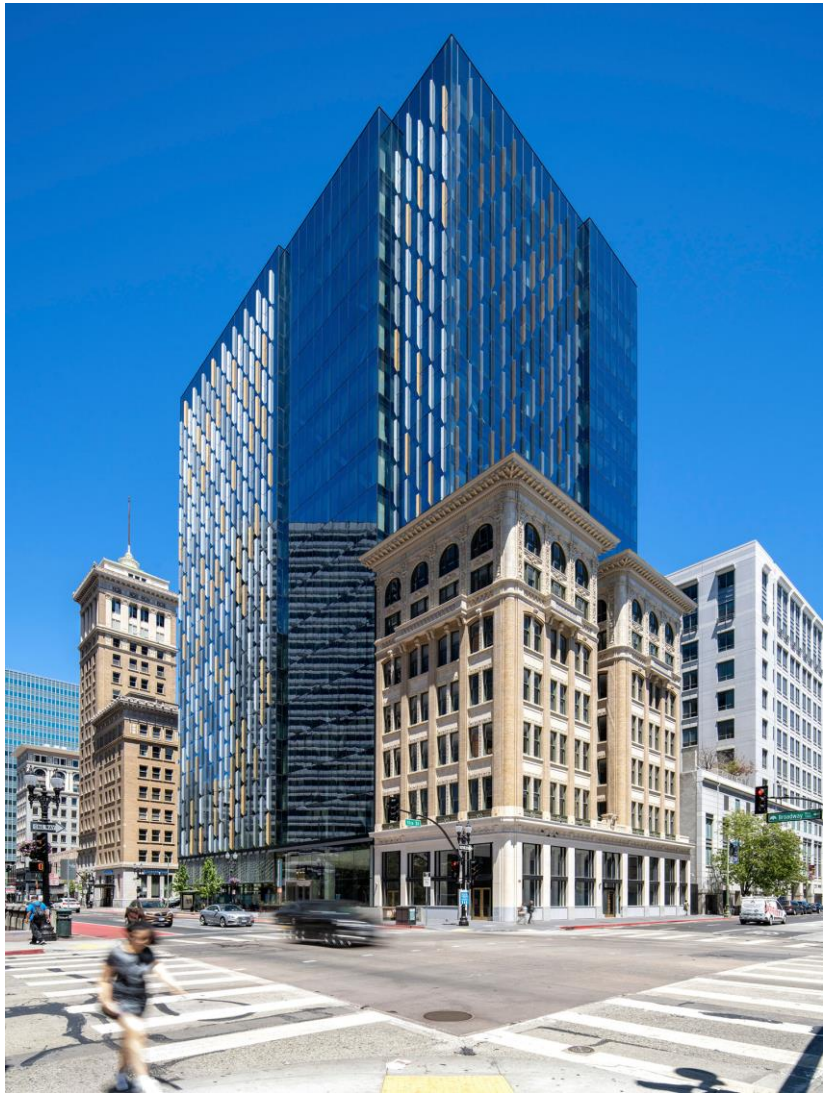

UCRS Advisory Board Meeting

Retirement Administration Service Center Update

Bernadette Green
Executive Director of RASC

March 1st, 2024

RASC Operating Model

- Our Mission

  The RASC will become a customer-centric organization that will consistently deliver a superior service experience to our active members, retirees, survivors, beneficiaries, internal clients and external partners.

  To accomplish this, we will:

  - Work collaboratively - as one team - to meet the needs of our valued members
  - Be accountable and measure our performance against our results
  - Continuously improve our operations and become more efficient
  - **Challenge ourselves and strive to be Best in Class**
  - Always provide an exceptional customer service experience
  - Ensure our members are satisfied with their outcomes

Strive to be Best in Class!

- RASC has a subscription for Pension Administration Benchmarking.
- RASC mission is aligned with CEM benchmarking, a firm that surveys and benchmarks large public pension systems.
- CEM believes the best measure for value for money is through member services, and that member service is defined from a member's perspective.
- Member service includes more channels, faster turnaround times, more availability, more choice, better content, and higher quality.

