UNIVERSITY OF CALIFORNIA Systemwide Human Resources

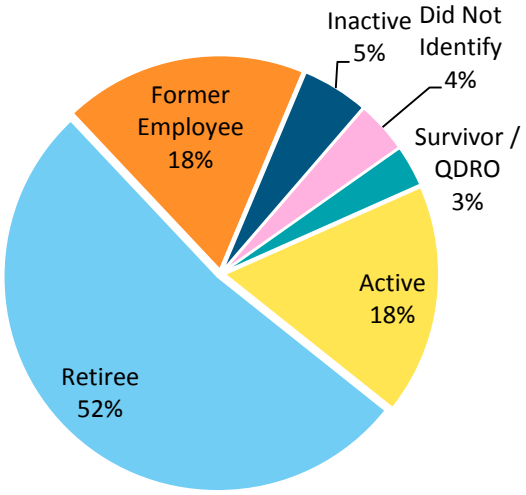
RASC Quick Facts

Fiscal Year 2016/17

Productivity Statistics	FY 2016-17	FY 2015-16	% Change
Calls Answered	117,781	110,123	+ 7%
Correspondence Answered	22,718	21,202	+ 7%
Retirement Elections Processed	4,880	4,908	- 1%
Survivor Benefits Processed	2,096	N/A	N/A

Key Performance Indicators (KPIs)	FY 2016-17	FY 2015-16	% Change
Average Correspondence Turn Time (days)	6	7	- 14%
% of Customers Satisfied or Better [1]	89%	86%	+ 3%
% Ret Elections Closed within 45 Days [2]	84%	83%	+ 1%

Customer Profile



Top Reasons Customers Contact the RASC

Category	Description	% of Total
UCRP	Retirement Counseling & Inquiries	56%
AYSO, Financial, & Other	Password Reset, Direct Deposit, Tax With-holding, etc.	24%
Retiree Insurance	Retiree Medical Plans & Medicare Enrollment	20%

Retirement Election Activity	FY 2016-17	FY 2015-16	% Change
# of Monthly Retirement Income Elections	3,915	3,838	+ 2%
# of Lump Sum Cashouts (LSC)	965	1,070	- 10%
Total # of Retirement Elections	**4,880**	**4,908**	**- 1%**

UCRP Benefit Payments	FY 2016-17	FY 2015-16	% Change
# of UCRP Benefit Recipients	72,995	70,077	+ 4%
% of Benefits Paid by Direct Deposit	97%	97%	0%
Amount of UCRP Benefits Paid (excludes LSC) [4]	$3.0	$2.7	+ 7%
Amount of Lump Sum Cashouts [3]	$292	$286	+ 2%
Total Amount of UCRP Benefits Paid [4]	**$3.3**	**$3.1**	**+ 7%**

1 Based only on data from 1/1/2017 and later, due to a new rating system implemented January 2017

2 12-month rolling average in calendar days

3 in millions

4 in billions

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Fiscal Year 2016/17

Highlights

- **July Retirement Season**
  - 74% of active retirements were supported by the RASC for retirement counseling and document preparation services.
  - Processsed 2,200 retirement elections, similar to July 2016.

- **Delivered *Preparing for Retirement* Presentations**
  - 33 onsite, in-person presentations to campuses and medical centers, reaching 2,385 employees. 14 presentations are scheduled for Spring 2017.
  - 6 regularly scheduled webinars (two per month) hosted systemwide.
  - 96% of respondents were satisfied or better with the presentations.

- **Delivered RASC Training**
  - Presented team member training on the following topics: Learning & Development at OP, Breaking Bad Communication Habits, Qualified Domestic Relations Orders, Redwood knowledge base, Missing Participants and Uncashed Checks, Social Security Basics, 2016 Retirement Choice Updates, and RASC Overview and systems training for new hires.

Current Initiatives

- **Service Culture Initiative**
  - ICMI (International Customer Management Institute) presented its site assessment findings to the management team. The RASC was recognized for strengths in resourcefulness, employee engagement, change readiness and tenacity. In addition, 100% of employees interviewed shared pride in the service they offer members.
  - The RASC is working with ICMI to develop a roadmap to site certification.
  - Training was delivered to staff, supervisors and managers
    - Managers and Supervisors attended leadership, coaching and essential contact center management skills training.
    - Staff received training in contact center fundamentals, quality and customer interactions.

- **Data Cleanup in Preparation for Redwood**
  - The RASC has updated thousands of records to prepare for quality data readiness in the new system. Both the Redwood data team and the RASC continue to review and update legacy data with the intent of gaining efficiencies with business processes once Redwood is live. Data integrity initiatives, such as the effort to update contingent annuitant and survivor information, should be complete at the end of 2017.