RASC Performance Update

Retirement Administration Service Center Update

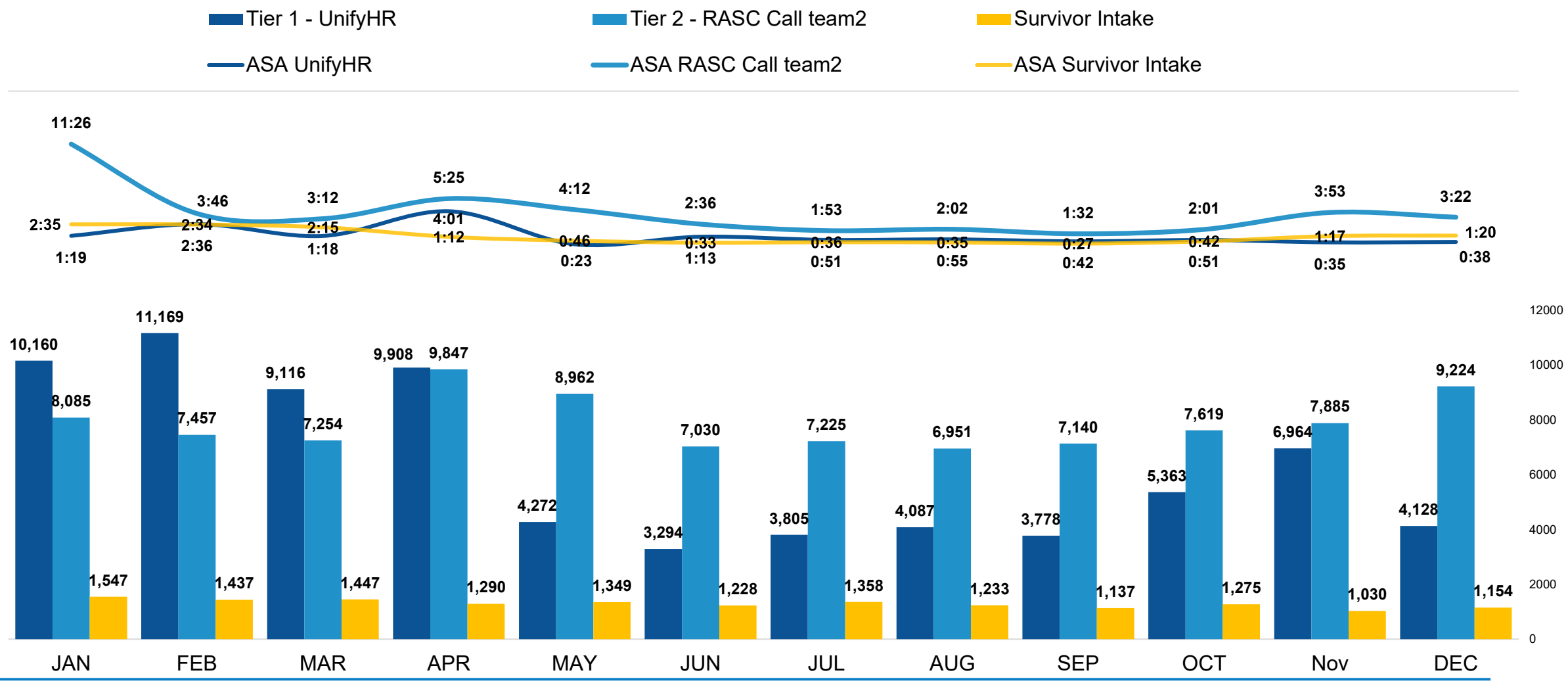
UCRS Advisory Board

February 28, 2025

UNIVERSITY OF CALIFORNIA

Systemwide Human Resources

Steady incoming call performance with seasonal uptick in speed of answer for Nov and Dec



