

CUCRA and CUCEA Joint Meeting

Retirement Administration Service Center Update

Bernadette Green
Executive Director of RASC

October 29th, 2024

CUCRA and CUCEA Joint Meeting

1

Progress from last year

2

Striving for Best-In-Class

CUCRA and CUCEA Joint Meeting

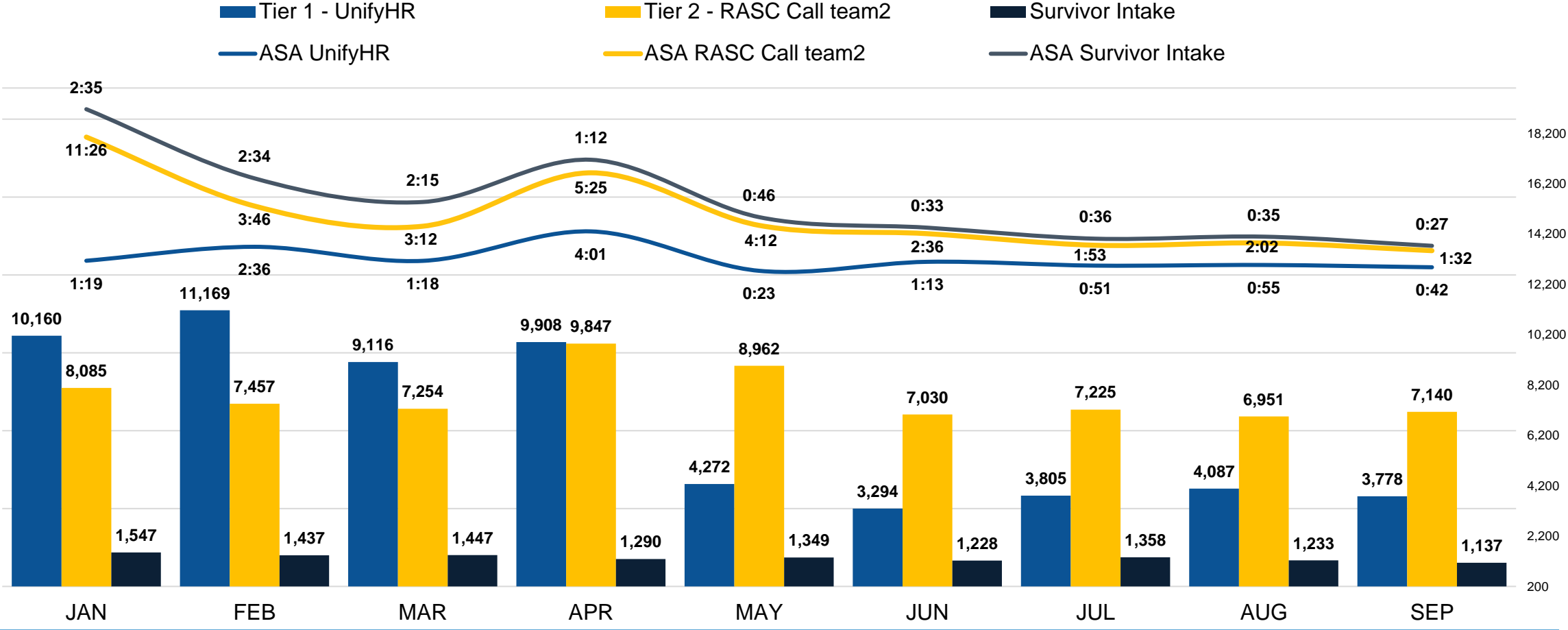
1 Progress from last year

2 Striving for Best-In-Class

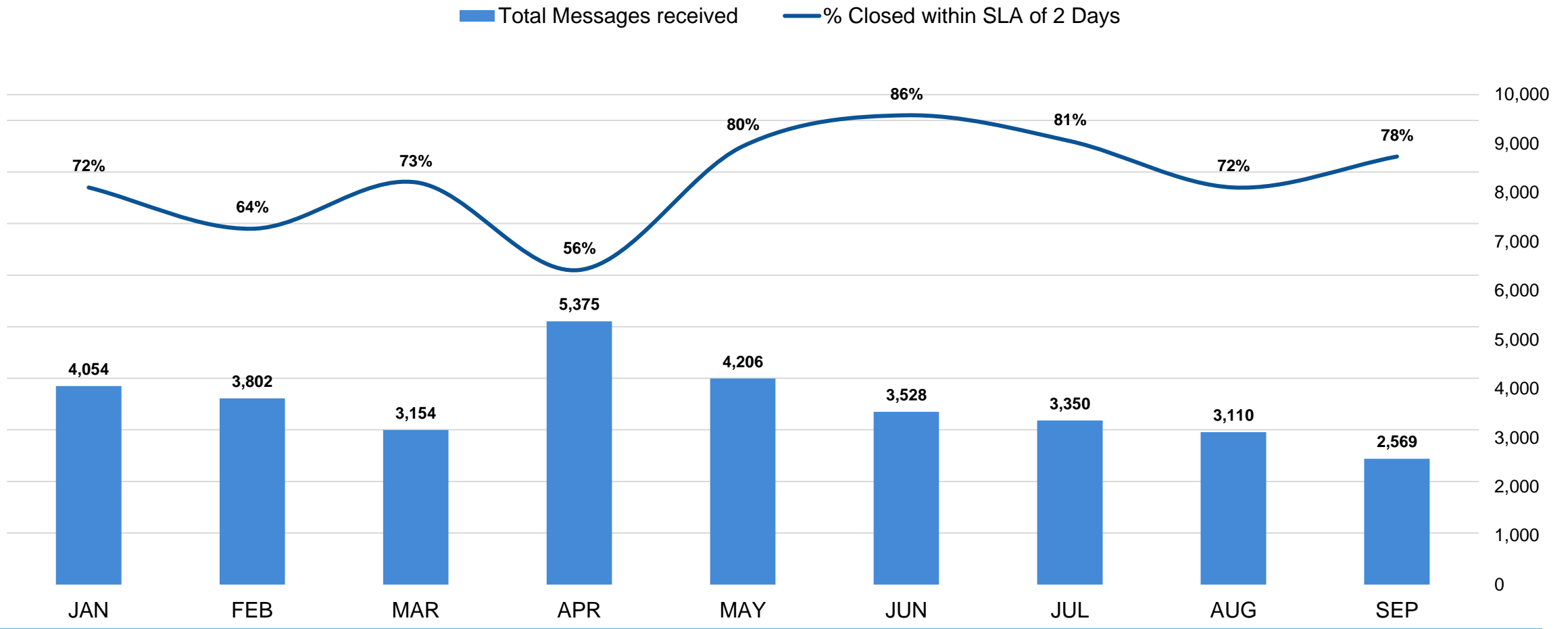
Member contact channels expanded



Incoming calls monthly 2024



Secure messages monthly 2024



Insurance Liaisons - Carrier Support

- **Enhancing Retiree Support and Engagement:**
Expand members' confidence through **education** and **direct support**.
- **Continuing Medicare Webinars and Office Hours:**
Drive awareness and **engagement**.
- **Developing Tailored Member Resources:**
Provide Open Enrollment **events** designed for **prospective retirees**, **retired members** and their **families**.



