

SBCERS MEMBER SERVICES EXPERIENCE

Santa Barbara County Employees' Retirement System

BACKGROUND

In May 2020 SBCERS began surveying all members at the conclusion of their retirement process.

- 690 Surveys sent
- 214 Responses (31%)

Survey has remained consistent and focused three areas: In-Person vs. Remote Services, Member Services Representative, and Retirement Process.

- Survey based on Likert scale:

Strongly Disagree	Somewhat Disagree	Neutral	Somewhat Agree	Strongly Agree
-2	-1	0	1	2

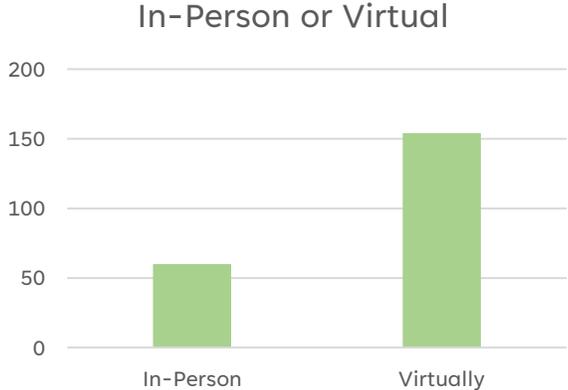
- Respondents were also asked to provide written feedback.
- Surveys were collected and tabulated by an independent team.

SURVEY POPULATION DATA

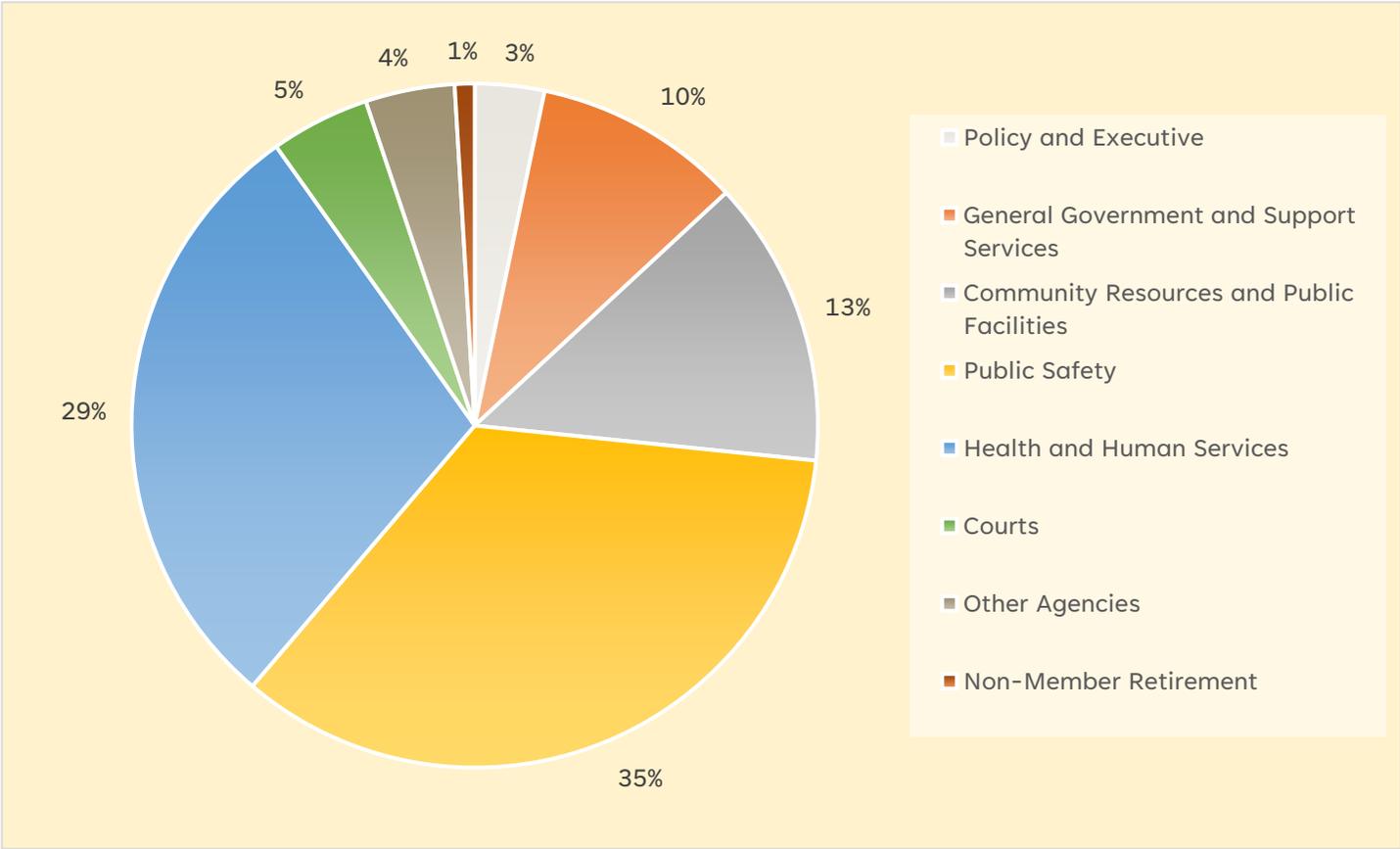
Outreach

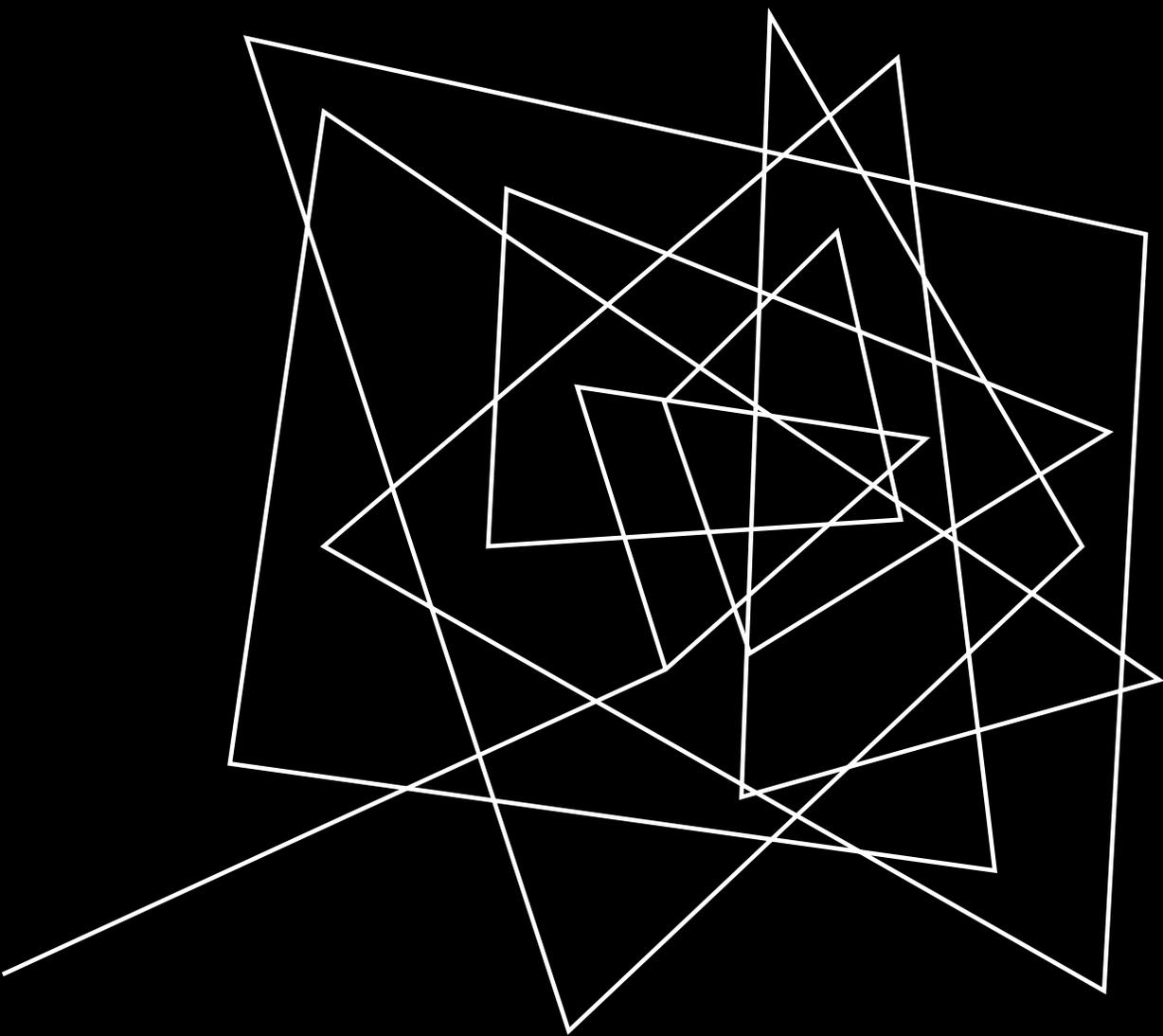
Status	Count
Bounced	56
Opted out	7
Complete Response	214
No Response	407
Partial Response	6
Grand Total	690

