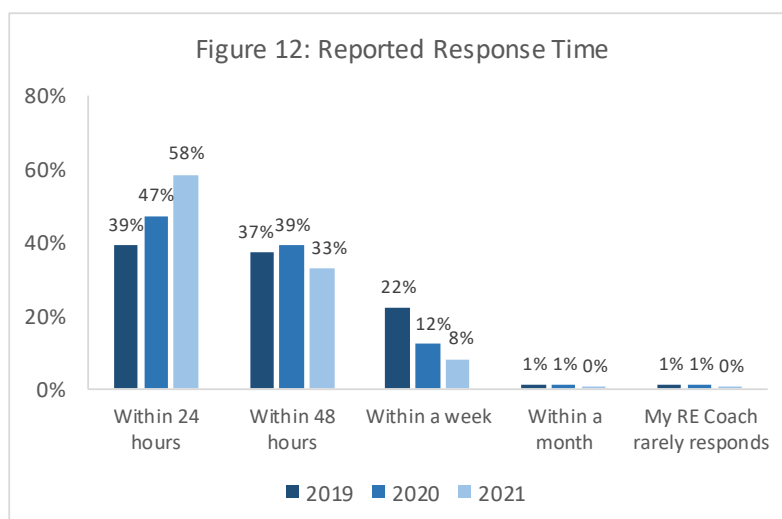


Respondents who said a two-day response was not reasonable were asked in an open-ended follow-up question, “what response time would be reasonable?” Of the respondents who said that two days was not reasonable, most provided a written response to the follow-up question. Among those respondents who thought a two-day response was unreasonable, 69 percent said they should get a response within a day, the same day, or within 24 hours. Five percent of these respondents thought they should have a response from their coach within two hours.

Most of the remaining respondents noted they want a quicker response when deadlines are approaching. As one respondent noted: “2 hours especially with the unreasonable deadline set by TRS. The 6th of the month for the prior month. It is difficult for districts who pay early in the month. Payroll and TRS due within two days of each other”. Or, as another respondent noted more emphatically (caps in the original): “MOST OF THE TIME WHEN WE REACH OUT IT IS DUE TO A TRS DEADLINE AND WE DO NOT HAVE 2 DAYS TO WAIT ON A RESPONSE”. As these comments illustrate, when deadlines are approaching, some survey participants want faster responses from their RE coaches.

### Reported Coach Response Time

Survey respondents report quicker response times in 2021. Fifty eight percent of respondents reported receiving a response within 24 hours. By comparison, 47 percent of respondents reported receiving a response within 24 hours in 2020 and 39 percent in 2019. In addition, less than 10 percent of respondents report that it took longer than 48 hours to receive a response in 2021. This is an improvement from 2019, when 24 percent reported that responses took longer than 48 hours.



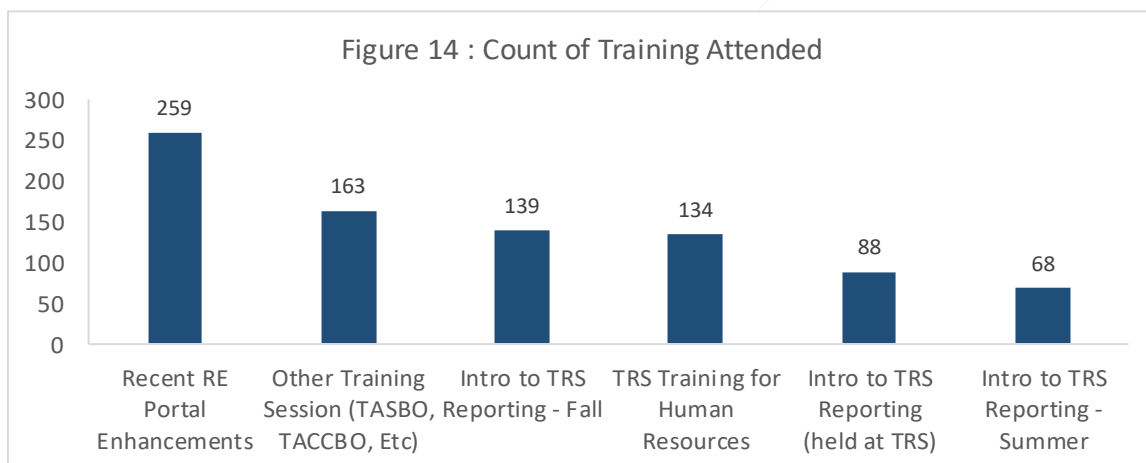
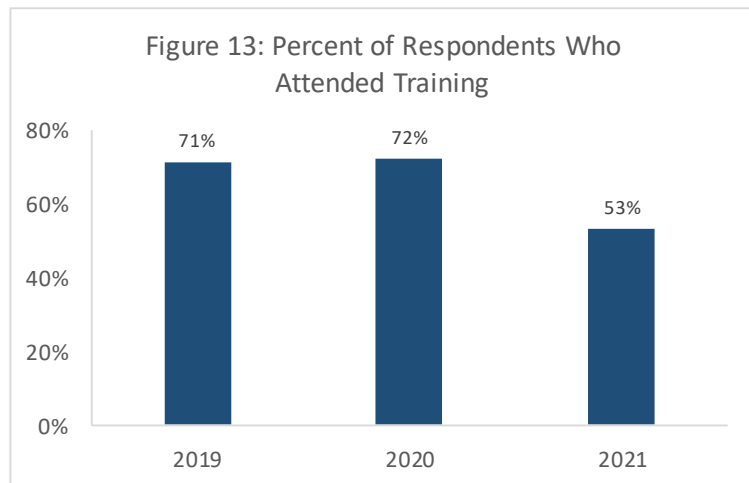
The data unequivocally show improvements in reported responsiveness over time.



