



LACERS
LA CITY EMPLOYEES'
RETIREMENT SYSTEM



REPORT TO BOARD OF ADMINISTRATION

From: Neil M. Guglielmo, General Manager

Neil M. Guglielmo

MEETING: FEBRUARY 28, 2023

ITEM: IV-B

**SUBJECT: SEMI-ANNUAL REPORT OF BUSINESS PLAN INITIATIVES FOR THE PERIOD
ENDING DECEMBER 31, 2022**

ACTION: CLOSED: CONSENT: RECEIVE & FILE:

Recommendation

That the Board receive and file this report.

Discussion

This semi-annual report of the business plan initiatives (BPIs) for Fiscal Year 2022-23 presents progress on nine priority initiatives during the reporting period from July to December 2022, with three continuing initiatives and six new initiatives.

The Environmental, Social and Governance Investing (ESG) BPI continues to engage ESG to optimize long-term risk adjusted returns. Last fiscal year, the Diversity, Equity, and Inclusion (DEI) BPI partnered with a professor-led graduate student group from California State University Los Angeles to explore DEI strategies. This fiscal year, the Workforce Diversity, Equity, and Inclusion BPI will engage with a vendor to develop a LACERS Fellowship Program supporting LACERS goal in promoting professional growth and maximizing opportunities for all staff. The Headquarters Move BPI completed its first significant move at the end of the 2nd Quarter and continues to resolve permitting delays to ensure full occupancy this fiscal year.

New BPIs include further enhancements in service delivery to Members with two Member Services BPIs, the Member Service Modernization BPI with integration and adoption of tools in improving customer service, and the Member Services Metrics BPI by updating the Member Service Agreement (MSA). Supplementing the Member Services initiatives is the Language Access Plan BPI, prompted by Mayor Garcetti's Executive Directive 32 - Strengthening Language Access in the City of Los Angeles. LACERS seeks to develop a Language Access Plan this fiscal year and begin implementation in the upcoming new fiscal year.

To further enhance operational efficiency and sustain a high-performance workforce, led by Benefits Administration divisions, the Knowledge Transfer BPI strategizes institutional knowledge management and transfer within the organization, while the Diversity in Hiring BPI, led by the Investment Division,

seeks to establish an Investment Officer Bridge Class to cultivate interest and advancement in the Investment career path.

The Governance BPI seeks to affirm and strengthen LACERS' mission, vision, and goals in three areas: the development of a new LACERS Strategic Plan in defining the organizations' direction for the next three to five years, the Triennial Board Policy Review to ensure current policies are updated and reflected appropriately, and hosting of a Pension Symposium in educating our stakeholders and members.

The following provides a brief highlight of each BPI. An Asterisk (*) denotes a new BPI.

***Governance BPI - on-track**

ENGAGING IN SOUND GOVERNANCE PRACTICES BY STRENGTHENING LACERS EFFECTIVENESS AND EFFICIENCY AS AN ORGANIZATION

Team Leads: Edwin Avanesian and John Koontz

- Project sponsor: Todd Bouey
- Total project budget: \$40,000
- Project duration: July 2022 and ongoing

***Member Service Modernization BPI - on-track**

IMPROVING CUSTOMER SERVICE AND STAFF EFFECTIVENESS THROUGH DEPARTMENT-WIDE INTEGRATION AND ADOPTION OF TECHNOLOGY ENGAGEMENT TOOLS

Team Leads: Tiffany Obembe, Gabriel J. Perez, and Heather Ramirez

- Project sponsor: Dale Wong-Nguyen
- Total project budget: \$75,000
- Project duration: July 2022 to June 2023

Headquarters Move BPI - off-track

PREPARING AND ENSURING A SMOOTH TRANSITION TO THE NEW HEADQUARTERS

Team Leads: Isaias Cantú and Horacio Arroyo

- Project sponsor: Todd Bouey
- Total project budget: \$21,593,773
- Project duration: November 2019 to June 2023

Workforce Diversity Equity and Inclusion - *on-track*

IMPLEMENTING A TWO-YEAR MIXED-MEDIA FELLOWSHIP PROGRAM TO HELP BUILD A MORE TRANSPARENT AND RESPONSIVE ORGANIZATION WHILE ALSO GUIDING THE PROFESSIONAL SUCCESS OF LACERS STAFF

Team Leads: Vikram Jadhav and Charlena Freeman

- Project sponsor: Neil M. Guglielmo
- Total project budget: \$75,000
- Project duration: September 2021 and ongoing