CEM's subscribers

Number of participating systems by geography

Geography	Small[1]	Medium[2]	Large[3]
USA	14	11	9
Canada	7	4	2
Europe	5	3	3
UK	7	8	7
Total	33	26	21

[1] *Fewer than 250,000 active members and annuitants*
[2] *250,000 - 500,000 active members and annuitants*
[3] *More than 500,000 active members and annuitants*

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CEM identified global trends

1 | IT is playing an increasingly greater role in pension administration.

2 | Digital-first has become highest service for most members and transactions, and has improved cost-effectiveness.

3 | Cybersecurity remains top of mind.

4 | Customer experience has become mission critical for some plans.

5 | Plans are dealing with the new normal regarding the post-pandemic workforce.

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New Senior Director of Operations

Ming Wung

Role

- Delivery and execution
- Data integrity
- Member satisfaction
- Improvements and efficiencies
- Stakeholder alignment

Experience

- **Convoy:** Customer Experience - Transformed service quality and efficiency through new operating model and customer first team culture.
- **Youtube:** Media Operations - Developed go-to-market operating models for video products on the world's largest streaming platform.
- **Google:** Ad Operations - Ran support operations for advertising products generating $30B+ in annual revenue.
- **Expedia:** Product / Strategy / Operations – Helped scale hotel support operations globally and built out key systems and tools.

New Digital Strategy and Systems Leader

Matthew Tindol

Role

- Strategy/Roadmap
- Business Requirement Documents
- Technology enablers
- Tools and coordination
- Help desk/support
- Research and Root cause analysis
- User acceptance testing