## Training Attendance

One of the more notable shifts over the past year was a decline in respondents who reported attending training. In 2021, 53 percent of respondents reported having attended training in the past year. This is much lower than in previous years (72 percent in 2020 and 71 percent in 2019) and likely reflects the effects of the pandemic.

When asked what type of training survey participants attended, the most common response (N=259) was the “Fall Information Session: Recent RE Portal Enhancements” followed by “other conference training” (N=163), “Introduction to TRS reporting”, and “TRS Training for Human Resources” (Figure 14).



## Training Effectiveness

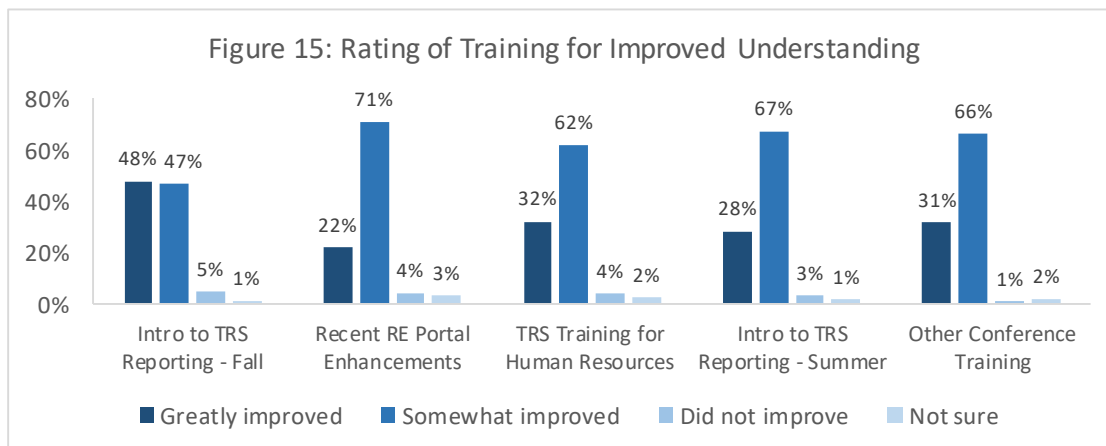
To evaluate the effectiveness of the training, respondents were asked the following two questions about each training session they attended:

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?”

