



RASC Update
CUCEA/CUCRA Joint Meeting
Retirement Administration Services Center

UNIVERSITY
OF
CALIFORNIA

Human
Resources

Agenda

RASC Update

July 1 Retirement Update

No Lapse in Pay Option

RASC Operating Model Update

Transition to the New Structure

RASC Performance Update

New Operating Model Principles

Customer-centric, whether a member, survivor, other beneficiary, or stakeholder;

Proactive and transparent end-to-end communication throughout the member/beneficiary lifecycle;

Accountable through a high-touch service delivery model: we will set service standards, deliver on our promises, and meet our commitments within the Service Partnership Agreements.

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.

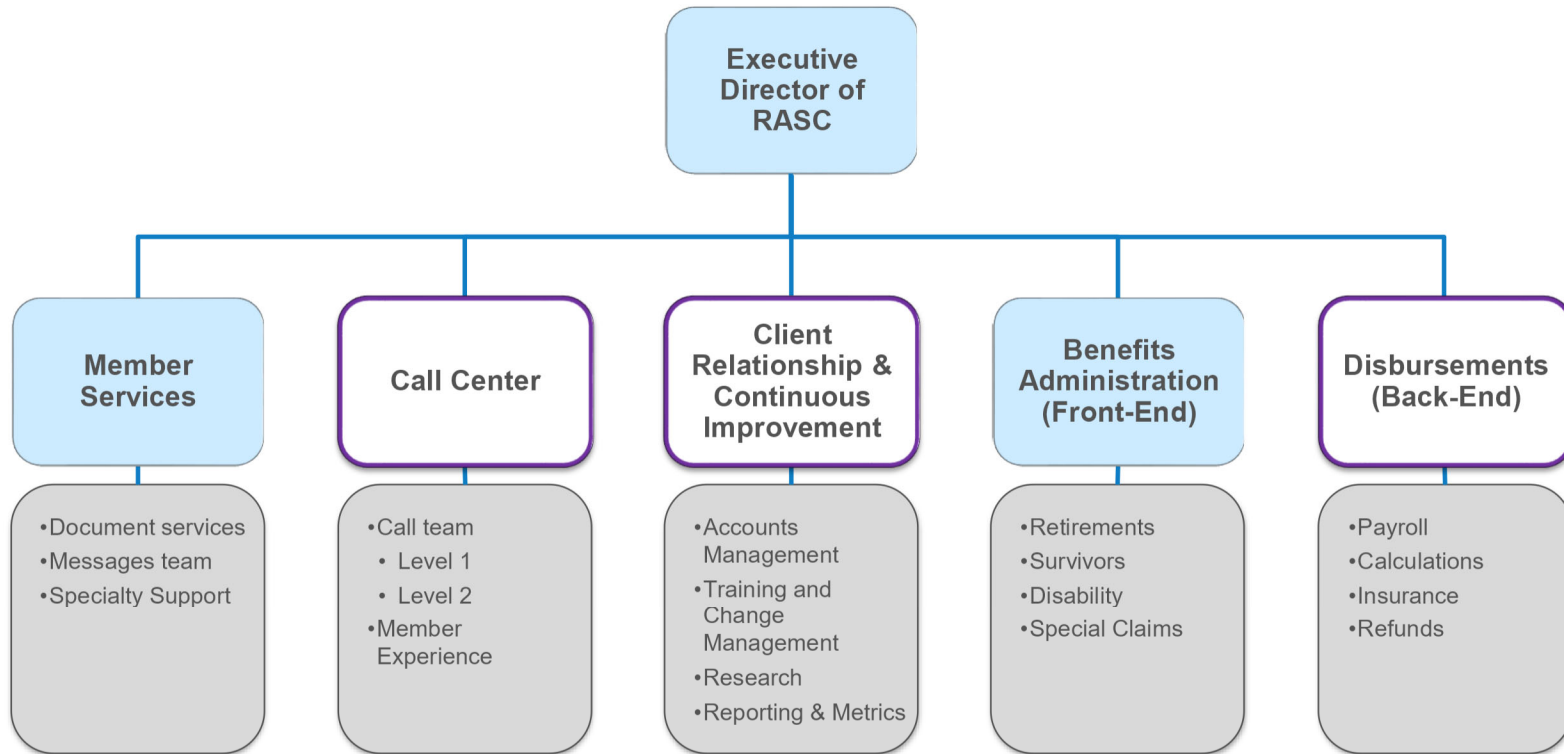
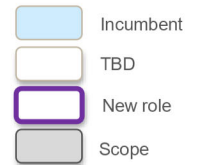
To accomplish this, we will:

- 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

Our Focus

- **Strategic Goals:**
 - **Member Services & Customer Satisfaction:** Provide trustworthy communications and an exceptional contact experience to our members
 - **Quality:** Deliver accurate and timely results through highly skilled team members
 - **Technology:** Adopt and embed existing and new technologies into our daily work and culture
 - **Relationships:** Build strong, collaborative relationships & partnerships with campuses; our partners and stakeholders
 - **Execution:** Encourage and drive high performance to achieve timely and optimal outcomes

New Leadership Structure



Recruitment Update

A key element of our new operating model, we will be recruiting and hiring three manager roles:

- Call Center Manager
- Client Relationship Manager
- Disbursement Manager

We will partner with and be supported by our Local HR recruitment team:

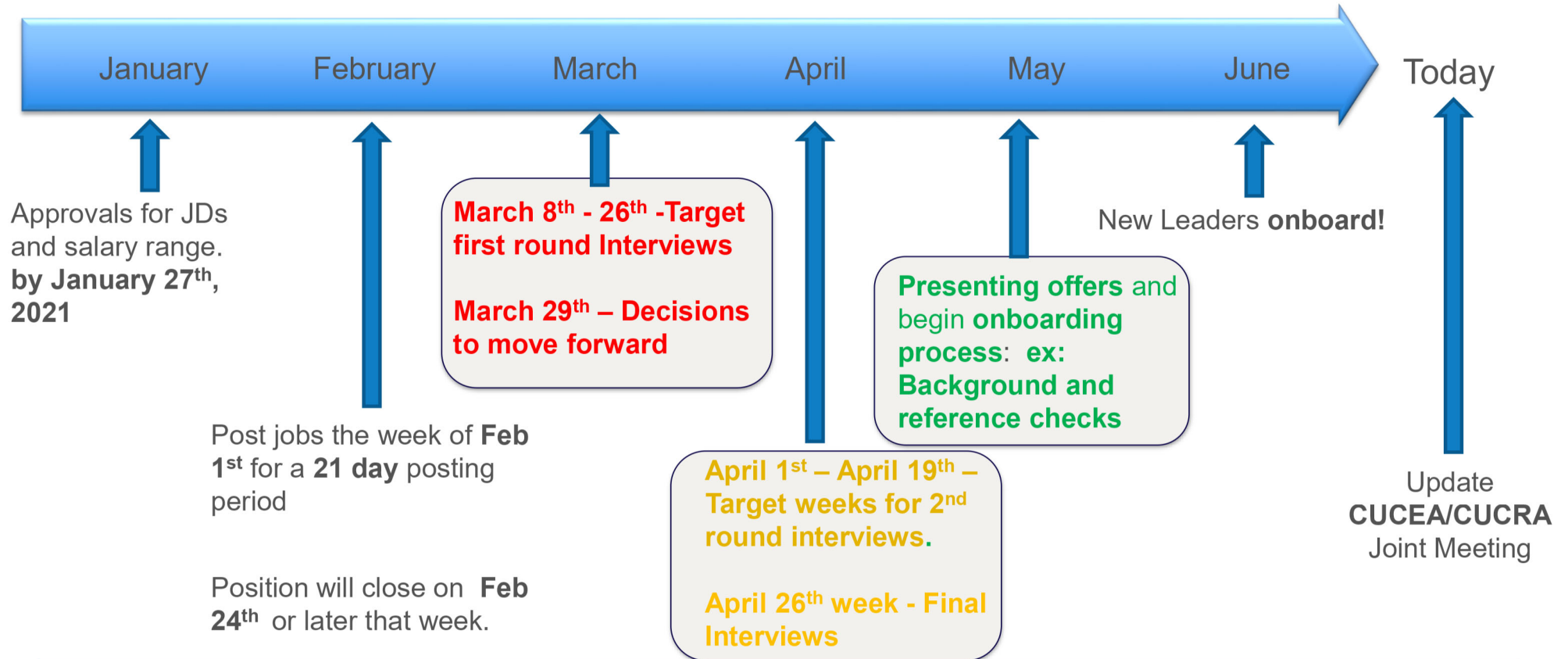
- Kelly Howard, Manager of Talent Acquisition and Executive Recruitment
- Arlene Asuncion, Senior Recruitment

