Teacher Retirement System of Texas
Reporting Employers Satisfaction Survey 2020

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Table of Contents

List of Figures

List of Tables

Teacher Retirement System
Reporting Employers Satisfaction Survey
2020

Executive Summary

The Teacher Retirement System (TRS) Reporting Employers Satisfaction Survey (RESS) was designed to provide critical feedback to the Teacher Retirement System of Texas on the services provided to Reporting Employers (REs). The initial sample provided by TRS included 1,332 REs. Because the same individual can represent multiple REs, however, there were only 1,215 unique email addresses. Forty-five of these email addresses were invalid, meaning the emails bounced and were not delivered, leaving 1,170 valid email address in the initial sample. Final results are based on 838 individual respondents representing 909 REs. The overall response rate to the survey was 72 percent, meaning that 72 percent of REs with a valid email address completed the survey. Major findings from the survey are noted below:

1. Response time concerns have improved since 2019 but slower than desired responses remain an issue for REs. Sixty-one percent of REs said two days (within 48 hours) was a reasonable amount of time to expect a response while 34 percent indicated that two days was not sufficient. In open-ended responses, respondents who said a two-day response was insufficient expressed concerns about tight deadlines and the need for immediate assistance to solve a problem or fix an error in reporting. These respondents recommended a 24-hour response policy to meet their needs and TRS reporting requirements.

2. REs continue to evaluate their coaches more positively than TRS services. While there are differences across employer type, REs perceived their coaches as assisting with a difficult, complex, and burdensome system. Throughout the survey, respondents distinguished between the TRS system, which they continue to view as unnecessarily complex, and TRS coaches and staff, who they perceive as helpful.

3. Despite these concerns, REs do not contact their coaches very frequently. Nearly three-quarter of REs (72 percent) report rarely contacting their coaches. This is an increase of six percent from FY 2019. This reduction in reported contact with RE coaches is partially due to a reduced need for assistance, driven by enhancements to RE portal reporting capabilities and resolved RE portal defects.

4. When asked to rate their coaches across a variety of dimensions, REs 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 REs said their coach was doing "very well." Evaluations of response times improved significantly relative to 2019, though this reflects improved response times and changes in survey question wording from "responds quickly" to "responds within the current service standard (2 business days)."

5. While response times remain an overriding concern, REs rank their coach's understanding of questions and responding appropriately as their most important considerations. The quality and speed of responses are both important to REs.

6. REs widely report attending training sessions. Their evaluations of those sessions indicate they perceived the sessions generally positively but rate them "somewhat" rather than "very" valuable and the resources and information provided as "good" but not "excellent." REs rate one-on-one training sessions as most valuable and most positively for providing resources and information. The more training can be tailored to individual needs, the more valuable it is perceived by REs.

7. The resources provided by TRS are generally evaluated positively in terms of their usefulness by users and evaluations have improved relative to 2019.

Overall, the 2020 RESS provides evidence of improvements over the 2019 survey, particularly with respect to improved response times. Yet, if evaluations are generally positive, many of the same complaints persist across years. REs continue to perceive the system as complex and burdensome, and continue to struggle with reporting deadlines. REs do appreciate the difficulty and complexity of the work and the support that TRS provides, and are appreciative of the support provided by TRS coaches and staff.

About the Survey

The TRS RESS was designed by research staff at Texas A&M's Public Policy Research Institute (PPRI) and 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 1,215 unique email addresses representing 1,332 organizations, including public schools, charter schools, colleges and universities. The survey methodology was designed to target payroll contacts who serve as the reporting employer contacts for their organization. For organizations without a contact, a web administrator was substituted as the email contact. Before sending out an initial invitation email, research staff at the PPRI emailed or called 200 organizations to identify the payroll contacts for organizations with a web administrator listed as their payroll contact. Where necessary, contact information was updated to reflect the current payroll contact.

Data collection efforts involved sending invitation emails to each of the unique email 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 TRS services provided to REs. Forty-five 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. If necessary, each potential respondent received at least 4 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 filters. This type of official organization 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 (2) calling those organizations for a best alternative/payroll contact when one was not found online. This was done to provide every opportunity for organizations to respond to the survey. In addition, because of survey information published in the TRS newsletter, the PPRI also received emails and phone calls from individuals who indicated they should have received the survey as the organization's payroll contact but did not. Each time a potential respondent contacted the PPRI, they were sent an email response with an anonymous link to the online TRS RESS survey. Ninety-two of these subsequent requests resulted in a survey response.

As a final step in quality control, the data set was reviewed 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 and were not subject to response bias. 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. Overall, the final data set includes 838 valid responses representing 909 organizations. The overall response rate and number of completed interviews is similar to 2019.

For survey researchers, response rates are generally less troubling 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 2020 RESS by comparing population

parameters—based on the original sample data provided by TRS—to sample characteristics of survey respondents. A couple of notes are in order: (1) Table 1 is based on the organizations represented and not on the number of respondents; (2) The column labeled "Sample Respondents" includes REs who began the survey regardless of whether or not they completed the survey. Overall, 922 respondents began the survey representing 998 REs. (3) The column labeled "Completed Interviews" only includes completed interviews. Overall, 838 respondents completed the survey representing 909 REs; (4) Because some of our respondents took the survey anonymously, there is missing data for coach color and institutional type. Among the completed interviews, there is missing data for 20 REs for coach color and for 23 REs for institutional type. Throughout the report, there are fewer respondents in the crosstabs based on institutional type than there are in the frequencies. As Table 1 reveals, the samples of respondents and completed interviews are representative of coach color and reporting employer 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 REs.

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

	POPULATION		SAMPLE RESPONDENTS		COMPLETED INTERVIEWS	
COACH COLOR	#	%	#	%	#	%
BLUE	89	6.7	61	6.3	58	6.5
BRONZE	82	6.2	59	6.1	55	6.2
BROWN	136	10.2	98	10.2	89	10.0
GOLD	82	6.2	50	5.2	44	4.9
GRAY	96	7.2	65	6.8	60	6.7
GREEN	136	10.2	108	11.2	106	11.9
ORANGE	137	10.3	120	12.5	108	12.1
PINK	111	8.3	74	7.7	70	7.9
PURPLE	137	10.3	93	9.7	85	9.6
RED	83	6.2	58	6.0	52	5.8
SILVER	78	5.9	70	7.3	66	7.4
WHITE	81	6.1	51	5.3	46	5.2
YELLOW	82	6.2	55	5.7	50	5.6
MISSING COLOR COACH	2		36		20	
TOTAL	1332		998		909	
REPORTING EMPLOYER TYPE						
PUBLIC SCHOOL	1219	91.9	888	92.6	819	92.4
HIGHER EDUCATION	107	8.1	71	7.4	67	7.6
MISSING INSTITUTION TYPE	6		39		23	
TOTAL	1332		998		909	

Finally, surveys can be used to estimate population parameters or to provide strategic and actionable information to an organization or actor. Satisfaction surveys of this type typically yield responses from participants who have the strongest feelings on the subject at hand and, subsequently, have something to say. As such, the RESS should identity areas of concern and issues that need to be addressed.

Survey Findings

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

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

Placing this question first allows respondents to offer "top of the mind" impressions without taking into account additional considerations. The results (presented in Figure 1) indicate that most respondents in the 2020 survey (76 percent) rated the quality of services received from TRS as "excellent" (21 percent) or "good" (55 percent).