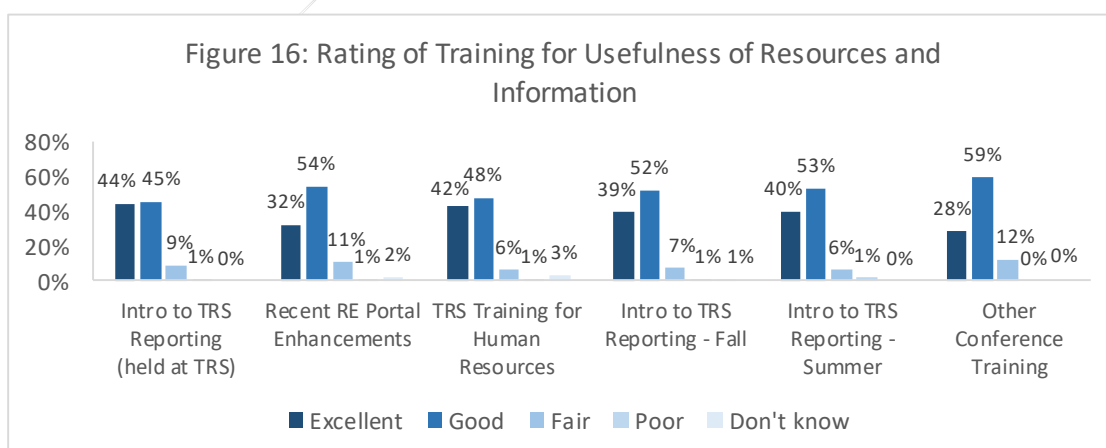
The majority of survey participants reported the training they attended improved their understanding of the applicable training topic (Figure 15). The highest rated training for improving understanding was the “Introduction to TRS Reporting (Held at TRS).” Forty-eight percent of respondents who reported attending the training say the training “greatly” improved their understanding.

For the other training sessions, respondents were more likely to report the training they attended only “somewhat” improved their understanding rather than “greatly” improved their understanding.

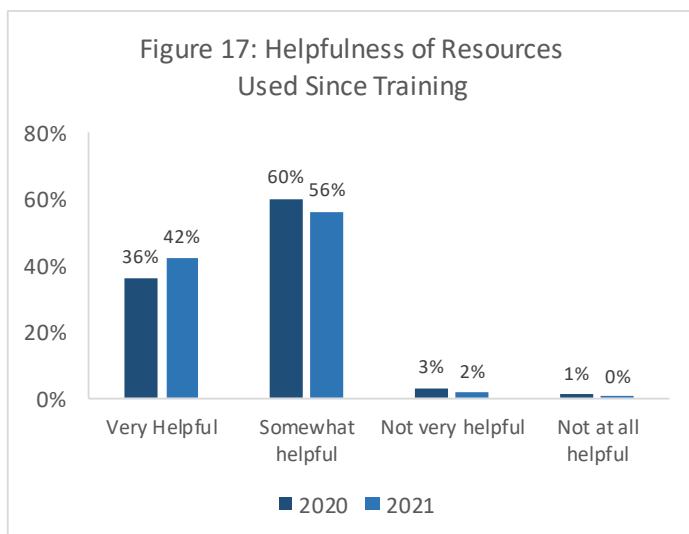
These results are consistent with the surveys conducted in previous years. However, comparisons to previous years are problematic because the training sessions are not identical across years and the evaluations are based only on the limited subset of respondents who attended training. That said, “Introduction to TRS Reporting (held at TRS)” was evaluated more positively in 2021 (48 percent said it greatly improved their understanding) relative to 2020 (26 percent said it greatly improve their understanding).



Similarly, when asked to rate the resources provided through the training (Figure 16), respondents were more likely to rate the resources and information provided during training as “good” rather than “excellent”. Evaluations are very positive with the percent of respondents rating the resources as “excellent” or “good” ranging from 86 percent for “Recent RE Portal Enhancements” to 93 percent for “Introduction to TRS Reporting – Summer”. Very few respondents rate training as “fair” or “poor”. Overall, survey participants value the resources and information provided during training.