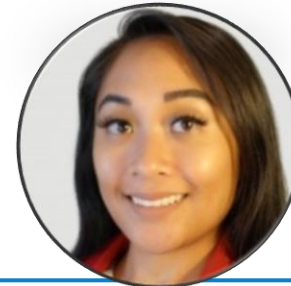
Mela.Asfaha@ucop.edu

Kaiser Permanente



Nicole.Zimmerman@ucop.edu

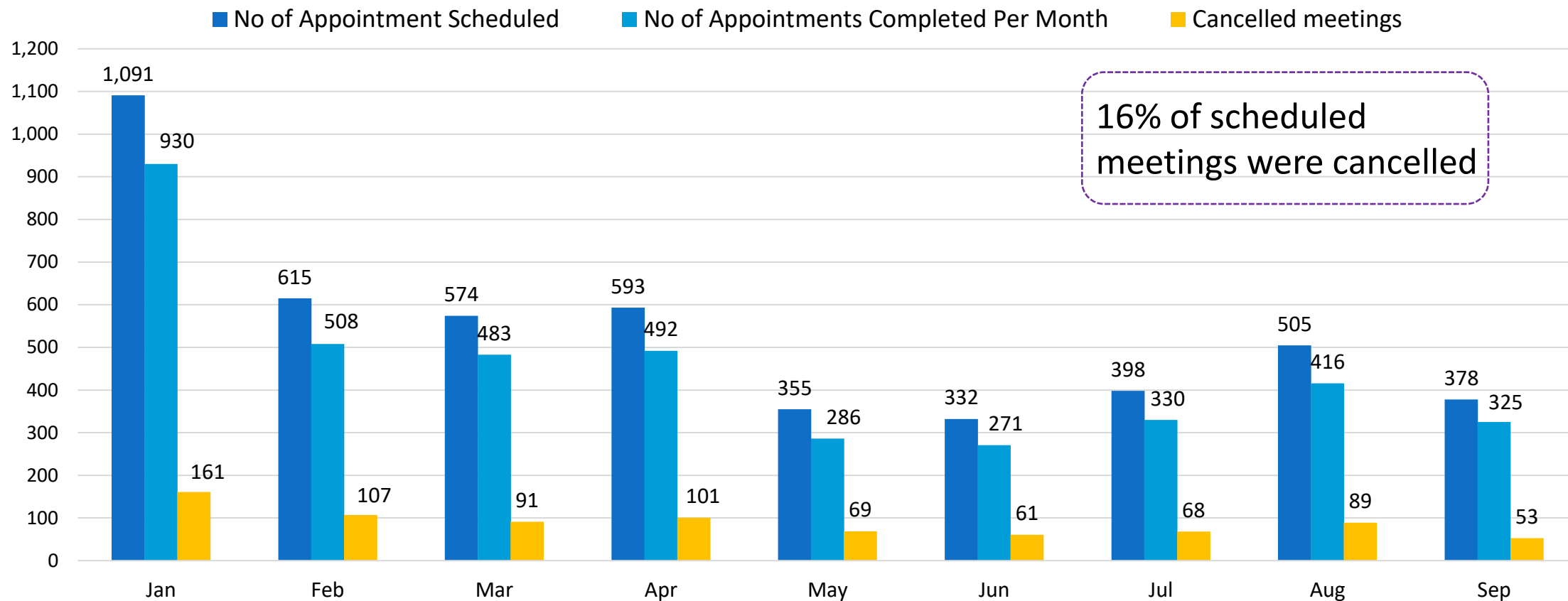
Health Net and United Health Care



Jasmine.Manglinong@ucop.edu

Medicare – On Leave

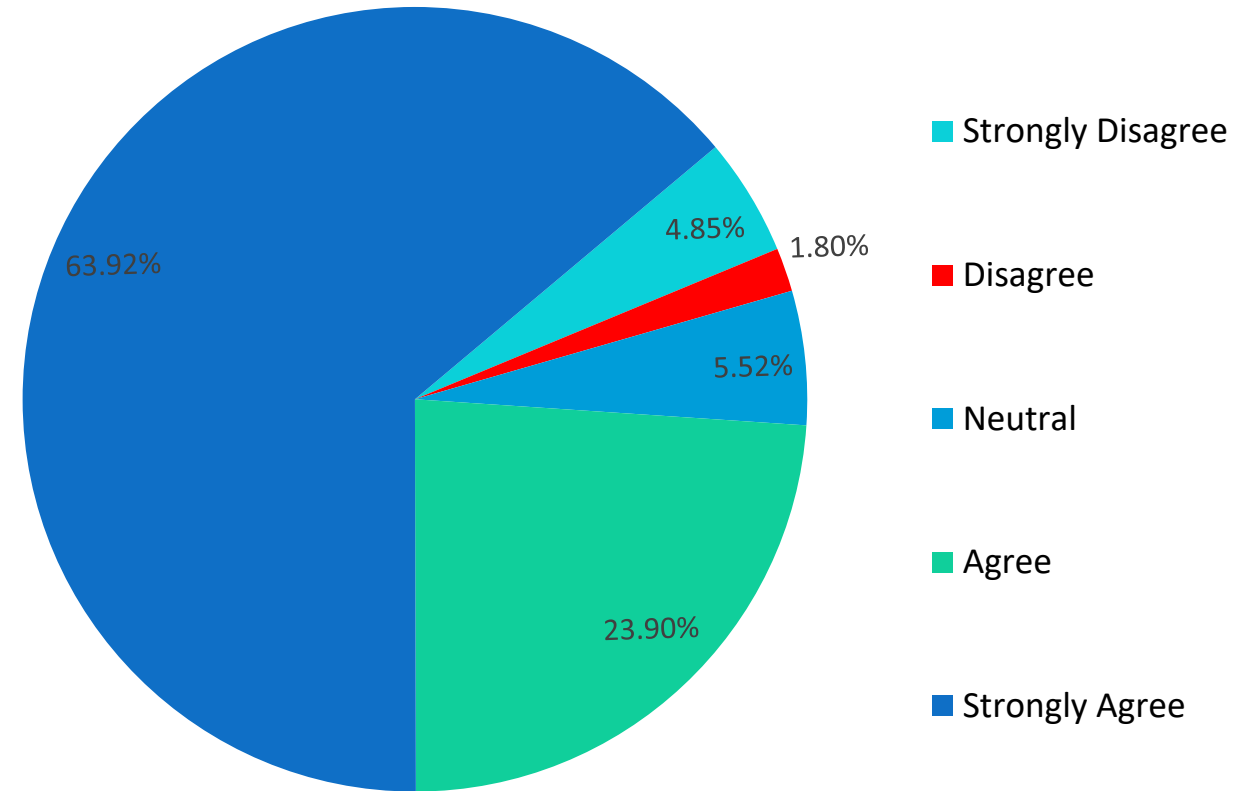
Retirement Counseling appointments 2024



Retirement Counseling survey results

My counseling session helped prepare me for my UC retirement

Over 560 Members testified to the help of retirement counselling session for UC retirement process



2024 Accomplishments

Successful Redwood
hosting migration

1

BIS is now a part of
RASC

2

RASC Portal
Launched

3

RASC Portal – The Journey

May 30, 2023

RASC Portal conceptualized, Stakeholder Discovery, Journey maps, RASC Brand exploration started

July 30, 2023

Brand assets delivered, Wireframes, Visual comps and Design System started

August 30, 2023

ADA Compliance met, Calendly Scheduling system, QuestionPro survey tool integrated



134,991 Total Visits

69,716 Unique Views

January 2, 2024

Portal launched, RASC Counseling Service Launched, Announced on UCnet, Social media, Roadshows organized, Training vendor engaged