We established interview teams for each role:

- First round team (RASC and external partners)
- Retiree Partners (final discussion prior to offer)

Recruitment Milestones

- Call Center Manager
- Disbursement Manager
- Client relationship Manager



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Retirement Update: July 1st

July 1st Retirement applications received as of April 28, 2021:

July 1 retirements received	1,469
Submitted for retirement	16
Pending review	759
Approved for retirement	21
Elected to retire	673

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No Lapse in Pay Option

As the third retirement season with Redwood approaches, we want to ensure a smooth transition from active employment to retirement for all UC faculty and staff. Our commitment is to complete this process within 45 days – unfortunately, we are not able to achieve this for everyone.

Our goal is to **reduce the hardship** felt by retirees who experience a lapse in pay.

RASC is providing an option for **prospective retirees** to **Opt-In** and receive a **payment** based upon their **estimated monthly retirement benefit**.

Option Overview

- ✓ The program will provide **provisional payments and healthcare continuation** for approved prospective retirees.
- ✓ Prospective retirees electing a **July 1st retirement date and a monthly UCRP benefit** are eligible to participate.
- ✓ Prospective retirees must submit the **No Lapse In Pay form** (UCRS Form 168) and **all required paperwork** for the retirement election (completed and signed) to RASC **by Friday, May 14th**.
- ✓ RASC will **review each submissions and confirm eligibility** in writing.

Eligibility

Eligible Retirees/Requirements

- 😊 New retiree with a July 1st retirement date
- 😊 Completed and submitted election documents
- 😊 Completed and submitted the No Lapse in Pay Form (UCRS 168) stating they wish to receive a provisional benefit payment between their retirement date and the first date of their fully audited and confirmed MRI

Ineligible Retirees/Exclusions

- ☹️ Lump sum cashout
- ☹️ Eligibility for reciprocity
- ☹️ UCRP service credit in more than one tier
- ☹️ Disability Crossover
- ☹️ Eligibility for Minimum Required Distributions (MRD)
- ☹️ Plan 02, 401-a, or 415 Limited
- ☹️ Qualified Domestic Relations Order

Additional Details

- RASC's goal is to process retirements **within 45 days**, but the no lapse in pay will provide an **estimated payment** if the processing time exceeds this.
- **Health and welfare coverage will continue without interruption** for those participating in this program.

