

Member Engagement Survey Results

Joint Meeting Item 4B
March 21, 2019

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Office of Communications



CEM Consortium

- Measure member engagement using a common survey metric
- Benchmark performance against peer systems
- Build on successes and best practices
- Share organizational initiatives that impact member engagement
- Promote continuous improvement and learning

Participants

- California State Teachers Retirement System
- Ohio Public Employees Retirement System
- Health Employees Superannuation Trust Australia
- Wisconsin Retirement System
- Michigan Office of Retirement Services
- Oregon Public Employees Retirement System
- Indiana Public Retirement System
- Illinois Municipal Retirement Fund

Why Engagement?

- Engagement refers to all the touch points
- Positive customer experiences will lead to higher engagement and influence behaviors
- Satisfaction usually is a result of engagement
- Engagement can be leveraged to help members prepare for retirement



ETF 2018 Survey

- Surveys distributed end of November 2018
- 92,550 surveys sent via email
- Anonymous
- Likert scale
- Response rate: 22%*
 - 20,440 respondents
- Average engagement score**
 - ETF: 5.74
 - Peers: 5.65

*Typical response rate: 10-15%

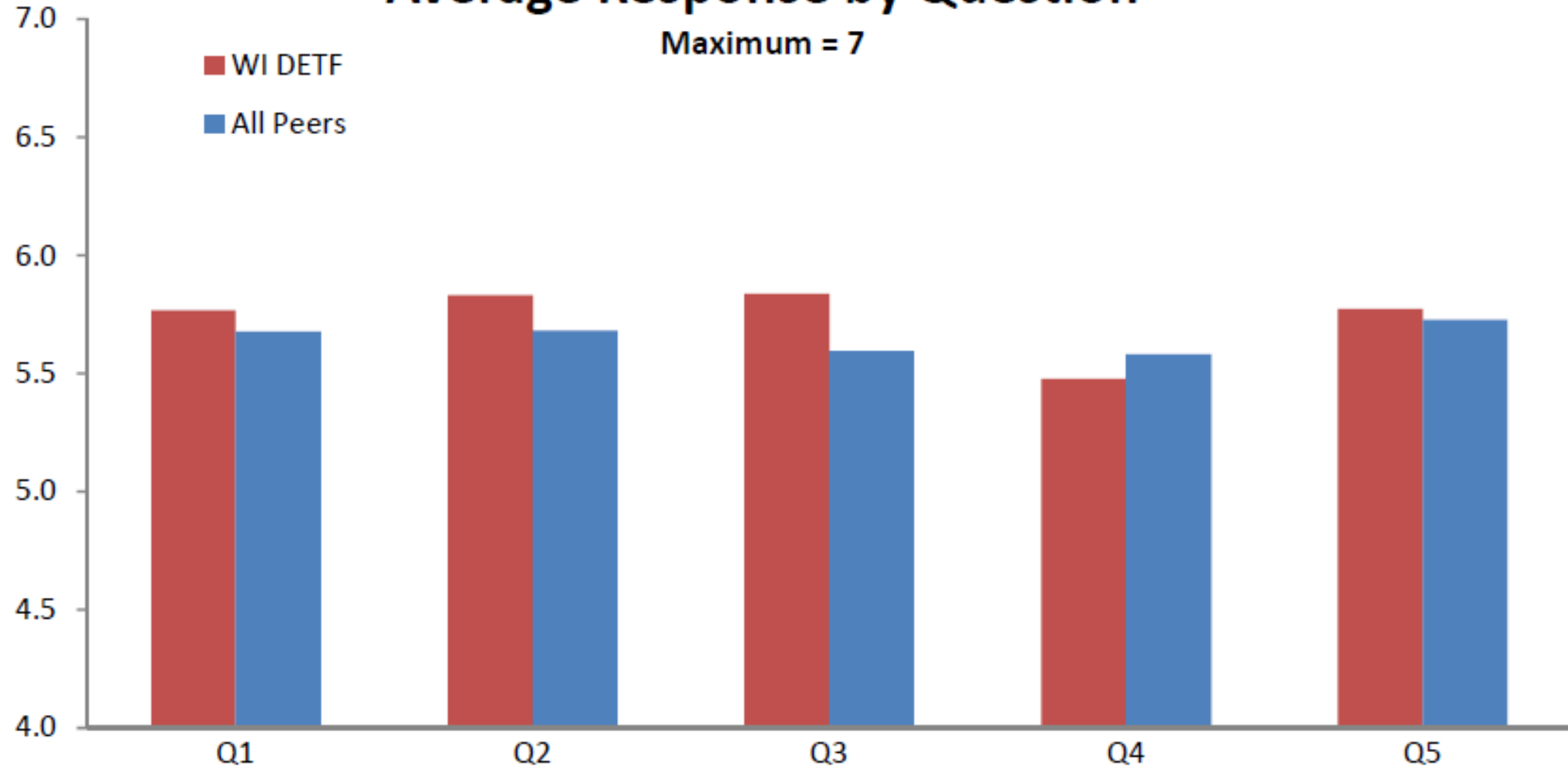
**Maximum = 7

Required Questions

- **Q1:** How satisfied are you with ETF?
- **Q2:** I know ETF operates in my best interest.
- **Q3:** I feel confident my retirement is secure with ETF.
- **Q4:** ETF sends communications that are relevant to my needs.
- **Q5:** ETF acts ethically.