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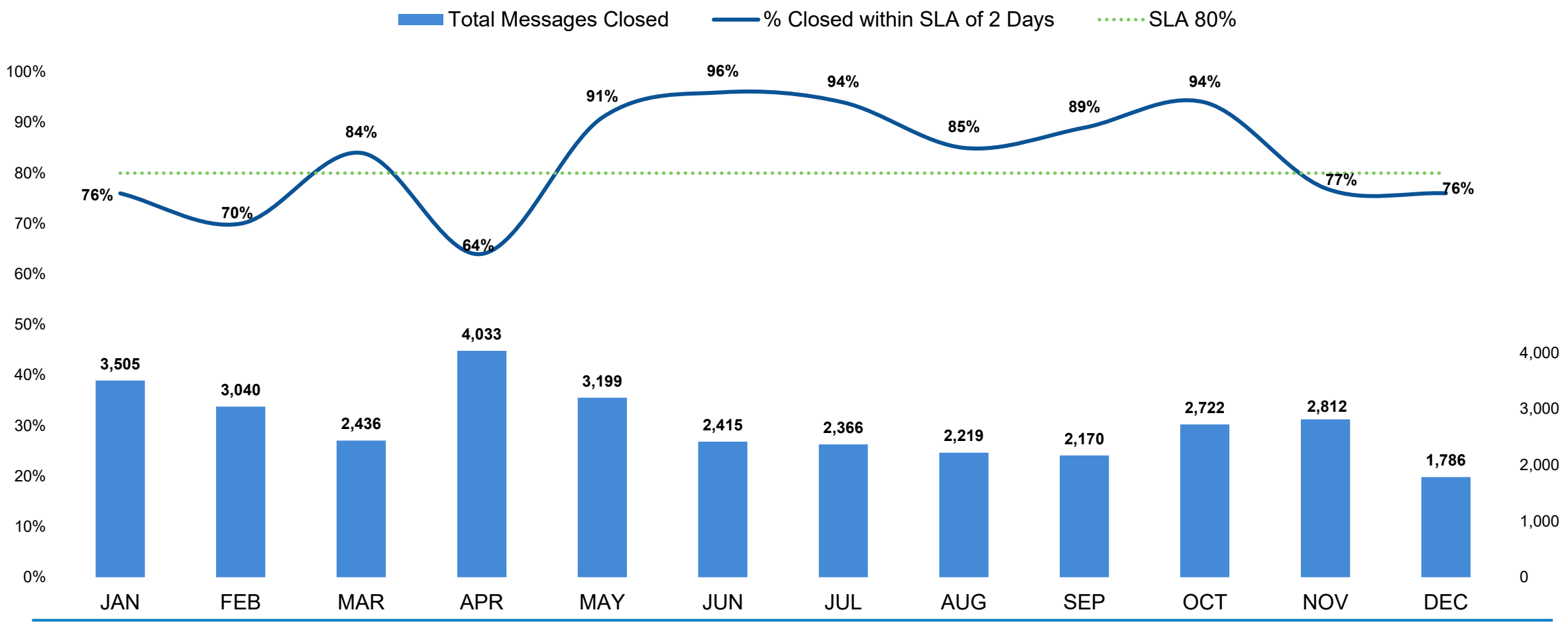
Systemwide Human Resources

The data represents 2024 calendar year. Performance results are reflected in business days.

Secure message performing near or above the resolution SLA



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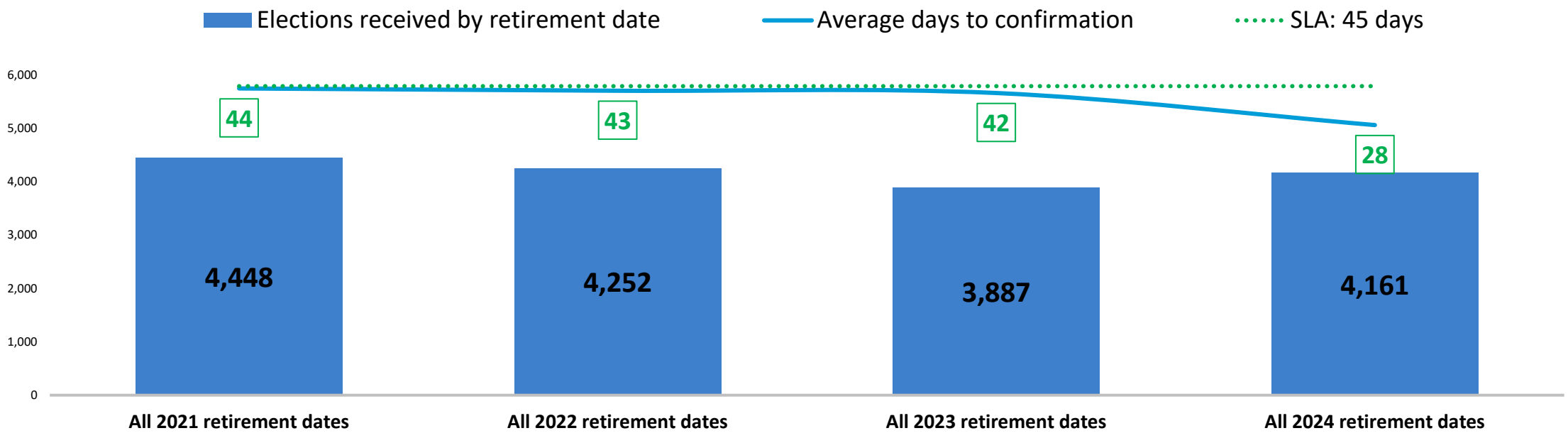
The data represents 2024 calendar year. Performance results are reflected in business days. Metrics restated to only include UCRAYS cases resolved by the secure messages team.