Member Experience



Member Provenance

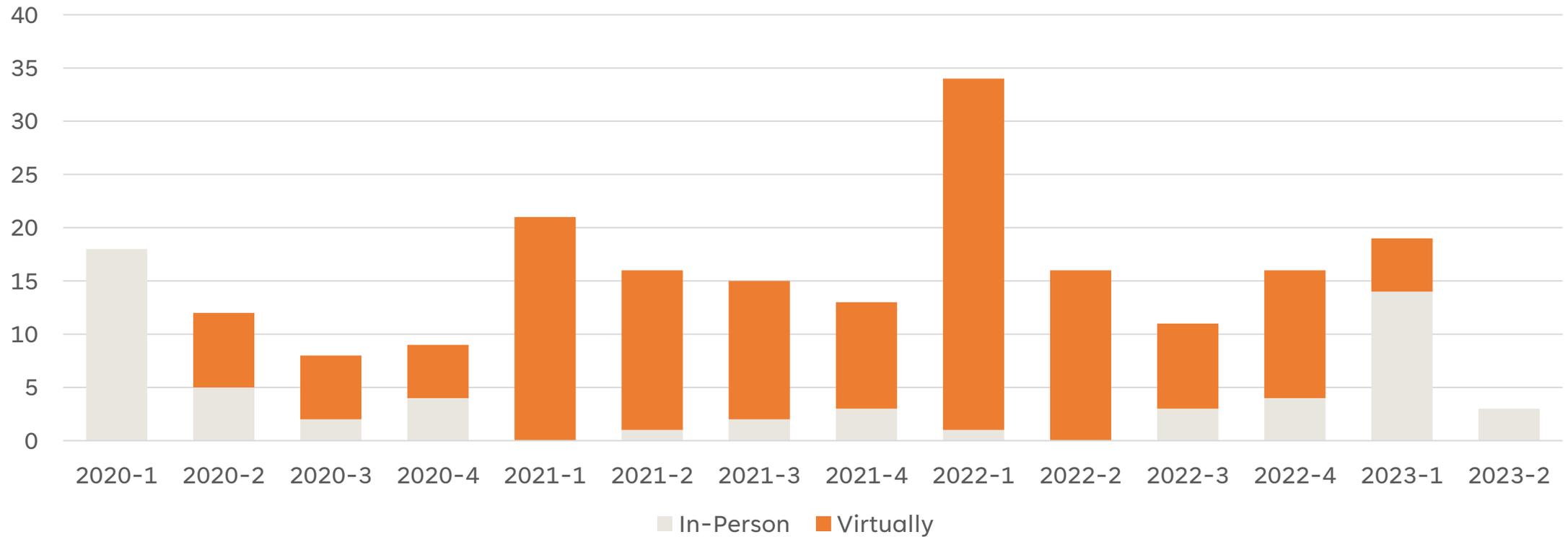




VIRTUAL
SERVICES

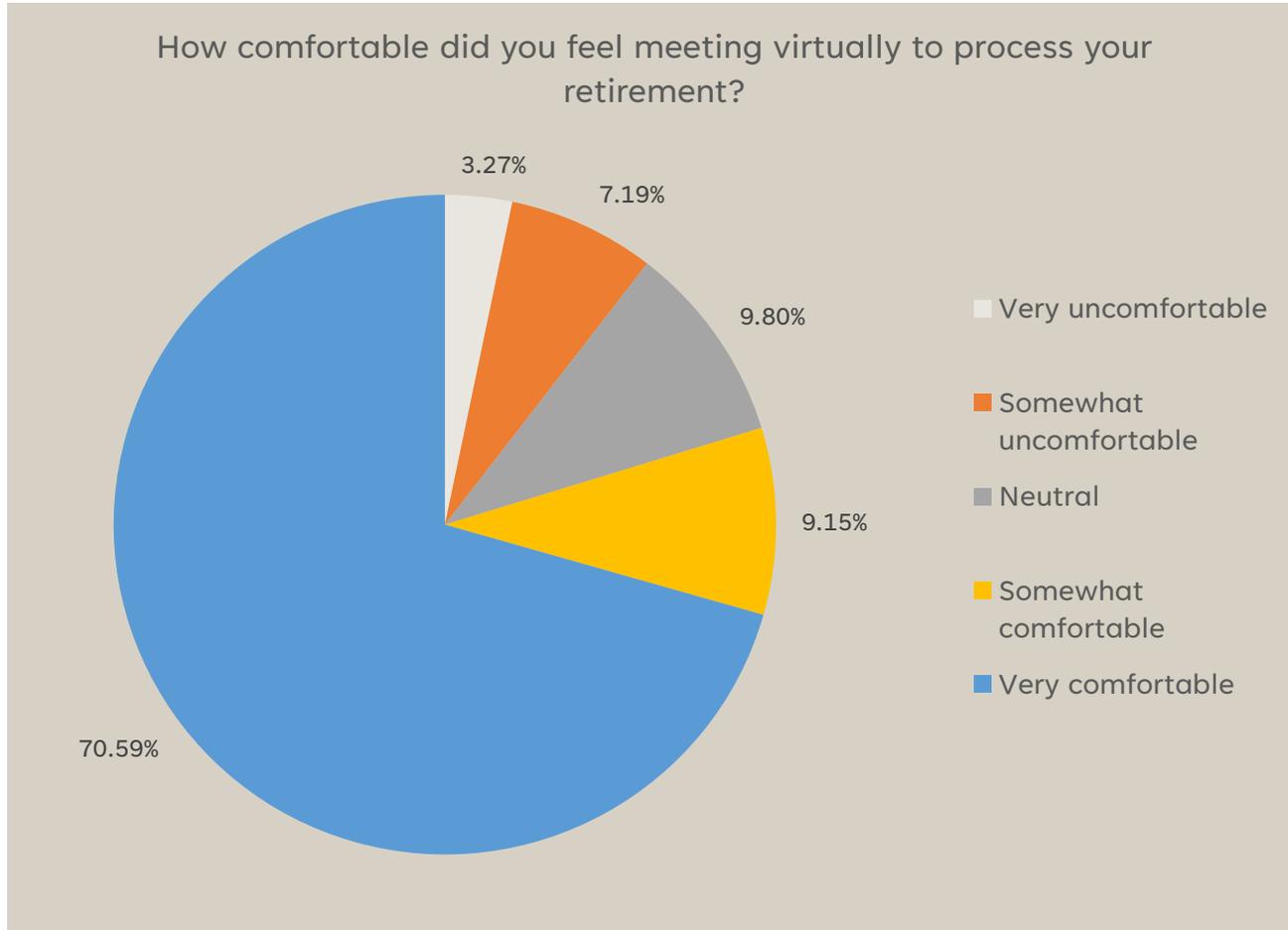
SERVICE EXPERIENCE OVER THE PERIOD

Did you meet your representative in-person or virtually?



WOULD YOU DO IT AGAIN?

Members who received virtual services were asked about their overall reflection on the experience.