Environmental, Social, and Governance Investing (ESG) BPI - *on-target*

ENHANCING LACERS INVESTMENT PORTFOLIO GUIDED BY THE RESPONSIBLE INVESTMENT POLICY AND ESG RISK FRAMEWORK

Team Leads: James Wang

- Project sponsor: Rod June
- Total project budget: \$18,125
- Project duration: July 2021 and ongoing

Knowledge Transfer - *on-track

IMPLEMENTING A COMPREHENSIVE TWO-PHASED TRAINING PROGRAM TO EXPEDITE KNOWLEDGE TRANSFER OF RETIREMENT AND HEALTH BENEFITS PROCESSING BETWEEN SENIOR AND NEWER STAFF

Team Leads: Ferralyn Sneed, Delia Hernandez, Audrey Dymally, and Stephanie Smith

- Project sponsor: Dale Wong-Nguyen
- Total project budget: \$7,500
- Project duration: July 2022 and ongoing

Language Access Plan - *on-track

PROVIDING TIMELY AND MEANINGFUL LANGUAGE ACCESS, INCLUDING THE DEAF AND HARD OF HEARING, TO PROGRAMS, SERVICES, INFORMATION, AND PARTICIPATORY PROCESSES

Team Leads: Taneda K. Larios

- Project sponsor: Neil M. Guglielmo
- Total project budget: No budget this Fiscal Year
- Project duration: July 2022 and ongoing

***Member Services Metrics - on-target**

AMENDING THE MEMBER SERVICE AGREEMENT (MSA) WITH DEFINED METRICS AND DEVELOPING DATA TRACKING SYSTEMS AND DASHBOARDS TO BETTER INFORM RESOURCE NEEDS AND PERFORMANCE

Team Leads: Taneda K. Larios and Vikram Jadhav

- Project sponsor: Neil M. Guglielmo, Todd Bouey, and Dale Wong-Nguyen
- Total project budget: No budget this Fiscal Year
- Project duration: July 2022 to June 2023

***Diversity in Hiring BPI - on-target**

LEADING THE CITY OF LA IN DEVELOPING AN INVESTMENT OFFICER BRIDGE CLASS TO INCREASE HIRING OPPORTUNITY IN INVESTMENT DIVISION

Team Leads: Clark Hoover and Vikram Jadhav

- Project sponsor: Neil M. Guglielmo and Rod June
- Total project budget: No budget this Fiscal Year
- Project duration: July 2022 and ongoing

Strategic Plan Impact Statement

The BPI Program seeks to enhance the Strategic Plan Goal of greater organizational effectiveness, efficiency, and resiliency.

Prepared By: Chhintana Kurimoto, Management Analyst

NMG/TB/LL/CK

Attachment: Semi-Annual Report of Business Plan Initiatives Fiscal Year 2022-23 for the reporting period ending December 31, 2022



BOARD Meeting: 2/28/2023
Item: IV-B
Attachment

FY2023

Business Plan

Initiatives

Semi-Annual Report of Business Plan Initiatives
for the Period Ending December 31, 2022

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LACERS Goals



- **Customer Service** - To provide outstanding customer service
- **Benefits Delivery** - To deliver accurate and timely Member benefits
- **Health and Wellness** - Improve value and minimize costs of Members' health and wellness benefits
- **Investment** - To optimize long-term risk adjusted returns through superior investments
- **Governance** - To uphold good governance practices which affirm transparency, accountability, and fiduciary duty
- **Organization** - To increase organizational effectiveness, efficiency, and resiliency
- **Workforce** - To recruit, retain, mentor, empower, and promote a high-performing workforce

