



*United States
Office of
Personnel Management
The Federal Government's Human Resources Agency*

***Retirement and Insurance Service
Benefits Administration Letter***

Number: 00-101

Date: February 18, 2000

Subject: Special Study of Benefits Counseling in Agencies

This letter requests your support for a special study of benefits counseling.

Introduction. The U.S. Office of Personnel Management's (OPM) Office of Merit Systems Oversight and Effectiveness (OMSOE) is doing a special study of benefits counseling in agencies. The study will look at how agencies inform employees about their benefits. The study also will look at challenges, best practices, and needs for additional tools or assistance from OPM. OMSOE will share results of the study at our Federal Benefits Conference, June 6 - 9.

Surveys. OMSOE has identified a small random sample of GS-200 series agency personnel and employees, nationwide, to complete short web-based surveys. The surveys were developed with input from headquarters level Benefits Officers.

The GS-200 series survey asks staff who do benefits counseling to provide information about their experience and resources. The employee survey asks employees about their knowledge of benefits counseling services.

OMSOE asked Benefits Officers to email the selected employees and ask that they complete the survey. If an employee could not be reached by email, OMSOE asked the Benefits Officer to print and mail the survey to the employee.

Telephone Interviews and Focus Groups. In March, OMSOE evaluators will interview agency benefits counselors by telephone, and conduct employee focus groups at a number of locations nationwide. OMSOE will also work with headquarters-level Benefits Officers to interview key benefits staff.

Use of Results in Retirement Systems Modernization. The study is timed to feed into the Retirement Systems Modernization (RSM) initiative. It will provide baseline information about benefits counseling today, and help provide insights into:

- the kinds of benefits information employees want,
- when they want it, and
- how they would like to receive it.

RSM will transform benefits counseling by giving benefits counselors complete employee work histories and better planning and information tools. To learn more about the RSM work, read the RSM newsletter, *Modernizing Today*, at www.opm.gov/retire/modern.

Best Practices. The study will also identify best practices to help agencies improve benefits service to employees. Such practices could include:

- employee statements of benefits,
- interactive tools for researching and viewing benefits information,
- benefits communication materials, such as brochures or newsletters, and
- benefits education initiatives (e.g., “brown bag lunches”).

The practices do not need to be elaborate or “state of the art”. Please call or email one of the study coordinators to share best practice information.

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Thank you in advance for your support of this study.



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