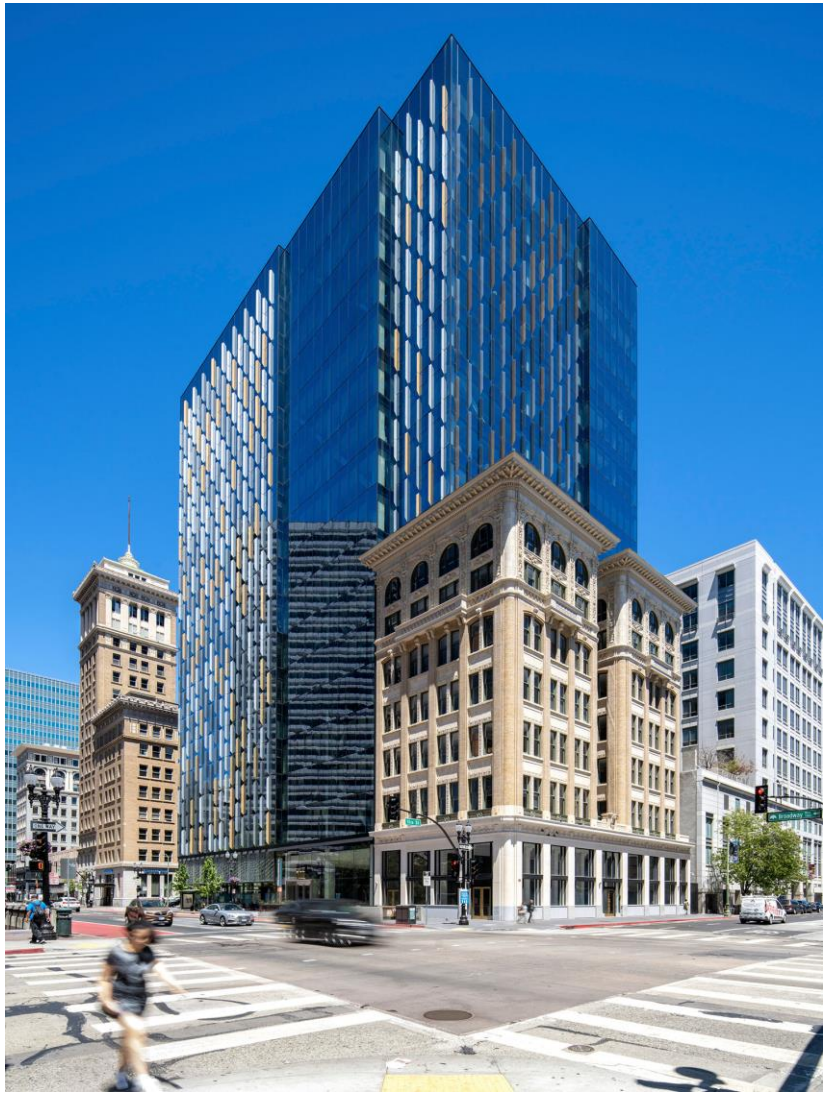


UCRS Advisory Board

Retirement Administration Service Center Update

Bernadette Green
Executive Director of RASC

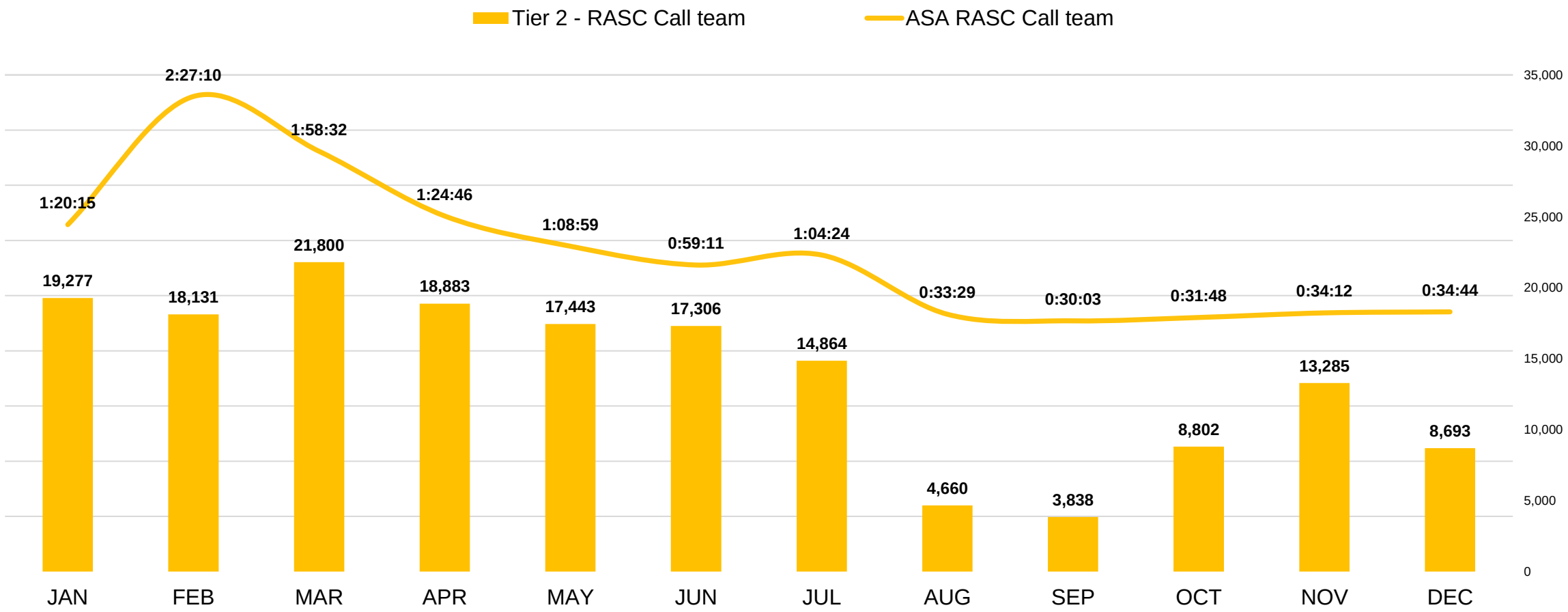
December 6, 2024

UCRS Advisory Board

1 Metrics and Performance: January – October 31st

Member contact channels expanded

Monthly incoming calls 2022



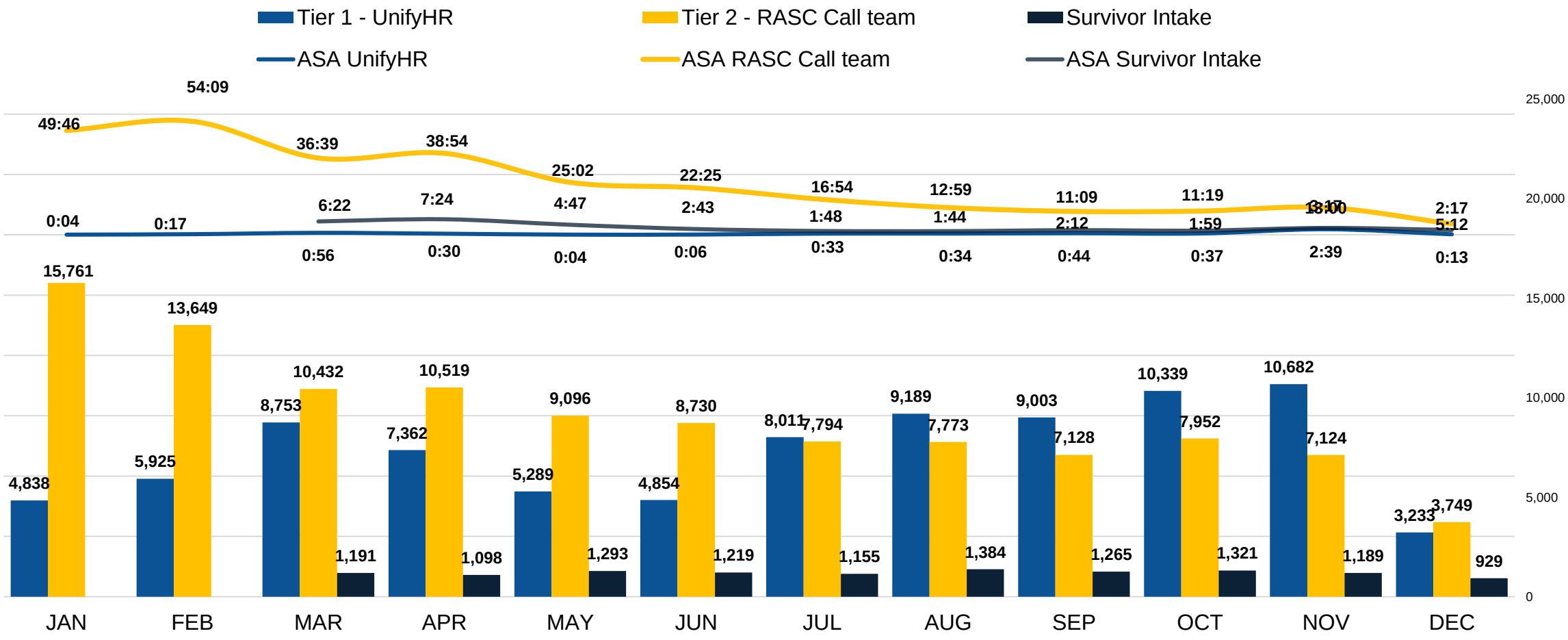
UNIVERSITY OF CALIFORNIA