Executive Summary Dashboard

 Completed
 On-Track

 Off-Track
 Need Intervention

	INITIATIVES	GOALS	STATUS	EXECUTIVE SPONSORS	INITIATIVE LEADS
1.	Governance	Governance		Todd Bouey	Edwin Avanesian & John Koontz
2.	Member Service Modernization	Customer Service, Benefits Delivery, & Organization		Dale Wong-Nguyen	Tiffany Obembe, Gabriel J. Perez, & Heather Ramirez
3.	Headquarters Move	Customer Service, Benefits Delivery, & Organization		Todd Bouey	Isaias Cantu & Horacio Arroyo
4.	Workforce Diversity, Equity, and Inclusion	Organization & Workforce		Neil Guglielmo	Vikram Jadhav & Charlena Freeman
5.	Environmental, Social, and Governance Investing	Governance & Investment		Rod June	James Wang
6.	Knowledge Transfer	Customer Service, Benefits Delivery, Organization, & Workforce		Dale Wong-Nguyen	Ferralyn Sneed, Delia Hernandez, Audrey Dymally, & Stephanie Smith
7.	Language Access Plan	Customer Service, Benefits Delivery, Governance, & Organization		Neil Guglielmo	Taneda Larios
8.	Member Service Metrics	Customer Service & Organization		Neil Guglielmo, Todd Bouey, Dale Wong-Nguyen	Taneda K. Larios & Vikram Jadhav
9.	Diversity in Hiring	Workforce		Neil Guglielmo & Rod June	Clark Hoover & Vikram Jadhav

INITIATIVE: GOVERNANCE

DIVISION(S)/SECTION: ADMINISTRATION / PROJECT MANAGEMENT OFFICE / MEMBER SERVICES

STRATEGIC GOAL(S): GOVERNANCE

STATUS: ON-TRACK

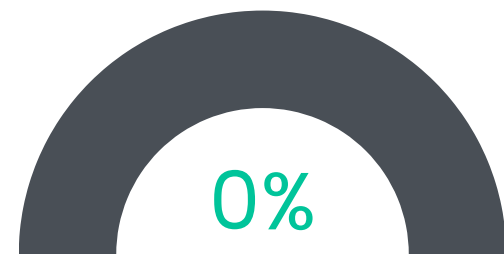
REPORT MONTHS: JULY 2022 - DECEMBER 2022

LEAD(S): EDWIN AVANESSIAN, JOHN KOONTZ

TEAM: CHHINTANA KURIMOTO, LISA LI, KHIA MOORE, NATHAN HERKELRATH, GABRIEL PEREZ, TIFFANY OBEMBE, HEATHER RAMIREZ, AND TANEDA K. LARIOS

INITIATIVE PURPOSE: SET THE COURSE FOR RISK MANAGEMENT AND STRATEGIC VISION FOR THE NEXT 3 TO 5 YEARS.

BUDGET



Appropriation	\$40,000
Expense:	\$0
Unspent:	\$40,000

KEY METRICS

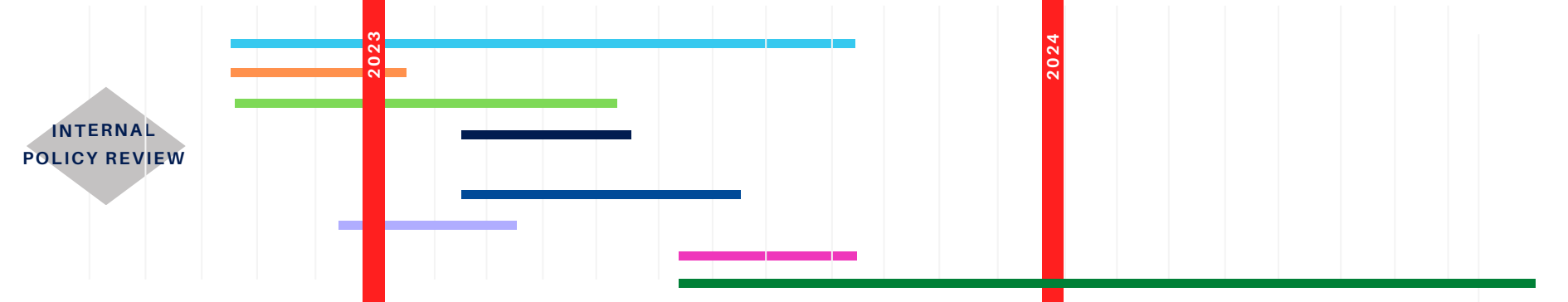


AREAS OF IMPROVEMENT

Improvement Area	Progress
Organization	Schedule has been created to list key deadlines for each task.
Flexibility	Increased flexibility towards meeting and reporting frequencies.
Quality of Work	Routine reviews of each major task to ensure that work is completed accurately and aligning with LACERS' mission.

