

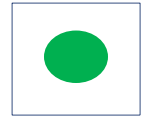
# Member Services Performance Summary

## Fiscal Year 2012 – November & December

	Jul-Aug	Sept-Oct	Nov-Dec	Jan-Feb	Mar-Apr	May-Jun
<b>Call Answer Rate</b> Answer 99% of incoming calls from members, employers and other interested parties.	●	●	●			
<b>Retirement Applications</b> Process 100% of valid retirement applications within 30 calendar days of retirement date.	●	●	●			
<b>Retirement Payments</b> Initiate 100% of monthly retirement benefit payments by the last working day of the month.	●	●	●			
<b>Retirement Estimates</b> Complete 100% of workable retirement estimates within 30 calendar days of receipt.	●	●	●			
<b>Withdrawal Payments</b> Pay account balance to 100% of eligible members within 30 calendar days of receipt of valid application.	●	●	●			



Status Legend: ● = On target or trending to target ▼ = Need to watch trend ■ = Management attention



Status

# Member Services – Call Answer Rate

## Strategic Goal

**Serve** members and employers in a professional, timely, accurate and cost-effective way.

## Performance Goal

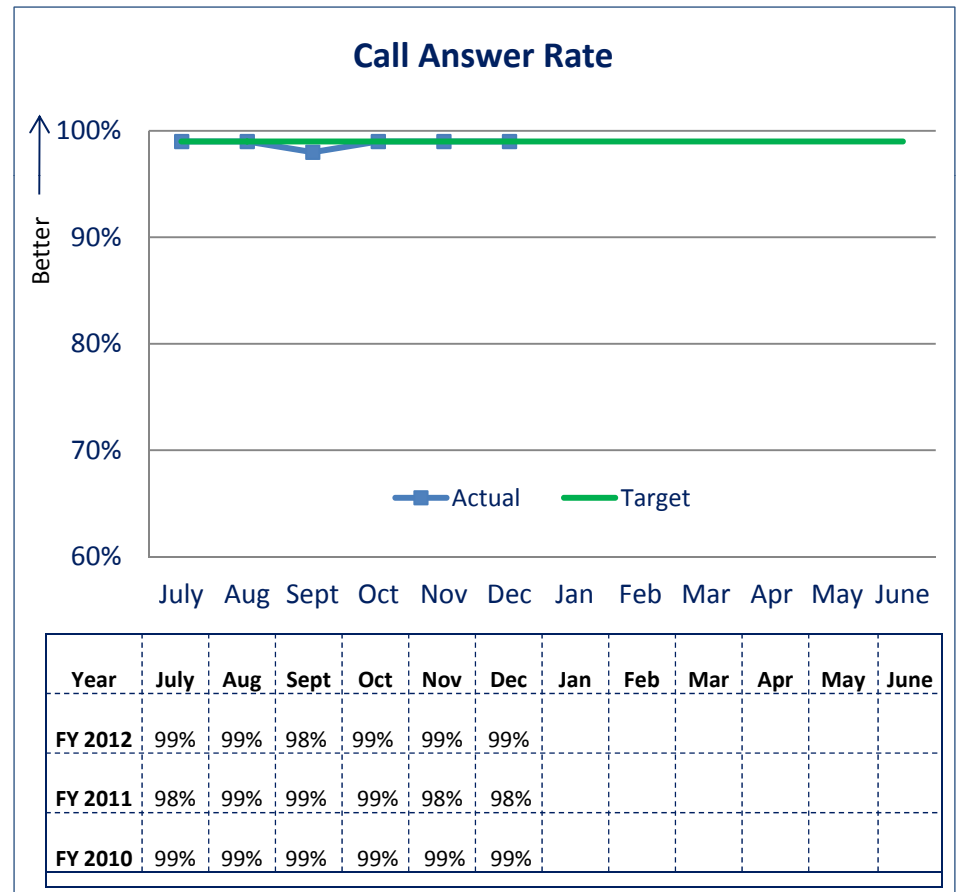
Answer **99%** of incoming calls from members, employers and other interested parties.

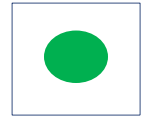
## Initiative - *Improve Customer Service*

Continually monitor business processes to ensure efficient, effective methods for delivering services.

## Comments

- ❖ Received 11,377 incoming calls during November and December.
- ❖ Met performance goal and responded to 99% of those incoming calls.