Systemwide Human Resources

The data represents 2022 calendar year

Results as of December 31, 2022

Monthly incoming calls 2023



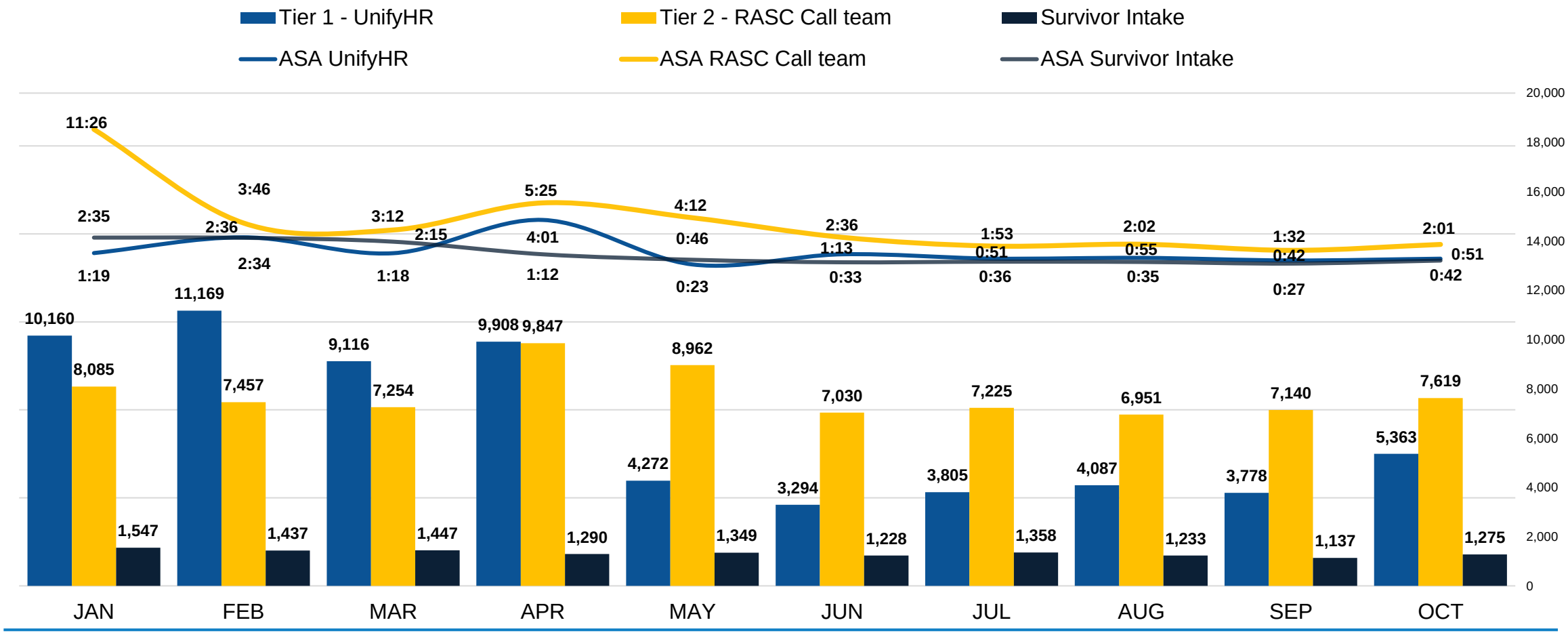
UNIVERSITY OF CALIFORNIA

Systemwide Human Resources

The data represents 2023 calendar year

Results as of December 31st , 2023

Monthly incoming calls 2024



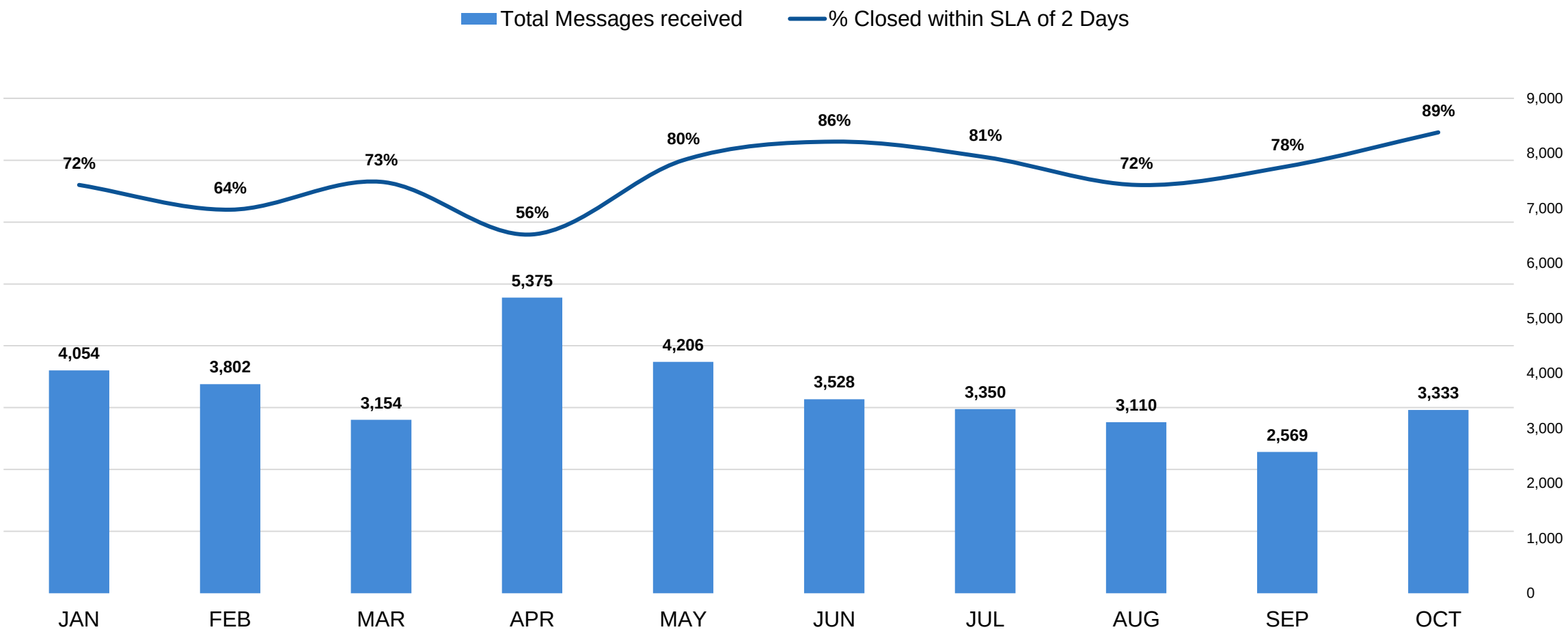
UNIVERSITY OF CALIFORNIA