Positive Takeaway:

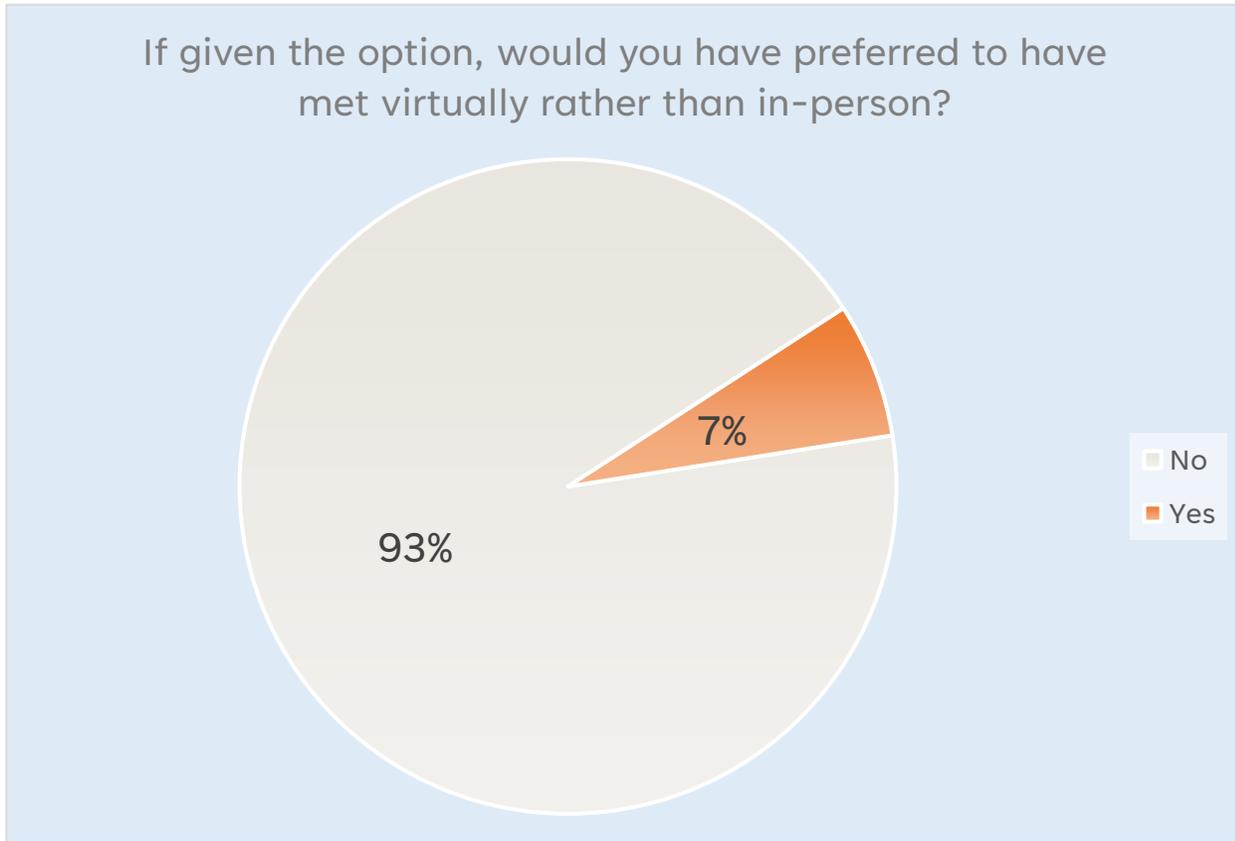
- Over 70% of members were completely comfortable with a virtual experience.

Observation:

- Almost 30% had some discomfort with the process and 20% were neutral to negative about it.

IN PERSON

Members who received In-Person services were asked about their willingness to try virtual.

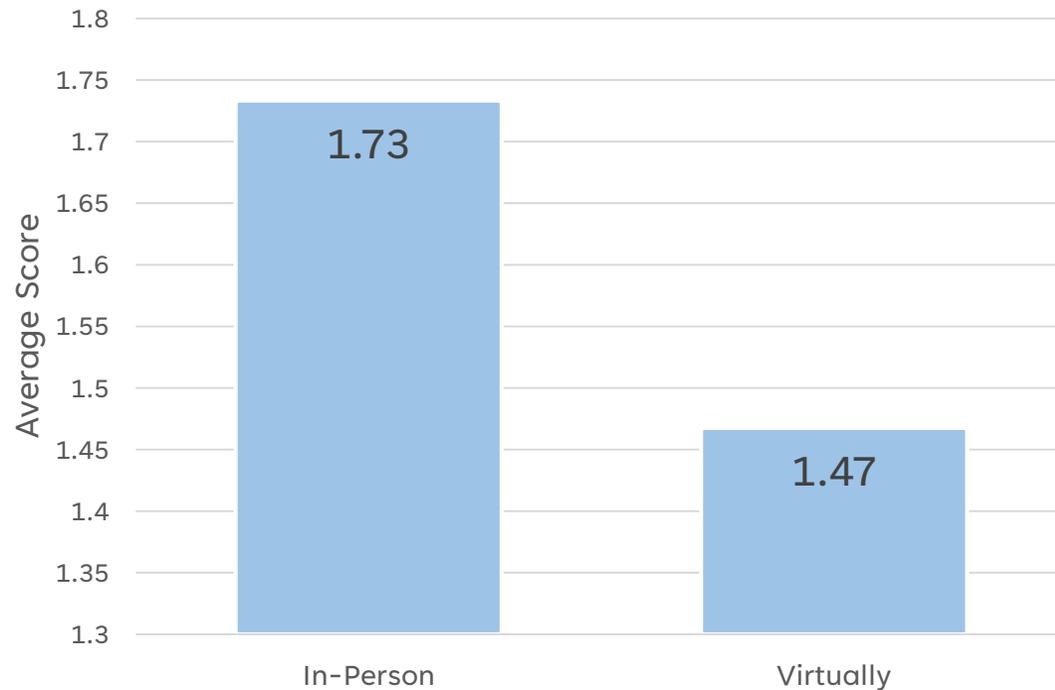


Observation:

Members who chose in person services had high conviction about the choice.

IN-PERSON SERVICES RANKED HIGHER

Overall how satisfied are you with the way SBCERS assisted you with Retirement?



Observation:

In-person services ranked higher than virtual services in terms of overall satisfaction.

Further investigation into “why” is needed:

- Do scores improve now that both virtual and in-person options are routinely available to members?
- Does process complexity factor into service method success?
(i.e. is it just too complicated for Zoom?)



HECKLES AND CHEERS (*EDITED TO PROTECT CONFIDENTIALITY*)

“I prefer in person always” –
Public Works

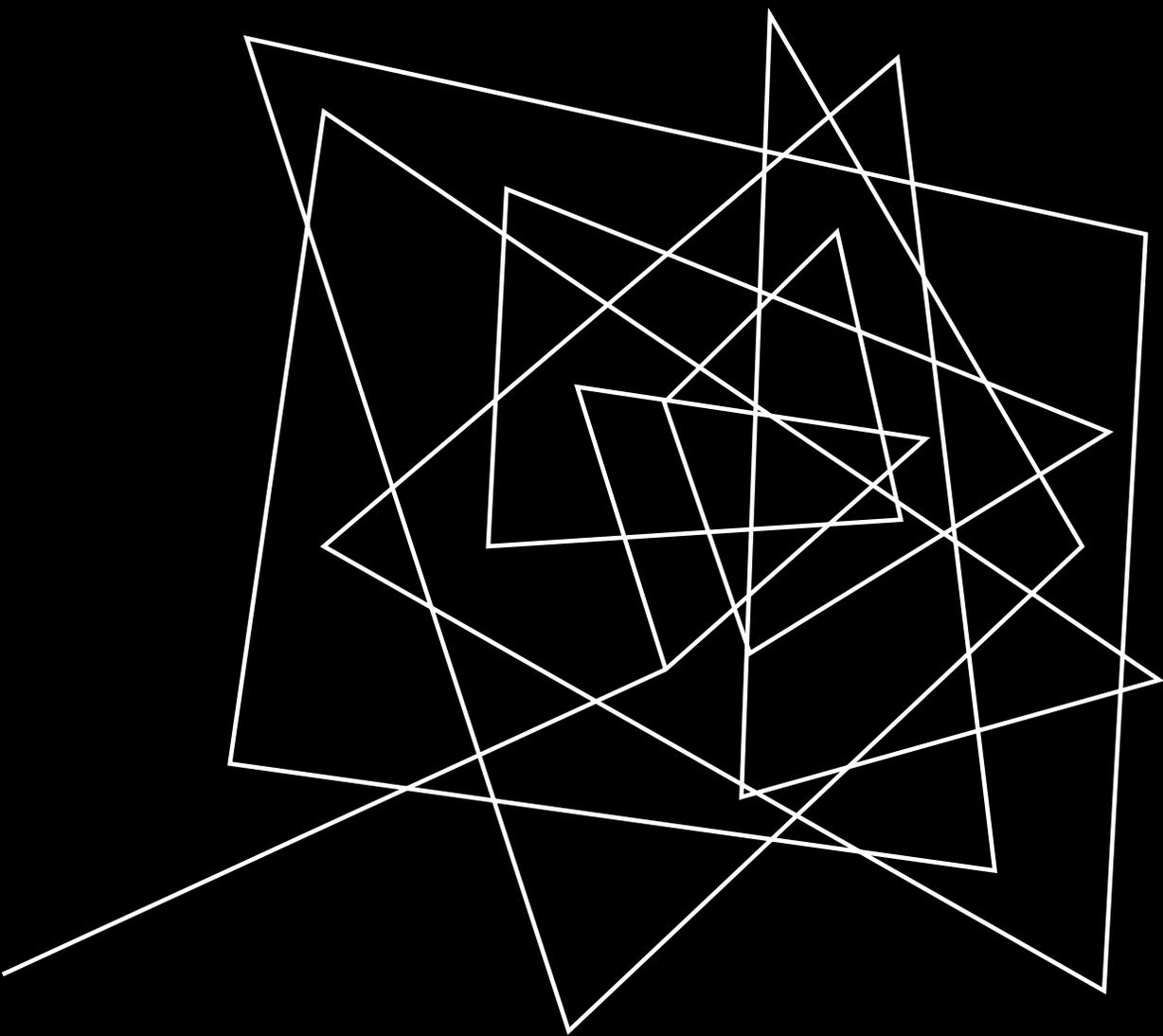
“There is no replacement for real-time, in-person connection - especially when meeting with such a pleasant, helpful and compassionate person. Over the years they provided invaluable counsel - patiently answering my many questions and offering sage guidance. During the restrictions of COVID, they were just as present and available virtually as in our previous in-person meetings, but meeting in face-to-face was always such a pleasure and reassurance that couldn't fully be replicated over the airways.” –**Other Agency**