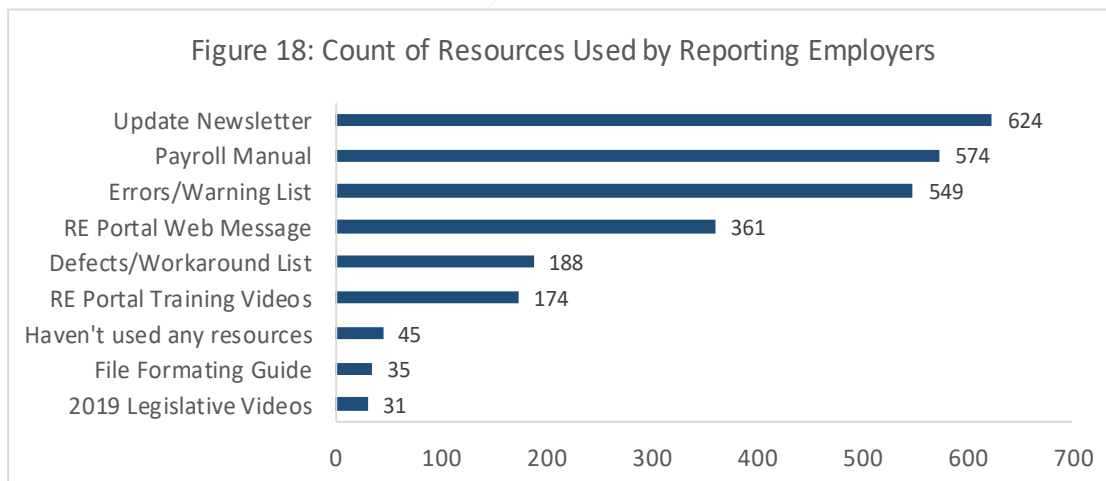


When asked to rate the resources used since their last training session (Figure 17), respondents were mostly positive. Forty-two percent of respondents rated the resources as “very helpful” and 56 percent rated the resources as “somewhat helpful”. Few respondents rated the resources as “not very helpful” or “not at all helpful”. There is also a slight increase – 36 percent in 2020 to 42 percent in 2021 – in the percent of respondents rating the resources they have used as “very helpful.” Overall, TRS training sessions help to improve understanding and provide helpful resources to the participants who attend.

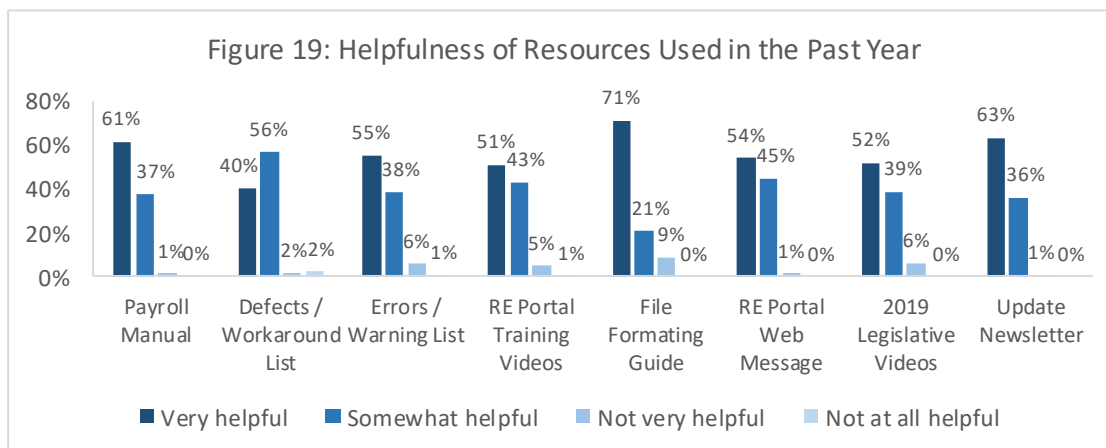


### Evaluations of TRS Resources

To gauge evaluations of TRS resources, respondents were asked which resources they used. For the resources that respondents reported as using, respondents were asked how helpful they found each of resource. Figure 15 presents the frequency of resources used. Consistent with previous years, respondents report using the “Update Newsletter/TRS Emails” most frequently (N=624) followed by the “Payroll Manual” (N=574), “Errors Warning List” (N=549), and “RE Portal Web Message” (N=361). The least frequently used resources are the “File Formatting Guide” (N=35) and the 2019 “Legislative Change Videos” (N=31).



