

Ohio Deferred Compensation

Participant and Employer Satisfaction Provider RFP

Questions and Answers

1. The RFP describes that telephone surveys are administered on a bi-weekly basis during an approximately four-month research period (two research periods per year.) Why are surveys conducted on a bi-weekly basis vs. continuously over the 4-month period?

Surveys are conducted on a bi-weekly basis and not continuously to allow Ohio DC to collect a sufficient number of contacts who have called into the service center, had an interaction with retirement planning specialists and/or a field account executive, or logged on to the Programs website within the previous two weeks.

2. If continuous data collection throughout the year were available, would this be of interest?

No, the Program prefers the current structure.

3. Is there a desire to conduct more surveys or are the current quota targets delivering sufficient insights? Do you have any plans to look at special segments, thus requiring extra sample?

There are no current plans to conduct more surveys or to look at special segments requiring an extra sample.

4. Are surveys conducted in English only?

Surveys are only conducted in English.

5. How do you analyze the open end verbatim comments today?

Verbatim comments are compiled and provided for Program review. If there are themes or commonalities found in the comments the current provider will note that during the presentation of the survey results.

The verbatim comments are shared with Nationwide who manages our service center, field account executives and participant website.

6. Open ends are often part of a skip pattern in the survey so not all respondents answer the open-end question. If coding/text mining is desired, can you please indicate what % of completed surveys include a response for each open end/verbatim?

All respondents receive one open-ended question. There are 9 other open-ends asked of individuals that provided a low score in a prior question. On average, all other open-end questions are only asked of less than 5% of respondents. On average, other (specify) responses are used on less than 2% on a specific question.

7. There are legal restrictions associated with dialing cell phones using automated dialing systems. How are cell phone records handled by the current vendor? Can you share with us what % of the records are cell phones vs. landlines?

All contact numbers are manually dialed. All contacts have opted-in to communications from the Program with the contact information provided. We do not track whether the numbers are cell vs landlines.

Every employer and participant being contacted currently has a relationship with Ohio DC. It is preferred that a live operator be on the line for every call because this is an accurate database with a high contact rate. (rate of people picking up the phone) and the relationship with the individual that answers is important. An automated predictive dialer should not be used.

8. Should vendors assume that the survey instruments will remain constant or are they likely to change each wave?

The survey instruments remain constant in each wave. Ohio DC reviews the instruments prior to each research period. Occasionally, additional questions may be added if the Program is seeking feedback on a certain topic.

9. For the website survey, is the survey currently offered using a link that is available to all users of the website during the data collection period? Or is it offered using a web pop that intercepts a random sample of website users?

Ohio DC collects the participants who made a transaction in the secure section of the website. That information is forwarded to the survey provider who in turn sends the participant an email that contains a link to the survey

10. For the website survey, is the survey offered to all users or only those who have authenticated/are using the secure site?

Only participants who assess the secure portion of the website and make a transaction receive the email regarding the survey.

11. What about the current program is working well? What is not working so well on which you will need further insight or assistance?

The survey is primary used to assess certain contract performance metrics for Nationwide. It has worked well for this purpose in addition to providing performance improvement feedback for Nationwide and our Program.

12. Can you give more details on the sample (amount/format/etc.)?

In 2016, the employer file sent to the provider contained 5,095 employer records. The Program has a list of employer contacts that are primarily payroll/HR related. Nationwide has a separate database that contains different contacts for employers. As an example, an individual employer may have multiple divisions or locations that Nationwide might need to contact to schedule worksite visits. Those contacts would be different than the payroll/HR contact used by the Program. Both files are sent to the provider.

In the Spring of 2017, for the first wave of surveys for the phone survey, the file contained 12,547 participant records for the phone survey. The file for the web survey contained 3,080 participant records. These files contain participants who have had contact with the Program since the final wave of surveys were conducted in the fall of 2016.

For the second wave of surveys in the Spring of 2017, the file contained 1,197 participant records and for the phone survey. The file for the web survey contained 344 participant records. These files would only contain participants who have had contact with the Program in the previous two weeks. Additional waves in each research period should contain a similar number of participants.

If a participant has been included in a survey file, their information will not be resent to The provider for one year. Participants can also request that they not be contacted in the future.

13. You mention the need to collect from 310 employers. Are there to be assumed multiple contacts at these employers, or are we to assume one single contact per employer?

Assume multiple contacts per employer.