Systemwide Human Resources

The data represents 2024 calendar year

Results as of October 31, 2024

Secure messages monthly 2024

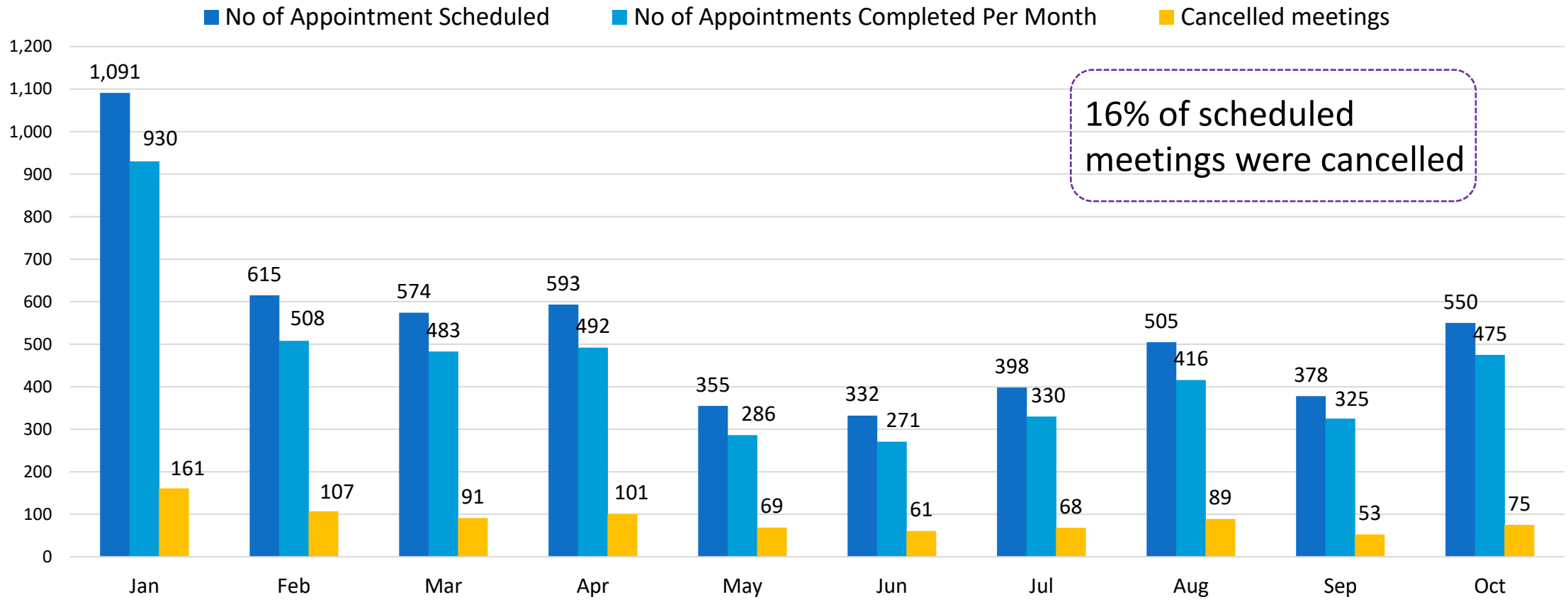


UNIVERSITY OF CALIFORNIA

Systemwide Human Resources

Performance results are reflected in business days and as of October 31, 2024

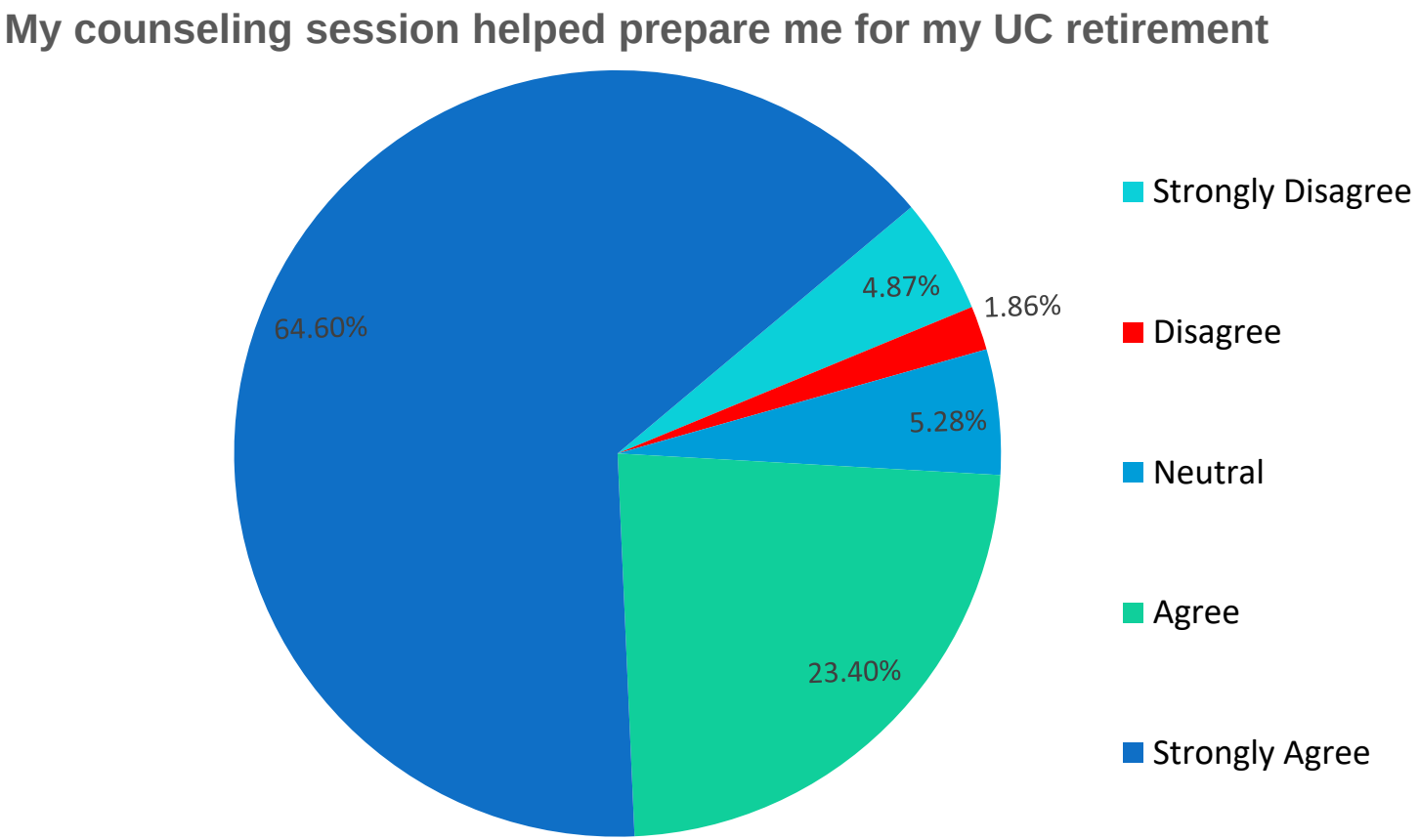
Retirement Counseling appointments 2024