Figure 1: Percent Rating the Overall Quality of TRS Services
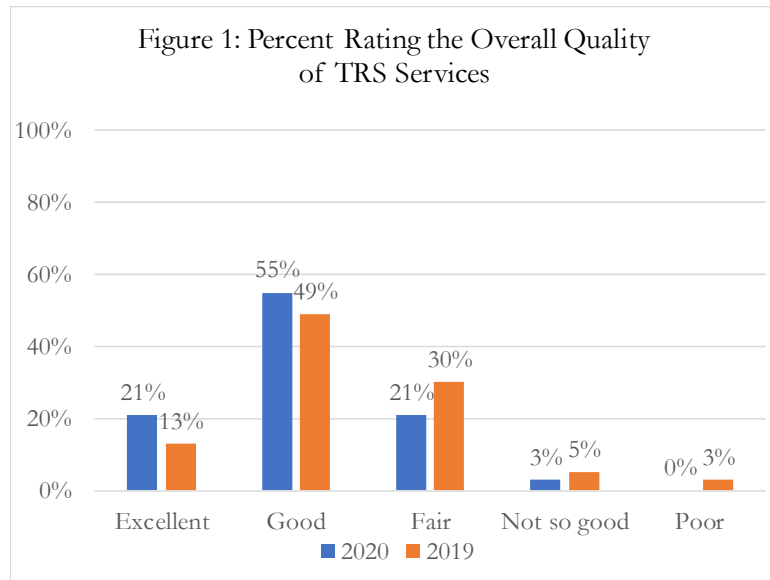
Approximately 24 percent of respondents indicated the quality of TRS services were, at best, "fair." This is a notable improvement over 2019 when 62 percent rated the overall quality of TRS services as "excellent" (13 percent) or "good" (49 percent). In addition, fewer respondents in the 2020 survey rated TRS services as "fair," "not so good," or "poor." Overall, the evaluation reflects an improvement over the 2019 results.

Figure 2: Percent Rating the Quality of TRS Services by Reporting Employer Type
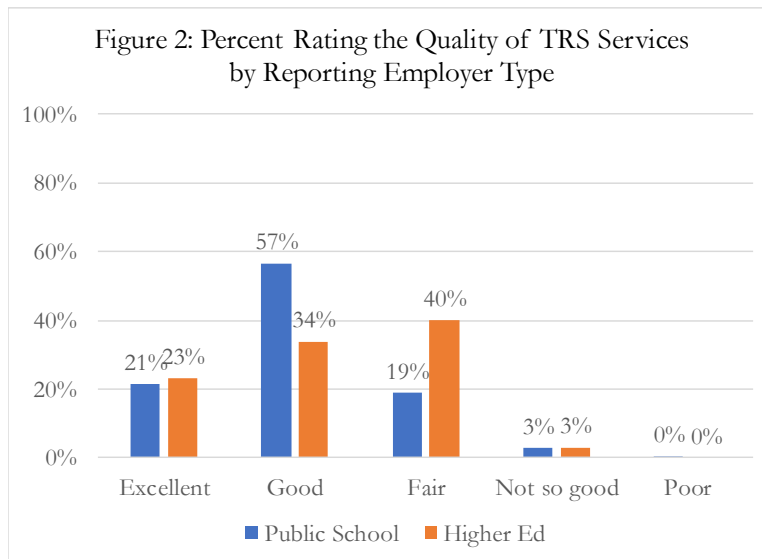
In Figure 2, we present ratings by reporting employer type. As the results in Figure 2 reveal, respondents representing higher education rated TRS services less positively than respondents representing public schools. Fifty- seven percent of respondents representing higher education rated services provided by TRS as "excellent" or "good" compared to 78 percent of respondents representing public schools. Notably, these are improvements across both employer types. In 2019, 40 percent of REs representing higher education rated TRS services as "excellent" or

"good" compared to 64 percent of respondents representing public schools. Even though the difference across institutional types persist, both public schools and higher education evaluated TRS services more positively in 2020 than in 2019.

Changes to TRS Services: To gain better insight into how respondents evaluate the quality of TRS services, they were asked the following open-ended question: "What, if anything, would you change about the services TRS provides to its REs?"
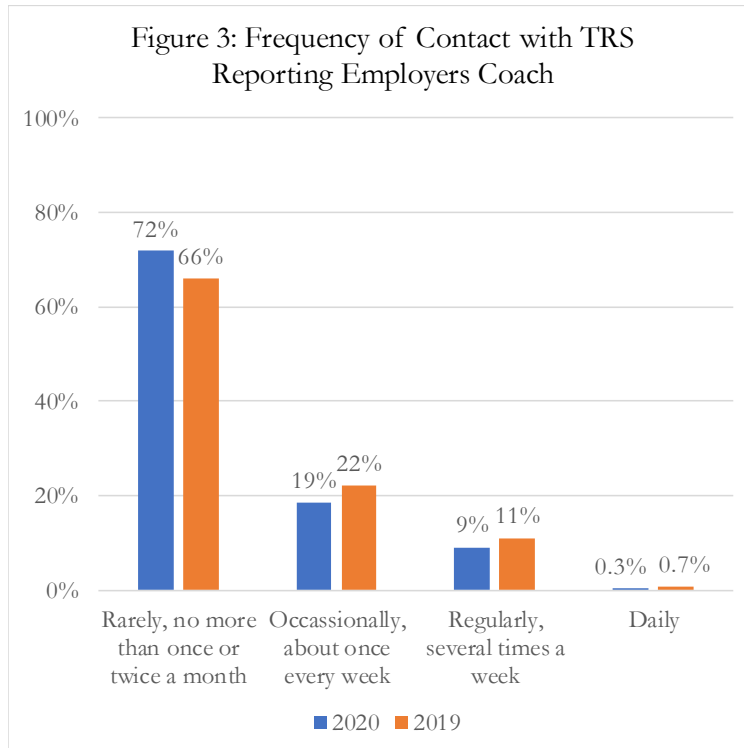
Overall, about a third of the 2020 survey respondents provided an open-ended response to this question as compared to 2019 when approximately half of respondents offered an open comment. Given the increases in overall satisfaction noted above, this is not unexpected. Open-ended comments in satisfaction surveys typically reflect dissatisfied customers who offer more detailed comments. As in 2019, two major themes emerged from these responses: (1) TRS response times are too slow relative to the needs of REs and (2) improvements are needed for online support system. The following represent the type of comments received regarding response times:

> Emails and calls need to be answered a little quicker.
> Even though it has gotten MUCH better, would like to have a little quicker response time.
> Hire more TEAM coaches so that each ISD can get more attention. Possibly even communicate something over the phone rather than by email.
> If I call I would like my TRS Coach to call me back NOT email me.
> Response times from coaches could be improved. Currently a 24 hour response time is expected because the coaches are so overwhelmed by the number of entities they service. More coaches could shorten the response time and help entities get reports and TEXNET deposits submitted earlier. More local training would also be great. Right now, the only training for entitles on the reporting procedures is located in Austin which is too far to travel with our workload.

General frustration with the reporting system is also reflected in respondent's comments:

> 1. Our "coach" at TRS is great but she has too many schools to help. The response time has greatly improved since the implementation of the system. However, when a response time is 2 to 3 days that keeps the district from being able to move on to the next step in our reporting and maintenance. I do not believe this is the coach's fault, I believe it is a system breakdown with coach's not having time or processes taking longer at TRS. 2. It would be great if there were some enhancements to the system that have been discussed at meetings with TRS. But there always seems to be a problem with programming time available, or rules that require too much time to be changed. For instance, it would be so helpful if we could see the history of an employee online that would show the records we have posted for the year rather than going to .csv files that are not cumulative.
> Be able to see contract and demographic data of an individual contract and new member contribution data.
> It would help if it could show a history on an employee with all the dates ever used. All on one page so the corrections would be easier to make.

As these responses illustrate, REs recognize that response times have improved but remain frustrated with response times and the difficulty of working with the reporting system.

