



Benefits & Services Committee

Item Number 3 – Open Session

Subject: Service Performance Objectives

Presenter(s): Bill Perez, Julie Underwood

Item Type: Consent Information

Date & Time: September 2, 2021 – 0 minutes

Attachment(s): Attachment 1 - FY 2021-22 Service Performance Objectives

Attachment 2 - FY 2020-21 Service Performance Objectives –
Stoplight Chart

PowerPoint(s): None

PURPOSE

The purpose of this item is to share with the Committee the 2020-21 Service Performance Objectives. Additionally, this item provides the 2020-21 “Stoplight Chart,” which details performance on the service objectives through the end of the last fiscal year.

DISCUSSION/SUMMARY

Service Performance Objectives (SPOs) serve as overall representations of CalSTRS' performance in service delivery. CalSTRS strives to set performance objectives that are balanced. Measuring efficiency against effectiveness, cost against quality and user perception ensures member satisfaction and propels future improvements in customer service. SPOs are considered a strategic aid to management and set the stage for an informed discussion. They are studied, benchmarked with other pension systems, and confirmed annually with each Business Area before being approved by Executives.

SPO performance is reviewed quarterly with Executives and Directors during the Customer Service Performance Review where discussions are open and frank to gain understanding and knowledge of business areas that perform member-facing transactions in Financial Services, Benefits and Services and the Office of the General Counsel. During these sessions, senior leaders learn about stressors on member service levels and consider new approaches the organization might pursue. CalSTRS believes awareness and view into SPOs is critical to employee and Board alignment and business focus.

The 2020-21 Stoplight Chart reflects some adjustments transferring to remote work in the first quarter and reveals business areas where competition for resources between the Pension Solution project and performance levels are evident. Targets related to employer reporting and employer contribution submittal are set at 100% as it is our ultimate goal to encourage employers to report timely.

Changes to SPOs for fiscal year (FY) 2021-22 include:

Customer Service

The business area is increasing time to answer online messages from one day to three days with the same target in place. While the “time to answer calls” target has been met with consistency over many years, this will allow staff to prioritize the phone line over online messages.

Regarding “processing paper account transactions,” the business area is decreasing the target to meet the 10-day measure from 90% to 80% of the time.

Retirement Readiness

The Pension2 objectives reflect a realistic approach to growth targets in a maturing marketplace.

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Previous SPO	Target	New SPO	Target
Online messages answered within one business day	90%	Online messages answered within three business days	90%
Paper account maintenance transactions processed within 10 business days of receipt	90%	Paper account maintenance transactions processed within 10 business days of receipt	80%
% of annual growth of P2 assets under management based on previous year actual net cash flow	15%	Annual P2 Contributions	3-year rolling average +5%
% of annual net member growth in Pension2 403(b) and 457(b) plans based on previous year net new funded participant accounts	20%	Funded New Account Growth	3-year rolling average +5%
		Contract Exchange & Rollover	3-year rolling average +5%

CalSTRS FY 2021-22 Service Performance Objectives

2021-22 Service Performance Objectives		
Business Area	SPO	Target
CalSTRS	Members expressing a high level of satisfaction with CalSTRS overall (Annual Measure)	75%
	Member online self-service for account transactions	65%
Service Retirement	Members expressing a high level of satisfaction with their service retirement experience	75%
	Benefits established within 30 calendar days of benefit effective date or date of last application* (whichever is later)	90%
Disability	Eligible applications processed within 150 days of calendar receipt	90%
	Approved disability applicants expressing a high level of satisfaction with the overall process ²	75%
	Approved disability applicants expressing a high level of satisfaction with service received from the disability analyst overall	75%
Survivor Benefits	Applications processed within 30 calendar days of receipt of all necessary information	90%
	Ongoing allowances established within 10 calendar days of receipt of all necessary information	90%
Customer Service	Contact Center calls answered within 30 seconds	70%
	Members expressing a high level of satisfaction with service during their most recent Contact Center experience (CALLS) ¹	75%
	Online messages answered within three business days	90%
	Members expressing a high level of satisfaction with service during their most recent Contact Center experience (MESSAGES) ¹	75%
	Paper account maintenance transactions processed within 10 business days of receipt	80%
Financial Services	Service credit purchase requests completed within 25 business days	100%
	Refund applications processed within 25 business days of receipt	100%
Employer Reporting & Contributions	Employers expressing a high level of satisfaction with Member Account Services overall (Annual Measure)	75%
	Percent of employer reporting submitted prior to the delinquent date, by unit	100%
	Percent of contributions submitted prior to the delinquent date	100%
	Complete cases of all new retirees that hit a specific threshold ³ within 90 calendar days of benefit initiation date	95%