Performance results are reflected in business days and as of October 31, 2024

Retirement Counseling survey results

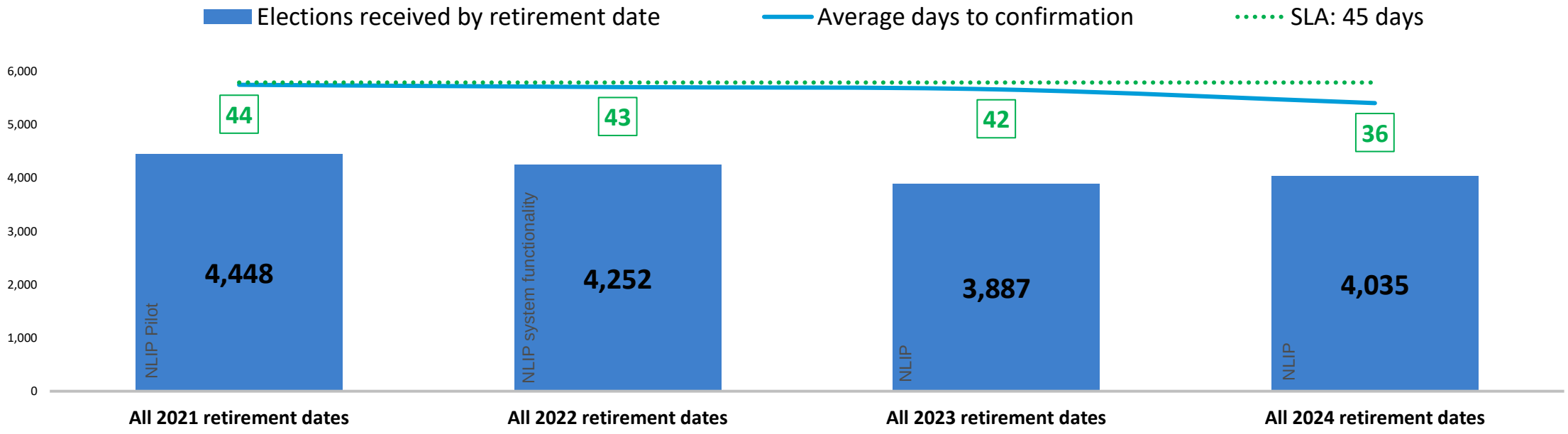
Over 620 Members testified to the help of retirement counseling session for UC retirement process



Results as of October 31, 2024

Retirement processing: year over year

- Improving overall average to process retirement elections:
  - 2024 performance **improved by 6 business days** from the **previous year**
  - **As of October 31, 2024,** the performance average is 36 business days, which is **9 business days below** the **Service Level Agreement** (SLA)



SLA: 45 business days from the election receipt date to generating confirmation of benefits statement

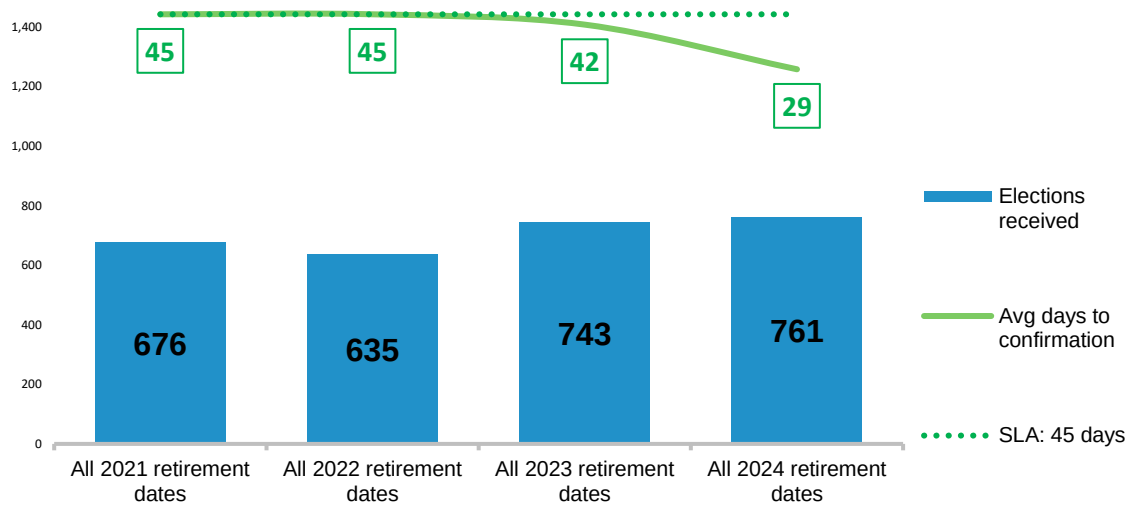
The data represents 2021, 2022, 2023 and 2024 calendar years