BOARD GOVERNANCE STATEMENT

- 1.0 Governance Principles
 - 2.0 Governing Statues
 - 3.0 Duties and Responsibilities
 - 4.0 Board Procedures
- BOARD ADMIN POLICIES**
- 1.0 Guidance for Board Members
 - 2.0 Contract Administration
 - 5.0 Other
 - 6.0 New Policies



MILESTONES OF KEY ACTIVITIES

	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter
Strategic Plan	2019 Strategic Plan Stats Gathered	Submission of Strategic Plan Budget Package	Development of RFP	RFP Posted to RAMPLA
Symposium	Tentative Agenda Created	Speakers Secured	Host Symposium	N/A
Triennial Board Policy Review	Perform Internal Policy Review	Initiate Policy Review Process with Board	Continue Policy Review Process with the Board	Continue Policy Review Process with the Board

INITIATIVE: GOVERNANCE

DIVISION(S)/SECTION: ADMINISTRATION / PROJECT MANAGEMENT OFFICE / MEMBER SERVICES

STRATEGIC GOAL(S): GOVERNANCE

REPORT MONTHS: JULY 2022 – DECEMBER 2022

LEAD(S): EDWIN AVANESSIAN, JOHN KOONTZ

TEAM: CHHINTANA KURIMOTO, LISA LI, KHIA MOORE, NATHAN HERKELRATH, GABRIEL PEREZ, TIFFANY OBEMBE, HEATHER RAMIREZ, AND TANEDA K. LARIOS

INITIATIVE PURPOSE: SET THE COURSE FOR RISK MANAGEMENT AND STRATEGIC VISION FOR THE NEXT 3 TO 5 YEARS

PROGRESS

Strategic Plan

LACERS has met with other pension peers to discuss their Strategic Planning process, from the procurement of the Consultant to the development of the Strategic Plan. The discussion led to the realization that additional funding would be needed to potentially secure an experienced consultant with a strong pension background. Therefore, for the FY24 budget preparation, a budget package of \$150k was submitted for consideration for FY24. In the meantime, staff has collected statistical information for the current Strategic Plan that will later be provided to the consultant once they have been onboarded.

Pension Symposium

LACERS has routinely met every month to discuss the direction of the symposium and the type of topics that should be covered. Q2 yielded the result of a finalized agenda with symposium speakers secured as well. Admin and the Exec team has also worked closely with the Member Engagement team to conduct testing with the webinar feature of Zoom to ensure a successful symposium.

PROGRESS CONT.

Triennial Board Policy Review

LACERS presented the Board with a plan and timeline for performing the triennial review of the Board Policy. The plan and timeline were adopted by the Board on November 8, 2022. Since, progress on the Triennial Board Policy Review has remained on schedule including Board review of Sections 2.0. Work on the review is scheduled to continue until September of 2024.

CHALLENGES

Strategic Plan

Upon discussing with other pension peers, whom had recently contracted with a consultant for their Strategic Plan, a series of challenges were identified.

1. Lack of Qualified Consultants – RFPs had received minimal responses and the final selected Consultant usually did not provide sufficient support to the entire Strategic Planning process
2. Insufficient Funding – To develop a robust strategic plan with a consultant that has a strong Pensions background, a significant amount of funding is needed. LACERS currently only has \$25k budgeted which will likely not be able to yield any desirable results for this fiscal year.

Pension Symposium

As the development of the symposium is a collaborative effort with multiple divisions and sections, scheduling to meet was a rising challenge due to competing priorities of different sections. Benefits Bureau had a massive influx of cases due to Open Enrollment and Administration Bureau had initiated preparation for the HQ move and budget preparation, which led to increased difficulties in coordinating. However, increased flexibility towards meeting frequencies enabled everyone to meet at least once a month for the review of symposium materials.

Triennial Board Policy Review

As the review continues, the principal challenge LACERS can anticipate would involve extended discussion of a specific topic that might delay the timeline. Although prolonged discussions may extend the timeline, the product of these discussions are in the long-term policy interests of the Board and LACERS.

INITIATIVE: GOVERNANCE

DIVISION(S)/SECTION: ADMINISTRATION / PROJECT MANAGEMENT OFFICE / MEMBER SERVICES

STRATEGIC GOAL(S): GOVERNANCE

REPORT MONTHS: JULY 2022 – DECEMBER 2022

LEAD(S): EDWIN AVANESSIAN, JOHN KOONTZ

TEAM: CHHINTANA KURIMOTO, LISA LI, KHIA MOORE, NATHAN HERKELRATH, GABRIEL PEREZ, TIFFANY OBEMBE, HEATHER RAMIREZ, AND TANEDA K. LARIOS

INITIATIVE PURPOSE: SET THE COURSE FOR RISK MANAGEMENT AND STRATEGIC VISION FOR THE NEXT 3 TO 5 YEARS

NEXT STEPS

Strategic Plan

If the budget package is approved with the \$150k, Admin team will be able to move forward to develop a RFP that will fully meet LACERS' requirements for a strategic plan. Staff will also continue to compile any past information that LACERS had conducted for the development of the 2019 strategic plan, so there may be a point of reference that the consultant can start off with when working with staff. It is anticipated that the RFP will be released late FY23 to successfully onboard the consultant by the end of Q1 FY24.