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New Operating Model

RASC Partners

Member Services

Self Service

Document Services

Mailroom and scanning services

Messages Team

Secure messages channel

Call Team

Call Level 1

Call Level 2

Specialty Support

Fulfillment Operations

Retirement

Payroll

Survivors

Calculations

Disability

Insurance

Special Claims

Refunds

Embedded Teams

Member Queries

UC Locations/
Service Centers

Benefits Information Systems

Client Relationship & Continuous Improvement

Account Management

Training & Change

Comms & Outreach

Research

Reporting & Metrics

Benefit Plan Accounting

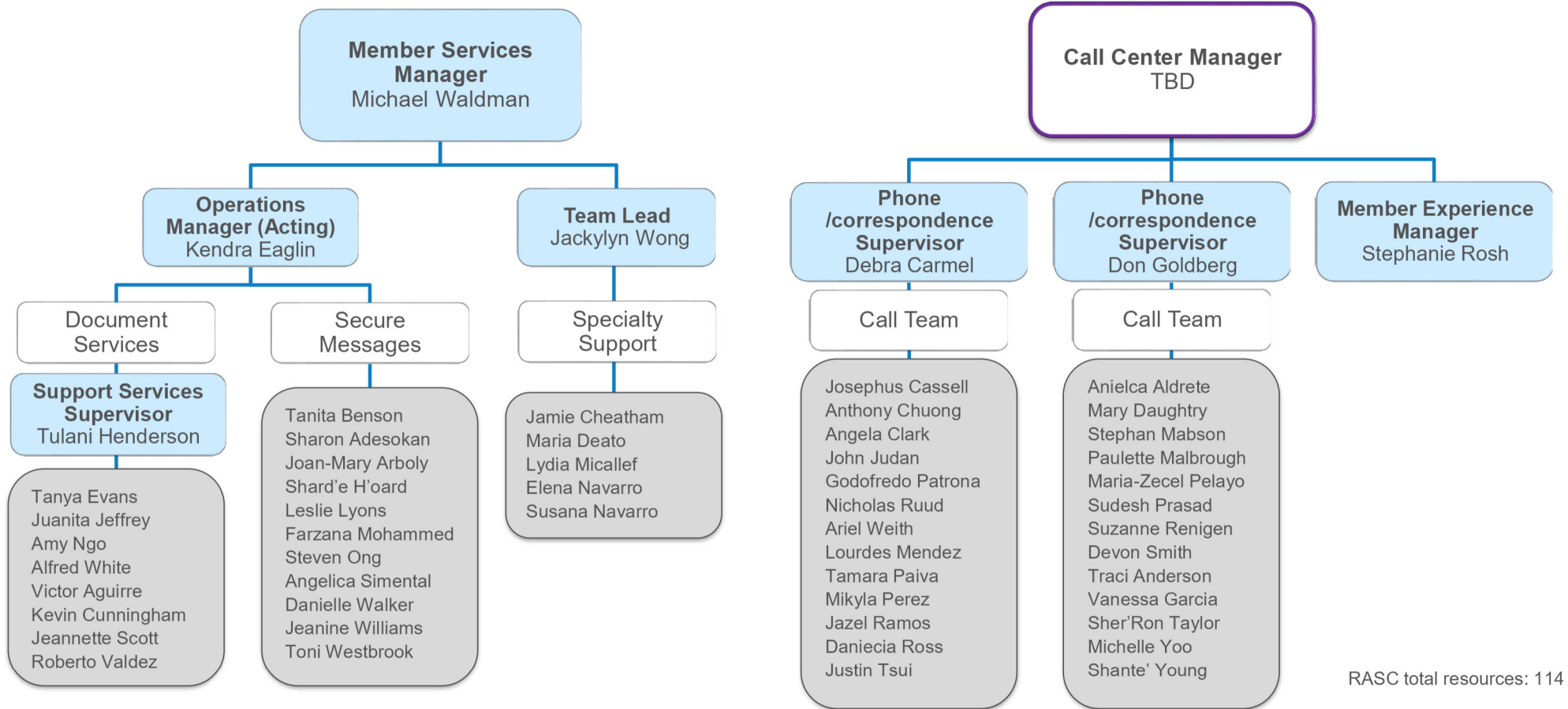
Retirement Policy Group

Actuarial Services Group

Transitioning Member Services: New Structure

- New assignments and reporting relationships took effect on April 1st.
- Core responsibilities will evolve over time but their day to day work is not expected to drastically change
- Michael and others are guiding them through the process and answering any questions
- These changes prepare us for success in the new operating model
- There are no immediate changes to position titles, contracts, etc. at this time

Member Services Resources Allocation



RASC total resources: 114

Member Satisfaction and Feedback:

We are implementing Call and Secure Messages Surveys.

Please rate your **level of satisfaction today** based on four short statements, using a scale of **1 to 5** (where 5 is “**very satisfied**”).

Call Survey: Every **5th caller** will be **invited to participate** and provide feedback

Secure Message Survey: **Each** Members will be **invited to provide feedback** upon case closure

We are focused and will be measuring the following:

- Service representative provided friendly, **professional service**.*
- Service representative was **knowledgeable and answered all of my questions**.*
- Service representative **effectively handled** and **resolved my inquiry**.*
- Please rate your **overall service experience** today.*

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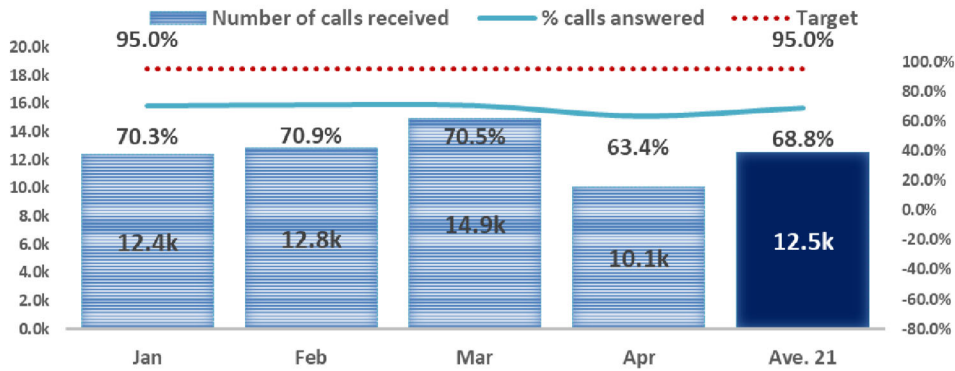
RASC Performance Update