Status

# Member Services– Retirement Applications

## Strategic Goal

**Serve** members and employers in a professional, timely, accurate and cost-effective way.

## Performance Goal

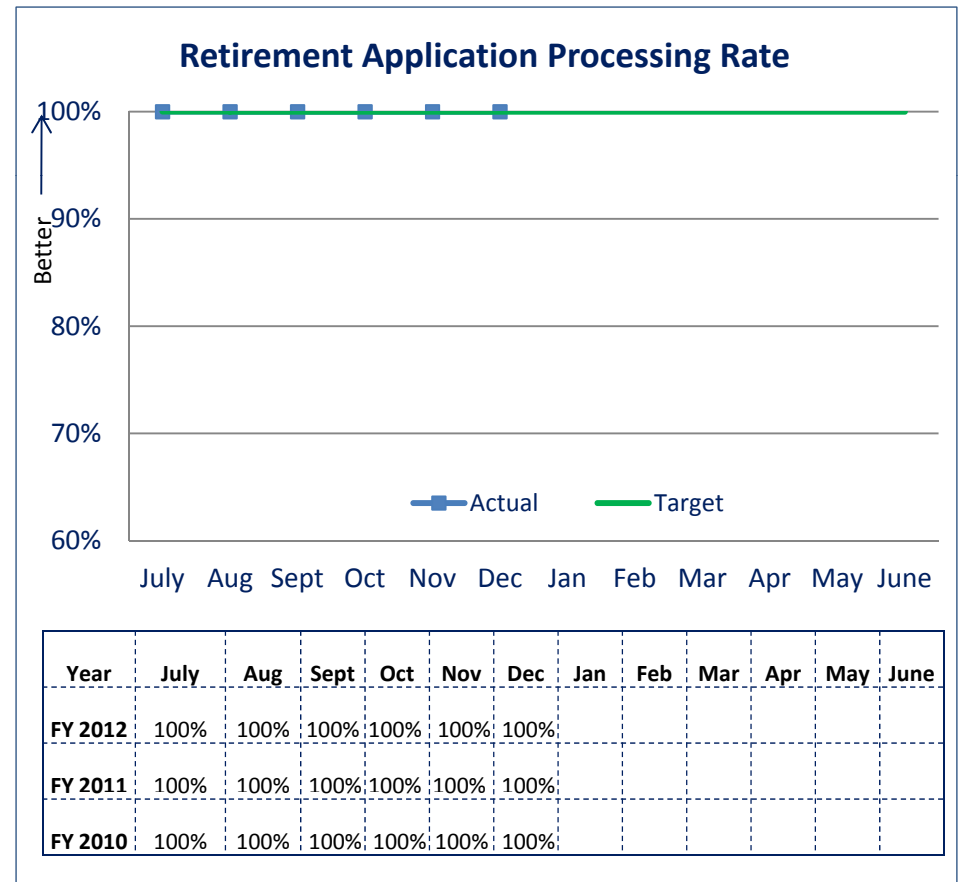
Process 100% of valid retirement applications within 30 calendar days of retirement date.

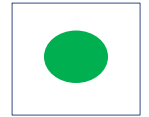
## Initiative - *Improve Customer Service*

Continually monitor business processes to ensure efficient, effective methods for delivering services.

## Comments

- ❖ Successfully processed 621 retirement applications for members who retired in November and December 2011.
  - November total included 182 applications from members accepting the State of Kansas Voluntary Retirement Incentive Program (last sizeable month for State VRIP applications).
- ❖ This represents a 47 percent increase over the 422 retirement applications processed during the same period in FY 2011.





Status

# Member Services – Retirement Payments

## Strategic Goal

**Serve** members and employers in a professional, timely, accurate and cost-effective way.

## Performance Goal

Initiate 100% of monthly retirement benefit payments by the last working day of the month.

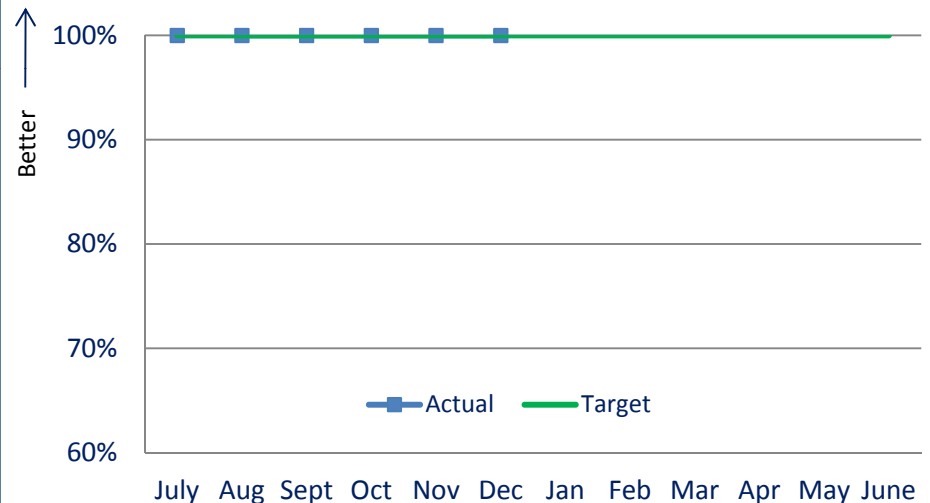
## Initiative - *Improve Customer Service*