Figure 3: Frequency of Contact with TRS Reporting Employers Coach

Rarely, no more than once or twice a month: 2020 72%, 2019 66%
Occasionally, about once every week: 2020 19%, 2019 22%
Regularly, several times a week: 2020 9%, 2019 11%
Daily: 2020 0.3%, 2019 0.7%

Legend: ■ 2020 ■ 2019

Figure 4: Frequency of Contact with Reporting Employers Coach by Reporting Employer Type

Rarely, no more than once or twice a month: Public School 75%, Higher Ed 29%
Occasionally, about once every week: Public School 18%, Higher Ed 29%
Regularly, several times a week: Public School 7%, Higher Ed 38%
Daily: Public School 0%, Higher Ed 4%

Legend: ■ Public School ■ Higher Ed

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

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

For the most part, REs report having little contact with their coaches. As indicated in Figure 3, nearly three in four respondents (72 percent) reported "rarely" contacting their coach (no more than once or twice a month). The percent "rarely" contacting their coach increased by six points relative to 2019, indicating even less contact than a year ago. Given increases in overall satisfaction, this may reflect positive changes relating to the RE portal. In FY 2019, Benefit Services and TRS IT staff resolved 44 defects and made enhancements in the RE Portal.
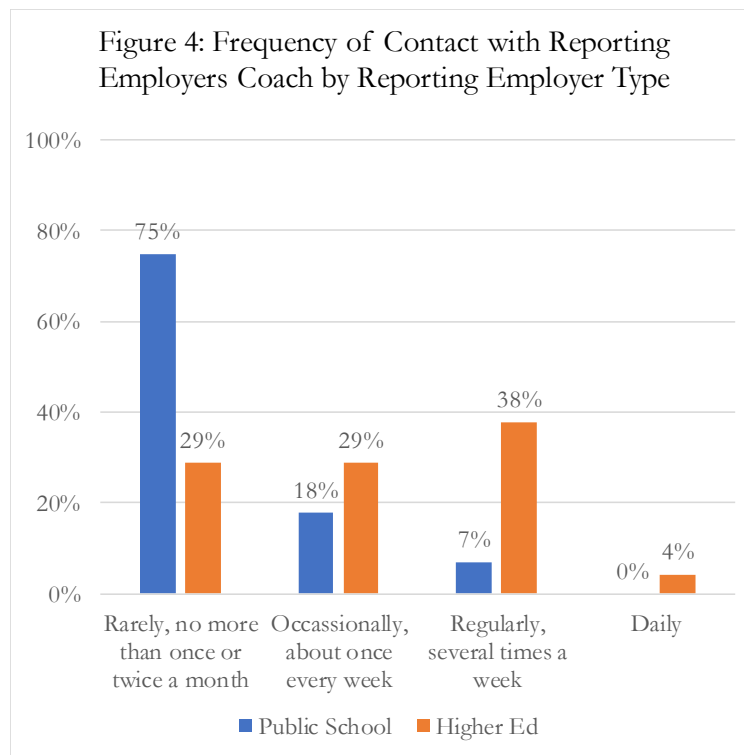
Respondents representing higher education report significantly more contact with their coaches than respondents representing public schools. As can be seen in Figure 4, 43 percent of respondents in higher education reported having "regular" or "daily" contact with their coach compared to just 7 percent for public schools. This difference may reflect the different responsibilities, time demands, experience, and education of REs in higher education.
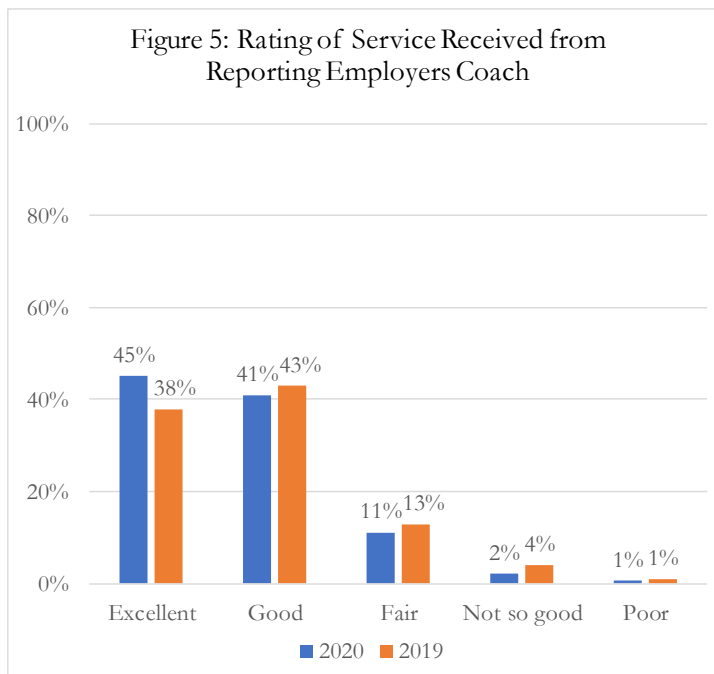
Relative to 2019, REs in higher education were much more likely to report "rarely" contacting their coach. In 2019, 13 percent of higher education REs reported "rarely" contacting their coach compared to 29 percent in 2020. Perhaps even more notable, in 2019, 57 percent of REs in higher education reported "regularly" contacting their coach compared to 37 percent in 2020.
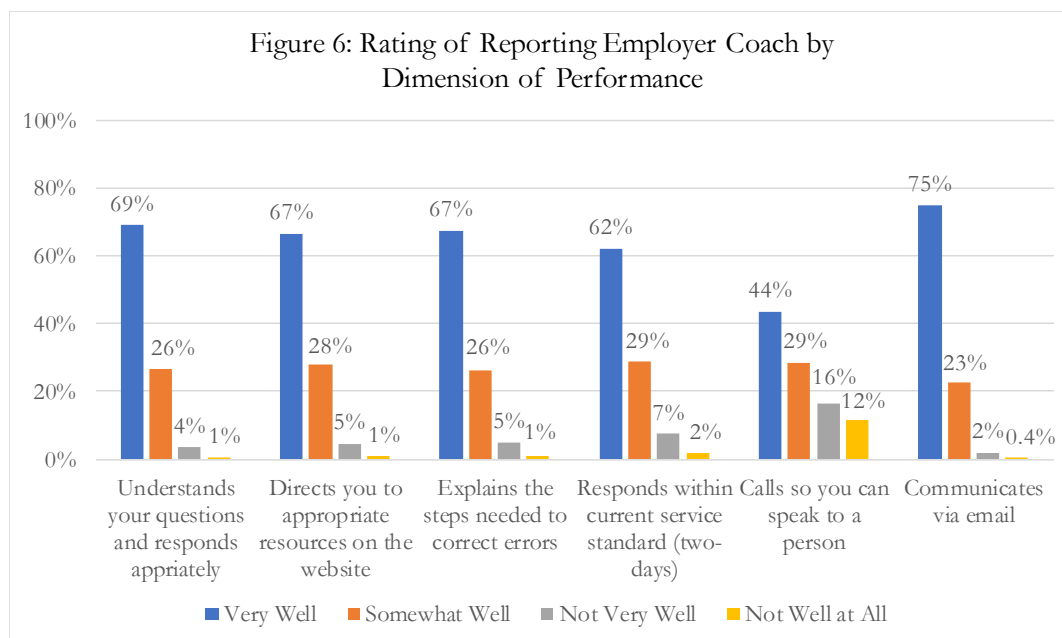
Rating Quality of Services Provided by TRS Coaches: Despite reporting less contact, respondents generally rated their coach more favorably in 2020. The specific question wording is as follows:

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

The results are presented in Figure 5. Overall, 86 percent of respondents rated their coach as "excellent" (45 percent) or "good" (41 percent). This is a slight increase over 2019 when 81 percent of respondents rated their coach as "excellent" or "good." Notably, the percent rating their coach as "excellent" increased from 38 percent in 2019 to 45 percent in 2020. Relative to 2019, evaluations of coaches have improved significantly.

Figure 5: Rating of Service Received from Reporting Employers Coach

| Rating	2020	2019
Excellent	45%	38%
Good	41%	43%
Fair	11%	13%
Not so good	2%	4%
Poor	1%	1%

Consistent with 2019 results, the ratings for coaches are more positive than ratings of overall TRS services. As noted in the 2019 report, these findings suggest that coaches are perceived as allies in dealing with complexities of the reporting system and meeting reporting deadlines. There are no significant differences by employer type, meaning that representatives of colleges and universities evaluate their coaches similarly to representatives from public schools.