Performance results are reflected in business days and as of October 31, 2024

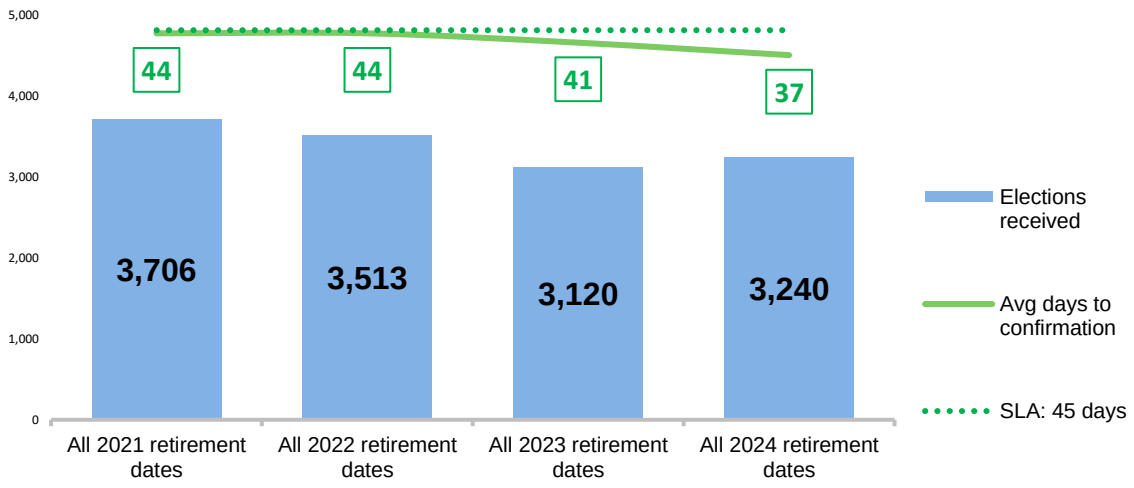
Retirement processing: year over year

Total elections received

Academics and Faculty



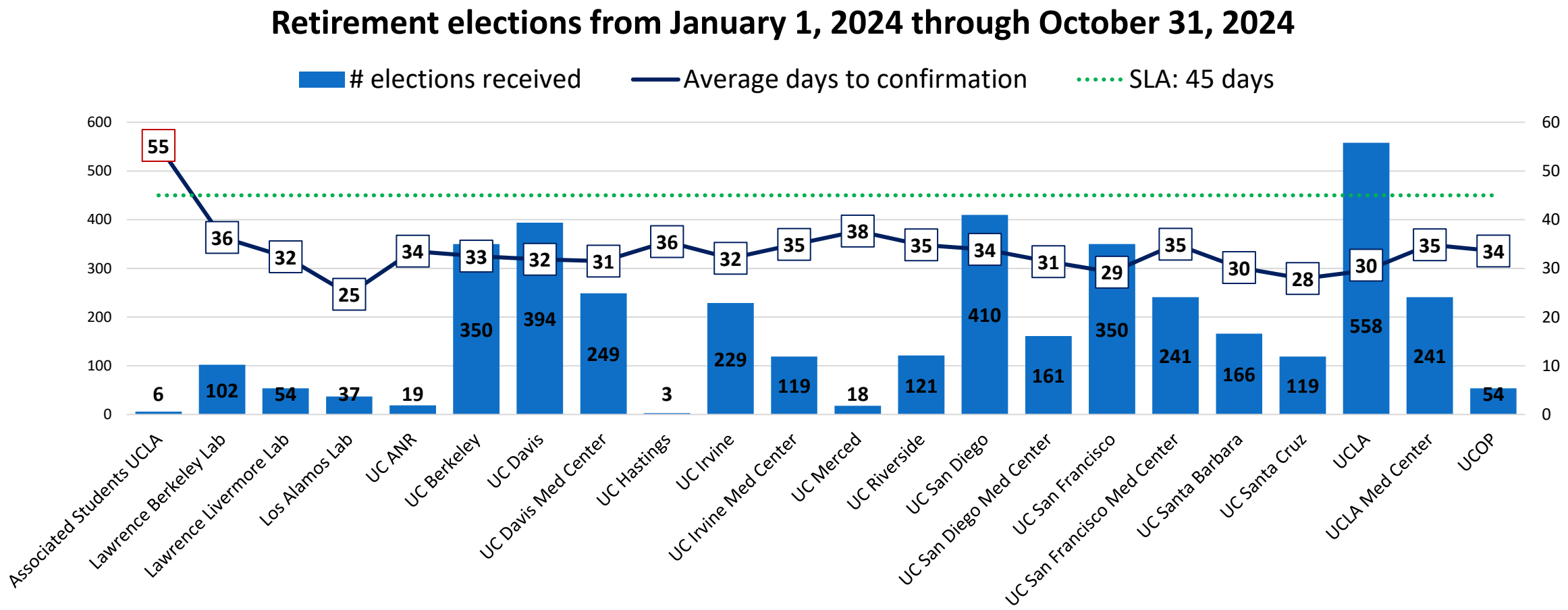
Staff



The data represents 2021, 2022, 2023 and 2024 calendar years

Performance results are reflected in business days and as of October 31, 2024

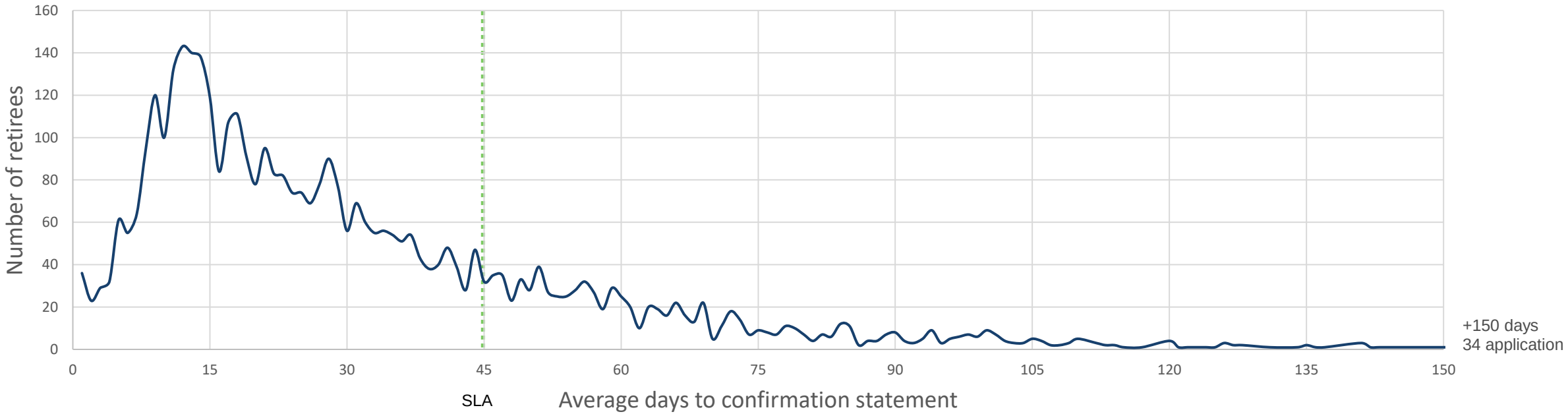
Retirement performance by campuses 2024



Performance results are reflected in business days and as of October 31, 2024

2024 Retirement elections

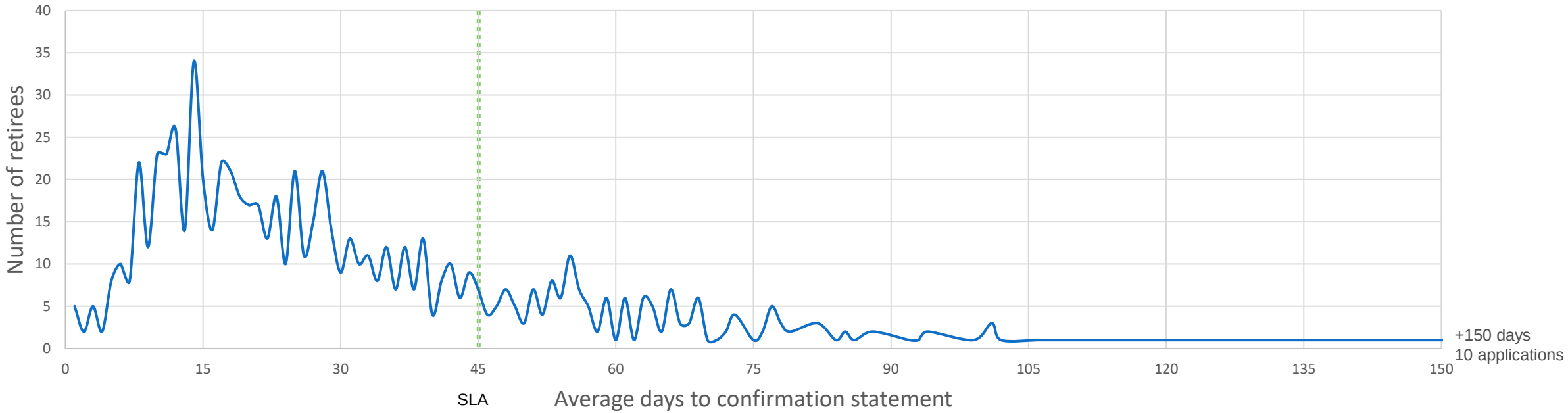
- 78% retirement applications processed are within the SLA of 45 days.
  - The remaining 22% were processed within 75 days.
- Assuming common pattern is a 90:10 distribution of difficulty:
  - 90% - The current maximum amount of time to process an application without exceptional complications is 65 days.
  - 10% - As of October 31st, applications are processed in an average of 101 days.



Performance results are reflected in business days and as of October 31, 2024

2024 Retirement elections: Academics and Faculty

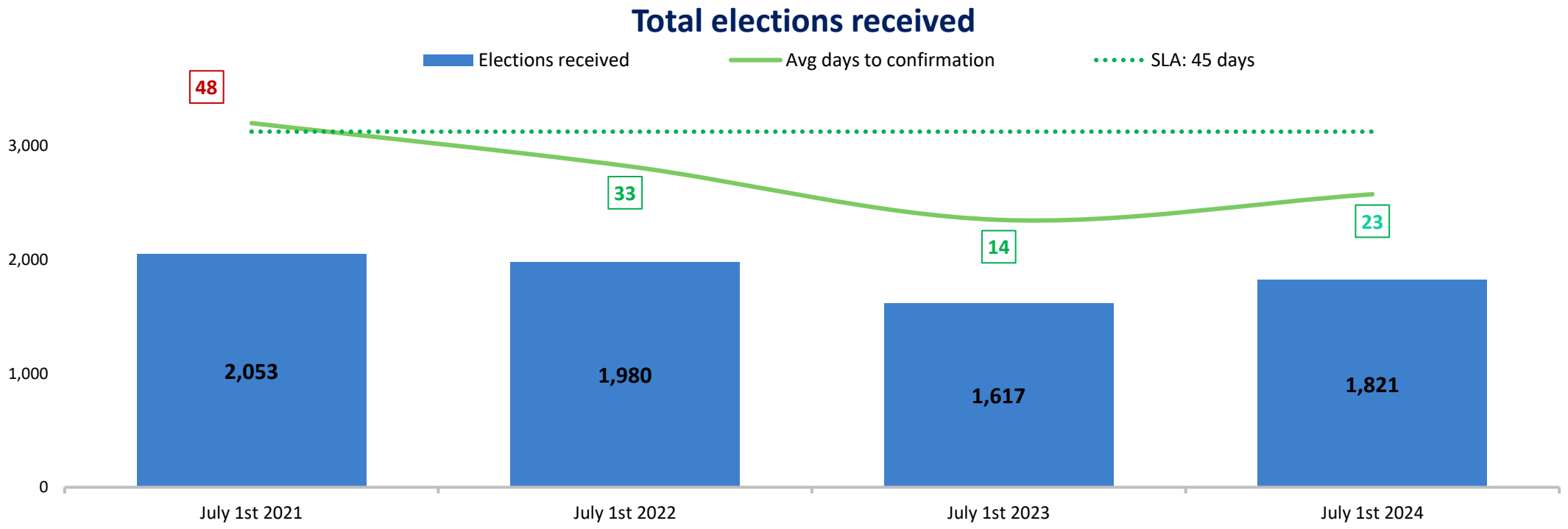
- 77% Academics and Faculty applications processed are within the SLA of 45 days.
  - The remaining 23% were processed within 73 days.
- Assuming common pattern is a 90:10 distribution of difficulty:
  - 90% - The current maximum amount of time to process an application without exceptional complications is 66 days.
  - 10% - As of October 31st, applications are processed in an average of 97 days.