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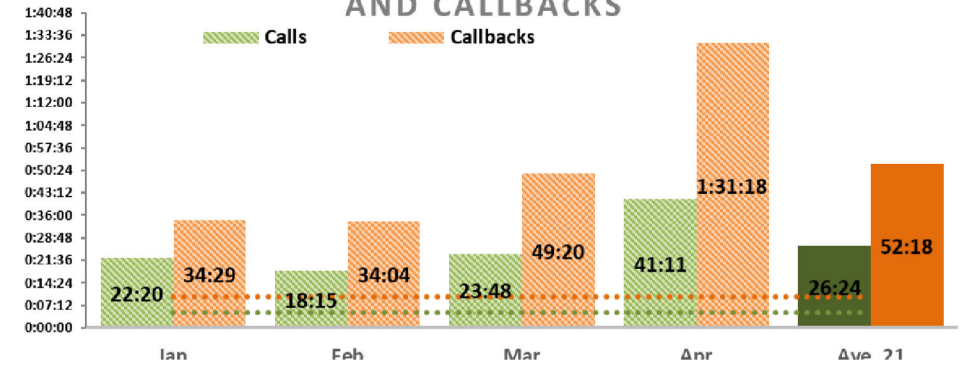
Metric	Definition	Unit	Target	Aug-2020	Sep-2020	Oct-2020	Nov-2020	Dec-2020	Jan-2021	Feb-2021	Mar-2021	Trend	Notes
Quality	PRP Accuracy Rate	%	100%	▲ 98.8%	▲ 98.0%	▲ 97.5%	▲ 98.8%	▲ 98.5%	▲ 97.7%	▲ 97.9%	▲ 97.9%		
	PRP Accuracy Volume	\$	\$ 5.00	◆ \$ 45.73	◆ \$ 61.73	◆ \$ 57.88	◆ \$ 33.72	◆ \$ 36.94	◆ \$ 63.59	◆ \$ 55.20	◆ \$ 60.41		
	Call Answer Rate	%	95%	-	▲ 78.8%	◆ 63.7%	◆ 57.6%	▲ 81.5%	◆ 70.3%	◆ 70.9%	◆ 70.5%		
Timeliness	Call speed to answer	Minutes	05:00 min = +1.0x	-	◆ -1.0x	◆ -4.8x	◆ -6.5x	◆ -0.5x	◆ -2.5x	◆ -1.7x	◆ -2.8x		
	Call speed to return (callback feature)	Minutes	10:00 min = +1.0x	-	-	-	◆ -2.0x	◆ -1.2x	◆ -1.4x	◆ -1.4x	◆ -2.9x		
	Retirement Processing	Days	45 = +100%	◆ 70.5%	▲ 81.2%	● 103.3%	● 102.7%	● 105.3%	● 101.8%	● 99.2%	● 98.4%		
	Survivor Packet turn time	Days	30 = +100%	-	-	-	-	-	-	-	-		Will provide pending receipt of report from BIS
	Survivor Application Processing	Days	30 = +100%	◆ 33.3%	◆ 73.7%	◆ 62.6%	◆ 79.7%	◆ 33.6%	◆ 40.4%	◆ 66.7%	▲ 89.6%		
Workload	Survivor Application Processing	Days	60 = +100%	◆ 69.4%	◆ 60.0%	◆ 73.9%	◆ 33.7%	◆ 60.2%	◆ 43.3%	◆ 38.5%	◆ 38.2%		
	Agent Talk time	Minutes	-	-	0:10:04	0:10:36	0:12:28	0:10:43	0:11:51	0:11:25	0:11:50		
	Total Calls received	Count	-	-	8,296	12,256	14,800	9,264	12,381	12,823	14,913		
	Total Secure Messages received	Count	-	6,735	4,822	4,848	4,651	3,380	4,359	3,826	4,636		
Efficiency	Call handling time	Minutes	10:00 min = +100%	-	◆ 31.0%	◆ 20.8%	◆ 1.7%	◆ 16.2%	◆ -11.0%	◆ -8.6%	◆ -36.3%		
	Agent Inactive time	Minutes	1 hour = +1.0x	-	◆ -4.5x	◆ -4.4x	◆ -4.9x	◆ -4.7x	◆ -4.2x	◆ -3.1x	◆ -3.8x		
	Call Answer Rate	Count	25	-	◆ 15	◆ 17	◆ 18	◆ 15	◆ 17	◆ 18	◆ 19		
Satisfaction	Member Call Satisfaction	Scale	4	-	-	-	-	-	-	-	-		Request survey feedback starting April 1st
	Member Secure Messages Satisfaction	Scale	4	-	-	-	-	-	-	-	-		Request survey feedback starting April 1st
	Executive Escalations	Count	12 = +1.0x	◆ -3.8x	◆ 0.3x	● 1.7x	● 1.8x	● 1.7x	● 1.4x	● 1.1x	◆ 0.4x		