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

Dimension	Very Well	Somewhat Well	Not Very Well	Not Well at All
Understands your questions and responds appriately	69%	26%	4%	1%
Directs you to appropriate resources on the website	67%	28%	5%	1%
Explains the steps needed to correct errors	67%	26%	5%	1%
Responds within current service standard (two-days)	62%	29%	7%	2%
Calls so you can speak to a person	44%	29%	16%	12%
Communicates via email	75%	23%	2%	0.4%

7

Rating by Dimension of Performance: To gain additional insight into the ratings of RE coaches, respondents were asked a series of questions evaluating specific dimensions of their coach's performance. This set of questions asked how well coaches (1) understand your questions and respond appropriately; (2) direct you to appropriate resources on the web; (3) explain the steps needed to correct errors; (4) respond within the current service standard (2 business days); (5) Call so you can speak to a person on the phone; and (6) Communicate via email. Notably, the fourth item reflects a wording a change from 2019 when REs were asked if their coach responded quickly rather than within the current service standard.

As can be seen in Figure 6, respondents generally evaluate their coaches positively across each of these dimensions. Sixty-eight percent of REs said their coach understands their questions "very well," 67 percent that their coach directed them to appropriate online resources, 67 percent that they explained the steps needed to correct errors, and 62 percent that their RE coach responded very quickly. Coaches receive their most positive evaluation for responding by email (75 percent) and their most negative evaluations for calling so REs can speak to a person (44 percent). Overall, these are generally positive evaluations and, with a couple of exceptions, consistent with the results from 2019 (see Figure 7). Relative to 2019, respondents to the 2020 survey were much more positive about the ability of their coaches to direct REs to appropriate web resources and to respond within two days. In 2020, 61 percent of REs said their coach responded with the current service standard compared to 47 percent in 2019 who said their coach responded quickly. This likely reflects differences in both question wording and response times.

Figure 7: Percent Rating Coaches "Very Well" or "Somewhat Well" by Dimension
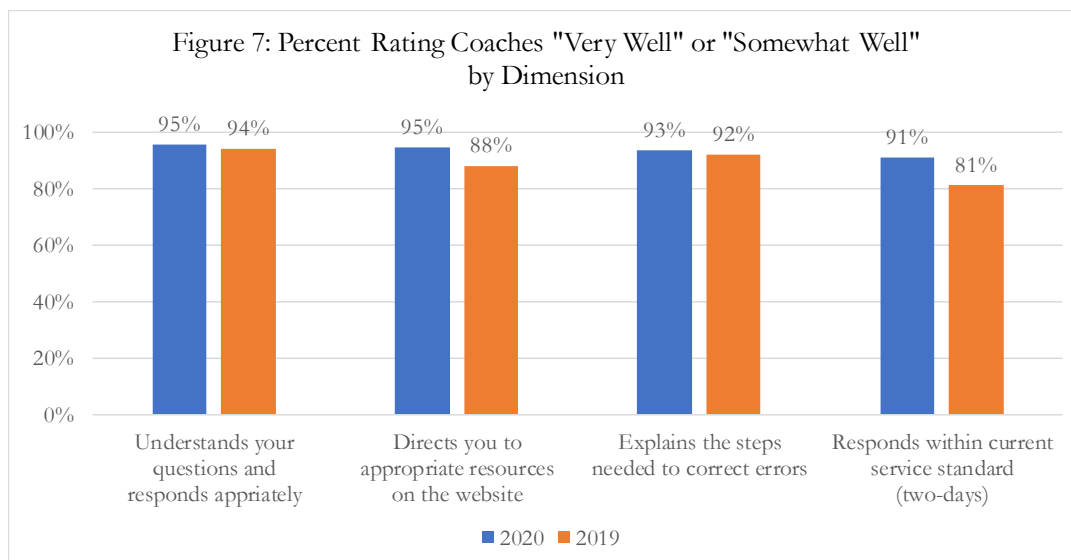
Differences by employer type are fairly small for "understand your questions and respond appropriately" and "explain the steps needed to correct errors" but more notable when it comes to the question of whether coaches "direct you to appropriate resources on the website" or "responds within the current service standard (2 business days)." Fifty-two percent of respondents representing higher education said their coach did "very well" responding within the current service standard compared to 61 percent representing public schools. Likewise, 56 percent of respondents representing higher education said their coach did "very well" directing them to appropriate website resources compared to 63 percent representing public schools.

Importance of Services: A second set of questions asked respondents about the importance of various TRS services. The initial services mirror those noted above. Figure 8 presents the percent of respondents who reported that these items were very important.

Figure 8: Percent Rating Services Provided by TRS Coaches as "Very Important"
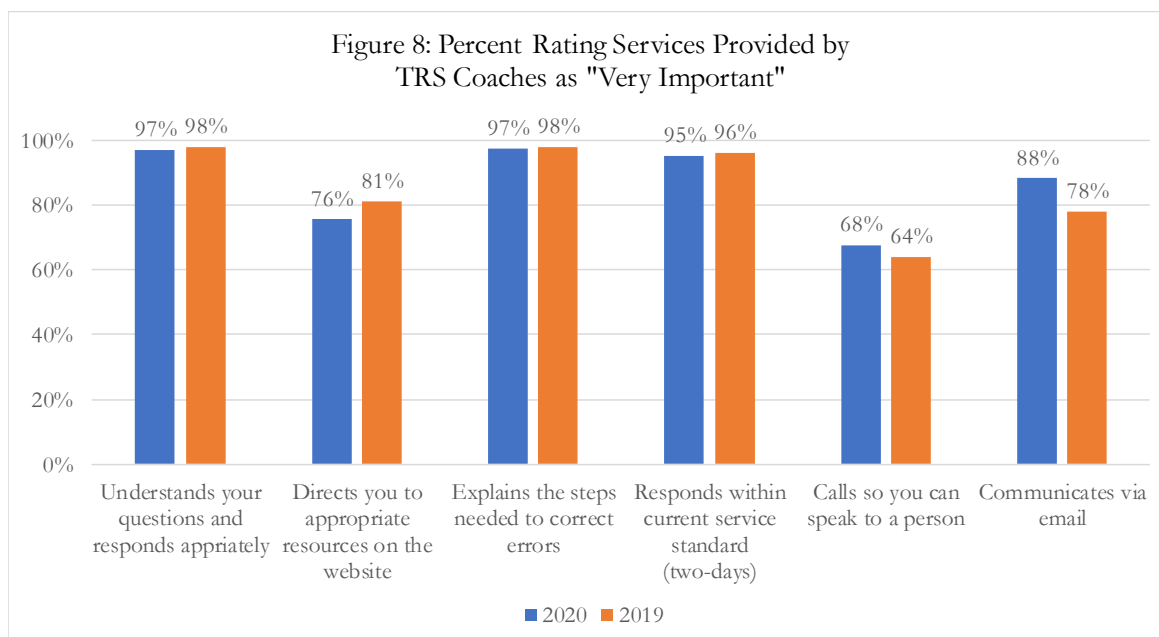
As can be seen in Figure 8, each of these services is considered important though, with the exception of communicating via email and calling to speak to a person on the phone, the importance of each item declined slightly relative to 2019. These declines are generally small. Nearly all REs (97 percent) believed that understanding questions and responding appropriately and explaining the steps needed to correct errors were "very important." Only slightly fewer respondents indicated responding within the current service standard (95 percent) or communicating via email (88 percent) were "very important," but these tasks are still considered "very important" by most respondents. Fewer respondents reported that being directed to appropriate resources on the website was important. For this question, the reported importance declined five points relative to 2019. Seventy-six percent of respondents rated it as "very important" in the current survey compared to 81 percent in 2019. This may reflect better accessibility or familiarity with existing online resources. If so, REs may need less direction to find what they need on the website. For communication, REs place greater importance on email responses (88 percent rate it as "very important") than talking to a person by phone (68 percent). Rather than reflecting the lack of importance of a phone call, this likely reflects the predominance of email for work-related communication.