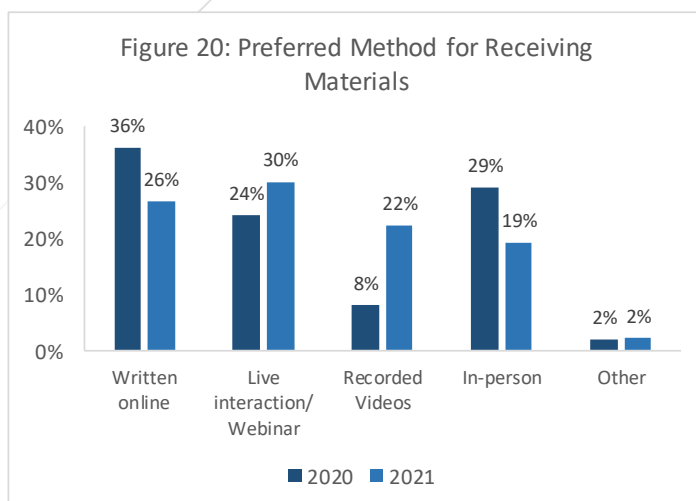
Survey participants were generally positive in their evaluations of training resources (Figure 19). Except for the “Defects/Workaround List” each of the resources is rated as “very helpful” by a majority of the respondents who used the resource. Few respondents rated the resources as “not very helpful” or “not at all helpful.”



### Preference for Receiving Training Materials

When asked how they prefer to receive their training materials, respondents reported a slight preference for “Live interaction/Webinar” (30 percent), followed by “Written Online” (26 percent), and “Recorded Videos” (22 percent).

These results are a notable shift from 2020. Reflecting a possible impact from the COVID-19 pandemic, the percent preferring “In-person” declined by 10 percent while the percent preferring “Recorded Videos” increased by 14 percent and the percent preferring “Live interaction/Webinar” increased by 6 percent.



Additionally, there are notable differences by RE type. Respondents representing higher education are more likely to prefer “Written Online” materials (37 percent) than respondents representing public schools (26 percent). Respondents representing public schools are more likely to prefer “Live interaction/Webinars” or “Recorded Videos”.

### 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?"

Because the responses are similar and largely reinforce other findings presented in this report, the feedback is presented together rather than separated by question. As in earlier sections, respondents expressed frustration with a complex TRS system, tight deadlines with financial penalties, and difficulty in getting timely support when they need it most. On a positive note, they also expressed support for their coaches. Below are some illustrative comments.

#### *Improve Communication*

- "Setting up a live chat. When we start the monthly reporting process a quick answer to our issues would help speed up our completing the reporting on time."
- "Continued communication for upcoming training sessions, videos available, changes, updates, or defects."
- "A real time chat feature with my TRS coach would be nice. It's much easier to communicate through live chat then over the phone (which wastes my TRS coaches time to help other RE's) or through email (while my TRS coach responds very quickly in under an hour or so when I get going on a submission then have to wait for a response it make the workflow cumbersome). A live chat in real time as I am working through errors/issues when doing month end TRS reporting would really assist RE's when reporting."
- "Accessibility! One of the questions, mention a Live Chat. This would be an excellent tool to be able to chat and have someone walk you through the rejections."
- "Communicating via email is time consuming. If we could contact a person, it would help the process of correcting any errors."
- "Easier communication between the coaches and the reporting employers. A chat feature would be very helpful, as most employers who are needing help cannot wait 2 business days for a response or they will not be able to submit reports in a timely manner. Also, the mass emails that are sent out reminding of balances owed should only be sent to those institutions who actually owe a balance. Many reporting employers have several employees who receive the emails, and it makes for a very hectic time when people who are not actually submitting the reports and payments receive an email saying that a balance was not paid, when in fact it had been."

#### *Simplify the Process*

- "Simplify the process! I am the business manager, and it takes our payroll coordinator a full day to reconcile payroll and TRS. At the beginning of the year, with all the new hires, it takes much more time than that. Reporting every sub, even though they are not a TRS retiree, creates a lot of unnecessary work."
- "2 things...Simplify the system and more empathy on the due dates. For example, in 2021 Easter falls on April 4th. Our School District is closed April 2, 3, 4, and 5, but, I'll be at work trying to get TEAM in by the due date of April 6th. Our Districts are broke. Funding is at an all time low. Yet,

TRS wants to incur penalties and interest on reports (even when there's no money involved) and deposits not made on time. Every TRS/TEAM training I went to, pre-COVID, the first part of the meeting was complaining about TRS and the TEAM portal...a system implemented with training videos and reporting parallels, followed by pages of issues and defects, and coaches so overwhelmed with calls and emails it took weeks to get a reply for help. The TEAM portal is complicated and not user friendly."

- "I think the most important thing is to improve the portal as to reduce time needed to submit reports. The portal can be difficult to work with at times and also is inconvenient when the portal is shut down for daily maintenance. Often, the portal does not update the status of a submitted report so it can become difficult to know if what was submitted is being validated or not."
- "Make the reporting portal more user friendly."