“my assigned representative and their knowledge, expertise and compassion was an asset to my retirement process!”
–**District Attorney’s office**

“I met first in person then virtually due to COVID. Loved getting to meet them and it was also pleasant to speak over the phone. Was no problem with them working from home” –**Sheriff**

CONCLUSIONS

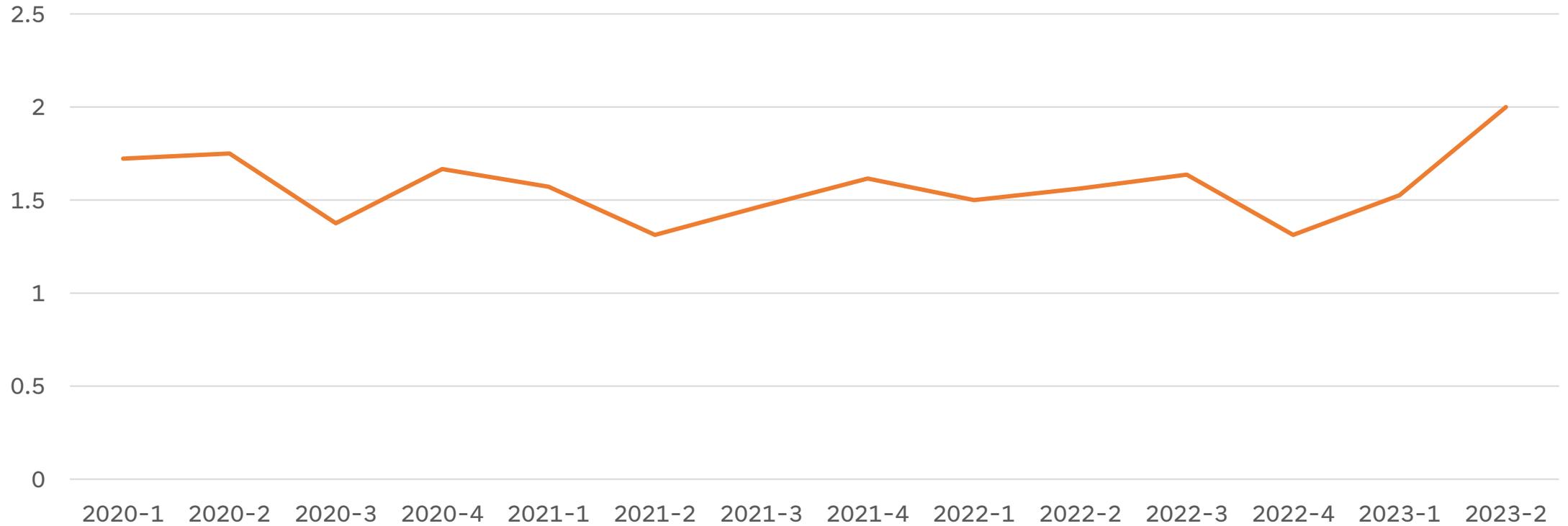
- In-Person services are still an in-demand method of delivery.
- Virtual services are here to stay.
- Further research into what works and doesn't work about virtual is warranted.



OVERALL MEMBER
SATISFACTION

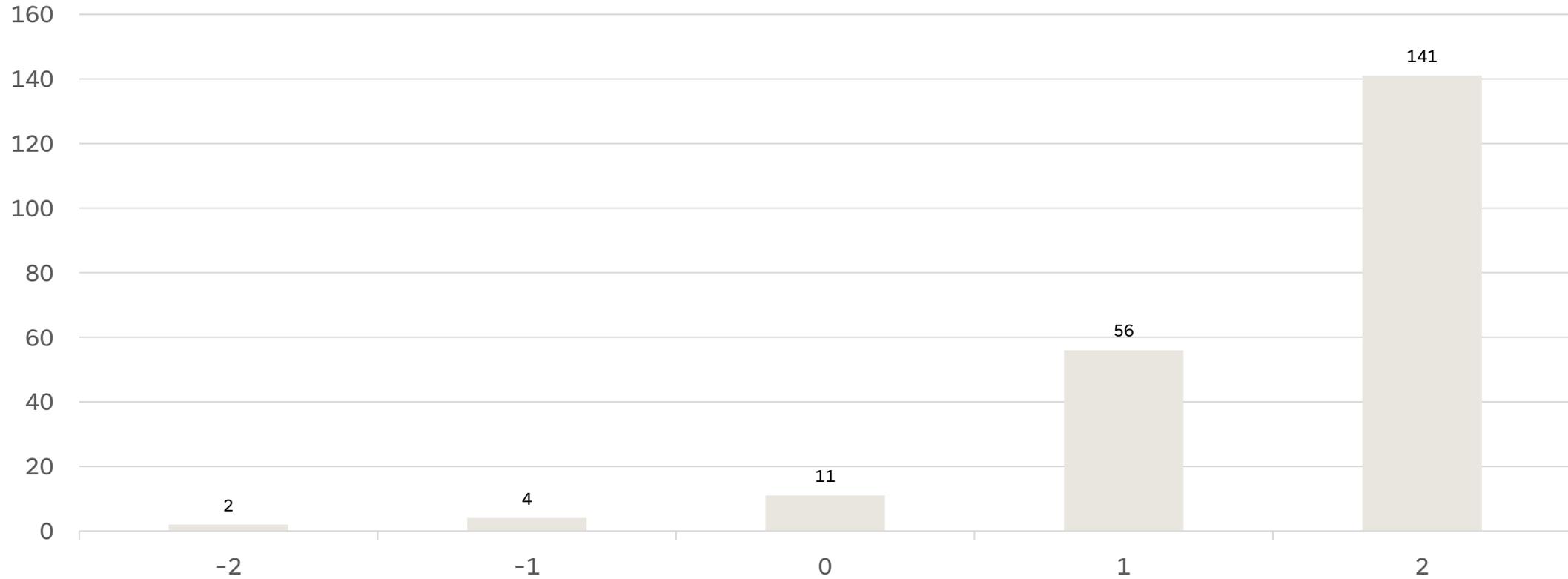
OVERALL SERVICE EXPERIENCE OVER THE PERIOD

Overall how satisfied are you with the way SBCERS assisted you with your retirement?



