UNIVERSITY OF CALIFORNIA Systemwide Human Resources

RASC Quick Facts

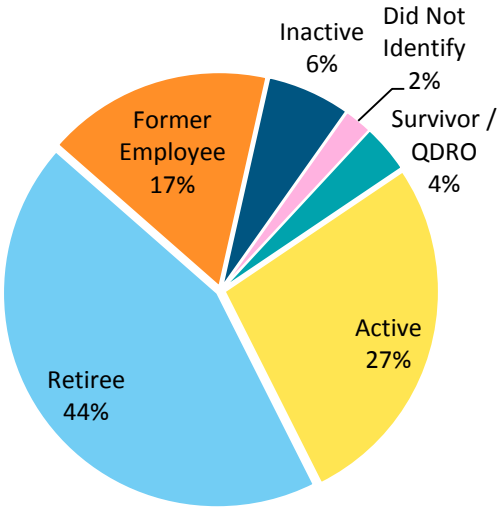
Q1 2018

Productivity Statistics	**Q1 2018**	**Q1 2017**	**% Change**
Calls Answered	29,914	31,558	- 5%
Correspondence Answered	5,854	6,450	- 9%
Retirement Elections Processed	1,030	1,246	- 17%
Survivor Benefits Processed	459	535	-14%

Key Performance Indicators (KPIs)

Customer Care	**Q1 2018**	**Q1 2017**	**% Change**
Average Correspondence Turn Time (days)	7	7	0%
% of Customers Satisfied or Better	91%	89%	+ 2%
Fulfillment Operations			
Average Retirement Election Processing Time (days) [1]	28	32	- 13%
% Ret Elections Closed within 45 Days [1]	86%	82%	+ 5%

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.	30%
Retiree Insurance	Retiree Medical Plans & Medicare Enrollment	14%

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

March 31, 2018

Highlights

- Delivered Preparing for Retirement Presentations
  - 17 onsite, in-person presentations to campuses and medical centers, reaching 1,900 faculty and staff during Q1
  - 5 regularly scheduled webinars (two per month) hosted systemwide
  - 94% of respondents were satisfied or better with the presentations

Current Initiatives

- Service Culture Initiative
  - In 2016, the RASC identified a need to take the center to the next level to improve both the customer experience and campus/location support.
  - The RASC selected International Customer Management Institute (ICMI) Certification Program which is a comprehensive management approach that employs a mix of specialized tools, cross-industry best practices, assessments and proven recommendations that deliver sustained contact center efficiency and effectiveness.
  - The RASC, in conjunction with ICMI, has developed a roadmap to site certification. The process is comprised of a formal customer management operations assessment, followed by an implementation and audit period which then prepares us for certification.
    - The formal assessment indicated the RASC meets 16 of 23 core criteria for contact center certification.
    - For the remaining 7 areas, ICMI recommended actions to simplify operations, enhance forecasting and planning tools, leverage technology enhancements, and implement enhanced quality controls.
    - Focused workgroups are in flight to achieve key milestones by the end of September 2018.
      - Training was delivered to all team members, supervisors and managers.
        - Managers and Supervisors attended leadership, coaching and essential contact center management skills training.
        - Team members received training in contact center fundamentals, quality and customer interactions.
      - Quality Assurance reviews of front-facing customer interactions have been enhanced with a focus on accuracy and compliance.
      - Workforce Management Tools piloted to achieve service levels and schedule adherence.
      - Enhanced training will support continuous learning in the RASC
    - ICMI will be here to perform the site audit in October 2018.
    - The RASC will be the first California governmental entity to achieve ICMI site certification.

March 31, 2018