Retirement processing time improved by 14 days year over year

Average retirement now takes 28 business days, 17 days better than the Service Level Agreement (SLA)



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

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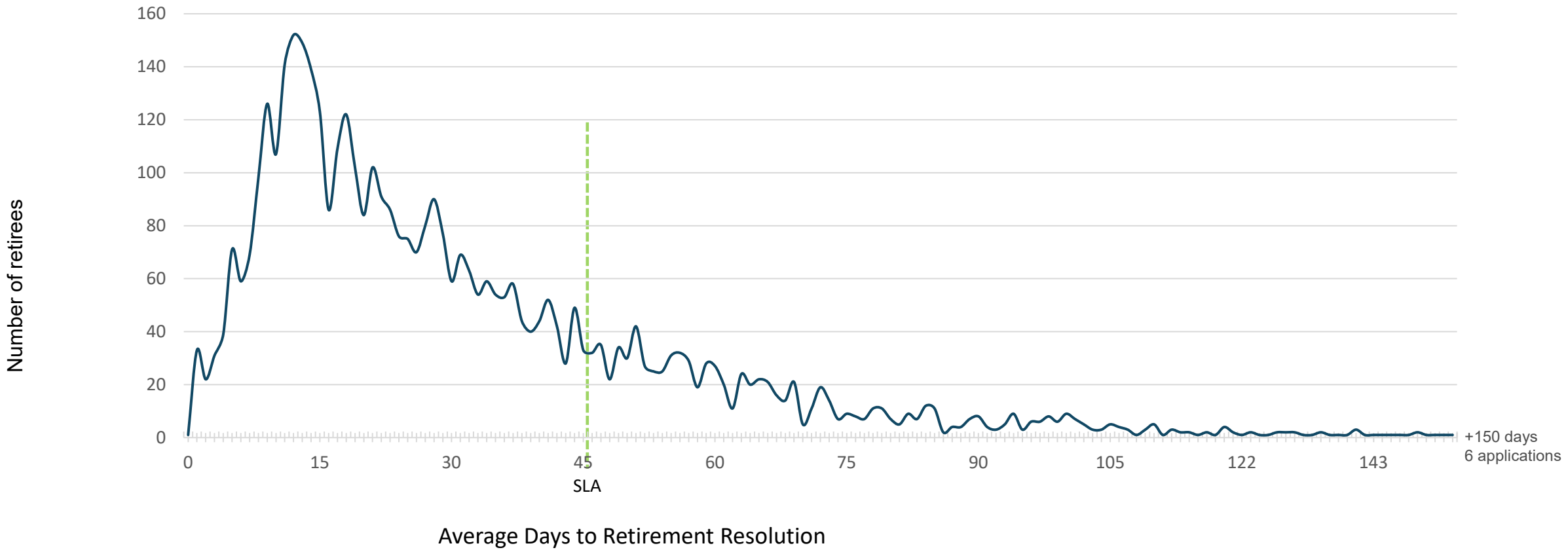
The data represents 2024 calendar year. Performance results are reflected in business days. Metrics restated to include recalculations.