Pension Symposium

With the symposium agenda finalized, staff are developing presentations for their respective topics. A training and an actual symposium test run is expected to happen toward the end of January 2023 to provide practice to all speakers and panelists.

Triennial Board Policy Review

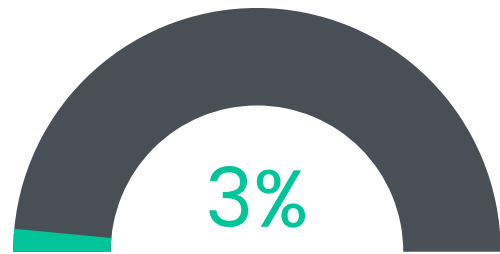
The Board's Policy Review is scheduled to continue over the course of two fiscal years including FY23 and FY24. Future reviews include Sections 1, 3, 4 of the Board Governance Statement and Sections 1, 2, and 5 of the Board Administration Policies (BAP). Sections 3 and 4 of the BAP were previously reviewed in 2021.

INITIATIVE: MEMBER SERVICE MODERNIZATION
DIVISION(S)/SECTION: COMMUNICATIONS & STAKEHOLDER RELATIONS DIVISION
STRATEGIC GOAL(S): CUSTOMER SERVICE, BENEFITS DELIVERY, & ORGANIZATION

STATUS: ON-TRACK
REPORT MONTHS: JULY 2022 - DECEMBER 2022
LEAD(S): TIFFANY OBEMBE, GABRIEL J PEREZ, AND HEATHER RAMIREZ
TEAM: JENNIFER ROMERO, GINA HENDERSON, SANDRA JAMES, NATHAN HERKELRATH, CARLOS JOVEL JR., KHIA MOORE

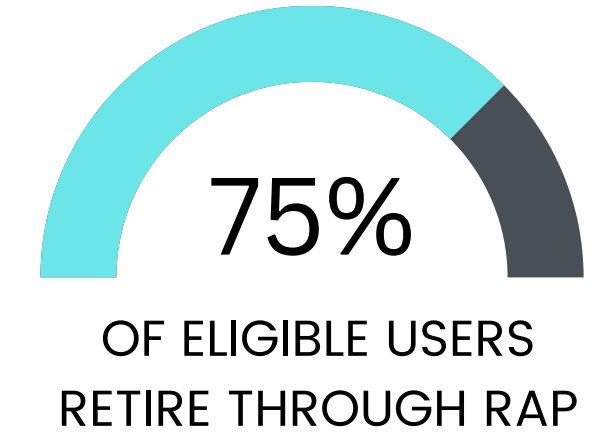
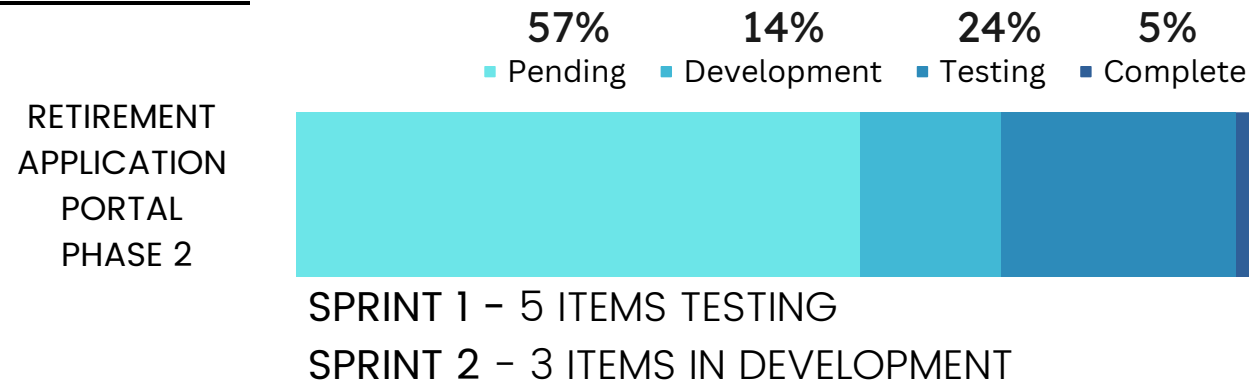
INITIATIVE PURPOSE: THE RETIREMENT APPLICATION PORTAL (RAP) WILL PROVIDE MORE EFFICIENCY FOR OUR STAFF, AND A BETTER USER EXPERIENCE FOR MEMBERS. AMAZON CONNECT ACROSS THE DEPT WILL ALLOW US TO PROVIDE BETTER CUSTOMER SERVICE THROUGH THE TOOLS BUILT IN.