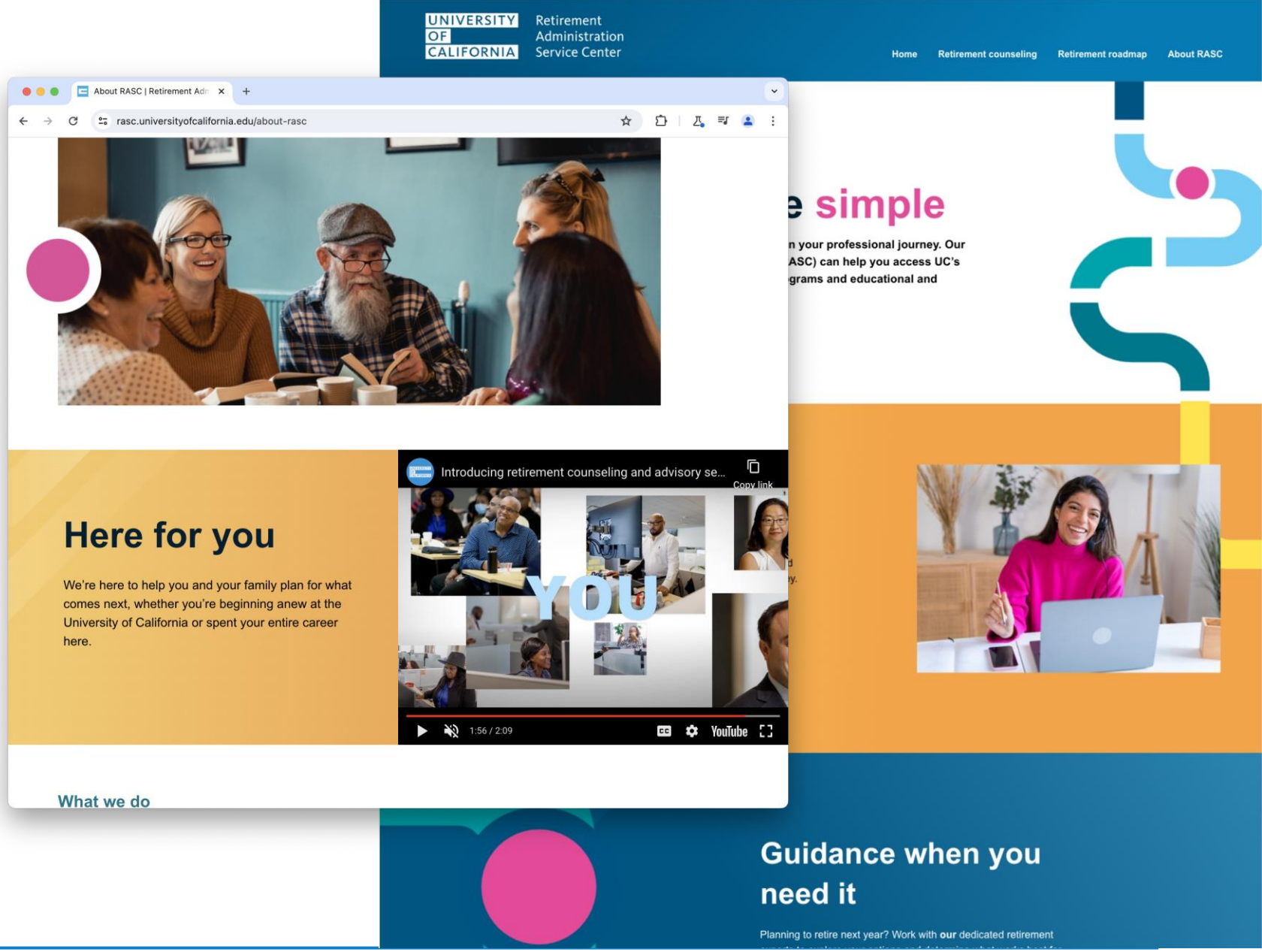
Experience

- **Chevron Credit Union:** Migrated to new digital banking platform along with 20+ third party integrations.
- **US Bank:** Led the successful delivery of crucial functionality and content across US Bank's public sites, product applications, and the mobile banking app.
- **Wells Fargo:** Drove the strategic direction for the Consumer Deposits Group products. This included online