

**OCERS Board Policy**  
**Member Services**  
**Customer Service Policy**

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## **Background**

1. The Board's mission is to provide the highest quality of customer service to OCERS members, retirees, and beneficiaries in a cost-effective and prudent manner.

## **Policy Objectives**

2. Establish measurable goals to manage the customer service levels provided by Member Services staff to plan participants.

## **Policy Guidelines**

3. The following are quantifiable goals used for measuring customer service levels:
  - a. Member satisfaction – In-person interaction surveys. Goal is 95% positive responses.
  - b. Timeliness – In-person member interactions for walk-in members, seen within 15 minutes. Goal is 95%.
  - c. Benefit Recalculations – unplanned benefit recalculations should be less than 5% of the total number of calculations completed per month.
  - d. Payroll initiations within 45-60 days of the retirement date (with all documentation submitted the month prior to payroll processing). Goal is 95%.
  - e. Cost Notifications provided for all Service Credit Purchases within 45 business days of OCERS receipt of all data needed to determination eligibility and perform calculation. Goal is 95%.
  - f. Member communications (voice mails and emails) will be returned within one business day. Goal is 90%.
    - i. Staff will update their voicemail and utilize the out-of-office notification on their e-mail to indicate approximate turnaround time in situations when it is known that additional time is needed to return calls and emails.
  - g. Respond to all calls received during business hours in the Member Services phone queues within 60 seconds. Goal is 90%.
  - h. Provide a Quality Assurance report to the Audit Committee two times a year.
  - i. Provide staff with regular training opportunities for continued development in customer service and technical skills. All OCERS staff must complete a minimum of 12 hours of training per year. Goal is 95.

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**Policy Review**

- 4. The Board shall review this policy at least every 3 years to ensure that it remains relevant and appropriate.

**Policy History**

- 5. This policy was adopted by the Board of Retirement on November 16, 2015, and revised October 15, 2018, October 17, 2022, and October 21, 2024.

**Secretary's Certificate**

I, the undersigned, the duly appointed Secretary of the Orange County Employees Retirement System, hereby certify the adoption of this policy.

*Steve Delaney*

**10/21/2024**

Steve Delaney, Secretary of the Board

Date