Differences by institutional type are mostly small with one exception. Sixty-four percent of REs representing higher education said that being directed to online resources was "very important" compared to 76 percent of REs representing public schools. This may reflect greater comfort in using online resources among REs representing public schools. However, it may also be possible that the online resources that relate to the questions being asked by REs in higher education are not as plentiful or useful.

Figure 9: Intended Use of Online Chat for Communicating with Reporting Employer Coach

Yes 77%

No 6%

Don't Know 18%
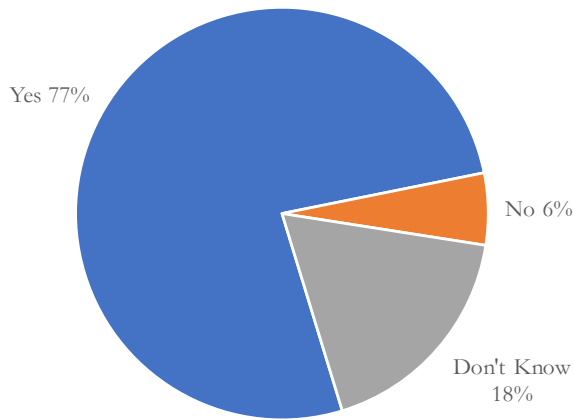
Intended Use of Online Chat: Willingness to use online communication was gauged by responses to a question asking respondents:

"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 9. Seventy-seven percent of respondents said they would use online chat compared to only 6 percent who said they would not use online chat. An additional 17 percent said they did not know or were unsure. These numbers are comparable to 2019 when 79 percent of respondents said yes they would use online chat, 4 percent said no and 16 percent said they were unsure or did not know.

Differences based on reporting employer type are relatively small. Seventy-one percent of respondents from higher education said they would use online chat compared to 77 percent from public schools. Overall, REs appear 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. The difference between REs representing higher education versus public schools, for example, is mostly in a larger percentage of respondents from higher education saying they did not know if they would use online chat (22 percent for higher education relative to 17 percent for public schools).

Ranking TRS Coach Services: As a final check on the importance of various services to REs, respondents were asked to rank the top three most important services. Table 2 presents the results ordered by the number of respondents who ranked each service in the top three. For example, 799 respondents ranked "explain the steps needed to correct errors" as one of the most important services that TRS coaches provide while 686 respondents ranked "understand your questions and respond appropriately" in their top three for TRS services. The order of rankings, judged by being placed in the top three services, did not change from 2019.

We can also look at the rankings in terms of what REs ranked as most important. REs rank understanding their questions and responding appropriately as their most important priority followed by explaining the steps necessary to correct errors and responding within two business days. The means of communication (phone versus email) is less important. The rankings for the each of these services is similar to 2019, though the relative importance of quick response declined in 2020.

Table 2. Ranking of TRS Reporting Employer Coach Services

	Number Ranking Each Item in Top 3	Number of Respondents Ranking Each Item		
		First	Second	Third
2020				
Explain the steps needed to correct errors	799	221	408	170
Understand your questions and respond appropriately	717	416	196	105
Responds with current service standard (2 business days)	590	166	147	277
Call so you can speak to a person on the phone	220	34	61	125
Communicate via email	142	6	24	112
Communicate via chat	65	17	14	34
Direct you to appropriate resources on the website	51	2	15	34
Something else (specify)	19	6	3	10
2019				
Explain the steps needed to correct errors	761	189	354	218
Understand your questions and respond appropriately	686	358	210	118
Quick response time	575	207	138	230
Call so you can speak to a person on the phone	234	63	74	97
Communicate via email	149	13	30	106
Communicate via chat	71	7	30	34
Direct you to appropriate resources on the website	40	0	11	29
Something else (specify)	30	20	4	6

While respondents were offered the opportunity to provide a different service option, only a limited number ($n = 19$) did so. Notably, these participants emphasized quick response times. The following are illustrative examples:

> Give answers quicker. Sometimes even the 2 day turn around is too long.
> Not wait two plus days for an email back. Sometimes we do not have two plus days to get our reports done and need help faster than that.

Policy Versus Actual Response Time: If response time is an ongoing concern, what do REs perceive as a reasonable response time? To gauge their expectations respondents were asked the following question: "Our goal is to respond to you within two business days. Do you think this is reasonable?"
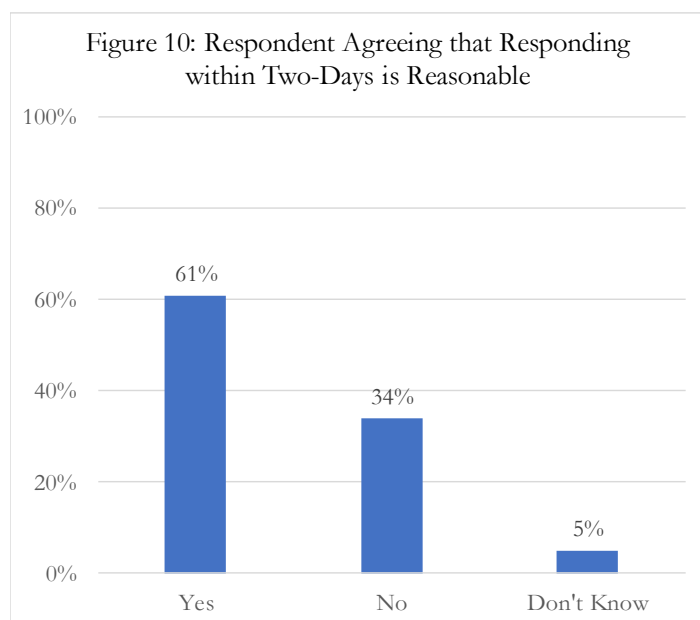
Figure 10: Respondent Agreeing that Responding within Two-Days is Reasonable

Figure 10 displays the results. Sixty-one percent of respondents agreed that a response within two business was reasonable while 34 percent said a two-day response time was unreasonable. Those REs who said a two-day response was not reasonable were asked a follow-up question probing for reasons why. While the number of responses was limited, they were revealing. A two-day response time was viewed as not reasonable by these respondents because (1) they believed they should have a response within 24 hours; (2) their reporting deadlines were as short as 2-4 days, making a two-day response inadequate for their immediate needs; or (3) their questions arise too close to reporting deadlines, thus making a two-day response unhelpful for the immediate task at hand. We provide several illustrative examples below:

Two days is too long when you only have five business days to complete reporting
As with many schools, I am responsible for all HR, benefits, payroll as well as TRS. There are times I do not have two days to wait
Because of the system lag, some changes have to process overnight before we continue working on reports. If we have to wait two business days for a response, an error could take at least three days to clear when we are all working on already unreasonable deadlines.