Business Area	SPO	Target
Community Property	Acceptable court orders implemented to member's accounts within 15 calendar days of receipt of all required documentation	85%
	Community Property estimates provided to a member, non-member, or legal representative within 17 calendar days of receipt	90%
	Member submitted draft court orders reviewed and responded to within 10 calendar days of receipt	90%
	Members expressing a high level of satisfaction with Community Property estimate services ²	75%
	Members expressing a high level of satisfaction with Community Property representatives overall ²	75%
Retirement Readiness	Members expressing a high level of satisfaction with their benefits planning session	75%
	Members expressing a high level of satisfaction with the length of time between scheduling an appointment and attending a benefits planning session	75%
	Members age 44 and younger who receive educational services (Annual Measure)	2%
	NEW - Annual P2 Contributions	3-year rolling average +5%
	NEW - Contract Exchange & Rollover	
	NEW - Funded New Account Growth	
	Net new # of 457(b) and 403(b) plan adoptions (Annual Measure)	30
Participants expressing a high level of satisfaction with Pension2 overall (Annual Measure)	75%	

¹Quarterly survey results are based on member interactions from one month out of the quarter

²Monthly results based on survey responses from previous month

³Specific threshold: \$100,000 or more in an unmodified benefit; OR \$150,000 or more in final compensation; OR \$25,000 or more in special compensation

CalSTRS FY 2020-21 Service Performance Objectives

Business Area	FY 2020-21 Service Performance Objective	Target	FY
CalSTRS	Members Expressing a high level of satisfaction with CalSTRS overall (Annual Measure)	75%	69%
	Member online self-service for account transactions	65%	63%
Service Retirement	Members expressing a high level of satisfaction with their service retirement experience	75%	87%
	Benefits established within 30 calendar days of benefit effective date or date of last application* (whichever is later)	90%	99%
Disability	Eligible applications processed within 150 days of calendar receipt	90%	80%
	Approved disability applicants expressing a high level of satisfaction with the overall process ²	75%	63%
	Approved disability applicants expressing a high level of satisfaction with service received from the disability analyst overall	75%	73%
Survivor Benefits	Applications processed within 30 calendar days of receipt of all necessary information	90%	80%
	Ongoing allowances established within 10 calendar days of receipt of all necessary information	90%	91%
Customer Service	Contact Center calls answered within 30 seconds	70%	77%
	Members expressing a high level of satisfaction with service during their most recent Contact Center experience (CALLS) ¹	75%	80%
	Online messages answered within one business day	90%	77%
	Members expressing a high level of satisfaction with service during their most recent Contact Center experience (MESSAGES) ¹	75%	74.9%
	Paper account maintenance transactions processed within 10 business days of receipt	90%	88%
Financial Services	Service credit purchase requests completed within 25 business days	100%	63%
	Refund applications processed within 25 business days of receipt	100%	95%
Employer Reporting & Contributions	Employers expressing a high level of satisfaction with Employer Services overall (Annual Measure)	75%	84%
	Percent of employer reporting submitted prior to the delinquent date, by unit	100%	99.7%

	Percent of contributions submitted prior to the delinquent date	100%	98%
	Complete cases of all new retirees that hit a specific threshold ³ within 90 calendar days of benefit initiation date	95%	99%
Community Property	Acceptable court orders implemented to member's accounts within 15 calendar days of receipt of all required documentation	85%	95%
	Community Property estimates provided to a member, non-member, or legal representative within 17 calendar days of receipt	90%	95%
	Member submitted draft court orders reviewed and responded to within 10 calendar days of receipt	90%	98%
	Members expressing a high level of satisfaction with Community Property estimate services ²	75%	78%
	Members expressing a high level of satisfaction with Community Property representatives overall ²	75%	91%
Retirement Readiness	Members expressing a high level of satisfaction with their benefits planning session	75%	89%
	Members expressing a high level of satisfaction with the length of time between scheduling an appointment and attending a benefits planning session	75%	81%
	Members age 44 and younger who receive educational services (Annual Measure)	2%	7,224
	% of annual growth of P2 assets under management based on previous year actual net cash flow	15%	12.3%
	% of annual net member growth in Pension2 403(b) and 457(b) plans based on previous year net new funded participant accounts	20%	17.1%
	Net new # of 457(b) and 403(b) plan adoptions (Annual Measure)	30	58
	Participants expressing a high level of satisfaction with Pension2 overall (Annual Measure)	75%	64%

**Annual target and/or verbiage adjusted from previous fiscal years - verbiage and target shown for current fiscal year*

¹Quarterly survey results are based on surveyed responses from one month out of the quarter

²Monthly results based on survey responses from previous month

³Specific threshold: \$100,000 or more in an unmodified benefit; OR \$150,000 or more in final compensation; OR \$25,000 or more in special compensation