Retirement Administration Service Center (RASC)

UCRS Advisory Board Meeting

June 24, 2011

RASC Organization and Key Metrics

Joe Lewis
Director

Ellen Lorenz
Business Controls & Customer Service Director

- Implement and administer CRM
- Develop learning curriculum
- Lead Process Improvement initiatives
- Establish and produce Performance Metrics
- Coordinate disaster recovery and business continuity planning

Michael Waldman
Customer Service Manager

- Deliver Customer Service via face to face, telephone, electronic & written correspondence
- Serve 54,000 Retirees, 32,000 former employees, & 189,000 active employees *
- Support Retirees, Employees & Benefits Offices
- Scan & index 850,000 pages of documents per year

Richard Townsend
Operational Compliance Manager

- Calculation & audit of all UCRP benefit calculations
- Ensure compliance with Plan & governmental regulations
- Process buyback & reciprocity requests;
- Specify, develop & implement Retirement Plan changes
- Administer Senior Management Supplemental Benefit Program

Robert Pettit
Retirement Operations Director

- Administer annual benefit payments of $1.7 billion to nearly 54,000 retirees, their dependents & surviving family members
- Process & audit retirement elections; review & approve UCRP disability applications
- Maintain $21 million in non-contributory accounts; process CAP distributions

Stephanie Rosh
Retiree Insurance Manager

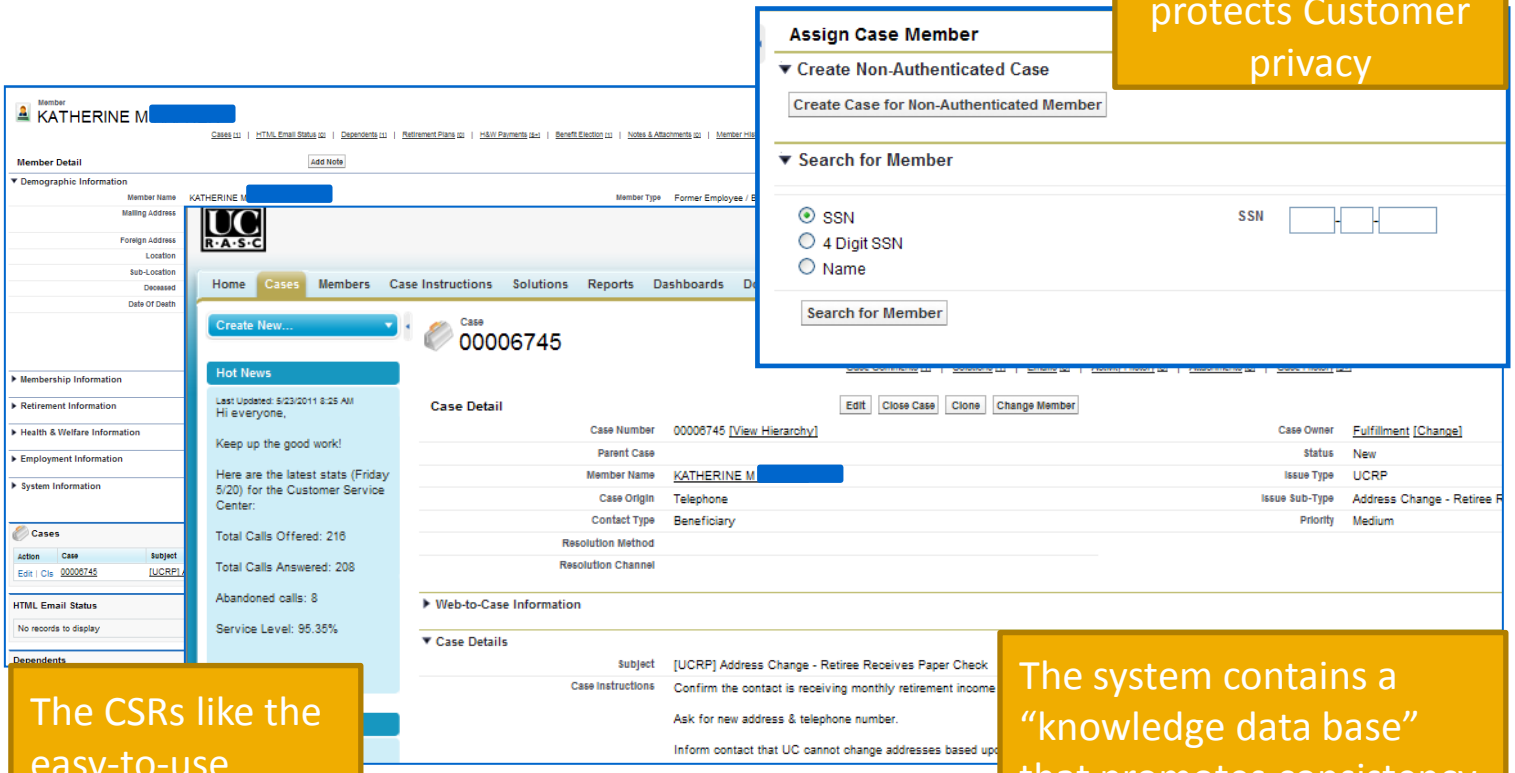
- Administer insurance services for retiree, survivor and disabled members
- Perform benefit & insurance payment-related functions in support of UC's medical, dental & legal plans
- Work closely with plan carriers to establish new and service existing member insurance accounts

* Retirement counseling for UC Berkeley; full service support for 1,500 Oakland-based OP employees

Customer Relationship Management Tool (CRM)

"Salesforce is the premier cloud computing product, and that's what we've implemented"

Authentication protects Customer privacy



The CSRs like the easy-to-use screens

The system contains a "knowledge data base" that promotes consistency of answers

CRM – Management Reporting

RASC Management uses data as the basis for decision-making to: Leverage resources to support current and expanded service offerings; Identify areas of opportunity for improvement; and Recognize, reward, and sustain high performance.