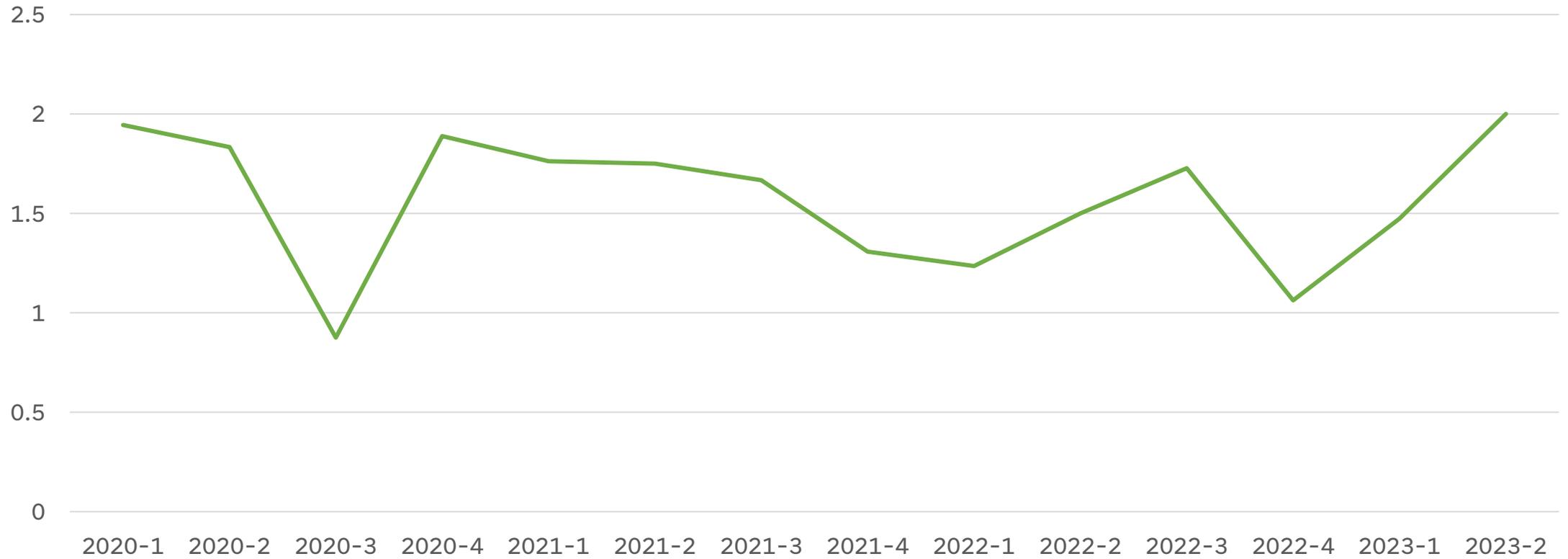
AGGREGATE OVERALL ALL SATISFACTION SCORES

Strong weighting toward overall satisfaction.



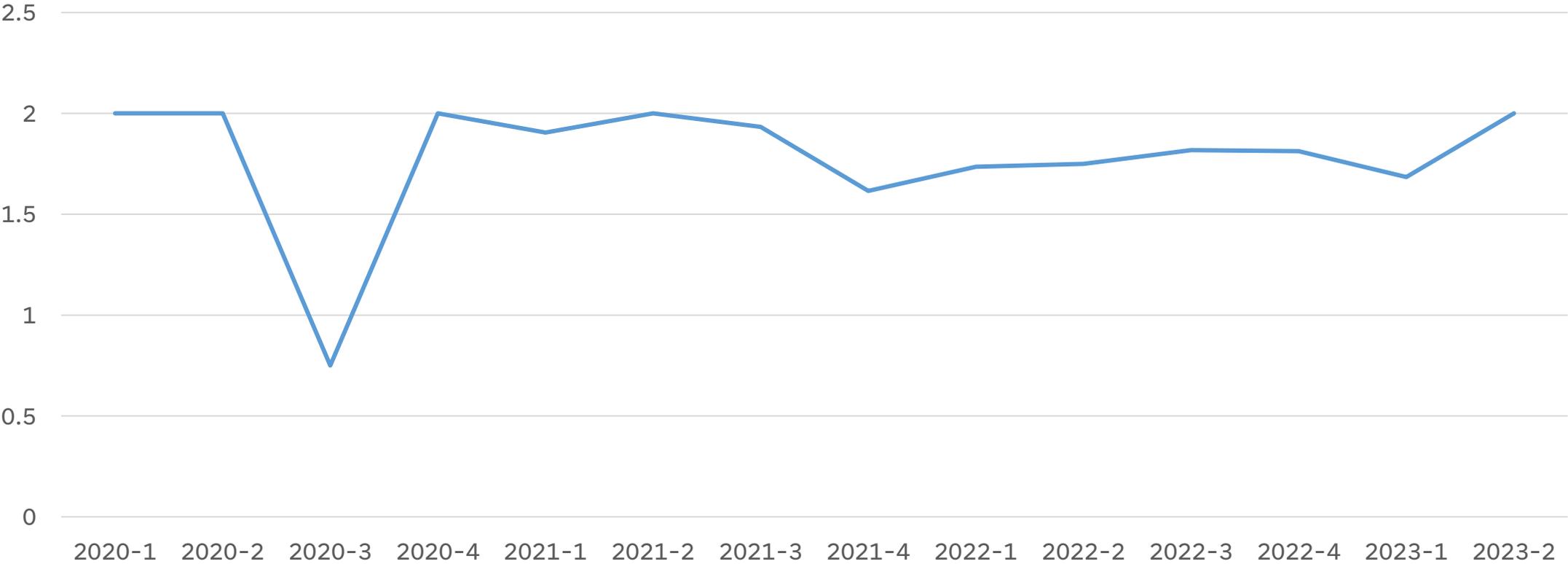
MEASURING TIMELINESS

The Member Services Representative responded to my inquiries in a timely manner.



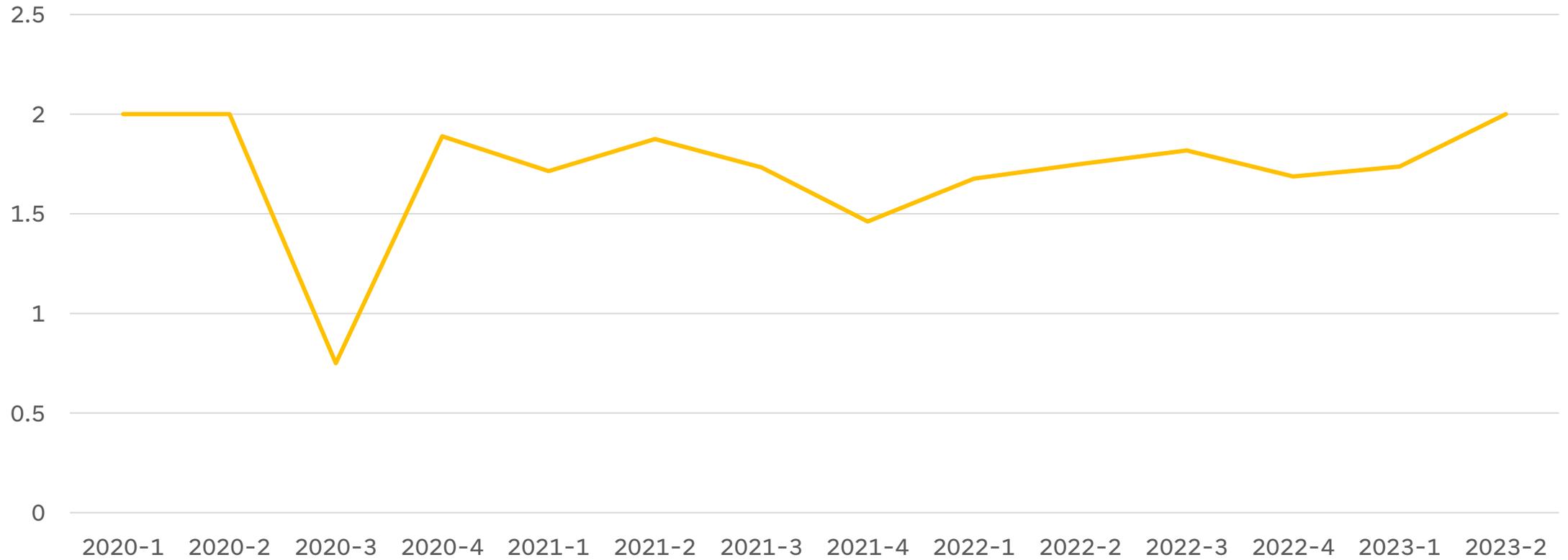
BEDSIDE MANNER

The Member Services Representative was courteous and professional.



