



Teacher Retirement System of Texas Reporting Entity Partner Satisfaction Survey



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Executive Summary

The TRS Reporting Entity Partner Satisfaction Survey (REPSS) was designed to provide critical feedback to the Teacher Retirement System of Texas on the services provided to Reporting Entity Partners. Final results are based on 851 respondents representing 916 reporting entity partners. The overall response rate for the survey, calculated as the percentage of individual respondents to unique email addresses in the original sample, was 70 percent. Major findings from the survey are noted below:

1. Reporting Entity Partners (REPs) evaluate their reporting entity coaches more positively than they evaluate TRS services. While there are differences across reporting entity type, REPs largely see their coaches as helping them work with a difficult, complex, and burdensome system. Throughout the survey, respondents distinguish between the TRS system, which they view as burdensome and complex, and TRS reporting entity coaches and staff, who they see as largely helpful.
2. Response time emerges repeatedly throughout the survey as one of the REPs' leading complaints. Not only do REPs expect quicker responses than they are receiving but they also report working against deadlines that require immediate responses. In the open-ended responses, they express frustration at the demands of the system and the level of support that accompanies it. There seems to be a general understanding that TRS coaches are overwhelmed by the number of requests for assistance.
3. Despite these concerns, REPs do not report a great deal of contact with their reporting entity partner coaches. Approximately two-thirds of REPs report that they rarely contact their coaches. This may reflect differences in expectations versus actual response times. Working under tight deadlines, REPs report needing immediate assistance to solve a problem or fix an error in reporting.
4. When asked to rate their coaches across a variety of dimensions, REPs give coaches relatively positive marks for understanding their questions and responding appropriately, directing them to appropriate resources on the website, and explaining the steps needed to correct errors. On each of these dimensions, 60 percent of REPs said their coach was doing "very well." The one exception was responding quickly. In their open-ended responses, REPs report the need for more coaches, indicating that they attribute response times less to individual coaches than to the overall system.
5. While a consistently large concern, response time is not what REPs report as most important. REPs rank the understanding of questions and responding appropriately as their most important consideration. The quality and speed of responses are both important.
6. REPs widely report attending training sessions. Their evaluations of those sessions indicate they perceive the sessions as "somewhat" valuable and the resources and information provided as "good." Consistent with other areas of the report, REPs indicate the need for more tailored and more one-on-one training that address specific and often immediate needs. Providing more training online—but not live—may help REPs with time and travel constraints.
7. The resources provided by TRS are generally evaluated positively in terms of their usefulness by users, but many of the resources are not widely used. The file formatting guide, for example, is the most positively evaluated resource but is also the least widely utilized. The most widely used resource, the payroll manual, is used by 61 percent of REPs.

Overall, the report provides a mixed assessment from TRS's Reporting Entity Partners. They appreciate the difficulty and complexity of the work and the support that TRS is able to provide. With a few exceptions, they are also generally appreciative of the support provided by TRS coaches. However, they are frustrated by deadlines, the reporting system requirements, and the difficulties of working with the system.

About the Survey

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

The initial sample for the survey was provided by TRS and included email addresses for 1,321 public and higher education entities. Because an individual might represent multiple organizations, the sample file included 1,211 unique email addresses. In the initial data collection efforts, emails were sent to each of these addresses asking respondents for help in completing the survey, assuring that their responses would remain strictly confidential, and that the results would only be used to improve the services provided to REPs by TRS. Thirty of these initial emails “bounced,” indicating they were sent to an invalid email address. Subsequent email reminders were sent every 3-4 days encouraging potential respondents to take the survey. Each respondent received at least 4 reminders requesting their participation in the survey. At the same time, TRS alerted potential respondents in their monthly newsletter to look for the survey in their inboxes and spam filters. This type of official organization endorsement has been found to increase survey response rates.

A couple of complications emerged from this initial data collection effort. First, while the sample file included an email address for each organization, the email address often identified the organization's web administrator rather than their payroll contact. More than half of the initial sample (51.2 percent) identified an email address for a web administrator rather than the payroll contact. While web administrators were asked to forward to the appropriate contact, we have no way of determining how many of these emails were forwarded to the correct person within the organization. After the initial wave of data collection yielded 745 survey responses, PPRI researchers began (1) looking online for alternative/payroll contact information for non-respondents and (2) calling those organizations for a best alternative/payroll contact when one was not found online. These efforts yielded 87 additional survey responses.

Second, because of survey information published in the TRS newsletter, the PPRI began receiving emails and phone calls from individuals who indicated they should have received the survey as the organization's payroll contact but did not. While some of these contacts were new, others were in the initial sample file. This likely indicates that—thanks to spam filters or other security settings—at least some potential respondents may have never received the email invitation to participate in the survey. Each time a potential respondent contacted the PPRI, they were sent an email response with an anonymous link to the online TRS REPSS survey. Eighty-eight of these requests resulted in a survey response. Overall, 920 individuals responded to the survey request (76 percent response rate) representing 985 organizations.

As a final step in quality control, the data set was reviewed to determine the completeness of individual survey responses. Each response was reviewed to assure 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 and were not subject to response bias. Respondents who completed the survey too quick (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. Overall, the final data set includes 851 valid responses representing 916 organizations. Recalculating the response rates based on the number of valid responses to the number of unique email addresses in the original sample yields a response rate of 70 percent.

For survey researchers, response rates are generally less disconcerting than the potential for response bias, meaning 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 provides insight into the representativeness of the REPSS by comparing population

parameters—based on the original sample data provided by TRS—to sample characteristics of survey respondents. As Table 1 reveals, the sample is representative of coach color and reporting entity type – meaning that 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 REPs.