Continually monitor business processes to ensure efficient, effective methods for delivering services.

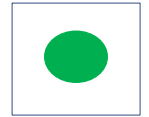
## Comments

- ❖ As of December 31, 2011, paid monthly retirement benefits totaling \$91.4 million to 81,025 retirees and survivors.
- ❖ Also distributed partial lump sum option payments totaling \$10.5 million to 257 new retirees during November and December.

**Timeliness of Retirement Payments**



Year	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June
<b>FY 2012</b>	100%	100%	100%	100%	100%	100%						
<b>FY 2011</b>	100%	100%	100%	100%	100%	100%						
<b>FY 2010</b>	100%	100%	100%	100%	100%	100%						



Status

# Member Services – Retirement Estimates

## Strategic Goal

**Serve** members and employers in a professional, timely, accurate and cost-effective way.

## Performance Goal

Complete 100% of workable retirement estimates within 30 calendar days of receipt.

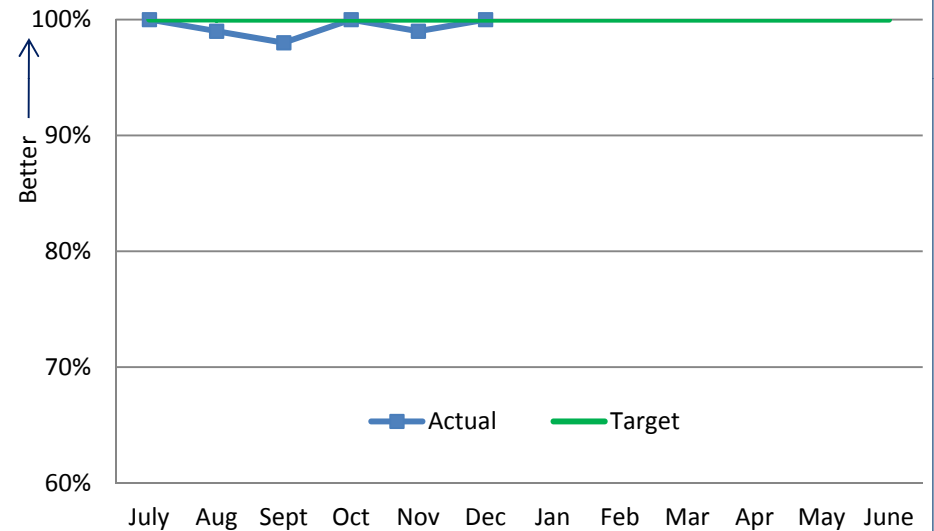
## Initiative - *Improve Customer Service*

Continually monitor business processes to ensure efficient, effective methods for delivering services.

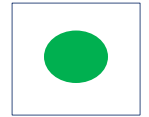
## Comments

- ❖ Processed 242 retirement estimate requests during November and December 2011.
- ❖ Responded to 99% of November estimate requests and 100% of December estimate requests within 30 calendar days.
- ❖ We continue to encourage members to use the on-line retirement estimate calculator.

**Timeliness of Retirement Estimate Processing**



Year	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June
<b>FY 2012</b>	100%	99%	98%	100%	99%	100%						
<b>FY 2011</b>	97%	100%	98%	100%	98%	99%						
<b>FY 2010</b>	98%	98%	99%	95%	99%	99%						



Status

# Member Services – Withdrawal Payments

## Strategic Goal

**Serve** members and employers in a professional, timely, accurate and cost-effective way.

## Performance Goal

Pay account balances to 100% of eligible members within 30 calendar days of receipt of valid application and supporting information.

## Initiative - *Improve Customer Service*

Continually monitor business processes to ensure efficient, effective methods for delivering services.

## Comments

- ❖ Processed 1,428 payments to members withdrawing their contributions and interest during November and December 2011.