customer applications, online banking, cash flow forecasting, budgeting, and spending tools.
- **Innoventry:** Established PMO for company and had a staff of three project managers.
- **GSL:** Product Manager.

Site Is Live!

rasc.universityofcalifornia.edu

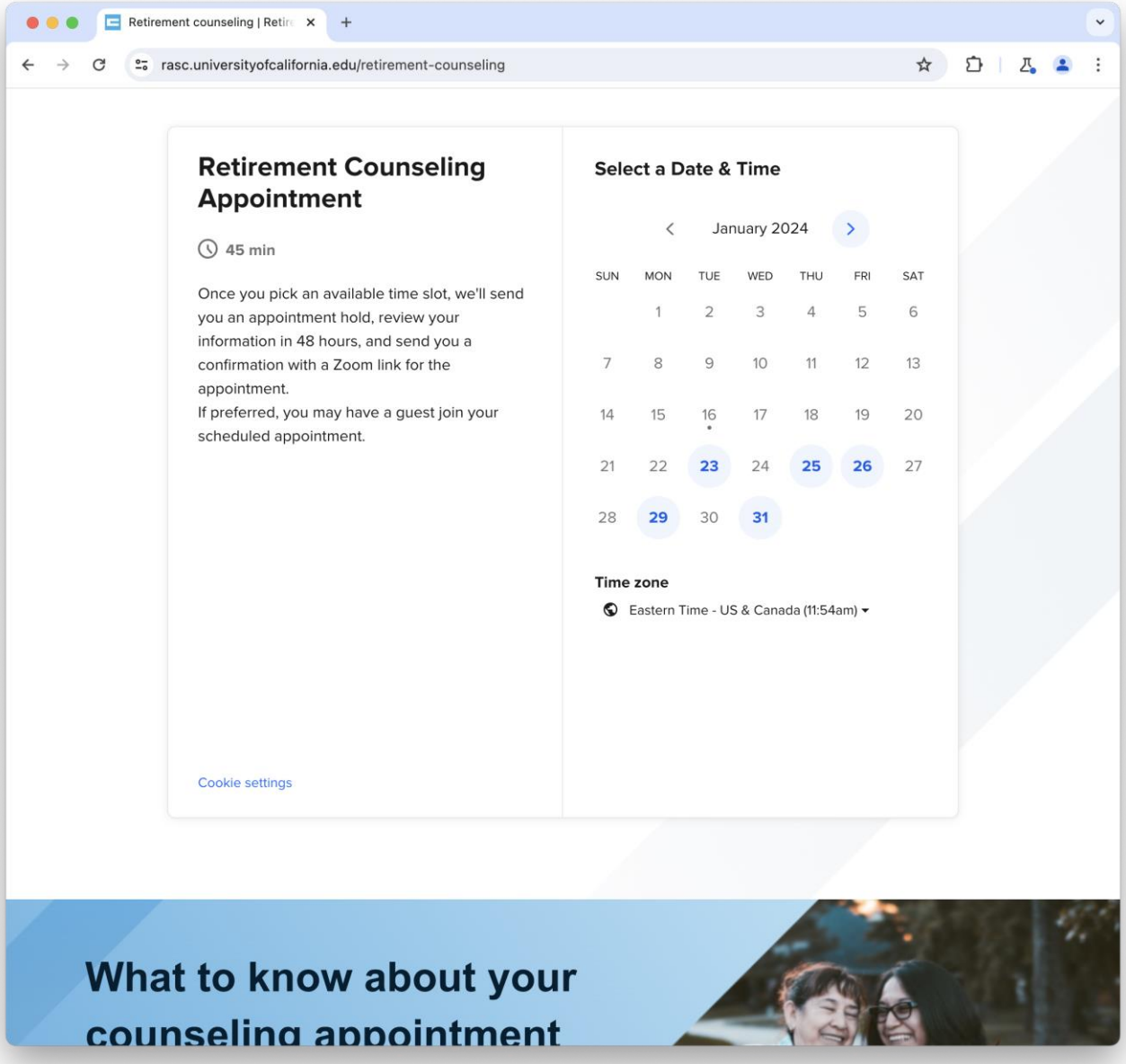
- Launched on January 2, 2024
- Announced on UCnet news, social media
- 13,000+ site visitors
- 5 pages with introductory video