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

Table 1: Comparison of Sample and Population by Coach Color and Reporting Entity Type

	POPULATION		SAMPLE	
	#	%	#	%
COACH COLOR				
BLUE	90	6.8	58	6.4
BROWN	167	12.6	120	13.2
GOLD	75	5.7	51	5.6
GRAY	96	7.3	65	7.1
GREEN	165	12.5	118	13.0
ORANGE	157	11.9	118	13.0
PINK	104	7.9	66	7.2
PURPLE	166	12.6	117	12.8
RED	158	12.0	103	11.3
SILVER	72	5.5	47	5.2
WHITE	71	5.4	48	5.3
REPORTING ENTITY TYPE				
PUBLIC EDUCATION	1,215	92.0	839	91.7
HIGHER EDUCATION	106	8.0	76	8.3

*Five cases in the sample did not have a reporting entity color and one case did not have a reporting entity type. These were respondents to the follow-up anonymous survey.

Full Report

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

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

This question was asked first to get respondents' "top of the mind" impressions without taking into account additional considerations. The results (presented in Figure 1) indicate that most respondents (62 percent) rated the quality of services received from TRS as excellent (13 percent) or good (49 percent). On this type of question, this is not a particularly positive response as nearly 30 percent indicated the quality of TRS services as, at best, fair. It is also not particularly negative as only 8 percent of respondents rated TRS services as "not so good" or "poor."

Figure 1: Percent Rating the Overall Quality of TRS Services

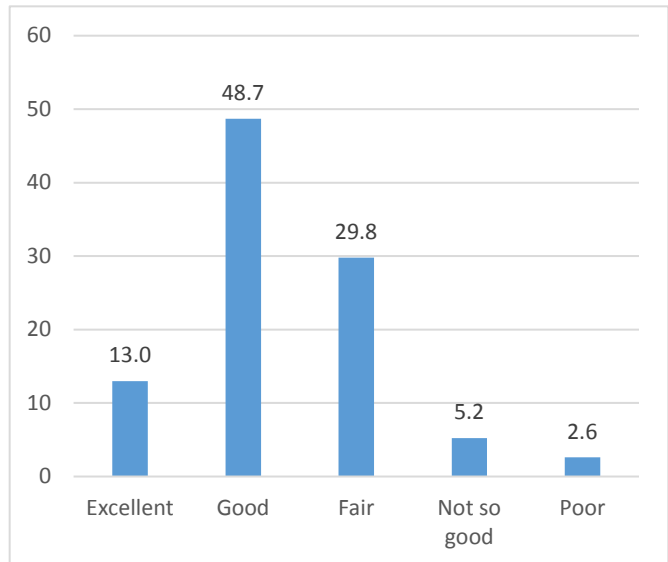
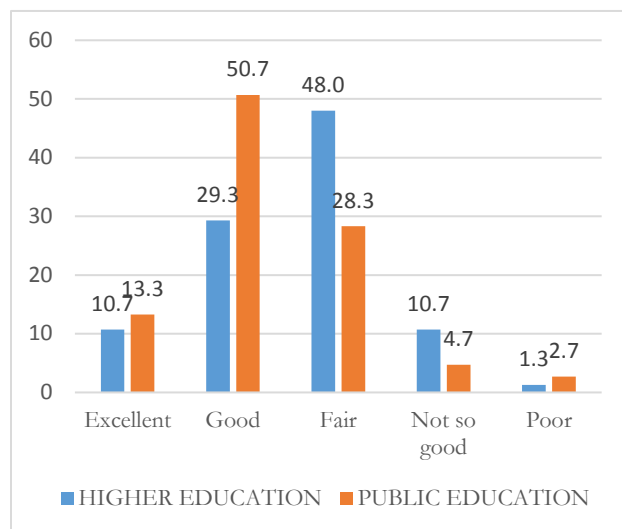


Figure 2: Percent Rating the Quality of TRS Services by Reporting Entity Type



In Figure 2, we present ratings by reporting entity type. As the results in Figure 2 reveal, respondents representing higher education rated TRS services less positively than respondents representing public education. Only 40 percent of respondents representing higher education rated services provided by TRS as excellent or good compared to 64 percent of respondents representing public education.

Changes to TRS Services: While such general questions are helpful, they do not provide much insight into how respondents are evaluating the quality of TRS services. To better understand the considerations at play in these evaluations, respondents were asked the following open-ended question:

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

Overall, just under half of the survey respondents provided an open-ended response to this question. Each individual response was carefully read to identify a common theme or themes across these individual responses. Rarely in open-ended questions does a single theme emerge so convincingly and overwhelmingly, but in this case the message from the open-ended responses was quite clear: TRS response times are too slow. The following are examples of some these responses:

- *You can never talk to anyone while you are working on it. You always have to wait a day or two before they will even respond to your email.*
- *When we have problems, it's hard to get in touch with our coaches sometimes.*

- *We need a way to call and get immediate help or at least a place to email and expect a response back within a few hours. Preferably a number to call for help.*
- *We need to go back to the TRS phone line being answered by a person that can assist us. Currently the ONLY person you can talk with is your consultant. We send email upon emails waiting to discuss an issue with our consultant. Many times when we finally get help we go over and over about the same issue. In the past we could call the reporting line and would talk with someone immediately and could move on.*

The inability to contact TRS reporting entity coaches when needed is also reflected in respondents' general frustration with the reporting system.

- *TRS was not fully prepared for the rollout of TEAM reporting system in 2017-2018. They either did not have enough well-trained TEAM "Coaches" or enough of an idea of what and where the issues would be with the new system. During the first year of implementation, it took forever to get a response from TRS when I had issues. While the response time has improved, the response time is still very slow. The TEAM system is ridiculously complex when correcting issues. I often feel like my Coach is telling me to try things just to see if they work rather than truly knowing how to fix the problem. I am sure it is frustrating on the TRS side, but I am not sure it is as frustrating as it is on the RE side.*
- *TRS needs to hire more coaches. I can't imagine the coaches having any time to actually resolve issues with the number of schools they are assigned. During critical times of the month issues need to be resolved quickly and with coaches being overloaded this doesn't happen.*