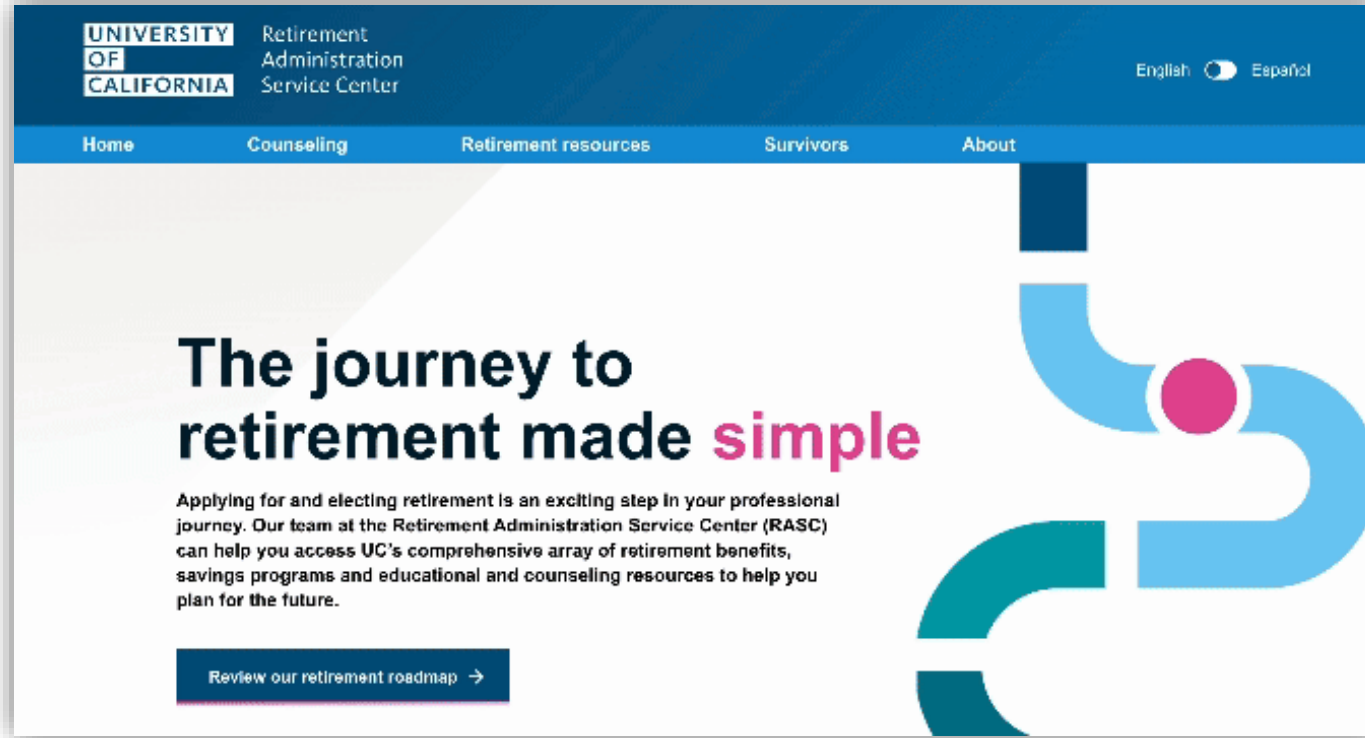
July 30, 2024

Redesigned headers, Updated Brand assets, New pages for Retiree Health including health benefits, Survivor Support, and Counselors

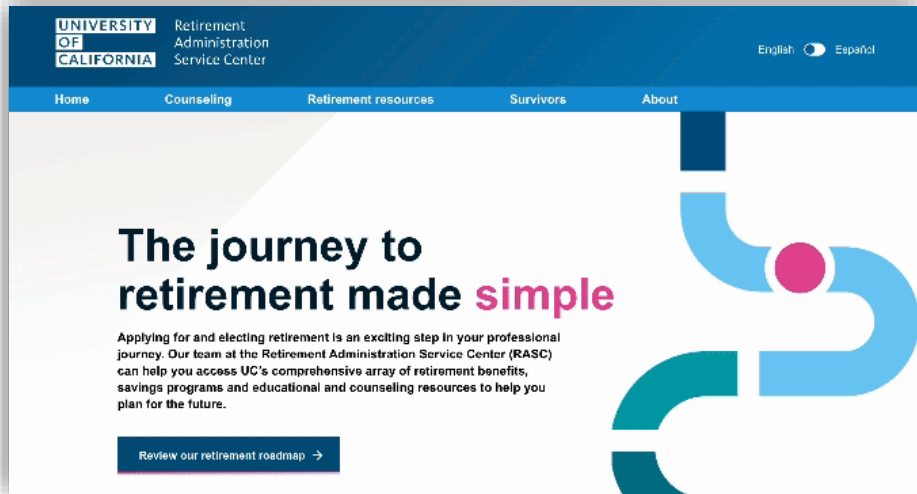
January 1, 2025

Multi-lingual Portal launch (Spanish), Updated content, Updated videos

RASC Portal – Upcoming Changes!