Figure 11: Reported Response Times
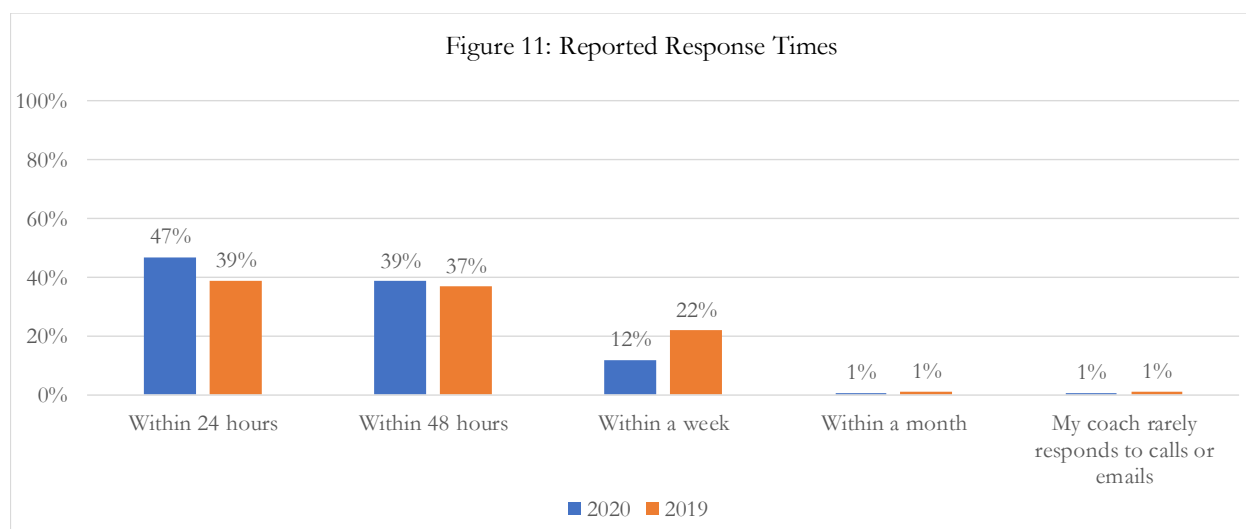
As these examples illustrate, tight deadlines and frustrations and delays from working with the reporting system meant a two-day response was insufficient for at least some respondents. There is no difference in the perceptions regarding the reasonableness of two-day response by institutional type.

Regardless of reasonableness, reported response times indicate that TRS coaches almost always respond within two days. As can be seen in Figure 11, 86 percent of REs received a response within 48 hours, and more than half of these respondents (and 47 percent of all respondents) received a response within 24 hours. Also worth noting, response times have improved significantly since 2019 when 76 percent of REs reported receiving a response within 48 hours. Most of this increase has been from an increase in the number of respondents receiving a response within 24 hours. A caveat is perhaps in order: Reported response times may not accurately reflect actual response times. Even so, this shift reflects REs' perceptions of quicker responses.

Differences across institutional type are relatively small (see Figure 12) but reflect other findings in this report. REs representing public schools were less likely to say that a two-day response time was a reasonable expectation but were more likely to report receiving a response within 48 hours. Sixty percent of REs representing public schools agreed that responding in two days was reasonable compared to 65 percent for higher education. Similarly, 86 percent of REs representing public schools received a response within 48 hours compared to 81 percent of REs representing higher education.


Figure 12: Reasonableness of Two-Day Response and Reported Response Time
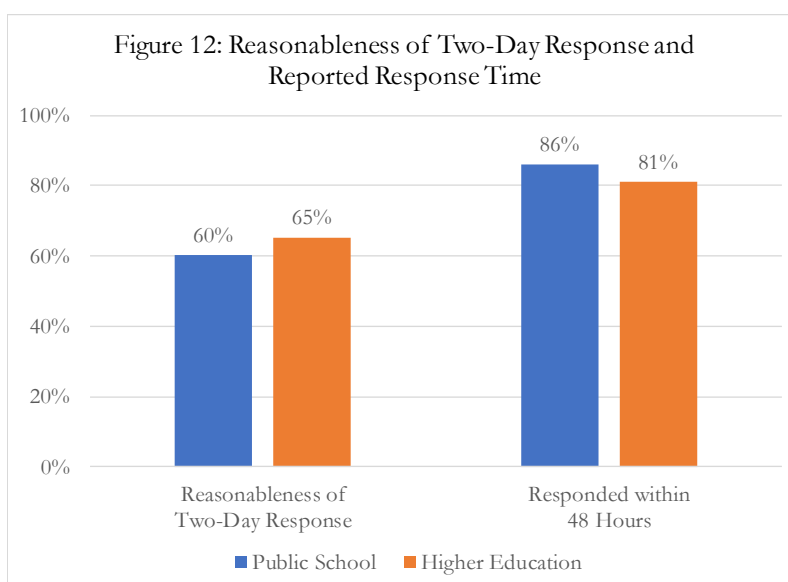
Attended Training: Training sessions provide a key mechanism for improving interactions with TRS services and coaches. Overall, 72 percent of respondents reported attending training within the past year. There is little difference in attendance by reporting institutional type (76 percent for higher education, 71 percent for public schools). The number of REs attending training in 2020 is nearly identical to the number attending training in 2019.

Respondents who reported attending training in the past year were asked which type of training session they attended. Of the respondents who reported attending a training session in the past year ($n = 651$), more than half attended the Spring 2019 RE Portal Trainings ($n = 374$) while 48 percent attended the Fall 2019 Legislative Update Training ($n = 313$), 15 percent attended the Introduction to TRS Reporting ($n = 96$), 6 percent attended one-on-one training ($n = 41$); and 14 percent attended some other training ($n = 91$). Bear in mind that the REs may have attended multiple trainings.

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 results are presented in Figures 13 and 14. Within each graph, we provide the number of respondents who provided an evaluation of the training. This is slightly different than the total who participated in training (presented above). Most respondents found the training improved their understanding (see Figure 13). However, respondents were, with one exception, more likely to say the training improved their understanding only "somewhat" rather than "greatly." Half of the respondents who participated in one-on-one or individualized training indicated that the training "greatly improved" their understanding. For each of the other types of trainings, the patterns are relatively similar. Approximately a quarter of respondents said training "greatly improved" their understanding while two-thirds said training "somewhat improved" their understanding.

Figure 13: Rating of Training for Improving Understanding
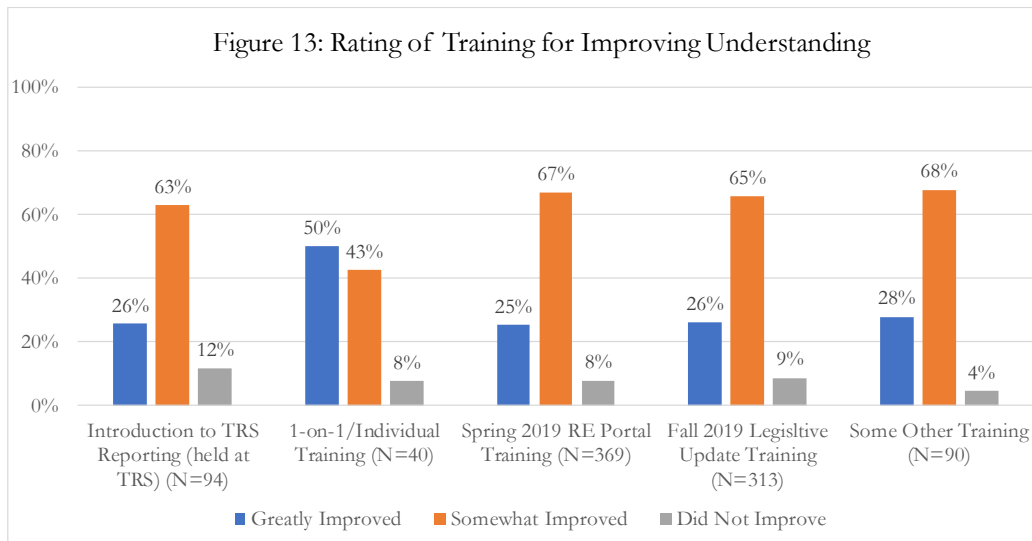
Similarly, when asked to rate the resources provided through the training, respondents were more likely to rate the resources and information provided during training as "good" rather than "excellent." It is worth noting that the overall evaluations are generally positive with the percent rating the resources and information provided during training as "good" or "excellent" ranging from 78 percent to 92 percent. Respondents were least positive about the Introduction to TRS Reporting (78 percent rated the training as "good" or "excellent") and most positive about one-on-one training (92 percent rated their one-on-one training as "good" or "excellent"). This likely reflects the more general nature of the "Introduction to TRS Reporting" relative to the more specific individualized training.