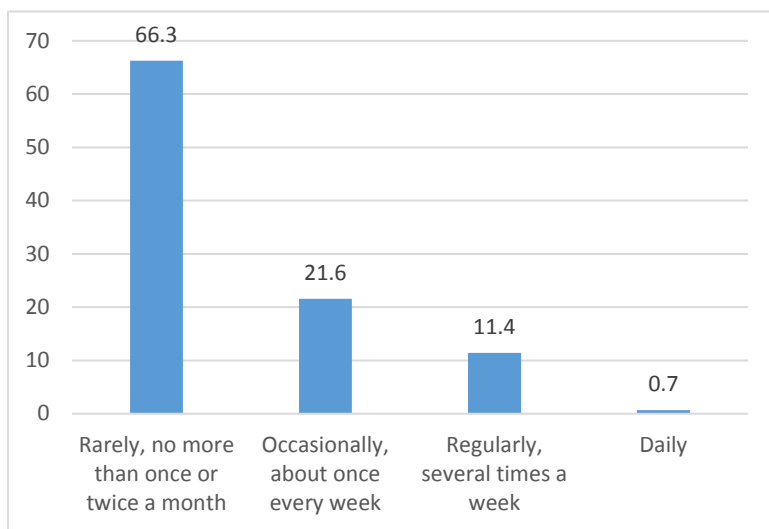
As these responses illustrate, REPs blame the system for the slow responses more than the individual coaches. Regardless, the concerns that emerge from open-ended responses are that the system is not user friendly and that the services provided by TRS are not sufficient for addressing concerns or issues in real time. As we show below, these same issues emerge in our quantitative findings.

Figure 3: Frequency of Contact with TRS Reporting Entity Coach

Contact with TRS Reporting Entity Coaches:
To gauge the level of interaction REPs have with their coaches, they were asked about their frequency of contact. The specific question wording was as follows:

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

For the most part, reporting entity partners report having little contact with their coaches. As indicated in Figure 3, two-thirds of respondents are contacting their coach no more than

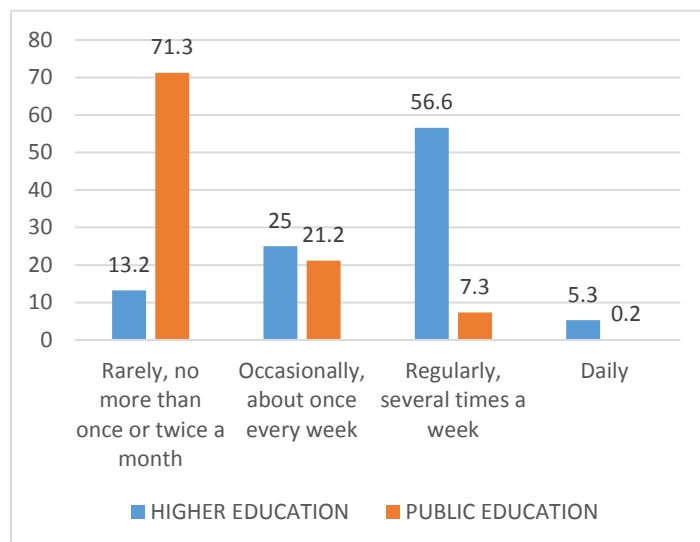


once or twice a month. Given the concerns noted above regarding response times, this finding indicates that REPs' frustrations with response time occurs relatively infrequently but when it does occur it is when REPs are facing major or pressing concerns, potentially with an immediate deadline.

Notably, REPs who have the most contact with their TRS reporting entity coach are least positive about TRS services. In a separate analysis (not shown), 69 percent of respondents who rarely have contact with their TRS reporting entity coach rate TRS services as excellent or good compared to 49 percent who occasionally contact

their coach and 46 percent who regularly contact their coach. While this may seem counterintuitive, frequent contact with a coach reflects some sort of problem or issue that cannot be easily resolved.

Figure 4: Frequency of Contact with Reporting Entity Coach by Reporting Entity Type



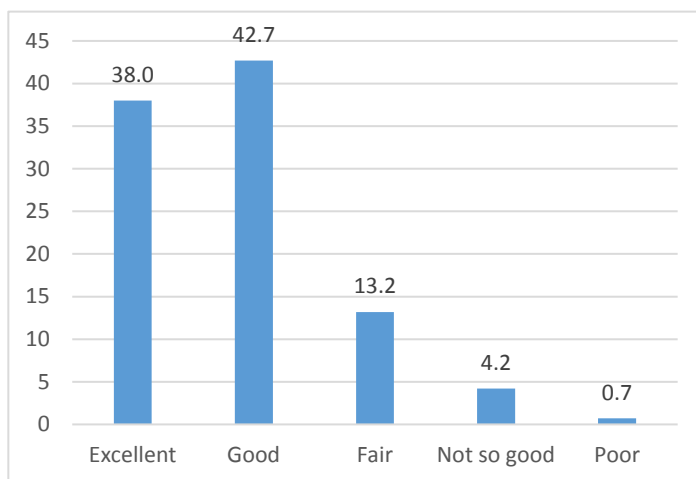
Respondents representing higher education report significantly more contact with their coaches than respondents representing public education. As can be seen in Figure 4, 62 percent of respondents in higher education reported having regular or daily contact with their reporting entity coach compared to just 7.5 percent for public education. This difference may reflect the different responsibilities, time demands, experience, and education of REPs in higher education. Seventy-one percent of respondents representing public education reported rarely contacting their TRS coach compared to 13 percent in higher education.