#### *Availability and Accessibility of Coaches*

- "At the end of the last training session I attended, the administrator emphasized the amount of TRS Coaches there were compared to the amount of reporting entities. Over several minutes discussed how many emails and phone calls each coach receives a day. Basically, I felt they were justifying their short falls with excuses. Everyone is busy and with how the TRS reports are ran, I need efficient and effective help. I don't want to feel like I am bothering a busy person or not get the answers I need to understand the process. If it weren't for our Regional Service Center, I would still be lost."
- "Be available anytime we need them. My coach is always absent at the most important times of the month as far as reporting goes. I am sitting around twiddling my thumbs waiting for her to respond to problems. This is time that I need to actually spend completing my reports."
- "Be more accessible and quicker than the 48 hour standard response period. With such steep penalties and rigid deadlines, districts need assistance with reporting issues. It would be helpful to "prioritize" contact with TRS. Place reporting issues and discrepancies higher than membership issues. Give a faster response time to districts working on a rejected report for instance over someone asking about membership benefits, etc."
- "Hire more coaches! It would vastly improve my ability to complete reports and meet TRS deadlines and expectations."

#### *Greater Flexibility with Deadlines Requirements*

- "Be more reasonable with their requirements. For example there is no logical reason why they require a district to submit the actual hours and days worked in the TRS month for a non contracted employee. School districts do not pay these employees on an hourly basis. Their salary is annualized just like a teacher's. The days that pull from the calendar are reflective of the days the employee is paid for which is all that TRS should care about. At the end of the school year TRS will know how many days these employees worked and how much they were paid. Knowing the exact hours and days in any particular month is a very unnecessary and burdensome requirement. The requirement for retirees makes sense because many are considered less than half time so if their hours go over in a given month that affects surcharges and pension checks. However, regular employees are not affected by this. If an employee is more than half time their number of hours and days shouldn't matter to TRS. If anything, they should just require it on employees who are less than half time."

- “Be more understanding of our issues and the problems that the new reporting has caused for the entities. TRS reporting is just a small part of our job, but takes up the most time and resources.”
- “Be respectful of our institutional required documentation and not so inflexible”
- “For me personally, that would be to make some changes in the timing of reporting information. I understand the need to report all of the information that we are reporting and I am willing to report that information. I do have a problem being asked to do the impossible. Example: We are required to report the actual days and hours worked during the previous month and the report is due on the 6th. It is not realistic to expect to even have that information available, much less be able to report it by the 6th or possibly sooner. The other problem is that we are reporting time worked by the month and our salaries are being reported by our payroll schedules. Example: Substitute works in the current month, but will not receive compensation for that work until next month. A partial fix would be to change the due date to later in the month, maybe the 15th. It is much harder to work around the other problem. I am reporting compensation based on amounts paid during a month which don't correspond to days worked during that month. A possible fix would be to allow us to report compensation and attribute days to multiple months.”

## TRS Reporting Employer Survey 2021

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 were 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, would you please forward this email to the appropriate contact or send that individual's contact information to Aaron Williams (awilliams@ppri.tamu.edu).*

If you have any questions about the survey, please contact Kirby Goidel by email (kgoidel@tamu.edu or phone (979-458-3231).

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

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

- ☐ Excellent
- ☐ Good
- ☐ Fair
- ☐ Not so good
- ☐ Poor

What, if anything, would you change about the services TRS provides to its Reporting Employers?

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

- ☐ Daily
- ☐ Regularly, several times a week
- ☐ Occasionally, about once every week
- ☐ Rarely, no more than once or twice a month
- ☐ Never

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

- ☐ Excellent
  - ☐ Good
  - ☐ Fair
  - ☐ Not so good
  - ☐ Poor
  - ☐ Don't know/Not Sure
-

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

	Very well	Somewhat well	Not very well	Not well at all	Don't Know/Not Sure
Understanding your questions and responding appropriately?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Directing you to appropriate resources on the website?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Explaining the steps needed to correct errors?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Responding within the current service standard (2 business days)?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Being available so that you can speak to a person on the phone?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Communicating via email?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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

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

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

- ☐ Yes
- ☐ No
- ☐ Don't know/Not sure

Please rank the three most important things your TRS 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
- ☐ Directs you to appropriate resources on the website
- ☐ Explains the steps needed to correct errors
- ☐ Responds within the current service standard (2 business days)
- ☐ Is available so you can speak to a person on the phone
- ☐ Communicates via email
- ☐ Communicates via chat
- ☐ Something else, please explain

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

- ☐ Yes
- ☐ No
- ☐ Don't know/Not sure

If no, what do you think would be reasonable?

