

VISION'31

# **Strategic Initiative 2.4.1**

## **Membership Voice Survey**

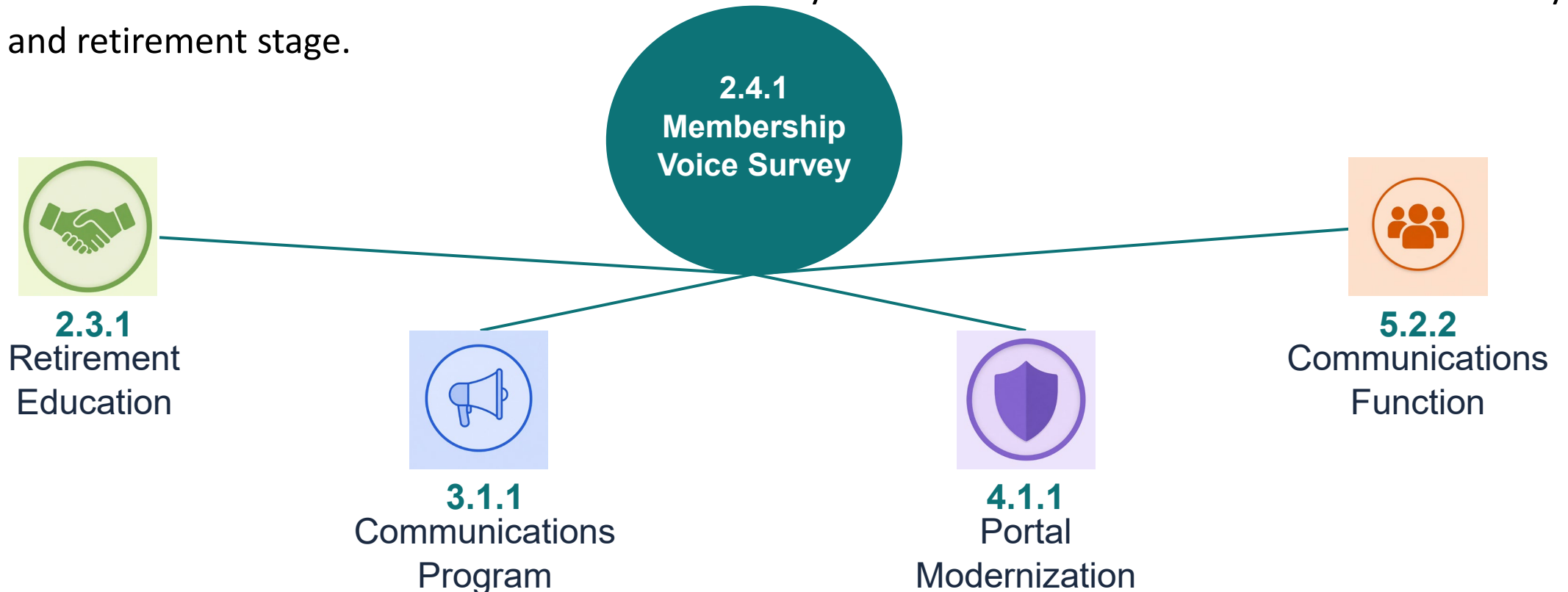
*A structured engagement effort across member career and retirement stages*