Rating Quality of Services Provided by TRS Coaches: Despite concerns about response times and the reporting system, respondents generally rated their reporting entity coach favorably. The specific question wording was as follows:

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

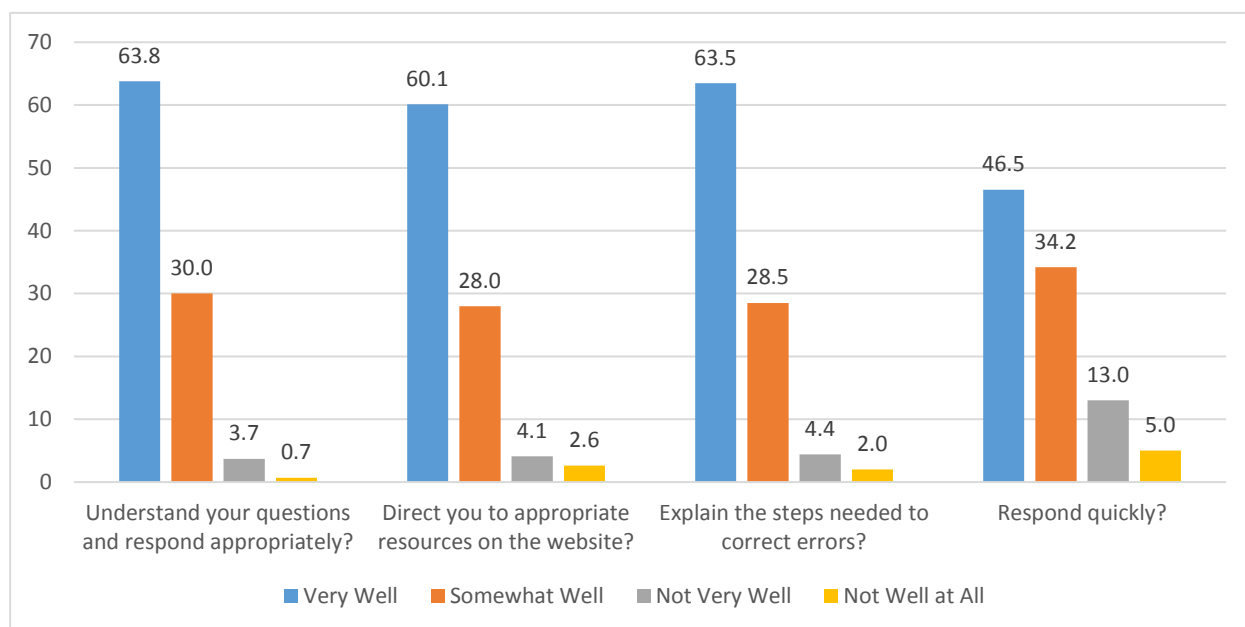
The results are presented in Figure 5. Overall, 81 percent of respondents rated their reporting entity coach as excellent (38 percent) or good (43 percent). Ratings of reporting coaches are significantly more positive than ratings of TRS services. As these findings suggest, coaches are perceived as allies in dealing with complexities of the reporting system and reporting entity portal. There are no significant differences by reporting entity type, meaning that representatives of colleges and universities evaluate their reporting entity coach similarly to representatives from public education.

Figure 5: Rating of Service Received from Reporting Entity Coach



Rating by Dimension of Performance: To gain more insight into the ratings of reporting entity partner coaches, respondents were asked a series of questions about their interactions with reporting entity partner coaches. The first set of questions asked how well they (1) understand your questions and respond appropriately; (2) direct you to appropriate resources on the web; (3) explain the steps needed to correct errors; and (4) respond quickly.

Figure 6: Rating of Reporting Entity Coach by Dimension of Performance



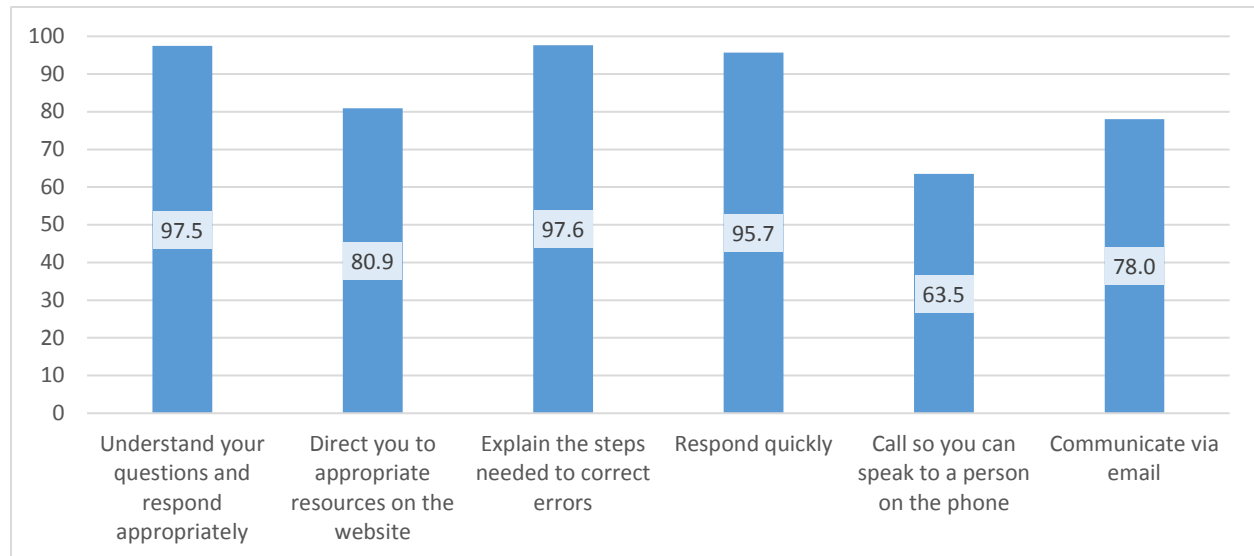
As can be seen in Figure 6, respondents were generally positive about their interactions with their reporting entity coach. Sixty-four percent of respondents reported that their coach understands their questions and responds appropriately very well, 60 percent reported that their coach directs them to appropriate online resources, and 64 percent reported that they explain the steps needed to correct errors.

The one “weak” spot, consistent with other findings in this report, is that only 47 percent reported that their reporting entity coach responded very quickly. In evaluating this response, context is important. Eighty-one percent of REPs said their coach responded “quickly” very well (47 percent) or somewhat well (34 percent).

Differences by reporting entity type on the first three items are fairly small but are more notable when it comes to the question of whether their coach “responds quickly.” Thirty-one percent of respondents representing higher education said their reporting entity coach did very well when it comes to responding quickly compared to 48 percent representing public education.

Importance of Services: A second set of questions asked about the importance of each of these services. The initial services mirror those noted above, with the addition of items for calling to speak on the phone and communicating via email. These are displayed in Figure 7.