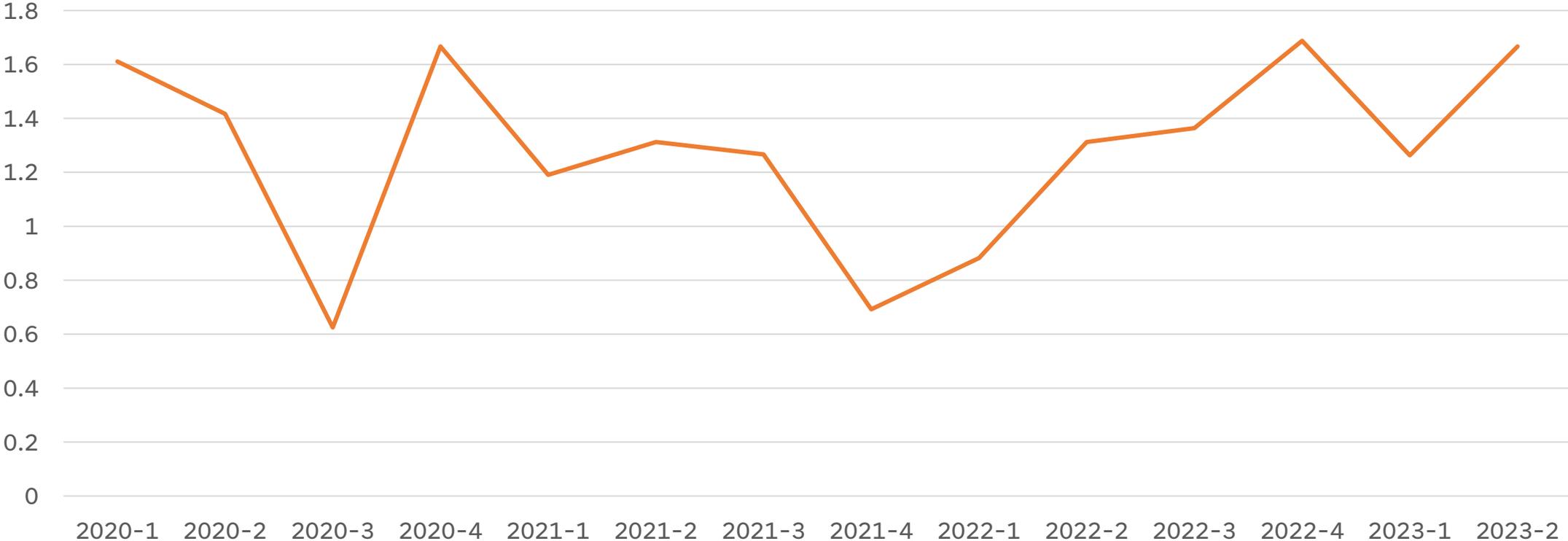
TRUSTWORTHINESS

The Member Services Representative was Trustworthy.



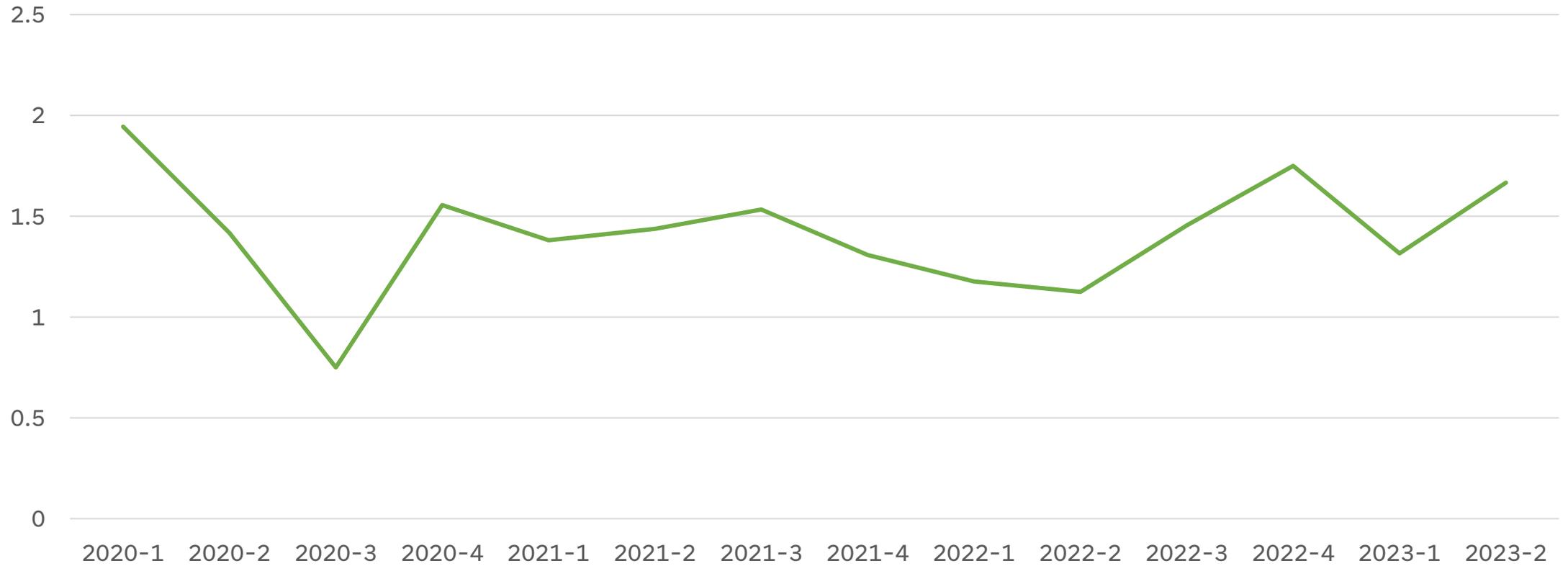
PROCESS COMPLEXITY

The retirement process was easy to understand and follow.



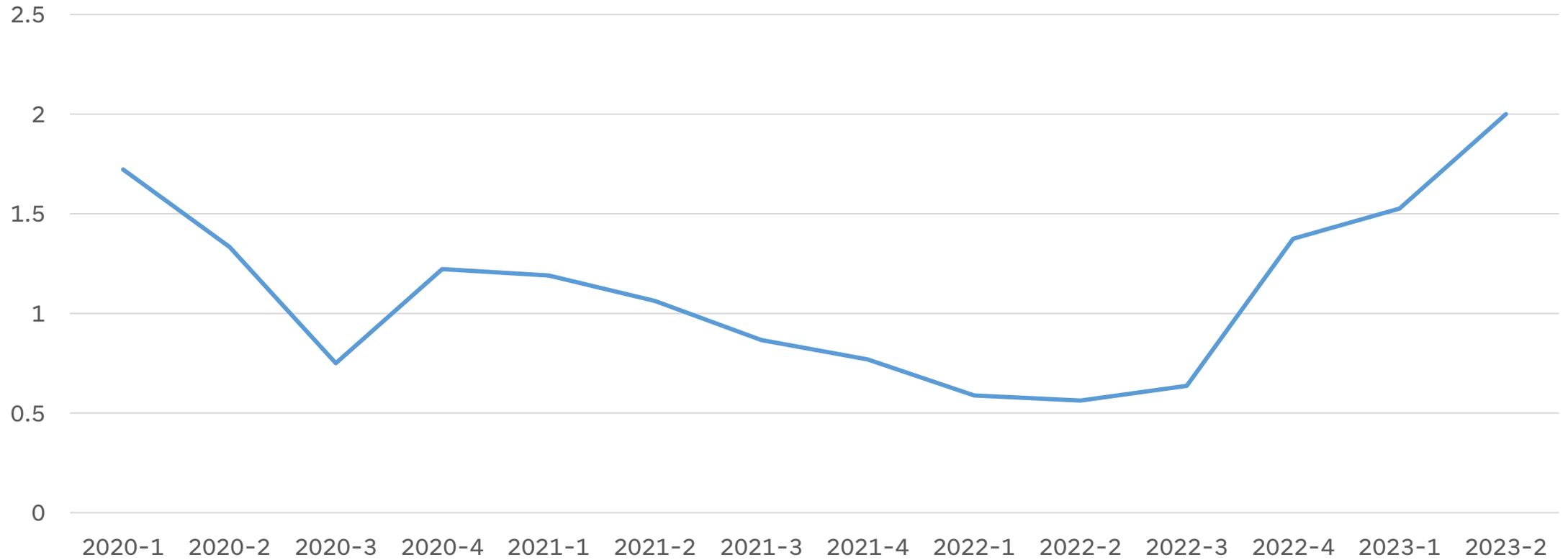
CLARITY IN COMMUNICATION

The retirement materials provided to me were clear and understandable.



