



UNITED STATES OFFICE OF PERSONNEL MANAGEMENT

Washington, DC 20415

The Director

Tuesday, January 4, 2000

MSG-002

MEMORANDUM FOR: Human Resources Directors

FROM: CAROL J. OKIN ASSOCIATE DIRECTOR, OFFICE OF MERIT SYSTEMS, OVERSIGHT AND EFFECTIVENESS

Subject: Special Study of Agency Benefits Counseling for Employees

During FY 2000, the Office of Merit Systems Oversight and Effectiveness (OMSOE) will be conducting a special study about information that agencies provide employees concerning their retirement, life insurance, health benefits, thrift savings plan, and social security. The study will look at the elements of agency benefits education programs and how well agencies deliver benefits information to employees. Specifically, it will look for areas of difficulty, agency best practices in benefits counseling, and needs for additional tools or assistance from the Office of Personnel Management (OPM).

Information obtained from this study will be particularly helpful at this time because of OPM's Retirement Systems Modernization (RSM) effort. Specifically, the information will furnish a baseline to assess change. More importantly, it will provide information that will go into the detailed design of the benefits counseling portion of the RSM work.

In February, a small random sample of GS-200 series agency personnel, and a small random sample of employees, nationwide, will be invited to complete a short survey located on the OPM Internet Homepage. We will identify the employees to be surveyed from the Central Personnel Data File. The survey for the GS-200 series personnel will ask those sampled, who actually provide benefits counseling, to describe their experience. The survey for employees generally will ask them about their knowledge of benefits counseling services available. We will give each member of the IAG Network of Benefits Officers a list of their employees that will be surveyed. Benefits Officers will then send an Email to those employees and ask them to go to the OPM Homepage and take the appropriate survey. If some sampled employees cannot be reached by Email, the Benefits Officers may print and mail the survey to them.

Also, in February and March, OMSOE evaluators will conduct telephone interviews of agency benefits counselors and conduct employee focus groups. The surveys, interviews and focus groups will obtain information about the kind of benefits counseling provided, how the counseling is delivered, use of technology in providing benefits information, the skill level of agency benefit specialists, the adequacy of benefits information provided, and the types of information and tools needed for the future.

OMSOE staff shared plans for this study with the IAG Network of Benefits Officers at their December 7, 1999 meeting. They provided attendees with copies of the two proposed surveys for comment from the Benefits Officers by January 14, 2000.

Thank you in advance for your cooperation and assistance in helping us conduct this study. Please call Craig Pettibone at 202-606-2980 or Email him at cbpettib@opm.gov if you have any questions about our plans for this study.