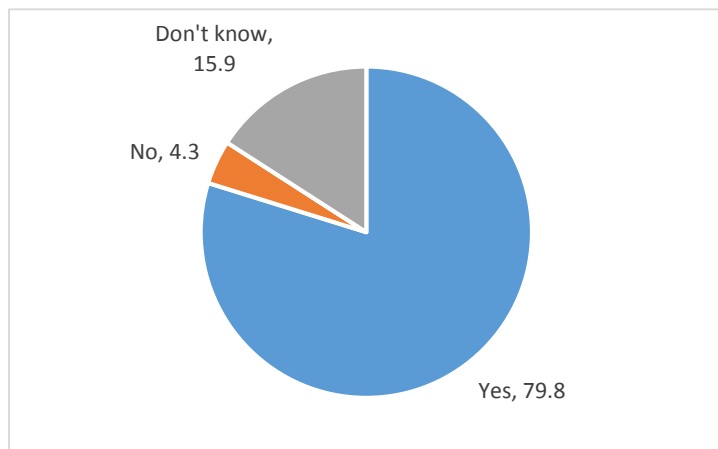
Figure 7: Percent Rating Services Provided by TRS Coaches as "Very Important"



As can be seen in Figure 7, each of these services is considered important, though some are more important than others. Nearly all survey respondents reported understanding questions and responding appropriately, explaining the steps needed to correct errors, and responding quickly were very important. Fewer respondents indicated being directed to online resources as very important, it is still considered very important by 81 percent respondents. When it comes to communication, respondents appeared to be more open to email responses (78 percent rate it as very important) than talking to a person by phone (64 percent). Rather than reflecting the lack of importance of a phone call, this likely reflects the predominance of email for work-related communication.

There are a couple of notable differences by reporting entity type. First, 66 percent of respondents representing higher education compared to 82 percent of public education reported that being directed to online resources was very important. This may reflect greater comfort in using online resources among REPs representing higher education. Second, 54 percent of respondents from higher education compared to 64 percent of respondents from public education said it was very important that someone call so that they could speak on the phone.

Figure 8: Intended Use of Online Chat for Communicating with Reporting Entity Coach



Intended Use of Online Chat: Willingness to use online communication tools was measured by responses to a question asking respondents:

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

The results are presented in Figure 8. Eighty percent of respondents said they would use online chat compared to only 4 percent who said they would not. An additional 16 percent said they did not know or were unsure whether they would use an online chat feature.

Differences based on reporting entity type are relatively small. Seventy-seven percent of respondents from higher education said they would use online chat compared to 81 percent from public education. REPs are clearly open to using online chat as a tool for interacting with their coach. For groups where willingness to use online chat is lower, the answers indicate greater uncertainty rather than opposition to its use.

Ranking TRS Coach Services: As a final check on the importance of various services to REPs, respondents were asked to rank the importance of each of these services (see Table 2). Respondents ranked understanding their questions and responding appropriately as their most important priority followed by responding quickly and explaining the steps needed to correct their errors. The means of communication (phone versus email) was less important.

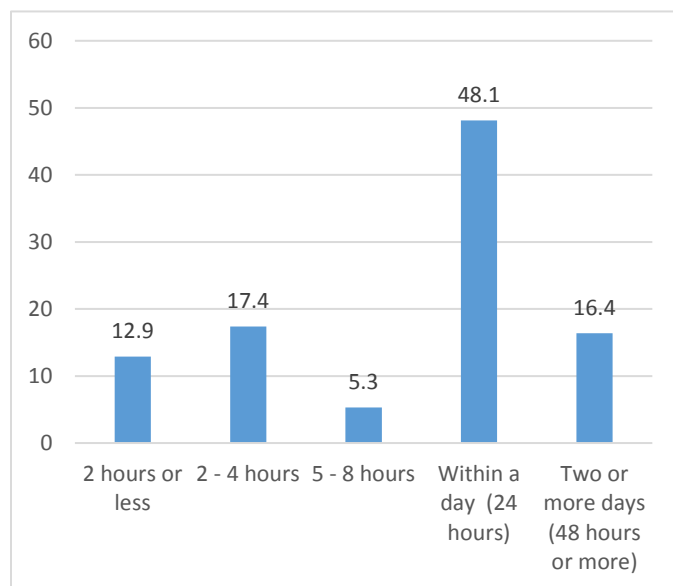
Table 2: Ranking of TRS Reporting Entity Coach Services

	Number Ranking Each Item	Percent of Respondents Ranking Each Item (Number)		
		First	Second	Third
Understands your questions and respond appropriately	686	52.2 (358)	30.6 (210)	17.2 (118)
Directs you to appropriate resources on the website	40	0 (0)	27.5 (11)	72.5 (29)
Explains the steps needed to correct errors	761	24.8 (189)	46.5 (354)	28.6 (218)
Responds within the current service standard (2 business days)	575	36.0 (207)	24.0 (138)	40.0 (230)
Calls so you can speak to a person on the phone	234	26.9 (63)	31.6 (74)	41.5 (97)
Communicates via email	149	8.7 (13)	20.1 (30)	71.1 (106)
Communicates via chat	71	9.9 (7)	42.3 (30)	47.9 (34)
Something Else (specify)	30	66.7 (20)	13.3 (4)	20.0 (6)

While respondents were offered the opportunity to provide a different option, only a limited number (n=30) did so. Notably, these participants mainly emphasized quick response. The following are illustrative examples:

- *TRS reporting is only one of the hundreds of tasks a district employee handles so we must be able to get a response in less than two business days.*
- *Given the current deadlines, response time should never be more than one business day.*
- *TRS must responds more quickly than 2 days. Service delays of two or more days with the amount of time given to prepare reports after the end of month is too long.*

Figure 9: Respondent Expectations Regarding Response Time for Reporting Entity Coach



Expected Versus Actual Response Time: If response time is an ongoing concern what do REPs perceive as a reasonable response time? To gauge their expectations, respondents were asked the following question:

During business hours, what do you consider a reasonable response time to your organization's calls or emails?