Results as of February 16th, 2024

Counseling Is Also Live!

- As of February 20th:
  - 1,327 appointments scheduled
    - Of those, 577 appointments completed
- Language translation services are provided
  - 34 members have requested an interpreter
- Future scheduling being offered 3 months in advance, on a rolling monthly basis
- Scheduling system video coming soon



Results as of February 16th, 2024

Campus Roadshows

January

Jan 24 – UC ANR
Jan 30 – UC Merced
Jan 31 – UC Santa Cruz

February

Feb 13 – UC Riverside and Health Center
Feb 15 – UC Irvine and Health Center
Feb 20 – UCLA Health Center
Feb 21 – UCOP
Feb 27 – UC Davis and Health Center

March

UC San Diego and Health Center – Mar 6

Results as of February 16th, 2024

Impact of expanding contact channels

Once fully implemented **74%** of incoming calls will be redirected to dedicated teams

13%
Direct contact
Insurance Liaisons

10%
Dedicated phone line
Survivor intake

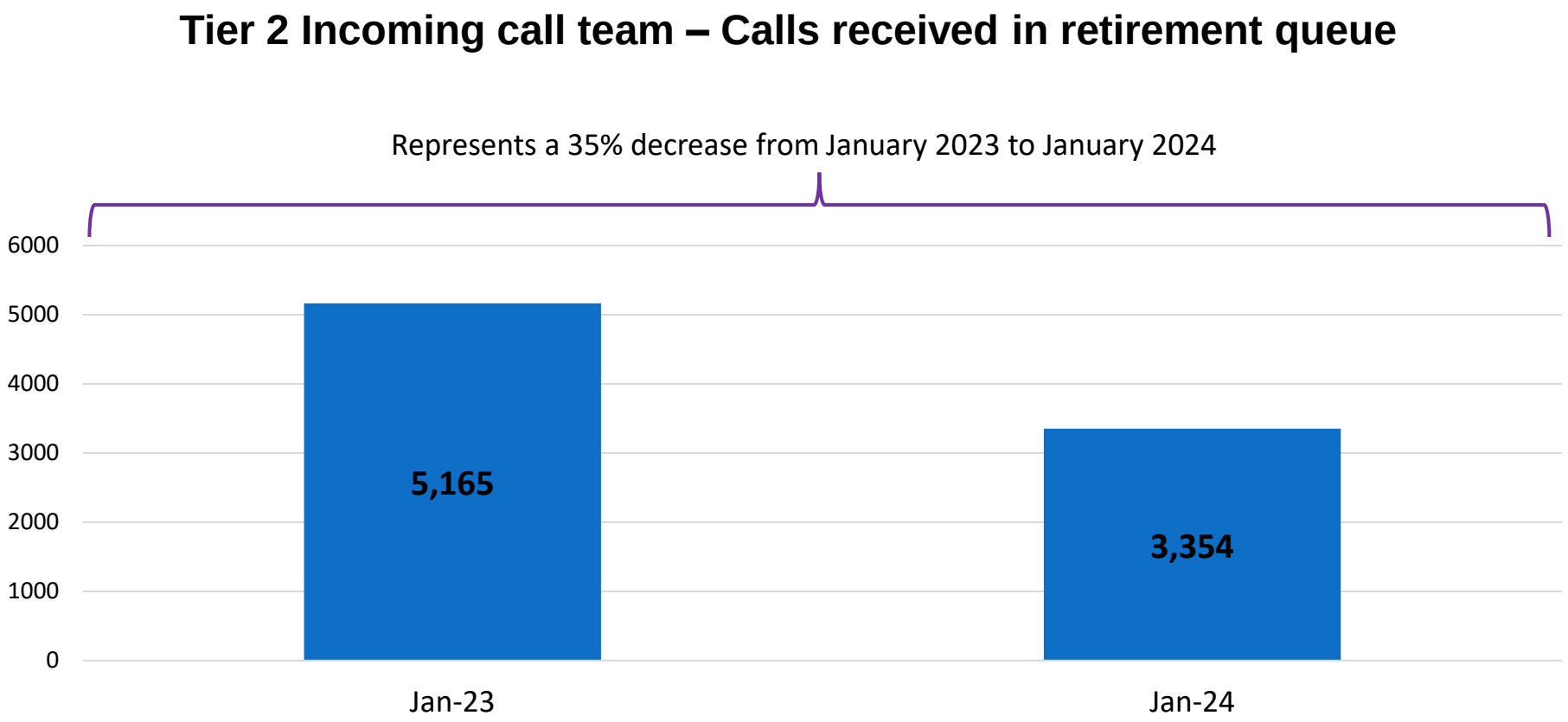
25%
Scheduled appointments
Retirement Counseling

26%
Tier 1 call support
UnifyHR

- Members receive high-touch service from specialized teams
- Provides more flexibility for members to receive support
- Reduces incoming call volumes into the call center
- Customer Service Representatives have more availability to support higher-level inquiries

Assumptions leveraging data as of February 28th, 2023

Impact of retirement counseling to Tier 2



The data represents 2023 and 2024 calendar years

Results as of February 16th, 2024

RASC Portal: Phase 2 Overview

Phase 2 will include content development for 30 flexible pieces of content (including topics such as Retirement Choice or no lapse in pay) over the course of seven weeks. All content will aim to drive members to retirement counselling, the retirement roadmap, or UCnet, as applicable.

What it is

- Language to supplement the work of RASC counselors and representatives
- Bite-sized explanations that direct members to more information
- Approved language for use across mediums (e.g., web pages, a chatbot, etc.)
- Overview content in RASC's tone of voice that directs members to UCnet, as needed

What it isn't

- A replacement for retirement counseling
- A comprehensive guide to retirement questions
- A set of web pages to include on the portal
- A duplication of UCnet