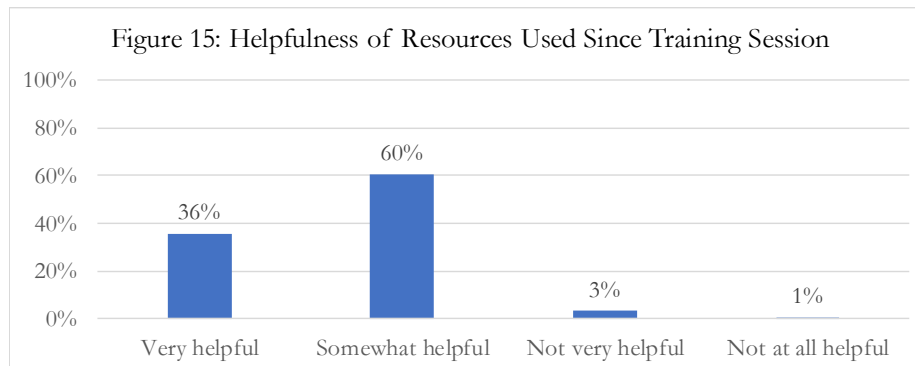Figure 14: Rating of Training for Resources and Information Provided
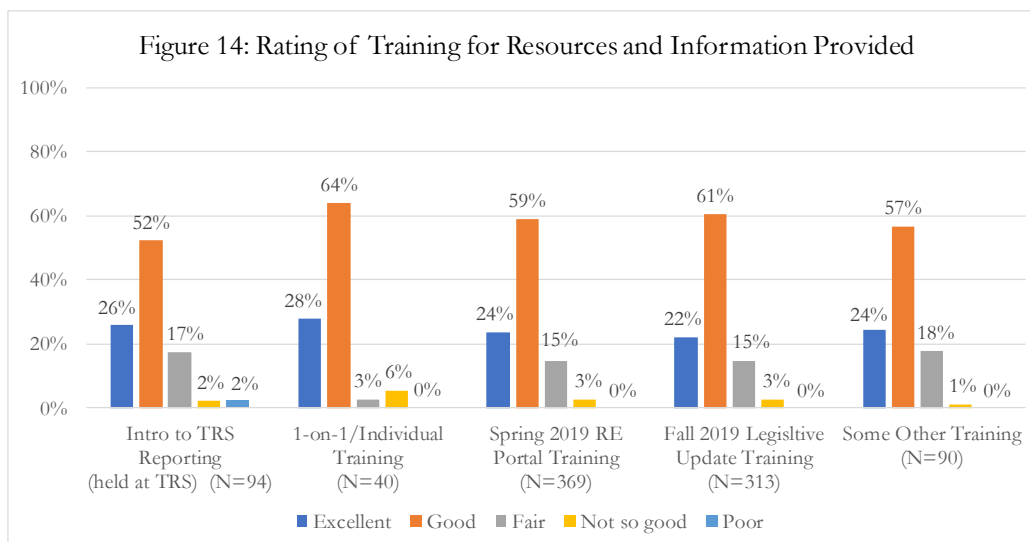
Evaluations of TRS Resources: To gauge evaluations of TRS resources, REs were first asked which resources they used and then how helpful they found each of these resources. The results (see Table 3) reveal that the Update Newsletter/TRS Emails is the most commonly used resource, followed by the Payroll Manual, the errors/warning list, the RE Portal Web Message, and the Defects/Workaround list. The most positively evaluated resources among users are the Payroll Manual, the File Formatting Guide, and the Errors/Warning list. TRS emails/newsletter and the Payroll Manuel are also positively evaluated resources. Fifty-six percent of REs rated TRS emails as "very helpful" while an additional 42 percent rated these emails as "somewhat helpful." Similarly, 53 percent of respondents rated the Payroll Manuel as "very helpful" and 45 percent rated it as "somewhat helpful." The Defects/Workaround list received the least positive evaluations as 33 percent rated it as "very helpful" and 56 percent rated it as "somewhat helpful." Notably, across the list of resources very few respondents rate these resources as "not very helpful" or "not at all helpful."

Reporting employers were more positive about each of these resources relative to the 2019 survey. They were significantly more positive about the Payroll Manual, RE Portal Training Videos, and the Errors/ Warning List. In 2019, 41 percent of REs rated the Payroll Manual as "very helpful" compared to 53 percent in 2020. Similarly, 34 percent of REs rated the RE Portal Videos as "very helpful" in 2019 compared to 45 percent in 2020. Finally, 36 percent of REs rated the Errors/Warning List as "very helpful" in 2019 compared to 45 percent in 2020.
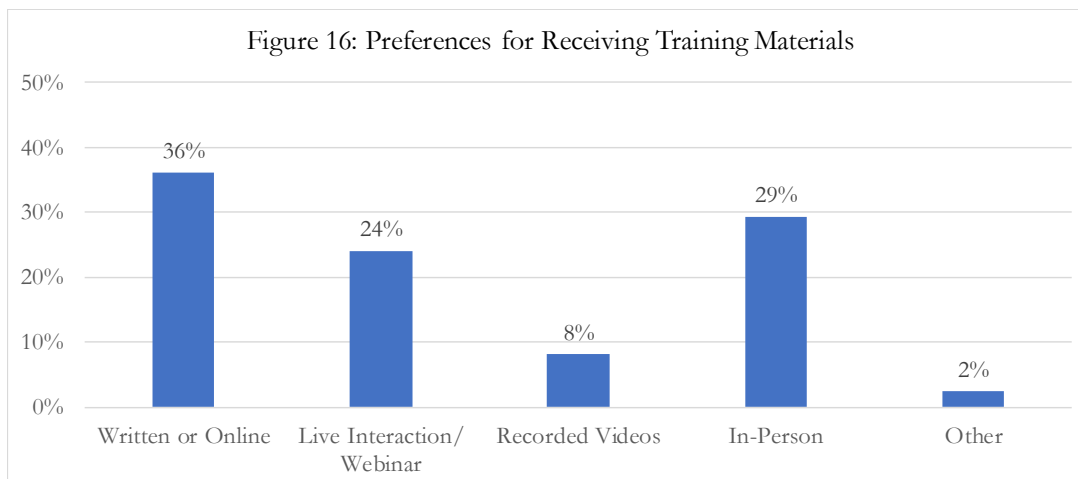
Table 3. TRS Resources Used

		HELPFULNESS OF RESOURCE			
	Number Using Resource	Very Helpful (%)	Somewhat helpful (%)	Not very helpful (%)	Not at all helpful (%)
Update newsletter/TRS emails	590	56	42	2	0.3
Payroll manual	566	53	45	3	0
File formatting guide	65	52	43	3	0
Legislative change videos	102	48	49	2	1
Errors/warning list	539	45	47	7	1
RE portal training videos	177	45	50	5	1
RE portal web message	358	44	53	2	0
Defects/workaround list	199	33	56	10	1

Overwhelmingly, REs rated these resources as at least "somewhat helpful" (see Figure 15). Ninety-six percent of REs rated the resources used since their training session as "very helpful" (36 percent) or "somewhat helpful" (60 percent). Very few respondents (4 percent) rated these resources as "not very helpful" or "not at all helpful."

Figure 15: Helpfulness of Resources Used Since Training Session

Rating	Percentage
Very helpful	36%
Somewhat helpful	60%
Not very helpful	3%
Not at all helpful	1%

Preference for Receiving Training Materials: When asked how they prefer to receive their training materials, respondents generally opted for written or online (36 percent) followed by in-person (29 percent). Respondents were less inclined to prefer a live webinar. There are no significant differences by type of institution. There are, however, 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 written or online training materials (44 percent) compared to those who had attended training (34 percent). In addition, respondents who attended trainings were more likely to prefer in-person training materials (32 percent) compared to those who had not attended training (20 percent). This suggests that the preference for training materials is related to training session attendance.

Figure 16: Preferences for Receiving Training Materials

Type	Percentage
Written or Online	36%
Live Interaction/Webinar	24%
Recorded Videos	8%
In-Person	29%
Other	2%

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 Employers?"*
- *"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, 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.