78% of retirements processed within 45 day SLA

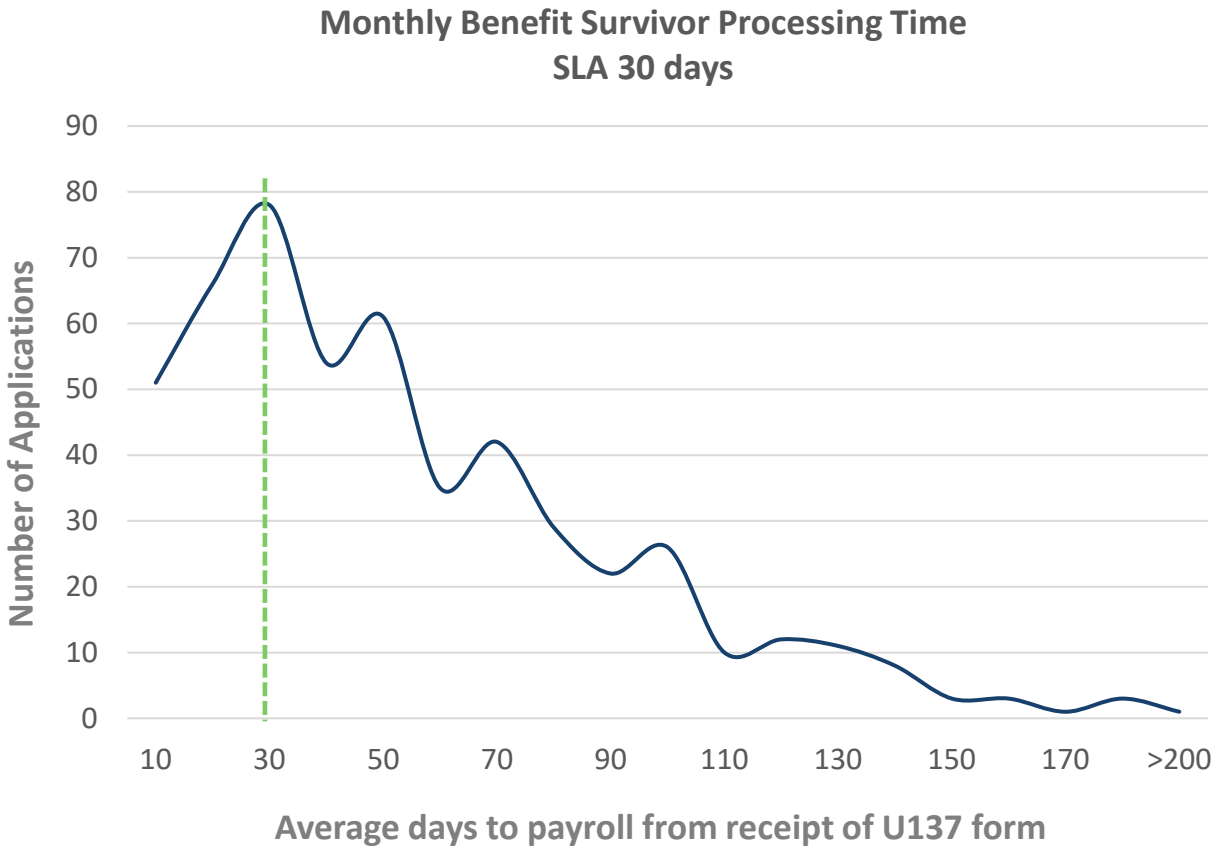
- Remaining 22% were processed within an average of 101 days
- Opportunity exists to increase use of "streamlined" retirement processing