Tone of Voice

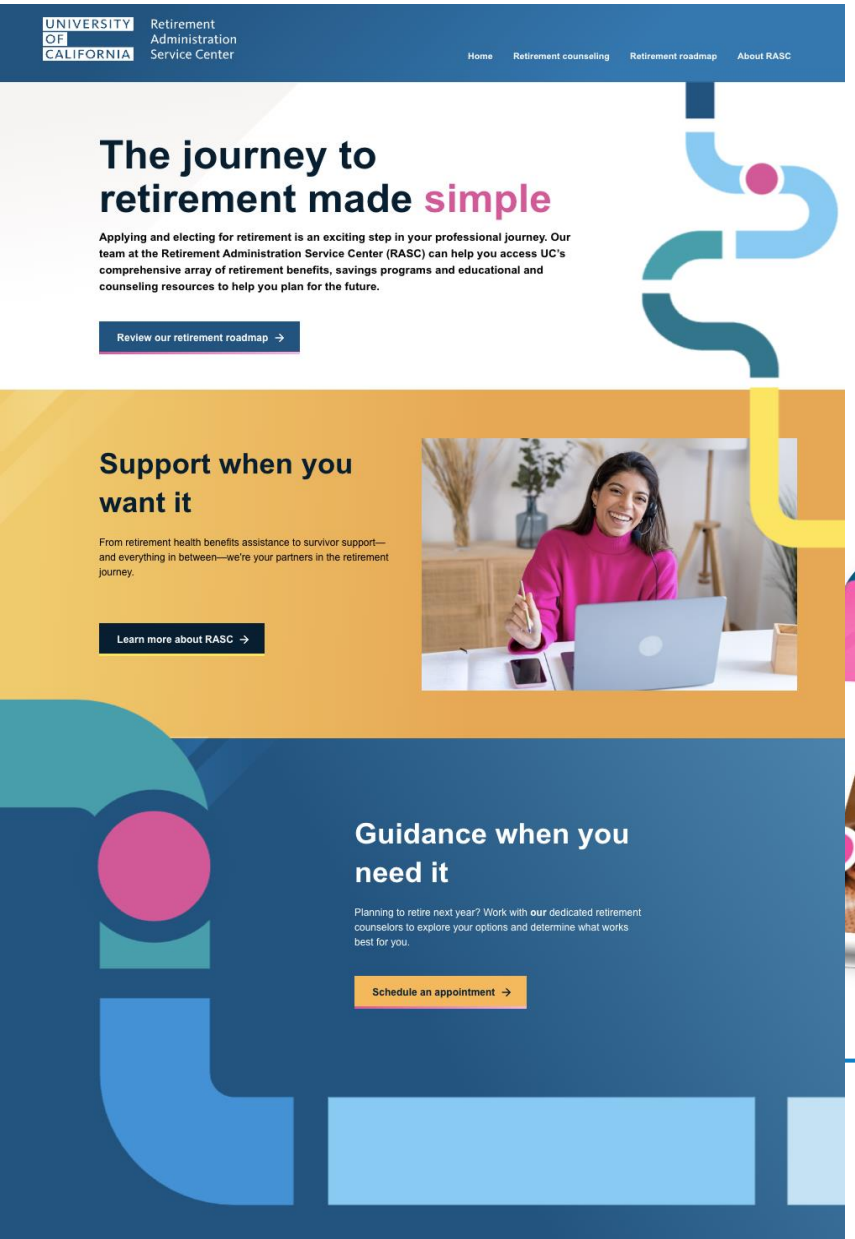
The tone of voice will evoke an emotional, personal, and motivational tone that has supportive and transparent language.

- The RASC brand voice leads as **conversational**. While never too casual, it is relaxed and approachable to meet the full spectrum of its members.
- Bold, yet respectful and professional, the RASC brand voice is **positive and intentional**.
- More inspirational than informative, the RASC brand voice is **future-oriented—promoting engagement and excitement.**