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

- ☐ Within 24 hours
- ☐ Within 48 hours
- ☐ Within a week
- ☐ Within a month
- ☐ My Reporting Employer Coach rarely responds to calls or emails

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

- ☐ Yes
- ☐ No
- ☐ Don't know/Not sure

Is there any particular reason why you did not attend an employer reporting training session in the past year?

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

- ☐ Introduction to TRS Reporting (held at TRS)
- ☐ Fall information session: Recent RE Portal Enhancements
- ☐ TRS Training for Human Resources
- ☐ Introduction to TRS Reporting - Fall
- ☐ Introduction to TRS Reporting - Summer
- ☐ Other Conference Training Session (TASBO, TACCBO, Etc)

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

- ☐ Greatly improved
- ☐ Somewhat improved
- ☐ Did not improve
- ☐ Not sure

How much did attendance at the ***Fall Information Session: Recent RE Portal Enhancements*** improve your understanding of Reporting Employer Portal functionality?

- ☐ Greatly improved
- ☐ Somewhat improved
- ☐ Did not improve
- ☐ Not sure

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

- ☐ Greatly improved
- ☐ Somewhat improved
- ☐ Did not improve
- ☐ Not sure

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

- ☐ Greatly improved
- ☐ Somewhat improved
- ☐ Did not improve
- ☐ Not sure

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

- ☐ Greatly improved
- ☐ Somewhat improved
- ☐ Did not improve
- ☐ Not sure

How much did attendance at this ***Other Conference Training Session*** improve your understanding of the topic?

- ☐ Greatly improved
- ☐ Somewhat improved
- ☐ Did not improve
- ☐ Not sure

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

- ☐ Excellent
- ☐ Good
- ☐ Fair
- ☐ Not so good
- ☐ Poor
- ☐ Don't know/Not sure

Please rate the usefulness of the resources and information provided to you during the ***Fall Information Session: Recent RE Portal Enhancements*** session?

- ☐ Excellent
- ☐ Good
- ☐ Fair
- ☐ Not so good
- ☐ Poor
- ☐ Don't know/Not sure



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

- ☐ Excellent
- ☐ Good
- ☐ Fair
- ☐ Not so good
- ☐ Poor
- ☐ Don't know/Not sure

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

- ☐ Excellent
- ☐ Good
- ☐ Fair
- ☐ Not so good
- ☐ Poor
- ☐ Don't know/Not sure

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

- ☐ Excellent
- ☐ Good
- ☐ Fair
- ☐ Not so good
- ☐ Poor
- ☐ Don't know/Not sure

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

- ☐ Excellent
- ☐ Good
- ☐ Fair
- ☐ Not so good
- ☐ Poor
- ☐ Don't know/Not sure

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

- ☐ Payroll Manual
- ☐ Defects/Workaround List
- ☐ Errors/Warnings List
- ☐ RE Portal Training Videos
- ☐ File Formatting Guide
- ☐ RE Portal Web Message
- ☐ 2019 Legislative Changes Videos
- ☐ Update Newsletter / TRS Emails
- ☒ I haven't used any of these resources

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

	Very helpful	Somewhat helpful	Not very helpful	Not at all helpful	Don't know/Not sure
Payroll manual	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Defects/Workaround List	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Errors/Warning List	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
RE Portal Training Videos	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
File Formatting Guide	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
RE Portal Web Message	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2019 Legislative Changes Videos	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Update Newsletter / TRS Emails	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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

- ☐ Very Helpful
- ☐ Somewhat helpful
- ☐ Not very helpful
- ☐ Not at all helpful

What is your preferred method for receiving training materials?

- ☐ Written online
- ☐ Live interaction/Webinar
- ☐ Recorded Videos
- ☐ In-person
- ☐ Other, please specify: \_\_\_\_\_

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

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How long have you been in your current position?

- ☐ Less than 1 year
- ☐ 1-2 years
- ☐ More than 2 years

What is the single most important thing TRS could do to improve its relationship with Reporting Employers?

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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?

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