August 2026

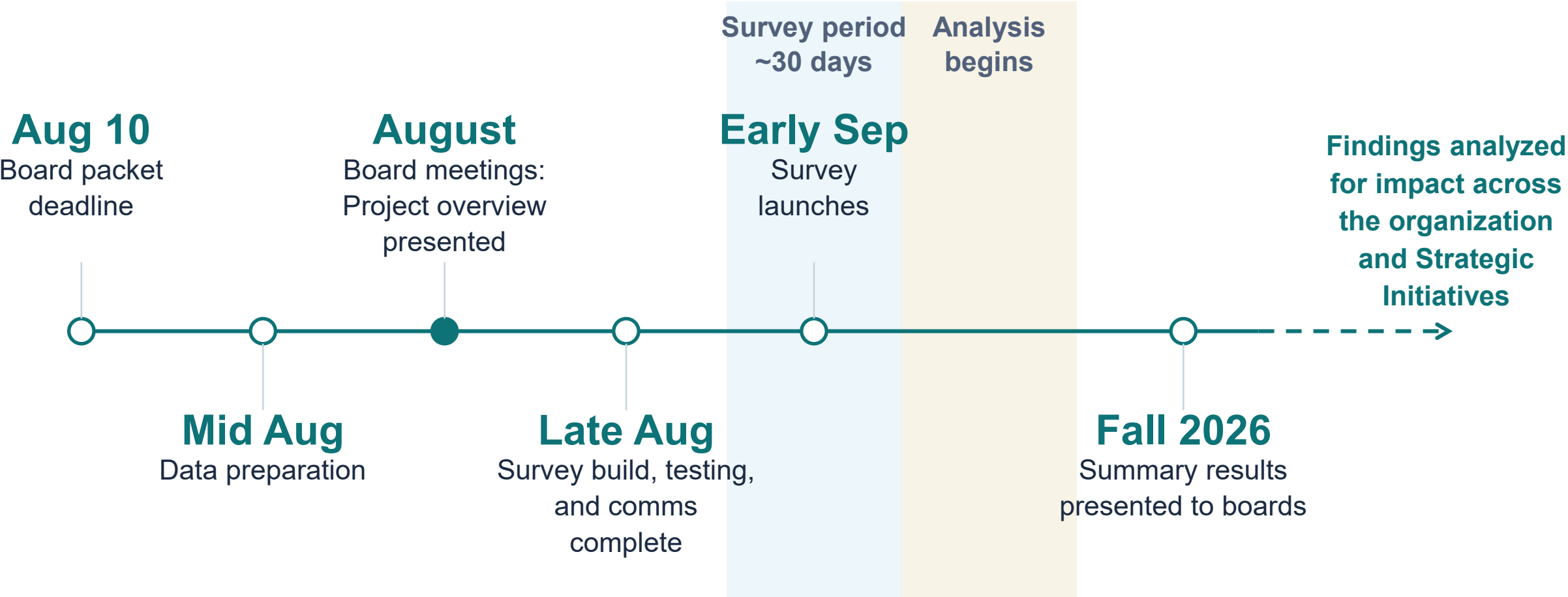
# Purpose and Strategic Connections

## ORS wants to know its members better.

This survey differs from existing channels, such as workshop follow-up surveys and passive tools like survey links in email footers and on the website. It is ORS's first systematic effort to hear from members at every career and retirement stage.



# Project Timeline



# Population Segmentation

| <i>Survey 1: Active Employees</i>                                                  |               |                 |               |
|------------------------------------------------------------------------------------|---------------|-----------------|---------------|
| Segment                                                                            | Federated     | Police and Fire | Total         |
| Early Active – less than 10 years of service                                       | 2,861         | 854             | <b>3,715</b>  |
| Late Active – more than 10 years of service                                        | 1,405         | 808             | <b>2,213</b>  |
| <i>Survey 2: Retirees, Beneficiaries, DRO Payees, and Separated Vested Members</i> |               |                 |               |
| Segment                                                                            | Federated     | Police and Fire | Total         |
| Separated, Deferred Vested – not active, not collecting                            | 2,344         | 413             | <b>2,757</b>  |
| Early Retiree – before age 65                                                      | 1,073         | 1,026           | <b>2,099</b>  |
| Late Retiree – after age 65                                                        | 3,131         | 1,265           | <b>4,396</b>  |
| Beneficiary*                                                                       | 687           | 551             | <b>1,238</b>  |
| <b>Total</b>                                                                       | <b>11,501</b> | <b>4,917</b>    | <b>16,418</b> |

*\*The survey will be sent to adult beneficiaries who have not recently experienced the loss of a member.*

# Survey Topics



## Overall Experience, Trust, and Confidence

Overall satisfaction and where members see room to improve



## Service Experience and Expectations

Timeliness, accuracy, and consistency across service channels



## Communication Preferences

Preferred channels, frequency, and content



## MemberDirect and Self-Service Needs

Current use, desired tasks, and portal priorities



## Retirement Education and Engagement

Topics, timing, and preferred formats by career stage

# Question Types and Administration

## Question Types

**Five-point rating scale**

**Satisfaction and confidence scale**

**Multiple choice**

**Select all that apply**

**Priority ranking**

**Frequency scale**

**Conditional follow up**

**Open ended comment**

## Survey Administration



Responses are anonymous to ORS and the boards.



Each member may respond once.



The platform follows up with members who have not yet responded.



Website notices, social media, and retiree associations help build awareness.

# Board Questions and Feedback

*This presentation is for awareness, so trustees, members, and the public understand how this initiative to hear from the membership is taking shape and to invite trustee questions and feedback before the survey is released.*



What questions do trustees have about the survey design, process, or timeline before launch?



Are the six analytical groups clear and meaningful?



Are there areas of member experience the boards want emphasized?