

CalSTRS Customer Service Performance Review

Business Area	Key Performance Indicators	Target	FY 21-22					FY 22-23					FY 23-24	
			Q1	Q2	Q3	Q4	FYTD	Q1	Q2	Q3	Q4	FYTD	Q1	FYTD
CalSTRS	Members Expressing a high level of satisfaction with CalSTRS overall (Annual Measure)	75%					69%					64%		
	Member online self-service for account transactions	65%	66%	59%	65%	59%	62%	62%	61%	71%	60%	64%	64%	64%
Service Retirement	Members expressing a high level of satisfaction with their service retirement experience	75%	84%	84%	88%	89%	86%	88%	85%	86%	88%	88%	85%	85%
	Benefits established within 30 calendar days of benefit effective date or date of last application* (whichever is later)	90%	97%	93%	97%	100%	98%	97%	96%	97%	100%	98%	98%	98%
Disability	Eligible applications processed within 150 calendar days of application received date	90%	76%	80%	71%	85%	78%	89%	83%	69%	89%	83%	94%	94%
	Approved applicants expressing a high level of satisfaction with the overall process ²	75%	56%	89%	78%	65%	72%	77%	71%	50%	65%	67%	62%	62%
Survivor Benefits	Approved applicants expressing a high level of satisfaction with service received from the disability analyst	75%	73%	100%	81%	56%	78%	95%	100%	88%	70%	87%	82%	82%
	Applications processed within 30 calendar days of receipt of all necessary information	90%	76%	94%	95%	93%	90%	95%	94%	93%	92%	93%	90%	90%
Customer Service	Ongoing allowances established within 10 calendar days of receipt of all necessary information	90%*	88%	88%	88%	87%	88%	88%	95%	95%	94%	93%	92%	92%
	Contact Center calls answered within 30 seconds	75%*	77%	90%	88%	91%	86%	93%	95%	90%	90%	92%	69%	69%
Customer Service	Members expressing a high level of satisfaction with service during their most recent Contact Center experience (CALLS) ¹	75%	93%	95%	95%	95%	95%	95%	95%	95%	96%	95%	95%	95%
	Average # of business days to respond to online messages	<2 days	1.68	0.76	0.89	0.47	0.96	0.37	0.38	0.44	0.74	0.49	0.61	0.61
	Members expressing a high level of satisfaction with service during their most recent Contact Center experience (MESSAGES) ¹	75%	72%	69%	78%	64%	70%	78%	75%	75%	79%	77%	77%	77%
	Paper account maintenance transactions processed within 10 business days of receipt	85%	99%	99%	100%	95%	98%	99%	99%	82%	72%	86%	95%	95%
	Abandoned calls	3%	1.3%	0.5%	0.8%	0.4%	0.8%	0.4%	0.3%	0.7%	0.7%	0.5%	3.6%	3.6%
Financial Services	Service credit purchase requests completed within 25 business days	100%	100%	100%	100%	100%	100%	100%	99.8%	100%	94.9%	98.8%	100%	100.0%
	Refund applications processed within 25 business days of receipt	100%	95%	95%	98%	99%	96%	93%	99%	98%	100%	97%	99%	99%
Employer Reporting & Contributions	(ES) Percent of employer reporting submitted prior to the delinquent date, by unit	100%*	99.8%	99.5%	98.8%	98.8%	99.2%	98.2%	99.6%	99.8%	99.4%	99.2%	98.1%	98.1%
	(FS) Percent of contributions submitted prior to the delinquent date (95%/5th day)	100%*	96%	96%	95%	98%	96%	98%	96%	97%	99%	97%	98%	98%
	(ES) Complete cases of all new retirees that hit a specific threshold ³ within 90 calendar days of benefit initiation date	95%	97%	45%	80%	97%	87%	99%	76%	94%	96%	93%	100%	100%
	(ES) Percent of employers receiving education after an audit (Internal)	100%	100%	100%	100%	100%	100%	100%	100%		100%	100%	100%	100%
	(ES)Number of employer training opportunities provided per quarter (Internal)	800%	12	19	12	24	67	22	12	16	12	62	15	15
Community Property	Acceptable court orders implemented to member's accounts within 15 calendar days of receipt of all required documentation	85%	98%	95%	99%	96%	97%	95%	93%	98%	88%	94%	94%	94%
	Community Property estimates provided to a member, non-member, or legal representative within 17 calendar days of receipt	90%	96%	95%	98%	100%	98%	99%	94%	94%	98%	96%	97%	97%
	Member submitted draft court orders reviewed and responded to within 10 calendar days of receipt	90%	98%	99%	91%	97%	96%	100%	93%	87%	85%	92%	88%	88%
	Members expressing a high level of satisfaction with Community Property estimate services ²	75%	78%	82%	85%	72%	80%	80%	92%	94%	84%	88%	79%	79%
Retirement Readiness	Members expressing a high level of satisfaction with Community Property representatives overall	75%	76%	87%	83%	77%	81%	91%	100%	93%	93%	94%	88%	88%
	Members expressing a high level of satisfaction with their benefits planning session	75%	91%	91%	91%	93%	91%	91%	92%	93%	91%	92%	92%	92%
	Members expressing a high level of satisfaction with the length of time between scheduling an appointment and attending a benefits planning session	75%	74.8%	77%	79%	78%	77%	85%	87%	84%	78%	84%	78%	78%
	Members age 44 and younger who receive educational services (Annual Measure)	2%*					7,860					8,733		
	Annual P2 Contributions (millions)	\$108					\$122					\$133.5		
	New Account Growth	5,083												
	Net new # of 457(b) and 403(b) plan adoptions (Annual Measure)	52*					65					46		
Participants expressing a high level of satisfaction with Pension2 overall (Annual Measure)	75%*					1					1			

*Annual target and/or verbiage adjusted from previous fiscal years - verbiage and target shown for current fiscal year
¹ Quarterly survey results are based on surveyed responses from one month out of the quarter
² Monthly results based on survey responses from previous month
³ Specific 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