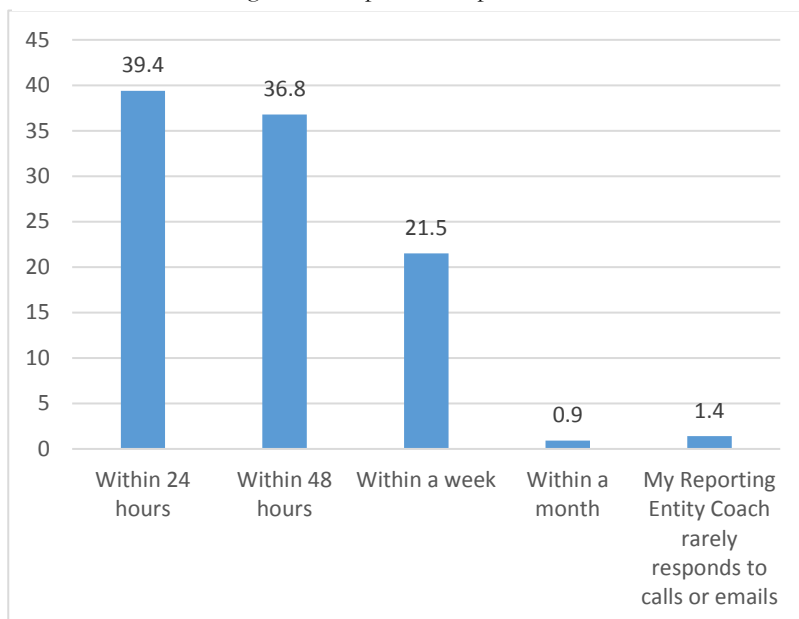
Figure 9 displays the results. Survey participants were given the option of responding in days or hours. To make the responses as comparable as possible, the responses were combined into a single response based on hours. Respondents who indicated they expected a response within a day were recoded as 24 hours, within two days as 48 hours, and within three days as 72 hours. As can be seen in Figure 13, the modal response (48 percent) was one day or within 24 hours. In addition, roughly a third of respondents expected

a response on the same day they emailed or called (within 8 hours) while 16 percent expected a response in two or more days.

Perhaps not surprisingly, there is gap between expected response time and reported response time. As can be seen in Figure 10, 84 percent of respondents expected a response within 24 hours while only 39 percent respondents reported receiving a response within that time frame. It is worth noting that the reported response time may not accurately reflect actual response times. However, it does reflect reporting entity partner perceptions. Related, the specific question (listed below) asks about average response time.

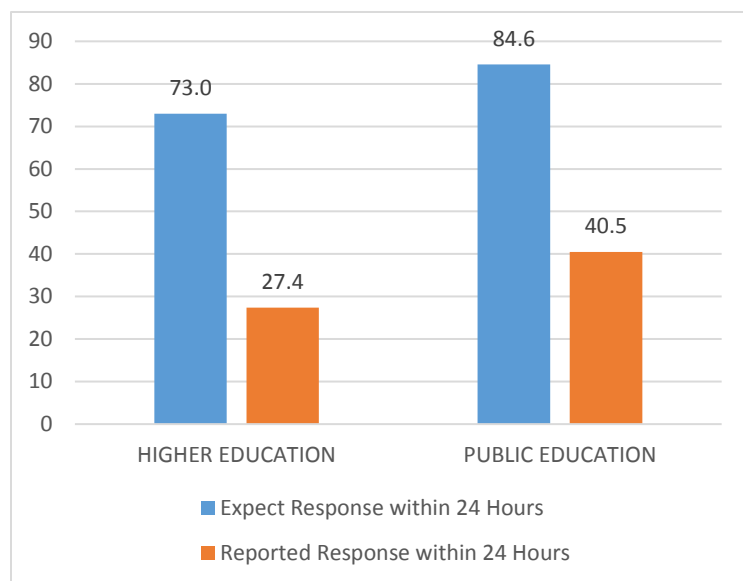
On average, how quickly does your TRS Reporting Entity Coach respond to your organization's calls or emails?

Figure 10: Reported Response Time



The use of “on average” is important in this context as it should signal that responses can be quicker (or slower), and we lack good information on how much variance there is in these response times. From an organizational perspective, this raises the question of whether response times can be improved or whether TRS can set expectations for existing response times.

Figure 11: Expected Versus Reported Response Times by Reporting Entity Type



While there are differences based on reporting entity type (see Figure 11), the larger pattern remains. There are significant gaps in the expectation that coaches will be able to respond within 24 hours and reported response times. First, representatives of higher education are less likely to report that they expect a response within 24 hours (73 percent compared to 85 percent of public education). Second, they are also less likely to report a response within 24 hours (27 percent compared to 41 percent of public education). In either case, there is a significant gap between expected and reported response times.

Attended Training: Training sessions provide a key mechanism for improving interactions with TRS services and coaches. Overall, 71 percent of respondents reported attending training within the past year. There is little difference in attendance by reporting entity type (73 percent for higher education, 70 percent for public education).

Respondents who reported that they had not attended training in the past year were asked a follow-up question probing for reasons for not attending. While the number of responses was limited, they were revealing. Respondents who did not attend training did not because they (1) were new on the job; (2) had timing or travel concerns; (3) were not aware of training opportunities; or (4) had attended training previously and were not sure if the new training opportunities were applicable to their current situations. We provide several illustrative examples below.

- *By the time I wanted to attend, the class had a waitlist. I am very interested in attending a training. It would help me tremendously. I accepted this job with no background experience and I am a perfectionist. I am afraid to make mistakes!*
- *The training was on payroll day.*
- *The training was too far of a commute.*
- *I attend every TRS training offered at my ESC, I'm just not sure the last time one was offered.*
- *I attended the mandatory training before TEAMS was launched. It has been over a year. If there is new information to be learned from attending another training session, I would be glad to attend.*

Respondents who reported attending training in the past year were asked which type of training session they attended. Of the 631 respondents who reported attending a training session in the past year, slightly less than half (N=306, 48 percent) attended the Introduction to TRS Reporting while 82 percent (N=521) reported attending training on the Reporting Entity Portal. An additional 15 percent of respondents (N=92) reported attending some other training session. Most of these respondents reported attending whatever training was

available, one-on-one training sessions with their coaches, or Texas Association of School Business Officials (TASBO) training sessions. When asked in a question about what training respondents would like to see that is not currently available, the most common responses involved requests for more one-on-one training, more training on how to fix errors, or training on more specific topics (e.g., for higher education).

