UNIVERSITY OF CALIFORNIA

Systemwide Human Resources

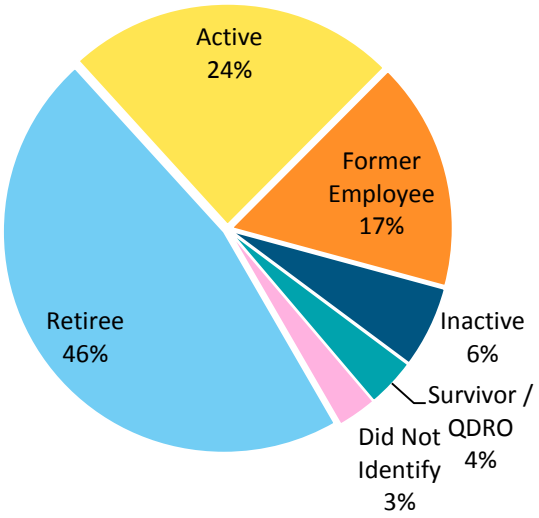
RASC Quick Facts

Q1 2017

Productivity Statistics	**Q1 2017**	**Q1 2016**	**% Change**
Calls Answered	31,558	31,982	- 1%
Correspondence Answered	6,450	6,105	+ 6%
Retirement Elections Processed	1,246	1,530	- 19%
Survivor Benefits Processed	535	463	+ 16%

Key Performance Indicators (KPIs)	**Actual**	**Goal**	**% of Goal**
Average Correspondence Turn Time (days)	7	7 or less	100%
% of Customers Satisfied or Better	89%	80% or more	111%
% Ret Elections Closed within 45 Days *	82%	82% or more	100%

Customer Profile



Top Reasons Customers Contact the RASC

Category	**Description**	**% of Total**
UCRP	Retirement Counseling & Inquiries	52%
AYSO, Financial, & Other	Password Reset, Direct Deposit, Tax With-holding, etc.	27%
Retiree Insurance	Retiree Medical Plans & Medicare Enrollment	21%

Retirement Election Activity	**FY 2015-16**	**FY 2014-15**	**% Change**
# 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	**FY 2015-16**	**FY 2014-15**	**% Change**
# of UCRP Benefit Recipients	70,077	67,321	+ 4%
% of Benefits Paid by Direct Deposit	97%	97%	0%
Amount of UCRP Benefits Paid (excludes LSC) ***	$2.7	$2.5	+ 8%
Amount of Lump Sum Cashouts **	$276	$288	- 4%
Total Amount of UCRP Benefits Paid ***	**$3.0**	**$2.8**	**+ 7%**

* 12-month rolling average in calendar days

** in millions

*** in billions

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Highlights

- **July Retirement Season**
  - Prepared Personal Retirement Profiles for 2,100 members during July peak season (April 1 through June month to date),
  - Retirement elections are up 13% from last year at this time.

- **Delivered *Preparing for Retirement* Presentations – Spring 2017**
  - 23 onsite, in-person presentations to campuses and medical centers, reaching 1,800 employees, approximately 400 more than the same time last year.
  - 6 regularly scheduled webinars (two per month) hosted systemwide.
  - 95% of respondents were satisfied or better with the presentations.

- **Delivered RASC Training**
  - Presented team member training on the following topics: 2016 Retirement Choice, Preparing for Retirement, All About COLAs, Communicating Through Email, Retiree Health, Medicare & Medicare Age-In, and RASC Overview, RASC systems training for new hires.

Current Initiatives

- **Service Culture Initiative**
  - Engaged with ICMI (International Customer Management Institute) to "mature" the organization and develop best practices. ICMI initiated the assessment phase with an onsite visit. ICMI is scheduling training for all levels of the RASC. ICMI will assist the RASC to strengthen its culture of service and optimize efficiencies at every level within the center, while aligning with the RASC's development of a learning curriculum and quality assurance program.

- **UCRP Pension Eligibility Audit**
  - Partnered with Secova to conduct a pilot to identify deceased pension benefit recipients. An announcement letter and affidavit were sent to the identified population of 2,210 in late November 2016. Reminder notices (US mail, outbound calls, and emails) were distributed in December and January. Secova's call center received 900 customer calls and conducted 1,700 outbound calls. 92% of pension benefit recipients responded, no response was received from 6%, and 2% were identified as deceased. There were 136 non responders, 43 of whom reside outside of the United States. The RASC is continuing to receive completed affidavits and is performing additional research and outreach to contact the remaining population of non-responders.