Average Response by Question

Maximum = 7



WI DETF

5.77

5.83

5.84

5.48

5.77

All Peers

5.68

5.68

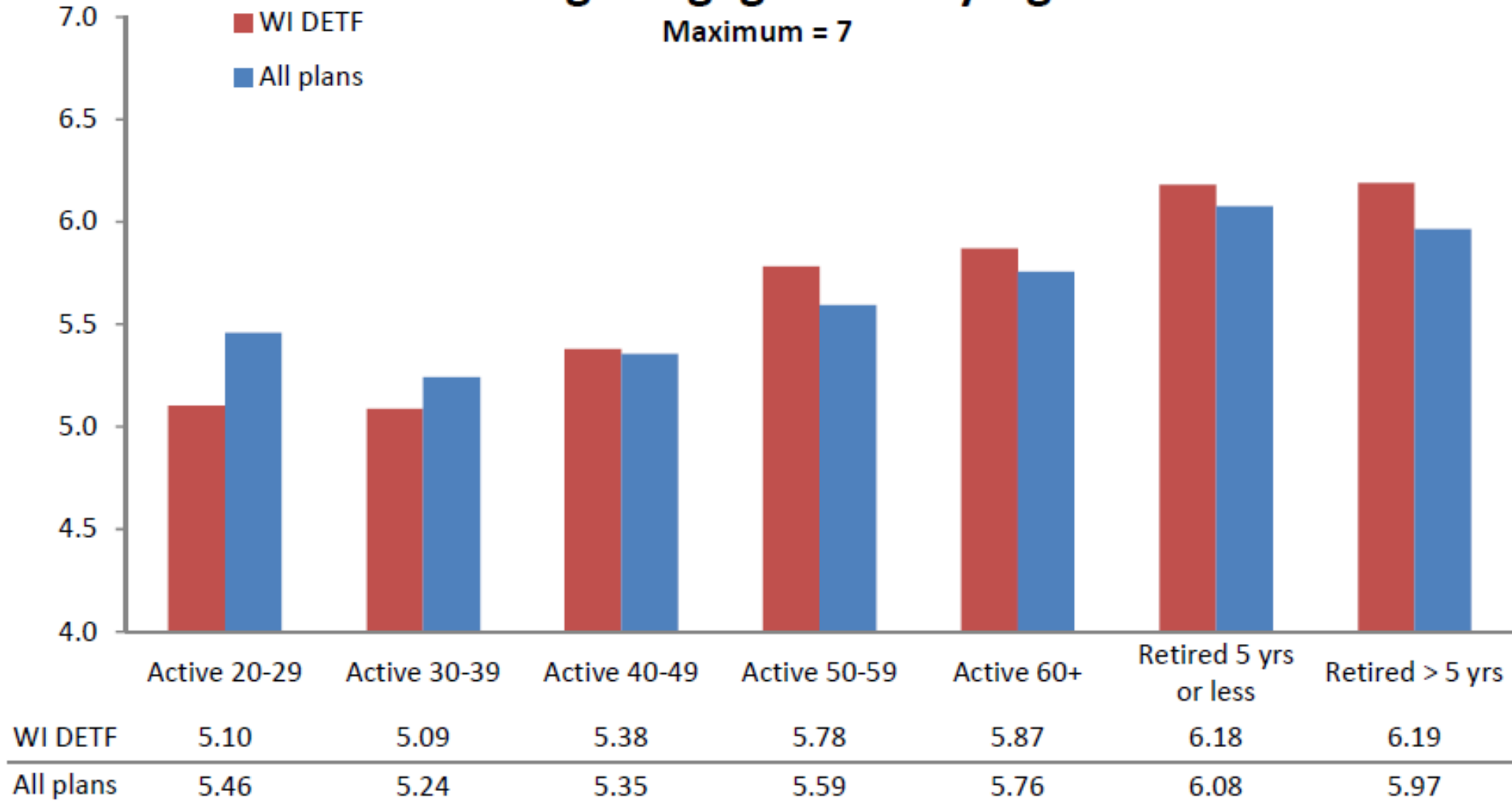
5.60

5.58