Among those respondents who attended a training session in the past year, approximately 40 percent attended more than a single session. Most of these respondents reported attending both the Introduction to TRS Reporting and the Reporting Entity Portal training. A handful of respondents (N=32) notably attended three or more sessions.

To evaluate the effectiveness of their training respondents were asked the following two questions:

- *How much did attendance at your training session improve your understanding of the <Enter the Training Title>? [TRS reporting process or Reporting Entity Portal functionality];*
- *Please rate the usefulness of the resources and information provided to you during your training session?*

While most respondents found the training improved their understanding (see Table 3), they were more likely to say the training improved their understanding “somewhat” rather than “greatly.” The percent reporting that training “greatly improved” their understanding was similar for the Introduction to TRS Reporting and Reporting Entity Portal training sessions and was slightly higher for “other” training. This likely reflects the greater specificity of the other training and perhaps the one-on-one interactions. Similarly, when asked to rate the resources provided through the training, they were more likely to rate these resources as “good” rather than “excellent.” As with the previous question, evaluations are fairly similar for the Introduction to TRS Reporting and Reporting Entity Portal training sessions. Overall, the trainings are clearly seen as beneficial but may not address all the needs of respondents in dealing with the TRS system or reporting entity portal, and REPs may benefit most from one-on-one support or more tailored training sessions.

Table 3: Number of Respondents Attending Training by Training Session

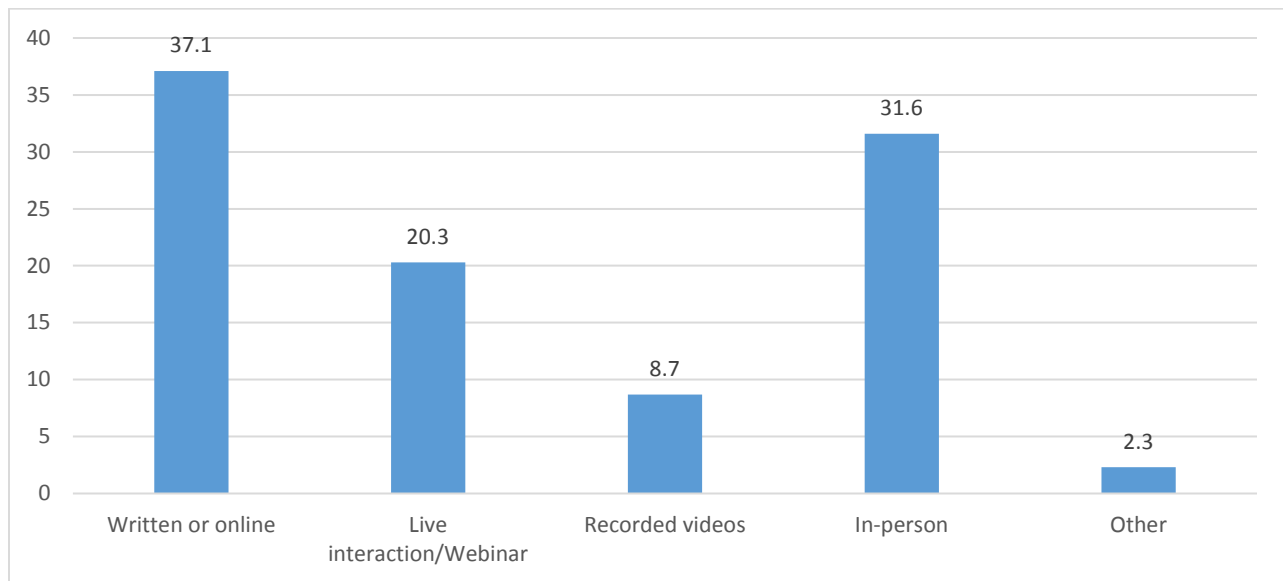
	Introduction to TRS Reporting	Reporting Entity Portal	Other
Number Attending Training	306	521	92
Training Improved Understanding			
Greatly	21.8	21.1	33.7
Somewhat	66.7	72	55.4
Did not improve	10.9	6.7	8.7
Not Sure	0.7	0.2	2.2
Evaluation of Usefulness of Resources Provided			
Excellent	17.8	14	25
Good	56.3	60	46.7
Fair	21.7	22.7	23.9
Not so good	3	2.3	1.1
Poor	1.3	0.4	3.3

Evaluations of TRS Resources: To gauge reporting entity evaluations of TRS resources, respondents were first asked which resources they used and then how helpful they found each of these resources. The results (see Table 4) reveal that the errors/warning list is the most commonly used resource followed by the Payroll Manual, the Reporting Entity Portal Web Message, and the Defects/Workaround list. The most positively evaluated resources among users are the File Formatting Guide, the Reporting Entity Portal Web Message, and the Payroll Manual.

Table 4: TRS Resources Used

	Payroll Manual	Defects /Workaround List	Errors /Warning List	RE Portal Training Videos	File Formatting Guide	RE Portal Web Message
Number of Respondents Using the Resource	556	389	673	209	117	423
Helpfulness of Resource						
Very helpful	40.6	31.1	36.3	33.8	46	41.4
Somewhat helpful	55.6	59.6	52.6	56.7	44.2	53.3
Not very helpful	2.3	6.6	7.3	7.5	6.2	4.4
Not at all helpful	0.8	2.4	2.3	1.5	1.8	0.5
Don't know/Not Sure	0.8	0.3	1.4	0.5	1.8	0.5

Figure 12: Preference for Receiving Training Materials



Preference for Receiving Training Materials: When asked how they prefer to receive their training materials, respondents generally opted for written or online (37 percent) followed by in-person (32 percent). Respondents were less inclined to prefer a live webinar. There are no significant differences by reporting entity type. There are significant differences by whether or not the respondent had attended training in the past year. Specifically, respondents who had not attended training were more likely to prefer a live webinar (24 percent) compared to those who had attended training (17 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:

- *What is the single most important thing TRS could do to improve its relationship with its Reporting Entity Partners?*
- *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, they are discussed together rather than individually. As in earlier sections of the survey, respondents expressed frustration with a complex TRS system, tight deadlines with financial penalties, and difficulty in getting timely support when they need it most.