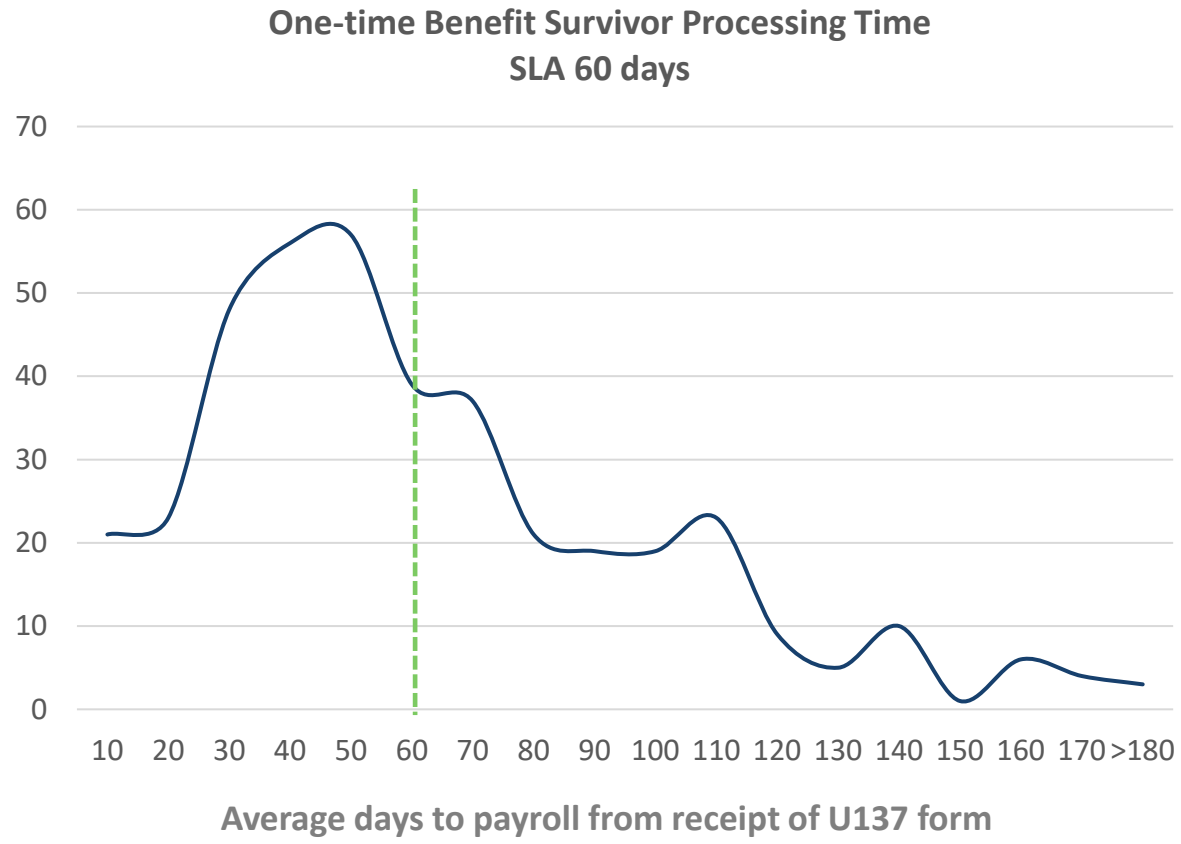
The data represents 2024 calendar year. Performance results are reflected in business days.

Improving Survivor Processing time is a critical focus for 2025

- 31% of applications received in 2024, were processed within the 30 days SLA
- Complex cases are averaging 72 days to complete



- 61% of applications were processed within the 60 days SLA indicating strong processing efficiency
- Complex cases are averaging 120 days to complete



The data represents 2024 calendar year. Performance results are reflected in business days.

Retirement Counseling – meet the counselors

Kevin Kennedy
Retirement Counseling Manager

Brandon Bastunas
Retirement Counselor

Edison Noboa
Retirement Counselor

Nina Qiu
Retirement Counselor

Donovan Malone
Retirement Counselor

- **6,315** RASC Counseling Appointments Scheduled
- **5,278** Counseling Appointments Completed
- **110** language translations