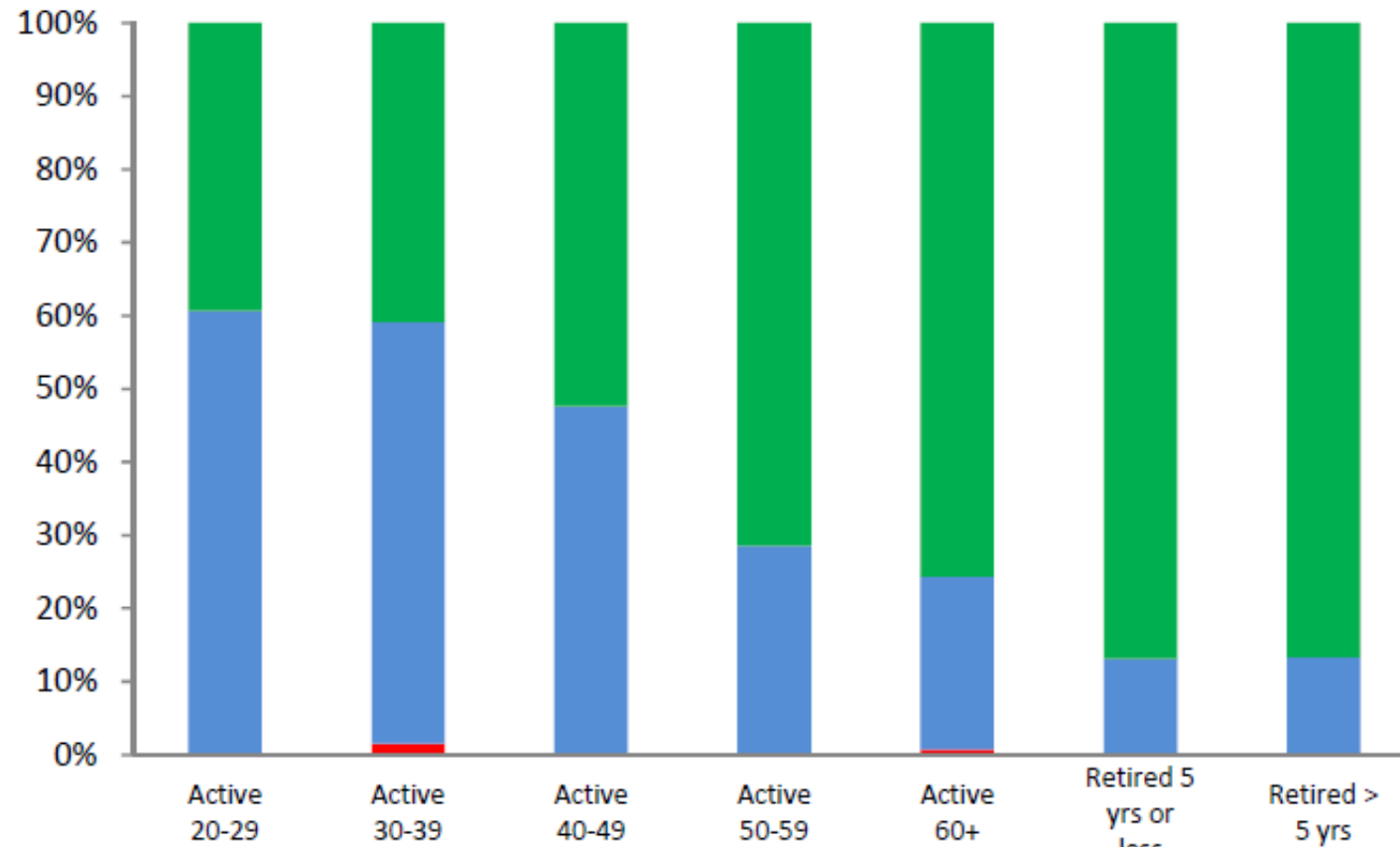
5.73

Average Engagement by Age

Maximum = 7



% Engaged vs. Disengaged by Age - WI DETF

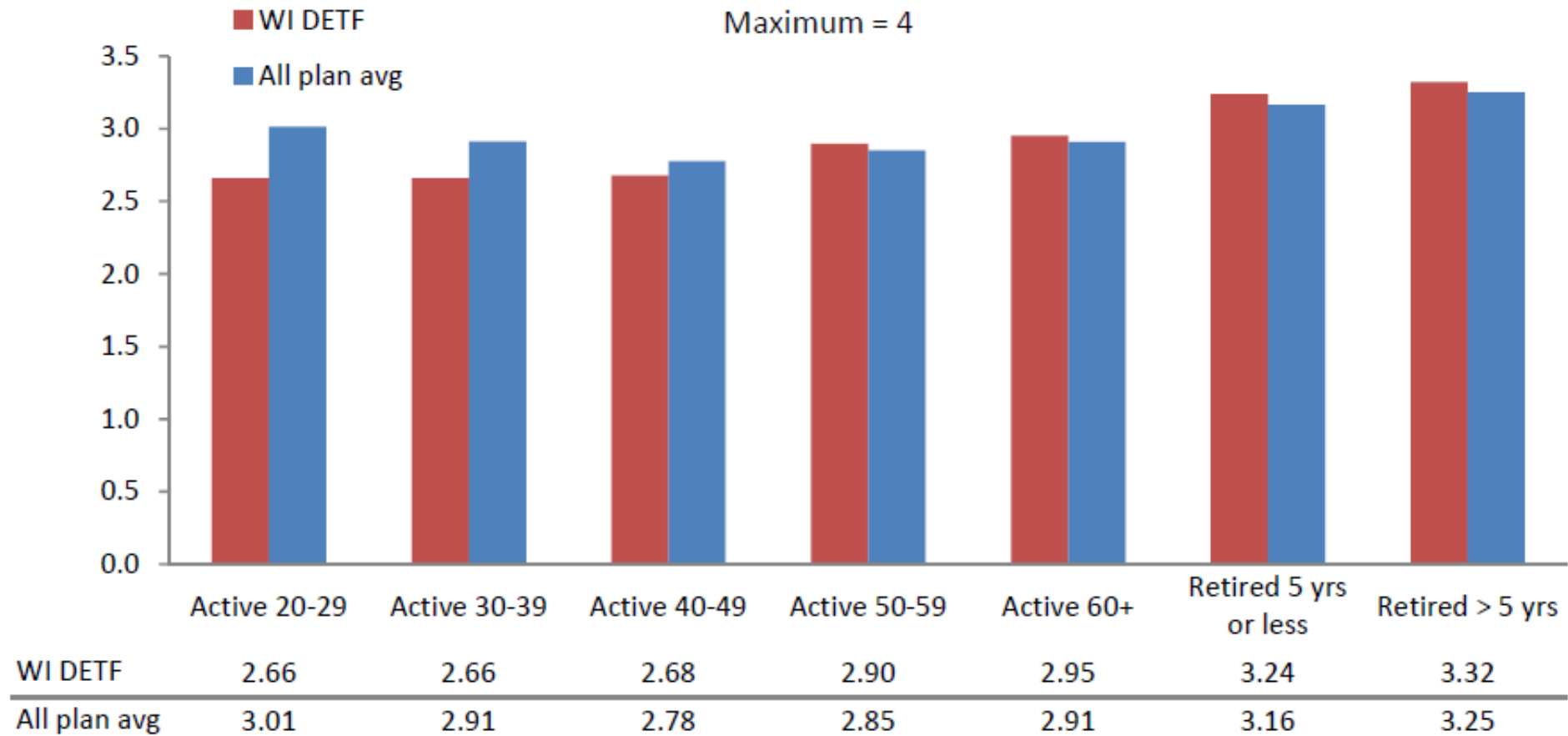


■ % Engaged	39.33%	40.84%	52.35%	71.37%	75.60%	86.84%	86.66%
■ % Neither engaged nor disengaged	60.67%	57.61%	47.36%	28.29%	23.66%	12.86%	13.04%
■ % Disengaged	0.00%	1.55%	0.29%	0.35%	0.74%	0.30%	0.30%