Thank you

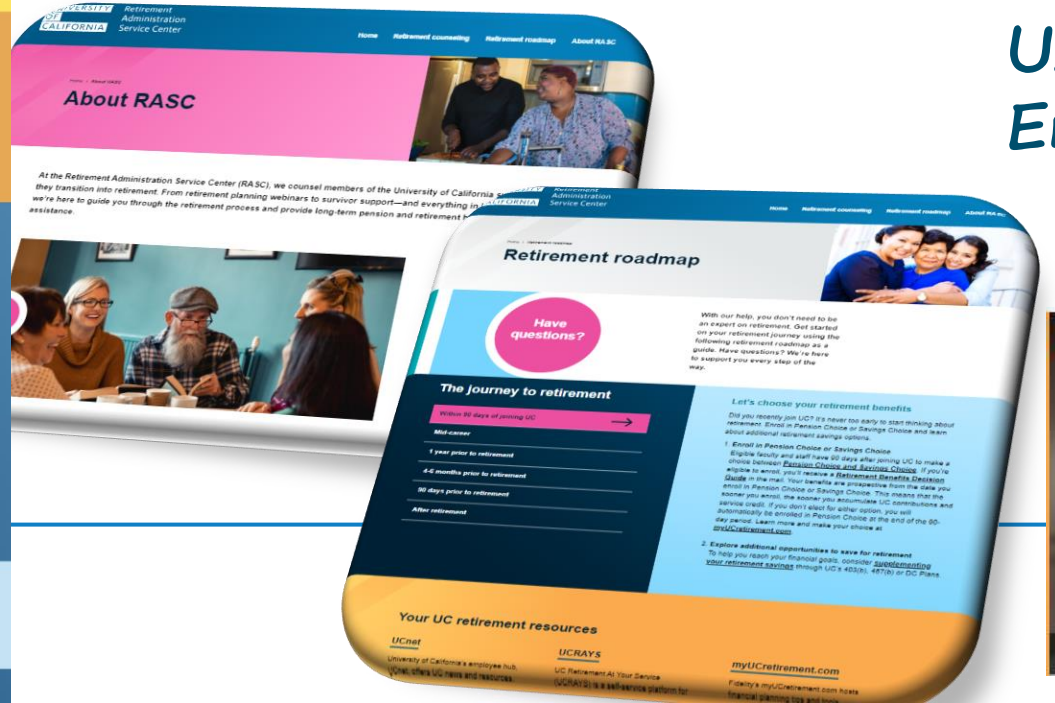
Appendix

Phase 1 Key Accomplishments



What has been delivered

- ✓ Mobile responsive and accessible **site**, built on **Drupal 10**, features a striking, unconventional design reflecting a bespoke **brand** that's compliant with the UC design system
- ✓ 30 pages of compelling and warm **content** walking users through the retirement process
- ✓ A secure **scheduling** tool integrated with the **counselors' Outlook calendars**, and compelling photography showing the diversity of the UC community
- ✓ Two stunning **videos** drawing on **UC videography** to help re-introduce retirement plan members to RASC's range of new and existing services and help explaining how to use the new scheduling



User Engagement

12 user groups

241 research findings

rasc.universityofcalifornia.edu

Data sources

- *Slide #3 – CEM mission: Data retrieved from CEM Benchmarking website.*

- *Slides #4, 5 – CEM's subscribers and global trends: Data provided by CEM Benchmarking.*
    - *Date received: January 25, 2024*

- *Slide #8 – Retirement Counseling Portal: Data provided by Deloitte Digital.*
    - *Date received: February 21, 2024*

- *Slide #9 – Retirement Counseling Portal: Retirement Counseling appointments statistics from Calendly provided by Retirement Counseling Manager.*
    - *Date received: February 22, 2024*

Data sources

- *Slide #12 - Incoming call team data: Analysis based on:*
  - *Call center data from TalkDesk provided by Call Center Manager.*
    - ➢ *Date ranges of the data: January 1-31, 2023*
    - ➢ *Date received: February 4, 2023*
  - *Call center data from TalkDesk provided by Call Center Manager.*
    - ➢ *Date ranges of the data: January 1-31, 2024*
    - ➢ *Date received: January 31, 2024*

- *Slide #13, 14 – RASC Portal Phase 2 Overview and Tone of Voice: Data provided by Deloitte Digital.*
    - ➢ *Date received: January 16, 2024*

- *Slide #17 – Phase 1 Key Accomplishments: Data provided by Deloitte Digital.*
    - ➢ *Date received: February 22, 2024*