BUDGET



Appropriation	\$75,000
Expense:	\$2,322
Unspent:	\$72,678

KEY METRICS



AREAS OF IMPROVEMENT

Improvement Area	Progress
Amazon Connect	
Coordination	Due to competing priorities coordination and support could pose as a challenge. Therefore, the team will prioritize high-level items for discussion.
Implementation	Additional testing to be conducted to ensure a smooth implementation

Improvement Area	Progress
RAP Phase 2	
Collaboration	Increased flexibility towards meeting frequencies and new channels of communication created
Box Testing	Additional input from units to identify bugs and reduce code drops and versioning for system stability

MILESTONES OF KEY ACTIVITIES

	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter
Retirement Application Portal (RAP)	Established and Approved Statement of Work (SOW) with Box.com	Prioritize fixes and enhancements begin	Continue with Box in 2 week sprints, with testing in Demo environment	Final testing and Code drop into Production Environment
Department-wide Amazon Connect	Testing of Quick Connect functionality	Draft proposal for Executive review	Proposal approval by Exec, report and LACERS-wide notification	Staff Training and Platform Implementation

INITIATIVE: MEMBER SERVICE MODERNIZATION

DIVISION(S)/SECTION: COMMUNICATIONS & STAKEHOLDER RELATIONS DIVISION

STRATEGIC GOAL(S): CUSTOMER SERVICE, BENEFITS DELIVERY, & ORGANIZATION

REPORT MONTHS: JULY 2022 – DECEMBER 2022

LEAD(S): TIFFANY OBEMBE, GABRIEL J PEREZ, AND HEATHER RAMIREZ

TEAM: JENNIFER ROMERO, GINA HENDERSON, SANDRA JAMES, NATHAN HERKELRATH, CARLOS JOVEL JR., KHIA MOORE

INITIATIVE PURPOSE: THE RETIREMENT APPLICATION PORTAL (RAP) WILL PROVIDE MORE EFFICIENCY FOR OUR STAFF, AND A BETTER USER EXPERIENCE FOR MEMBERS. AMAZON CONNECT ACROSS THE DEPT WILL ALLOW US TO PROVIDE BETTER CUSTOMER SERVICE THROUGH THE TOOLS BUILT IN.

PROGRESS

RAP

In the second quarter the Statement of Work (SOW) was established and approved. One item has been completed so far, the Tax Withholding changes. Our lead, Gabriel Perez, meets weekly with Box to discuss clarifications, updates, and changes. The team is currently in the middle of sprint two with five of the 23 items currently in the test phase.

Amazon Connect

During the first quarter the team tested the ability to use the quick connect technology. During the second quarter the team began drafting the memo to submit to Executive for approval.

CHALLENGES

RAP

- To incorporate all the units, a Phase 2 Team channel has been created where updates will be provided weekly to keep them in the loop, and as-needed where unit input may be required
- Box has not been able to duplicate all of the bugs reported. Unit input will be necessary in order for LACERS to provide as much documentation as possible of the reported issues and ensure that the bugs are fixed.
- To reduce the number of code drops and splintering of applications, versioning will be applied to the demo environment, which will allow testing at each sprint without negatively affecting the sample applications in the test environment.
- To minimize the impact on the live environment, the project will culminate in a single code drop at the completion.

Amazon Connect

- More testing is needed with the internal and external quick connect set-ups in the Amazon Connect portal as the initial testing did not run as smoothly as anticipated.
- With the extended move to 977, we anticipate more challenges to come as we try to coordinate testing with other units and ask for systems support when other priorities may take precedence.