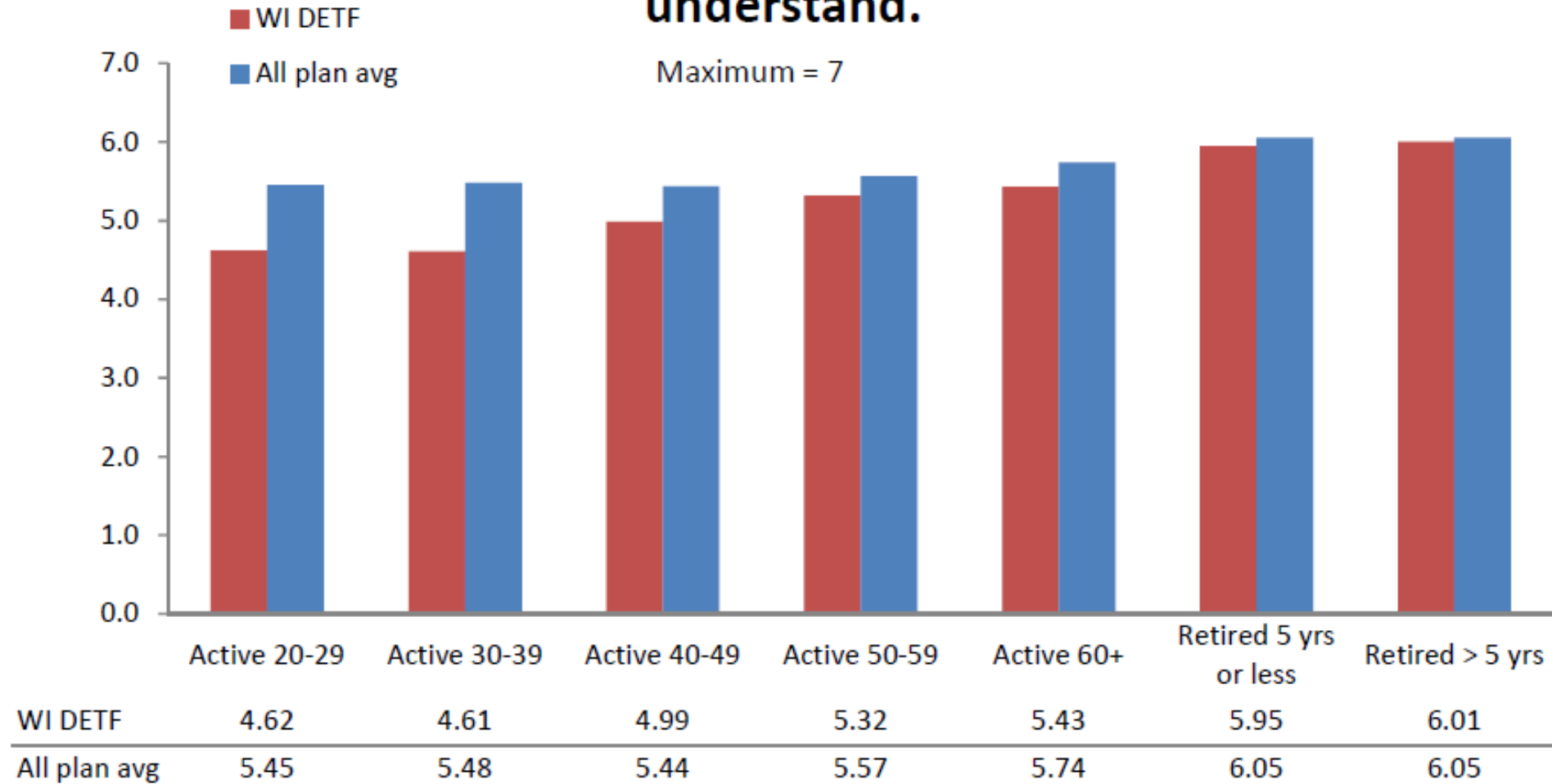


Optional Questions

Q1: How confident are you that you will have enough money to live comfortably through retirement?



Q2: Information provided by WI DETF is easy to understand.



The background is a dark blue gradient with numerous out-of-focus light spots in shades of blue and purple, creating a bokeh effect.

Questions?

Thank you



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