RASC Portal – Upcoming Changes!



Entire portal is getting a Spanish translation

2024 Accomplishments

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Retirement
Counseling

4

Retirement Counseling



Kevin Kennedy

Retirement Counseling
Manager



Brandon Bastunas

Retirement Counselor



Edison Noboa

Retirement Counselor



Nina Qiu

Retirement Counselor



Donovan Malone

Retirement Counselor



Edward Brown

Retirement Counselor



Clarissa Dimacali

Retirement Counselor



Amos Holts Jr.

Retirement Counselor



Devin MacKie

Retirement Counselor

- **4,200** RASC Counseling Appointments Scheduled
- **3,900** Counseling Appointments Completed
- **110** language translations

2024 Accomplishments

Successful Redwood
hosting migration

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RASC

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RASC Portal
Launched

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Retirement
Counseling

4

Reaching out to
members

5

Additional RASC Portal videos

Schedule an appointment



No Lapse in Pay and Benefit Continuation



Lump Sum Cashout Survey

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OF
CALIFORNIA

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UNIVERSITY
OF
CALIFORNIA

UC RETIREMENT ADMINISTRATION SERVICE CENTER
C/O LOGIT USA, INC.
PO BOX 2088
GRUNDY, VA 24614-9800

UC requests your feedback on the enclosed survey.

La UC solicita su opinión sobre la encuesta adjunta.

Save time. Complete the survey online
at logitsurveys.com/UCRASCsurvey
or just scan this QR code.



English

UNIVERSITY

Ahorre tiempo. Responda la encuesta en línea
ingresando en logitsurveys.com/UCRASCsurvey
o escaneando este código QR.



Spanish

**Members received
detailed instructions
with QR code**

not only in English

**They received the
survey in Spanish too!**

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Progress from last year

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Striving for Best-In-Class

Best

Better

Good



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.
- RASC will compare with other pension administration systems within higher education, state of California and their tier.



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



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.

CEM timeline



RASC BRAND

Strategic
Intentional
Purpose-driven

Retirement
Administration
Service Center



WE DID IT

SUPPORT

BEST-IN-CLASS

GROWTH

BENCHMARKING

PENSION ADMINISTRATION

THANK YOU

CUSTOMER SERVICE

MILESTONE

LEADERSHIP

TOGETHER WE CAN

COLLABORATION

INNOVATION

ACHIEVEMENT

JOURNEY

SUCCESS

HOPE

PRODUCTIVITY

ONE RASC

PERFORMANCE

Thank you

Data sources - Appendix

- *Slide #5 – Incoming Calls: Data provided by TalkDesk detailing the volume of incoming calls from January 2024 - September 2024. File received from the Call Center Manager*
 - *Data received: October 1, 2024*
- *Slide #6 – Secure Messaging Data: Data provided by Redwood detailing metrics on secure messages processed from January 2024 - September 2024. File received from the Secured Messages Team*
 - *Data received: October 1, 2024*
- *Slide #11 – Retirement Counseling Portal: Data provided by Deloitte Digital.*
 - *Date received: October 1, 2024*
- *Slide #8, 9– Retirement Counseling Portal: Retirement Counseling appointments statistics from Calendly provided by Deloitte Digital.*
 - *Date received: October 1, 2024*
- *Slide #22 – CEM mission: Data retrieved from CEM Benchmarking website.*
- *Slides #22,23, #24 – CEM’s subscribers and global trends: Data provided by CEM Benchmarking.*
 - *Date received: January 25, 2024*