- *While I understand why we report all employees paid to TRS each month, this process is much more time consuming than I think TRS understands. When you are the only one in your district that does payroll and is responsible for all the reporting, it can consume your day or week.*
- *When TRS creates new requirements for districts they need to make sure that the RE Portal has the capability of handling the information it receives. There is nothing more frustrating than having to use "work arounds" and doing more work because the RE Portal doesn't work right. This happens often. If TRS is requiring something they need to make sure their system works!*
- *TRS needs to make itself available to RE's. That is my biggest complaint. This system is difficult enough to use, and we have to come in and do reporting while the district is closed in order to meet the deadline. When you have a problem and have nobody to call for help, you are out on a limb. Furthermore, we have sent in letters over the span of 1+ years contesting interest charged to us (through no fault of our own as we caught and corrected the errors). We cannot get a real person to respond or look into this situation. We are not afforded such luxury on our end as RE's.*

- When we make a mistake, correct it in good faith (trying here!) and get charged interest automatically by the system, there should be a way to get that removed without sending letters out and never hearing back. This is ridiculous!*
- *TRS is doing a great job and our coach is awesome. The system is so complex that it is hard to understand. Also to make a correction to a report that is already submitted is daunting. The steps to correct are complicated. I want to just throw up my hands and say well I guess I can't fix that because I don't have the time to try and figure out all the steps needed to correct the issue. Thanks!*

Appendix: Survey Instrument

We need your help! We are collecting information from reporting entities currently working with the Teacher Retirement System of Texas (TRS) to better understand the information, resource, and training needs of Reporting Entity Partners. The information you provide will be strictly confidential and will only be used to help improve the services TRS provides to its partners. In addition, none of the information you provide will affect the services you receive from TRS. We are only interested in your honest assessment of the services provided by TRS.

If you have any questions about TRS or this research project, please feel free to contact Caasi Lamb, Director of Pension Policy & Research at the Teacher Retirement System of Texas (email: caasi.lamb@trs.texas.gov; phone: 512 542-2709). If you have any questions about the survey, please contact Kirby Goidel, Director, Public Policy Research Institute (email: kgoidel@tamu.edu; phone: 979 578-3231).

By clicking below to continue, you are agreeing to participate in the 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 (6)
-

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

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

- ☐ Rarely, no more than once or twice a month (1)
- ☐ Occasionally, about once every week (2)
- ☐ Regularly, several times a week (3)
- ☐ Daily (4)

How would you rate the quality of service you receive from your TRS Reporting Entity 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, would you say s/he:

	Very well (1)	Somewhat well (2)	Not very well (3)	Not well at all (4)	Don't know/Not sure (5)
Understands your questions and responds appropriately? (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Directs you to appropriate resources on the website? (2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Explains the steps needed to correct errors? (3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Responds within the current service standard (2 business days) (4)	<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 Entity 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)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Directs you to appropriate resources on the website (2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Explains the steps needed to correct errors? (3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Responds within the current service standard (2 business days) (4)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Calls so you can speak to a person on the phone (5)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Communicates via email (6)	<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 Entity Coach, would you use it?

- ☐ Yes (1)
- ☐ No (2)
- ☐ Don't know/Not sure (3)

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 respond 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)
- _____ Calls so you can speak to a person on the phone (5)
- _____ Communicates via email (6)
- _____ Communicates via chat (7)
- _____ Something else, please explain (8)

During business hours, what do you consider a reasonable response time to your organization's calls or emails? (*Only select one option and then enter the number of days or hours*).

- ☐ Within how many days? (Enter the number of days) (2)

- ☐ Within how many hours? (Enter the number of hours) (3)

On average, how quickly does your TRS Reporting Entity 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 Entity 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?

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

- ☐ Introduction to TRS Reporting (1)
- ☐ Reporting Entity Portal (2)
- ☐ Other, please specify (e.g., association training led by TRS): (3)
-

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

- ☐ Greatly improved (1)
 - ☐ Somewhat improved (2)
 - ☐ Did not improve (3)
 - ☐ Not sure (4)
-

How much did attendance at the ***Reporting Entity Portal*** training session improve your understanding of the Reporting Entity Portal?

- ☐ Greatly improved (1)
 - ☐ Somewhat improved (2)
 - ☐ Did not improve (3)
 - ☐ Not sure (4)
-

How much did attendance at this ***other*** training session improve your understanding of the topic?

- ☐ 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 ***Reporting Entity Portal*** 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 this *other* 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 past year? (Check all that apply)

- ☐ Payroll manual (1)
 - ☐ Defects/Workaround list (2)
 - ☐ Errors/Warning list (3)
 - ☐ RE Portal Training Videos (4)
 - ☐ File Formatting Guide (5)
 - ☐ RE Portal Web Message (7)
 - ☐ I haven't used any of these resources (6)
-

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

	Very helpful (1)	Somewhat helpful (2)	Not very helpful (3)	Not at all helpful (4)	Don't know/Not Sure (5)
Payroll manual (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Defects/Workaround List (2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Errors/Warning List (3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
RE Portal Training Videos (4)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
File Formatting Guide (5)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
RE Portal Web Message (6)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

What is your preferred method for receiving training materials?

- ☐ Written or online (1)
- ☐ Live interaction/Webinar (2)
- ☐ Recorded videos (3)
- ☐ In-person (4)
- ☐ Other, please specify: (5) _____

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

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 its Reporting Entity Partners?

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?
