UNIVERSITY OF CALIFORNIA

Systemwide Human Resources

RASC Quick Facts

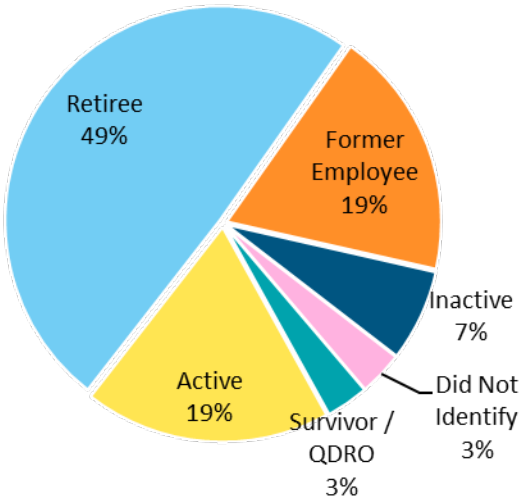
Fiscal Year 2017-18

Productivity Statistics	**FY 2017-18**	**FY 2016-17**	**% Change**
Calls Answered	108,994	117,781	- 7%
Correspondence Answered	22,635	22,718	0%
Retirement Elections Processed	5,087	4,880	+4%
Survivor Benefits Processed	1,949	2,096	- 7%

Key Performance Indicators (KPIs)

Customer Care	**FY 2017-18**	**FY 2016-17**	**% Change**
Average Correspondence Turn Time (days)	7	6	+ 17%
% of Customers Satisfied or Better	90%	89%	+ 1%
Fulfillment Operations			
Average Retirement Election Processing Time (days) [1]	30	30	0%
% Ret Elections Closed within 45 Days [1]	82%	84%	- 2%

Customer Profile



Top Reasons Customers Contact the RASC

Category	**Description**	**% of Total**
UCRP	Retirement Counseling & Inquiries	60%
AYSO, Financial, & Other	Password Reset, Direct Deposit, Tax With-holding, etc.	23%
Retiree Insurance	Retiree Medical Plans & Medicare Enrollment	17%

Retirement Election Activity	**FY 2017-18**	**FY 2016-17**	**% Change**
# of Monthly Retirement Income Elections	4,056	3,915	+4%
# of Lump Sum Cashouts (LSC)	1,031	965	+7%
Total # of Retirement Elections	**5,087**	**4,880**	**+4%**

UCRP Benefit Payments	**FY 2017-18**	**FY 2016-17**	**% Change**
# of UCRP Benefit Recipients	75,924	72,995	+4%
% of Benefits Paid by Direct Deposit	97%	97%	0%
Amount of UCRP Benefits Paid (excludes LSC) [3]	$3.3	$3.0	+10%
Amount of Lump Sum Cashouts [2]	$337	$292	+15%
Total Amount of UCRP Benefits Paid [3]	**$3.6**	**$3.3**	**+10%**

1 12-month rolling average in calendar days

2 in millions

3 in billions

RASC Quick Facts

Fiscal Year 2017-18

Highlights:

- Delivered Preparing for Retirement Presentations
  - Reached 2,200 faculty and staff members through onsite, in-person presentations to campuses and medical centers
  - Reached 500 faculty and staff members through systemwide webinars, scheduled monthly
  - 94% of respondents were satisfied or better with the presentations
  - Includes participation in four Pathway to Retirement seminars in coordination with Fidelity

- 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.
    - ICMI will be here in January 2019 to perform the final assessment for site certification.
    - The RASC will be the first California governmental entity to achieve ICMI site certification.

- Preparing for Redwood
  - Operational readiness teams focused on training and change management
    - January 7 – 11, 2019 – eLearning Kickodf and early exposure to Redwood
    - Mid January to Mid February – eLearning self-paced modules to be completed by all users
    - Mid to Late February – Classroom lab sessions to practice realistic customer scenarios