Sample: Performance Data against Targets

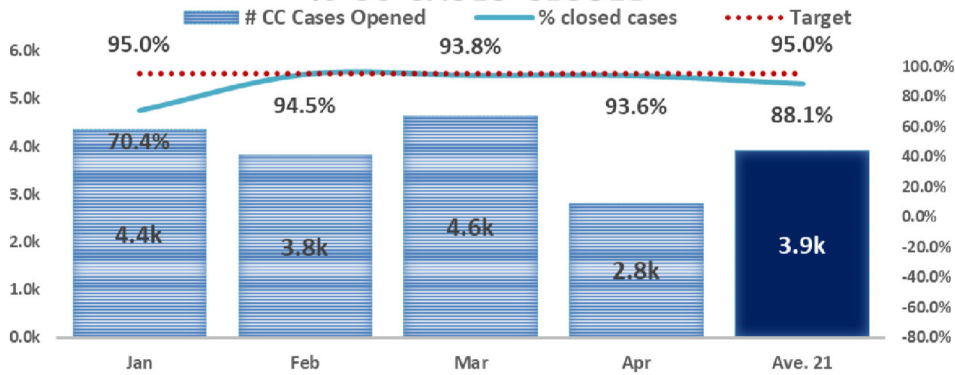
% CALLS ANSWERED



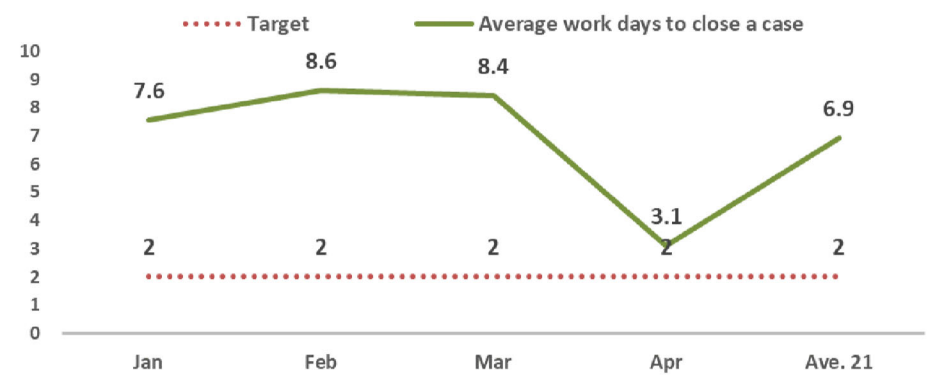
AVERAGE SPEED OF ANSWER FOR CALLS AND CALLBACKS



% CC CASES CLOSED



AVERAGE DAYS TO CLOSE A CASE





Appendix

Interview Teams

Call Center Manager

- Michael Waldman – Member Services Manager
- Bernadette Green – Interim Director of RASC
- Dianna Henderson – Chief of Staff System wide HR & Executive Director HR Policy

Client Relationship Manager

- Bernadette Green – Interim Director of RASC
- Danielle Griffin - Strategic Solutions/Product Manager UCPC
- Paul Schwartz – Director of Communications & External Relations
- Cary Sweeney – Director of UC Berkeley Retirement Center

Disbursement Manager

- Greg Ricks – Fulfillment Operations Manager
- Bernadette Green – Interim Director of RASC
- Dianna Henderson - Chief of Staff System wide HR & Executive Director HR Policy
- John Monroe – Actuarial Services Manager

Retiree Partners

- Joe Lewis – First Director of RASC & outgoing CUCRA Vice Chair
- Jo-Anne Boorkman – CUCEA Chair Elect
- John Meyer – Chair of CUCRA
- Frank Trueba – CUCRA Representative: Benefits & Health Care Facilitator Liaison

Pending Executive Response Items as of April 26 2021

NAME	2019	2020	2021
Bernadette	0	0	3
Donna	0	0	8
Michael	4	10	1
Stephanie	13	2	0
TOTAL: 41			