Performance results are reflected in business days and as of October 31, 2024

July 1st peak season performance

- On average, we continue to deliver confirmation statements below our service level agreement
- **Increased** average by **9 business days** from 2023, however **22 business days below SLA**
- Developing training for Calculations team members



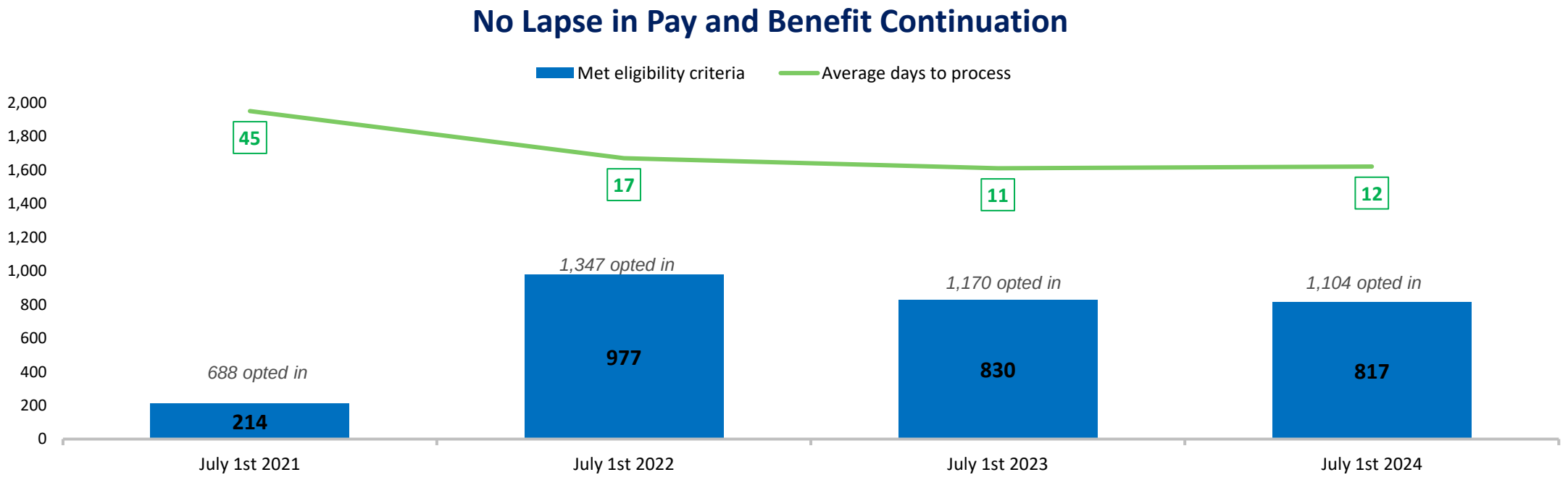
UNIVERSITY OF CALIFORNIA
Systemwide Human Resources

The data represents 2021, 2022, 2023 and 2024 calendar years

Performance results are reflected in business days and as of October 31, 2024

No Lapse in Pay and Benefit Continuation

- Program continues to reflect strong interest from prospective retirees (Opt-in: April 1 through May 13)
- Over 60% of July 1st prospective retirees expressed an interest and, of those, 74% met eligibility requirements
- Currently reviewing opportunities to expand eligibility criteria



The data represents 2021, 2022, 2023 and 2024 calendar years

Performance results are reflected in business days and as of October 31, 2024

RASC Portal – The Journey

May 30, 2023

RASC Portal conceptualized, Stakeholder Discovery, Journey maps, RASC Brand exploration started

July 30, 2023

Brand assets delivered, Wireframes, Visual comps and Design System started

August 30, 2023

ADA Compliance met, Calendly Scheduling system, QuestionPro survey tool integrated

145,513 Total Visits

75,853 Unique Views

January 2, 2024

Portal launched, RASC Counseling Service Launched, Announced on UCnet, Social media, Roadshows organized, Training vendor engaged

July 30, 2024

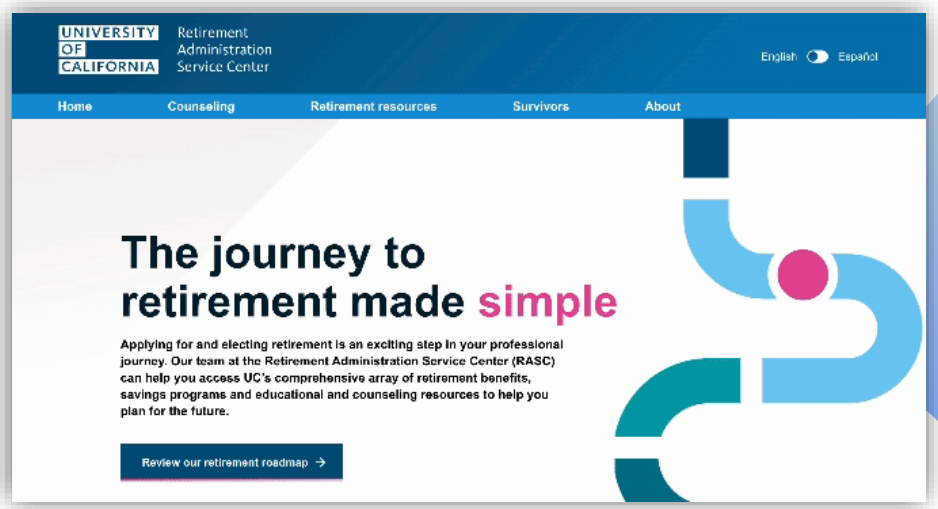
Redesigned headers, Updated Brand assets, New pages for Retiree Health including health benefits, Survivor Support, and Counselors

January 1, 2025

Multi-lingual Portal launch (Spanish), Updated content, Updated videos

Results as of October 31 , 2024

RASC Portal – Upcoming Changes!



Entire portal is getting a Spanish translation

Thank you

Data sources - Appendix

- *Slide #4-6 - Incoming Calls: Data provided by TalkDesk detailing the volume of incoming calls from January 2024 - September 2024. File received from the Call Center Manager*
  - *Data received: November 1, 2024*

- *Slide #7 - Secure Messaging Data: Data provided by* Redwood *detailing metrics on secure messages processed from January 2024 - September 2024. File received from the Secured Messages Team*
  - *Data received: November 1, 2024*

- *Slide #10-16 - Daily Retirement Processing, July 1st Peak Season, & NLIP : Redwood BIS.*
  - *Date received: November 13, 2024*

- *Slide #8, 9, and 17 - Retirement Counseling Portal: Retirement Counseling appointments statistics from Calendly provided by Deloitte Digital.*
  - *Date received: November 15, 2024*