Edward Brown
Retirement Counselor

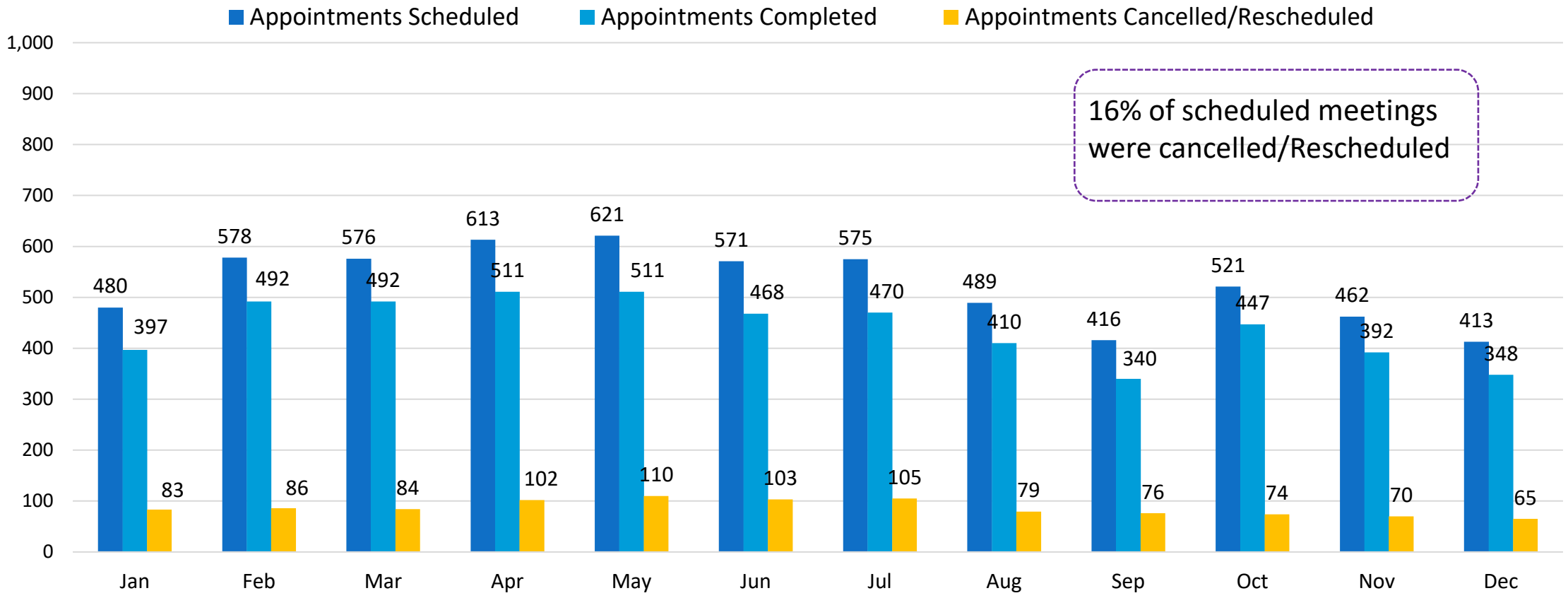
Clarissa Dimacali
Retirement Counselor

Amos Holts Jr.
Retirement Counselor

Devin MacKie
Retirement Counselor

The data represents 2024 calendar year. Performance results are reflected in business days.

Retirement Counseling appointments peak in lead up to July 1



The data represents 2024 calendar year. Performance results are reflected in business days.

RASC is taking proactive actions to manage peak demand for Retirement Counseling appointments

- Weekly virtual "Retirement 101" live webinars to prepare new and mid-career members for retirement
  - Starts mid-March and sets foundation for long-term retirement planning
- Enhancing resources for members who are ready to retire
  - Pre-recorded "How to retire July 1" informational video
  - Pre-recorded walk-throughs of the complete retirement process
  - Comprehensive retirement process maps with step and step instructions
- Partnering with Fidelity to do outreach to Spanish speaking members

RASC Spanish Portal is Live!

Videos
RASC videos are now in Spanish

Logo
RASC logo is now in Spanish

Calendly
Scheduling Retirement Counseling Appointments has been translated to Spanish

English Portal: **157,978** Total Visits
83,067 Unique Views

The data represents 2024 calendar year. Performance results are reflected in business days.

WE DID IT

SUPPORT

BEST-IN-CLASS

GROWTH

PENSION ADMINISTRATION

BENCHMARKING

THANK YOU

ONE RASC

PERFORMANCE

CUSTOMER SERVICE

MILESTONE

LEADERSHIP

TOGETHER WE CAN

COLLABORATION

ACHIEVEMENT

INNOVATION

JOURNEY

SUCCESS

HOPE

PRODUCTIVITY

Thank you

Data sources - Appendix

- *Incoming Calls: Data provided by TalkDesk detailing the volume of incoming calls from January 2024 – December 2024.*
  - *Data received: January 6, 2025*

- *Secure Messaging Data: Data provided by* Redwood *detailing metrics on secure messages processed from January 2024 – December 2024. File received from the Secured Messages Team*
  - *Data received: February 6, 2025*

- *Retirement Counseling Portal: Retirement Counseling appointments statistics from Calendly provided by Deloitte Digital.*
  - *Date received: January 6, 2025*

Data sources - Appendix

Slide #7 – Survivor Processing: Redwood BIS.

- *Data: 2024 Calendar year*
- *Date received: January 6th, 2025*

Slide #8,9,10 – Retirement Counseling Portal: Retirement Counseling appointments statistics from Calendly provided by Retirement Counseling Manager.

- *Date received: January 28, 2025*

Slide #11 – RASC Portal statistics from Deloitte.

- *Date received: January 28, 2025*