UNIVERSITY OF CALIFORNIA Systemwide Human Resources

RASC Quick Facts

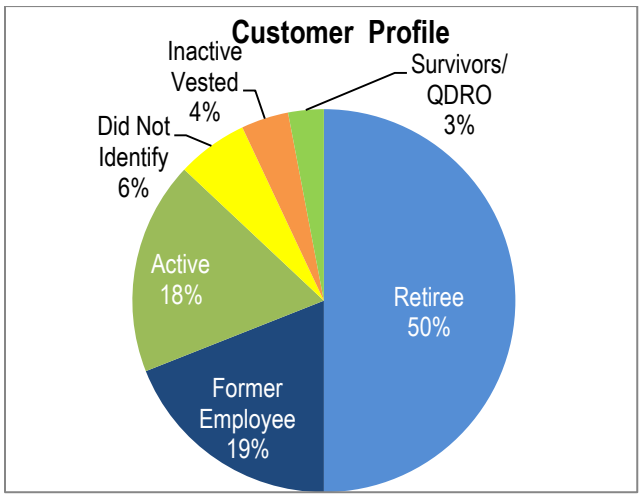
Calendar Year 2016

	Career Budget	Career Filled	Career Vacant	% Career Vacancy	TOPS Filled
RASC Staffing	84	82	2	2%	8

CUSTOMER CARE

	Calendar Year 2016	Calendar Year 2015	% Chg from Prior Year
# Calls Answered	115,693	109,901	5%
# Correspondence/Other	22,250	20,123	11%
Total Contacts	137,943	130,024	6%

	Actual	Goal	% of Goal
Service Level (% Calls Answered in 90 Seconds)*	83%	80% or more	104%
Abandonment Rate	4%	5% or less	101%
Average Correspondence Turn Time (Calendar Days)	6	7 or less	117%
% of Customers Satisfied or Better with their Experience	89%	80% or more	111%



Top 4 Reasons Customers Contact the RASC

Category	Description	% of Total
UCRP	Retirement Benefits Counseling & Estimates, Address Changes, Benefit Income Statements	56%
Health & Welfare	Retiree Medical Plans, Medicare Enrollment	18%
AYS	At Your Service Online Password Reset & Inquiries	13%
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.

Retirement Administration Service Center (RASC)
As of 12/31/2016

RASC Quick Facts

Calendar Year 2016

Highlights

- **Expanded Retirement Counseling**
  - Partnered with UCLA Medical Center to provide UCRP-related retirement counseling services (approx. 225 annual retirements).

- **Delivered *Preparing for Retirement* Presentations**
  - 34 onsite sessions attended by 2,500 employees at campuses and medical centers.
  - 24 regularly scheduled webinars hosted systemwide.
  - 96% of respondents were satisfied or better with the presentation.

- **Improved Customer Satisfaction**
  - 89% satisfied or better, up from 84% in 2015.
  - 19 internal training sessions delivered.
  - Aligned Customer Satisfaction survey to CalPERS, using a 5-point scale, in the spirit of more consistent benchmarking.

Current Initiatives

- **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. Initiated mailings have resulted in a 90% completion rate, with continued outreach to those who have not yet responded. Secova Inc. (vendor) has been administering the review and supporting members throughout the process.

- **Service Culture Initiative**
  - Initiated an 18-month engagement in Q4 with ICMI (International Customer Management Institute) to “mature” the organization and develop best practices. ICMI will assist the RASC in strengthening 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.