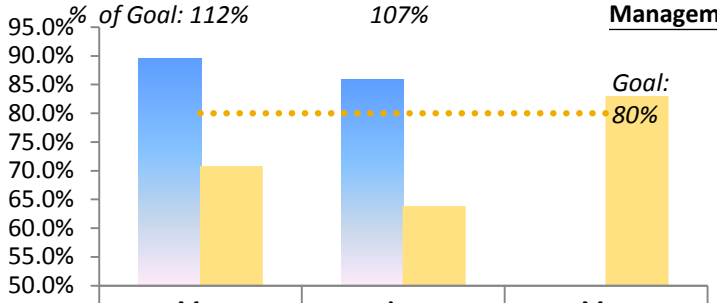
Customer Service Scorecard - Preliminary

March – May 2011

- Service level was surpassed for both March and April, at an average of 110% of goal
- While 2% more calls were handled, the 5% reduction in Calls Offered is due to reducing the percent of abandoned calls by half
- Customer Service supervisors adjusted scheduling to ensure maximum support during peak call hours
- CRM launched successfully on May 9, while continuing to meet service level commitments

	Mar 2011	Apr 2011	May 2011	Prior Year 3 Mo Avg	Curr Year 3 Mo Avg	% Chg	Goal	% of Goal
Inbound Calls								
# Offered	5,347	5,711		5,790	5,529	-5%		
# Answered	5,075	5,381		5,121	5,228	2%		
% Abandoned	4.2%	5.2%		9.5%	4.7%	-50%	< 10%	213%
Avg Wait Time (min)	0.41	0.54		1.58	0.48	-70%		
Avg Talk Time (min)	4.42	4.30		4.21	4.36	3%	<= 5.0	115%
Correspondence/ Email	1,001	1,067		1,137	1,034	-9%		
Records Management					*tbd*			

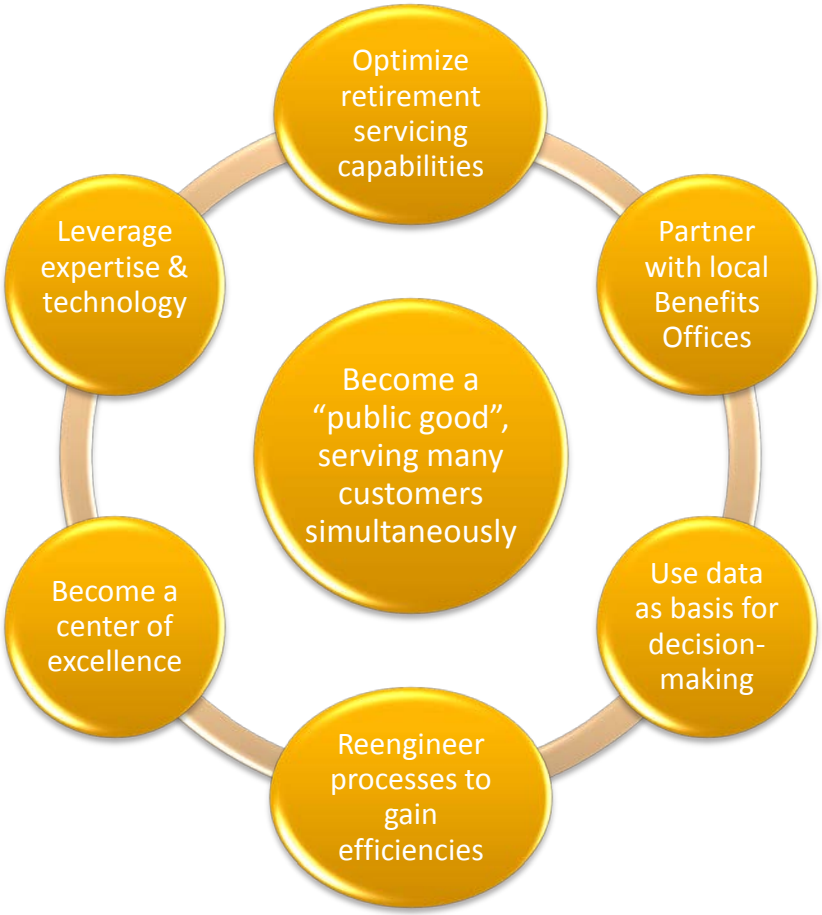
% of Calls Answered in 90 Seconds



	Mar	Apr	May
2011	89.5%	85.9%	
2010	70.8%	63.9%	83.0%
Goal	80.0%	80.0%	80.0%

Customer Service FTE	Mar 2011	Apr 2011	May 2011
Total FTE (Approved)	**23**	**23**	**23**
Filled	22	23	23
Vacant	1	0	0
Cost per Call		*tbd*	
Cost per Correspondence		*tbd*	

RASC Vision for the Future



"The RASC will play a major role in actualizing the Office of the President's mission to support the Campuses, Medical Centers, and the Lawrence Berkeley National Laboratory"
– Director Lewis, Spring 2011