Support for TRS Coaches/Staff:

- *I think they are doing a great job. My TRS coach is very helpful and I really like how she responds to my emails right away and she does a really good job on explaining on how to resolve the errors on all of my reports. She sometimes calls me instead of emailing me, which I think is very nice of her.*
- *Keep having workshops so we can come and ask questions. During the time I am there other people ask questions that help me make sure I'm doing right or that I may need to change how I do something. I had a one on one meeting with my coach and it has helped me to know who I'm talking to on the other end of the phone. I believe that it helps us both understand how to communicate and hopefully helped her understand the areas that I need help with. She has been great walking me through problems that I really did not understand.*

Suggestions for Improvement:

- *A best practices section in the TRS email to help streamline or give ideas to continually upgrade our relationship with TRS and our employees.*

Faster Response Times/Dealing with Deadlines:

- *A quicker response time when the question is pressing regarding our meeting the 6th of the month deadline. If I'm just correcting an old problem or need general information as to handle a new employee for an upcoming report, timing is not as critical. My coach is actually very good, however there have been times that I have had to work from home late because I will still need time to "fix" the issues, wait for loading, etc. so my reports reach "complete" in time for the deadline.*
- *Be able to help reporting employers quicker than two days. We are trying to get everything completed by the 6th day and when it takes two days to get information back, we are pushed further past that deadline. In order truly report accurately, the date needs to be pushed back further than the 6th. There is not enough time to get this much information reported to TRS.*
- *Provide faster responses to our questions so that we have more of a fair chance to meet deadlines.*
- *Consider the deadlines that are given month to month. Schools do not have the same work schedules every month. Making the portal more user friendly would definitely make reporting quicker. This back tracking and removing past months and reentering those months for corrections and having to wait for approval on every step is time consuming.*

More Training:

- *Maybe more access to trainings. They offer a few at TRS in Austin, but by the time I found out about them, the classes were full and unable to accept registration. They do go to the Region Centers but few and far between. I am willing to go to other ESC's for training but sometimes they are only offered at locations that are just too far to be feasible.*
- *More beginner trainings at the region centers, not just Austin*
- *More hands-on Training, it seems like ever since we have switch to the portal reporting is 10x more difficult.*

Appendix A: 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.

By clicking the link below, you are agreeing to participate in the survey. Thanks for agreeing to participate in the TRS Reporting Employers Satisfaction Survey.

Q1. Overall, how would you rate the quality of service your organization receives from TRS?

　○ Excellent

　○ Good

　○ Fair

　○ Not so good

　○ Poor

Q2. What, if anything, would you change about the services TRS provides to its Reporting Entity Partners?
_____
_____
_____
_____

Q3. 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

    ○ Occasionally, about once every week

    ○ Regularly, several times a week

    ○ Daily

Q4. How would you rate the quality of service you receive from your TRS Reporting Entity Coach?

    ○ Excellent

    ○ Good

    ○ Fair

    ○ Not so good

    ○ Poor

    ○ Don't know/Not sure

Q5. When you do contact your TRS Reporting Entity Coach, would you say s/he:

	Very well	Somewhat well	Not very well	Not well at all	Don't know/Not sure
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)	○	○	○	○	○
Calls so you can speak to a person on the phone	○	○	○	○	○
Communicates via email	○	○	○	○	○

Q6. How important is it to you that your TRS Reporting Entity Coach:

	Very important	Somewhat important	Not very important	Not at all important	Don't know/Not sure
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)	○	○	○	○	○
Calls so you can speak to a person on the phone	○	○	○	○	○
Communicates via email	○	○	○	○	○

Q7 If online chat was offered as another way to communicate with your TRS Reporting Entity Coach, would you use it?

○ Yes

○ No

○ Don't know/Not sure

Q8 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

____ Directs you to appropriate resources on the website

____ Explains the steps needed to correct errors

____ Responds within the current service standard (2 business days)

____ Calls so you can speak to a person on the phone

____ Communicates via email

____ Communicates via chat

____ Something else, please explain

Q9 Our goal is to respond to you within two business days. Do you think this is reasonable?

○ Yes

○ No

○ Don't know/Not Sure

Q9a If no, please explain: _____

Q10 On average, how quickly does your TRS Reporting Entity Coach respond to your organization's calls or emails?

○ Within 24 hours

○ Within 48 hours

○ Within a week

○ Within a month

○ My Reporting Entity Coach rarely responds to calls or emails

Q11 In the past year, have you attended a TRS training session?

○ Yes

○ No

○ Don't know/Not sure

Q12 Is there any particular reason why you did not attend an employer reporting training session in the past year?

_____
_____
_____
_____
_____
_____

Q13 Which training session did you attend? (Check all that apply)

☐ Introduction to TRS Reporting (held at TRS)

☐ 1-on-1/Individual Training

☐ Spring 2019 RE Portal Training

☐ Fall 2019 Legislative Update Training

☐ Some other training session, please specify (e.g., association training led by TRS):
_____

Q14 How much did attendance at the **Introduction to TRS Reporting** training session improve your understanding of the TRS reporting process?

○ Greatly improved

○ Somewhat improved

○ Did not improve

○ Not sure

Q15 How much did attendance at the 1-on-1/Individual Training session improve your understanding of Reporting Employer Portal functionality?

○ Greatly improved

○ Somewhat improved

○ Did not improve

○ Not sure

Q16 How much did attendance at the Spring 2019 RE Portal Training session improve your understanding of Reporting Employer Portal functionality?

○ Greatly improved

○ Somewhat improved

○ Did not improve

○ Not sure

Q17 How much did attendance at the *Fall 2019 Legislative Update Training* session improve your understanding of Reporting Employer Portal functionality?

○ Greatly improved

○ Somewhat improved

○ Did not improve

○ Not sure

Q18 How much did attendance at this *other* training session improve your understanding of the topic?

○ Greatly improved

○ Somewhat improved

○ Did not improve

○ Not sure

Q19 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

Q20 Please rate the usefulness of the resources and information provided to you during the *1-on-1/Individual Training* session? Excellent

○ Good

○ Fair

○ Not so good

○ Poor

○ Don't know/Not sure

Q21 Please rate the usefulness of the resources and information provided to you during the *Spring 2019 RE Portal Training* session?

○ Excellent

○ Good

○ Fair

○ Not so good

○ Poor

○ Don't know/Not sure

Q22 Please rate the usefulness of the resources and information provided to you during the **Fall 2019 Legislative Update Training** session?

○ Excellent

○ Good

○ Fair

○ Not so good

○ Poor

○ Don't know/Not sure

Q24 Please rate the usefulness of the resources and information provided to you during this *other* training session.

○ Excellent

○ Good

○ Fair

○ Not so good

○ Poor

○ Don't know/Not sure

Q25 Which of the following resources have you used during the past year? (Check all that apply)

- ☐ Payroll manual
- ☐ Defects/Workaround list
- ☐ Errors/Warning list
- ☐ RE Portal Training Videos
- ☐ File Formatting Guide
- ☐ RE Portal Web Message
- ☐ I haven't used any of these resources

Q26 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	Don't know/Not Sure
Payroll manual	○	○	○	○	○
Defects/Workaround List	○	○	○	○	○
Errors/Warning List	○	○	○	○	○
RE Portal Training Videos	○	○	○	○	○
File Formatting Guide	○	○	○	○	○
RE Portal Web Message	○	○	○	○	○

Q27 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

Q28 What is your preferred method for receiving training materials?

○ Written or online

○ Live interaction/Webinar

○ Recorded videos

○ In-person

○ Other, please specify: _____

Q29 Are there any training sessions or materials that are not currently available that you would like to see offered by TRS?

_____
_____
_____
_____
_____

Q30 How long have you been in your current position?

○ Less than 1 year

○ 1-2 years

○ More than 2 years

Q31 What is the single most important thing TRS could do to improve its relationship with its Reporting Entity Partners?

_____
_____
_____
_____
_____

Q32 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?

_____
_____
_____
_____
_____
_____