UNIVERSITY OF CALIFORNIA Systemwide Human Resources

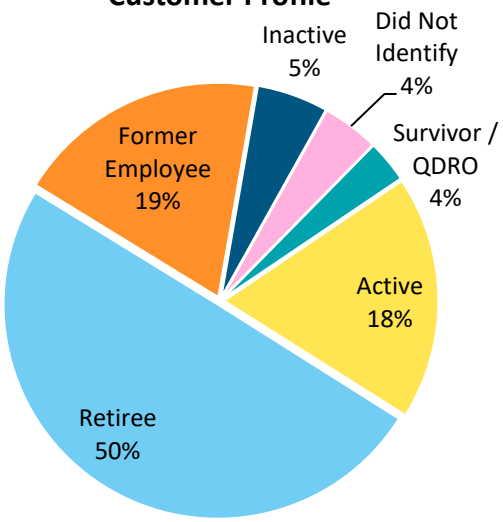
RASC Quick Facts

Calendar Year 2017

Productivity Statistics	**2017**	**2016**	**% Change**
Calls Answered	111,653	115,693	- 3%
Correspondence Answered	23,009	22,250	+ 3%
Retirement Elections Processed	5,217	5,188	0%
Survivor Benefits Processed	2,122	1,928	+ 10%

Key Performance Indicators (KPIs)	**2017**	**2016**	**% Change**
Average Correspondence Turn Time (days)	7	6	- 14%
% of Customers Satisfied or Better	89%	89%	0%
% Ret Elections Closed within 45 Days [1]	83%	84%	- 1%

Customer Profile



Top Reasons Customers Contact the RASC

Category	**Description**	**% of Total**
UCRP	Retirement Counseling & Inquiries	58%
AYSO, Financial, & Other	Password Reset, Direct Deposit, Tax With-holding, etc.	23%
Retiree Insurance	Retiree Medical Plans & Medicare Enrollment	19%

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) [3]	$3.0	$2.7	+ 7%
Amount of Lump Sum Cashouts [2]	$292	$276	+ 2%
Total Amount of UCRP Benefits Paid [3]	**$3.3**	**$3.1**	**+ 7%**

1 12-month rolling average in calendar days

2 in millions

3 in billions

Highlights

- **July 2017 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**
  - 36 onsite, in-person presentations to campuses and medical centers, reaching 2,400 faculty and staff in 2017
  - 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: Managing Difficult Customers, Customer Service, 2016 Retirement Choice Program, RASC Overview and Systems Training

Current Initiatives

- **Service Culture Initiative**
  - Implementing recommendations from the International Customer Management Institute (ICMI) which include enhanced quality monitoring and workforce management tools

- **Redwood Operational Readiness**
  - Launched volunteer efforts across the RASC to engage team members and prepare for the successful deployment of Redwood
  - Activity teams:
    - Data Integrity and Cleanup – managing the execution and cleanup of legacy data in preparation for the transition to Redwood
    - Knowtion – Identifying, creating and validating end-user process instructions and reference materials for the Redwood Knowledge Management tool
    - Toolkit reviews – Completing quality reviews of documentation about UC's new and future state processes (toolkits are foundational to the development of training materials)
    - eLearning Review – Reviewing and approving 30 eLearning courses, including quizzes, videos and simulations
    - Classroom Training – Supporting instructor-led training and eLearning courses, including logistical planning and certification verifications