UNIVERSITY OF CALIFORNIA Systemwide Human Resources

RASC Quick Facts

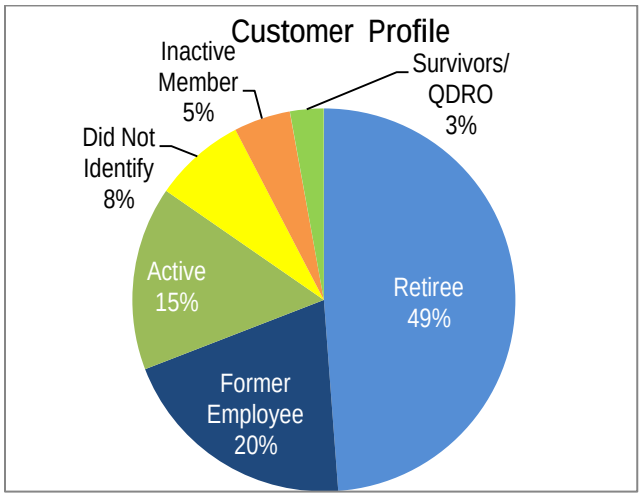
Fiscal Year 2015/16

	Career Budget	Career Filled	Career Vacant	% Career Vacancy	TOPS Filled
RASC Staffing	84	83	1	1%	3

CUSTOMER CARE

	Fiscal Year 2015/16	Fiscal Year 2014/15	% Chg from Prior Year
# Calls Answered	110,123	112,696	-2%
# Correspondence/Other	21,202	20,577	3%
Total Contacts	131,325	133,273	-1%

	Actual	Goal	% of Goal
Service Level (% Calls Answered in 90 Seconds)*	82%	80% or more	103%
Abandonment Rate	5%	5% or less	100%
Average Correspondence Turn Time (Calendar Days)	7	7 or less	100%
% of Customers Satisfied or Better with their Experience	86%	80% or more	108%



Top 4 Reasons Customers Contact the RASC

Category	Description	% of Total
UCRP	Retirement Benefits Counseling & Estimates, Address Changes, Benefit Income Statements	57%
Health & Welfare	Retiree Medical Plans, Medicare Enrollment	16%
AYS	At Your Service Online Password Reset & Inquiries	14%
Financial	Direct Deposits, Tax Withholding, Lost/Missing Checks	7%

FULFILLMENT OPERATIONS

	Actual	Goal	% of Goal
Retirement Election Processing			
% Closed within 45 Calendar Days*	83%	82% or more	101%

Retirement Election Activity	Fiscal Year 2015/16	Fiscal Year 2014/15	% Chg from Prior Year
# of Monthly Retirement Income Elections	3,990	3,949	1%
# of Lump Sum Cashouts (LSC)	1,077	1,395	-23%
Total # of Retirement Elections	5,067	5,344	-5%

UCRP Benefit Payments	Fiscal Year 2015/16	Fiscal Year 2014/15	% Chg from Prior Year
# of UCRP Benefit Recipients	70,077	67,321	4%
$ Amount of UCRP Benefits Paid (in billions, excludes LSC)	$2.7	$2.5	8%
$ Amount of Lump Sum Cashouts (in millions)	$276	$288	-4%
Total Amount of UCRP Benefits Paid (in billions)	$3.0	$2.8	7%

* Adjusted to exclude periods with significant systems downtime, including a telephony conversion.

Retirement Administration Service Center (RASC)
As of 6/30/16

Highlights

- **Retirement Counseling**
  - Performed 70% of systemwide active retirement counseling and document preparation services (2,321 of 3,316 actives).
  - Partnered with UCLA Medical Center to provide UCRP-related retirement counseling services beginning in December 2016. This partnership will increase active retirements processed by the RASC to 75%.
  - Providing counseling for all locations, except three campuses (UCLA, UCSF and UCSD).

- **Delivered Preparing for Retirement Presentations**
  - 18 onsite, in-person presentations to campuses and medical centers, reaching 1,400 employees.
  - 24 regularly scheduled webinars hosted systemwide.
    96% of respondents were satisfied or better with the presentation.

- **Improved Customer Satisfaction**
  - 86% satisfied or better, up from 80% in FY 2014-15.
  - 23 internal training sessions delivered.
  - Partnered with Faculty Welfare to enhance and clarify retiree health Medicare communications.

Current Initiatives

- **Open Enrollment**
  - 6,500 contacts in the first 10 days of Open Enrollment, a 35% increase above last year's volume.

- **Service Culture Initiative**
  - Recently engaged with ICMI (International Customer Management Institute) to "mature" the organization and develop best practices. We project an engagement of up to 18 months beginning in Q4 2016 which will include a site certification as well as individual professional certifications. ICMI will assist the RASC to strengthen its culture of service and optimizing efficiencies at every level within the center, while aligning with the RASC's development of a learning curriculum and quality assurance program.

- **UCRP Benefit Eligibility Audit**
  - UC conducts periodic audits and uses other methods to ensure that University-provided benefits are paid to those who are eligible to receive them. Beginning November 2016, UC will send selected retirees a packet with instructions on how to confirm eligibility. Secova Inc. (vendor) will administer the review.