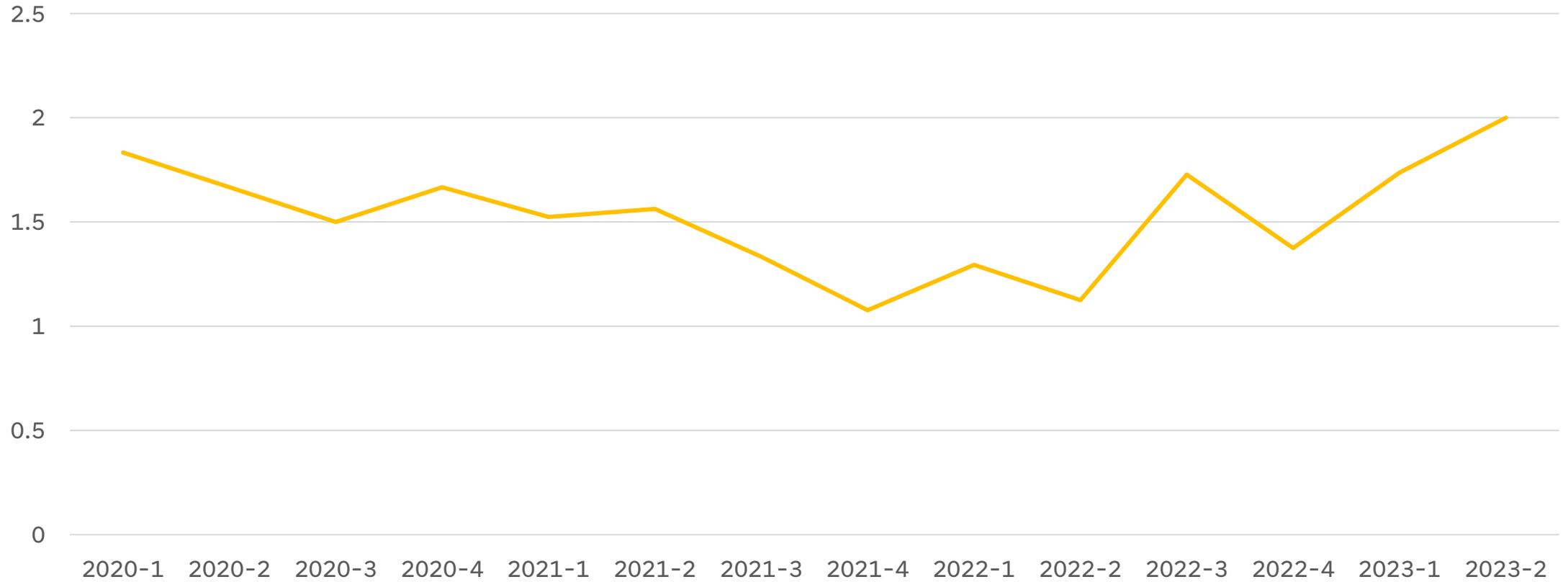
EASY TO FIND

The SBCERS office was easy to find.



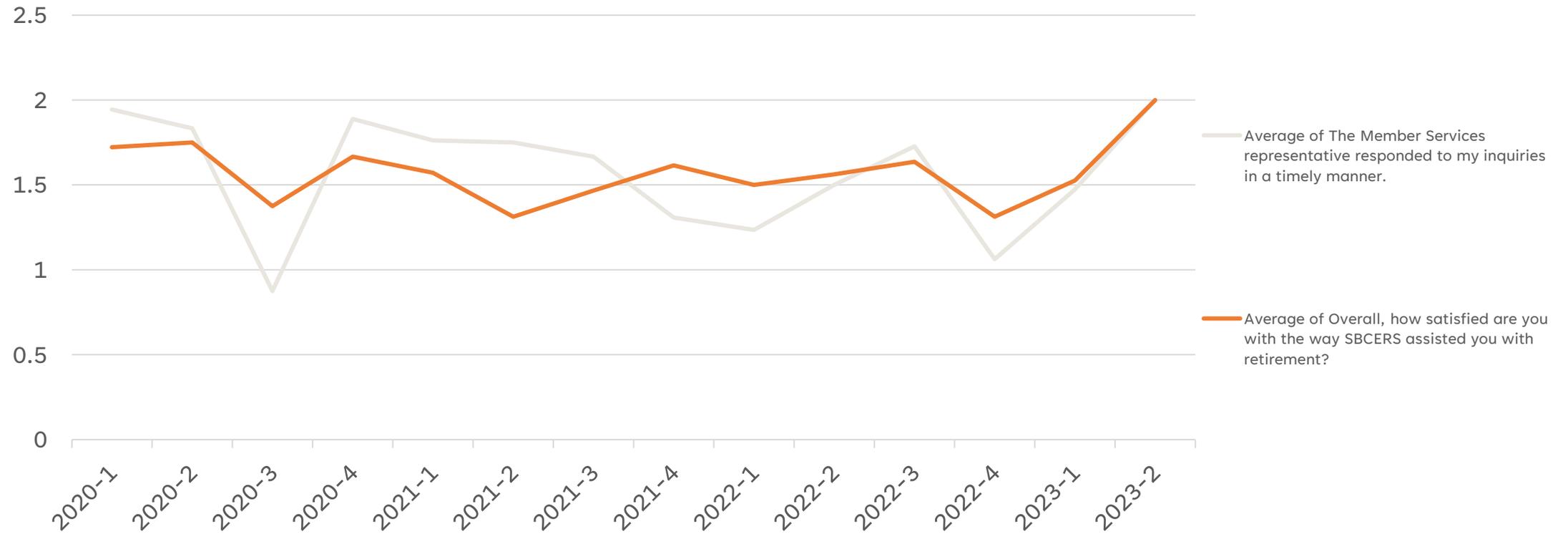
LENGTH OF TIME

I am satisfied with the length of time it took me to retire?



CORRELATIONS

There is a strong correlation between timeliness in responses and overall satisfaction.





HECKLES AND CHEERS (*EDITED TO PROTECT CONFIDENTIALITY*)

“I was satisfied up until the Skype meeting in January. After that I couldn’t get any confirmations either over the phone or by email from my rep. I was very anxious about the process and had no one to respond to my questions on whether my paperwork was received and complete, what and when my first paycheck would be so I could plan how to manage my finances and pay my bills.”

-Sheriff

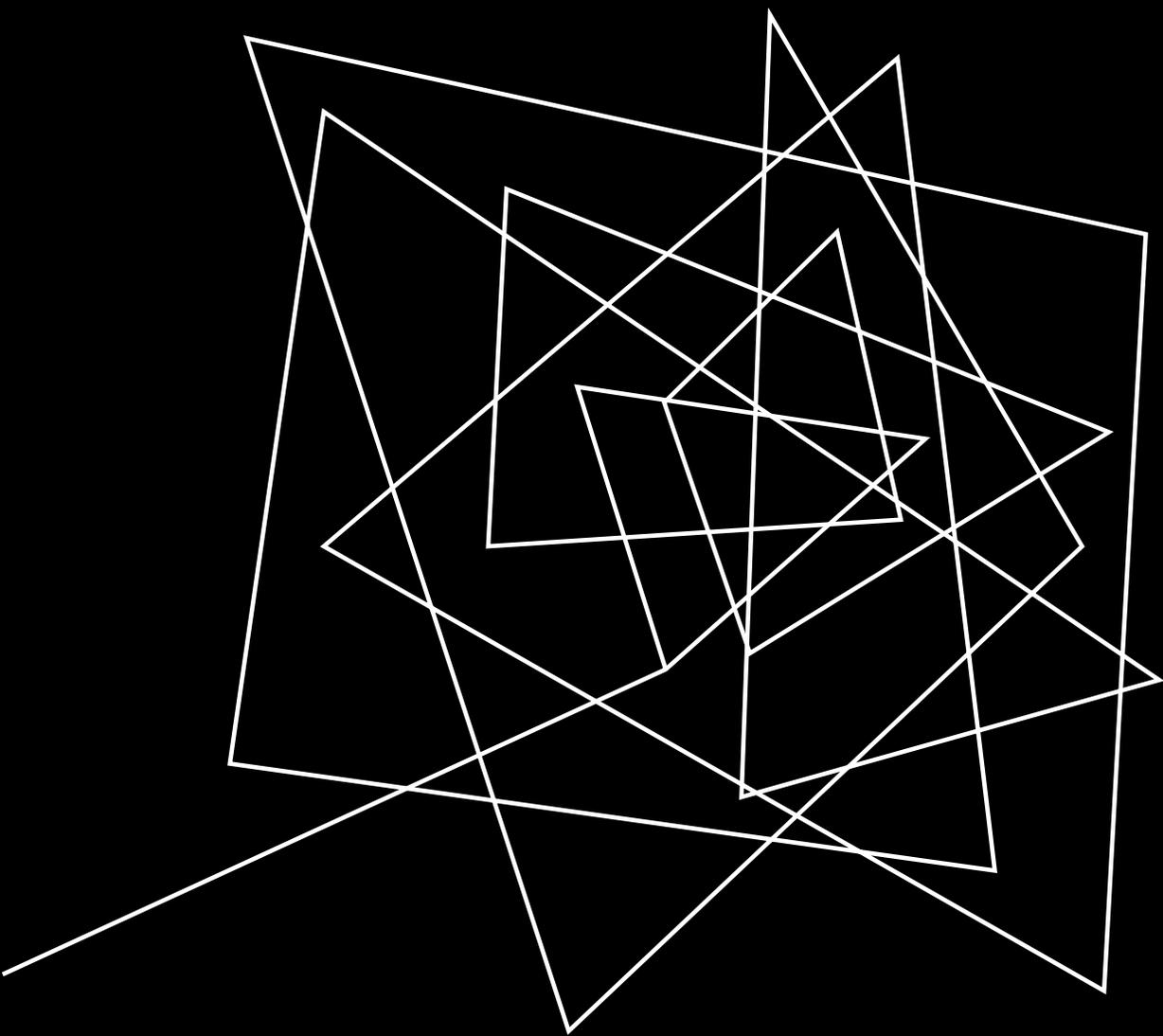
“The process was simple, but I was left feeling like I was missing something. Retirement is a closing out process, and it didn't feel very final. But that was probably due to COVID and the inability to meet in person.” –**Public Health**

“They consistently and professionally provided good information and answered my questions. I started the process early and we worked together over a period of months as new questions arose. I was and am very happy with the process.”

– **Social Services**

CONCLUSIONS

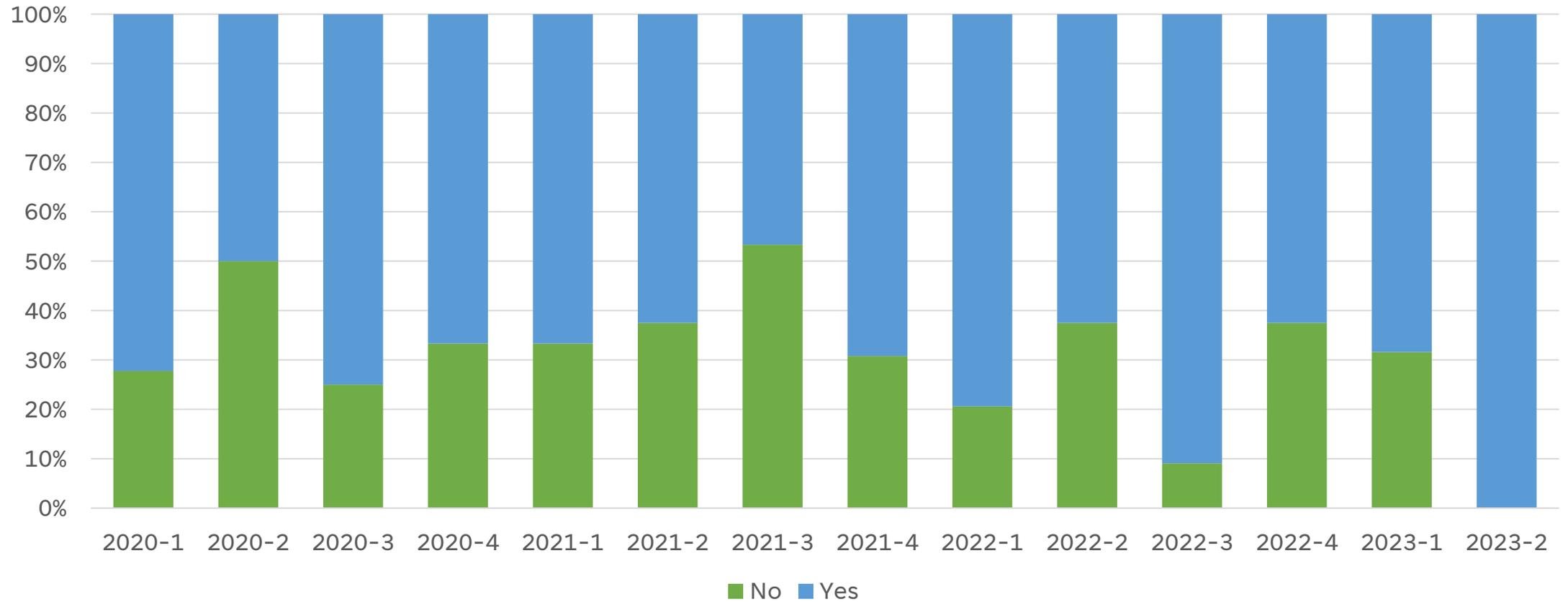
- Response times greatly influence overall satisfaction scores.
- Open facilities are important and add value.
- Opportunities to simplify the process and materials exist.



OTHER METRICS

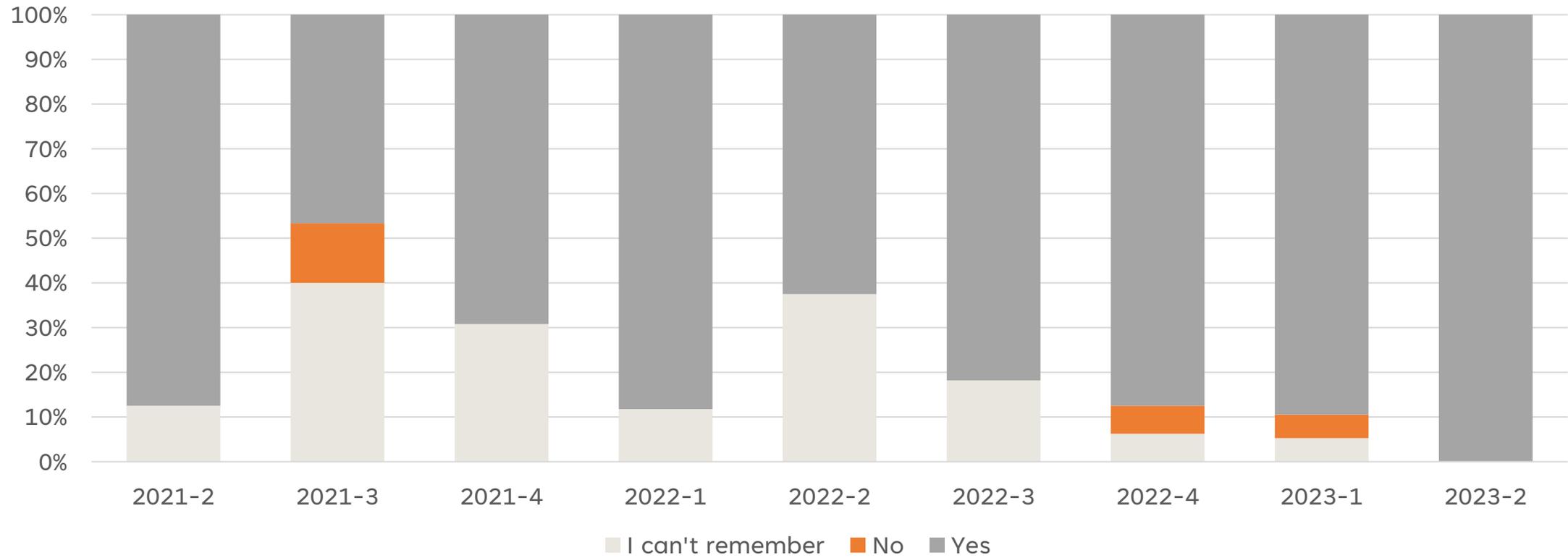
MySBCERS ACCOUNT REGISTRATION

Have you registered for a MySBCERS online account?



STRENGTHENING OUR COMMUNITY

Did your Member Services Representative tell you about the Retired Employees of Santa Barbara County (RESBC)?





OUR SUGGESTION BOX (*EDITED TO PROTECT CONFIDENTIALITY*)

“Just that all reps should know about and pass on that the retiree can put their vacation time into their 457, rather than take a taxable lump sum. Thank you.” – **General Services**

“Encourage folks to start looking into the process five years prior to their anticipated retirement.” – **Social Services**

“The new SBCERS website is great.” – **Public Health**

“I think you should have some sort of reception at the retirement office for all the poor people that retired during COVID :) since I've never been there. Of course, it isn't over and the new normal will be different than before COVID.” – **Social Services**



THANK YOU