INITIATIVE: MEMBER SERVICE MODERNIZATION

DIVISION(S)/SECTION: COMMUNICATIONS & STAKEHOLDER RELATIONS DIVISION

STRATEGIC GOAL(S): CUSTOMER SERVICE, BENEFITS DELIVERY, & ORGANIZATION

REPORT MONTHS: JULY 2022 – DECEMBER 2022

LEAD(S): TIFFANY OBEMBE, GABRIEL J PEREZ, AND HEATHER RAMIREZ

TEAM: JENNIFER ROMERO, GINA HENDERSON, SANDRA JAMES,
NATHAN HERKELRATH, CARLOS JOVEL JR., KHIA MOORE

INITIATIVE PURPOSE: THE RETIREMENT APPLICATION PORTAL (RAP) WILL PROVIDE MORE EFFICIENCY FOR OUR STAFF, AND A BETTER USER EXPERIENCE FOR MEMBERS. AMAZON CONNECT ACROSS THE DEPT WILL ALLOW US TO PROVIDE BETTER CUSTOMER SERVICE THROUGH THE TOOLS BUILT IN.

NEXT STEPS

RAP

The team will continue to work with Box on the features and bug fixes in a series of sprints that include weekly meetings to check in, provide additional information and direction as needed, and testing of the implemented fixes. These sprints will culminate in a single code drop to the production environment at the completion of the project.

Amazon Connect

The immediate next steps are to finalize the Amazon Connect memo and send it for Executive approval by the end of January. If approved, the BPI team will reach out to the Systems staff to start coordinating the technical implantation of Amazon Connect LACERS-wide in February. Strategies and a timeline for further testing will be discussed and finalized at the next BPI team meeting. A communications campaign will be developed by the Member Engagement team to inform staff of the upcoming rollout of Amazon Connect which will include, emails and possible infographics. A tentative date for implementation to begin would be March 2023/ or whenever feasibly possible based on the 977 move and Systems staff availability.

INITIATIVE: HQ MOVE
DIVISION(S)/SECTION: ADMINISTRATION/ADMINISTRATION SERVICES OFFICE
STRATEGIC GOAL(S): CUSTOMER SERVICE, BENEFITS DELIVERY, & ORGANIZATION

STATUS: **OFF-TRACK**
REPORT MONTHS: JULY 2022 – DECEMBER 2022
LEAD(S): ISAIAS CANTÚ AND HORACIO ARROYO
TEAM: KRISTEN SZANTO

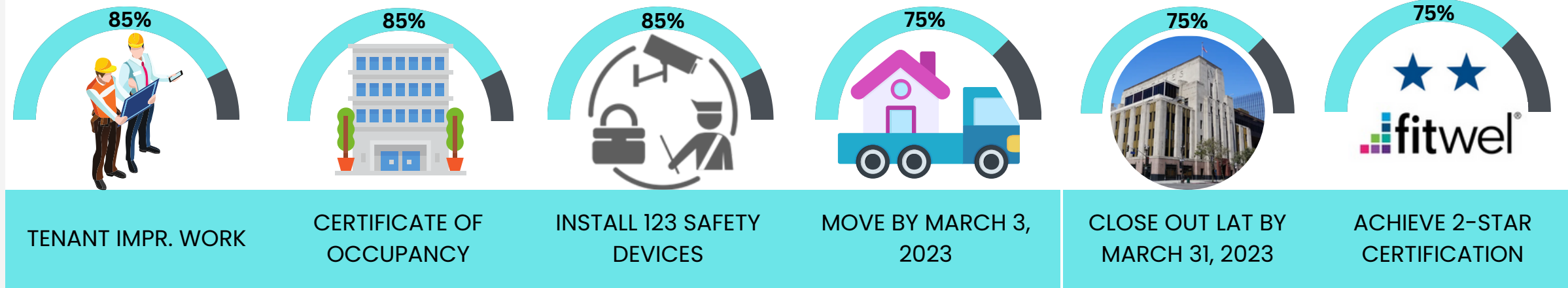
INITIATIVE PURPOSE: THE HEADQUARTERS (HQ) MOVE INITIATIVE SEEKS TO RELOCATE LACERS TO ITS NEW HOME AT 977 N BROADWAY. WITH CONSTRUCTION UNDERWAY, THE PROJECT INVOLVES CONSULTANTS, CONTRACTORS, AND KEY LACERS REPRESENTATIVES THAT WORK TOGETHER TO BUILD LACERS' NEW HOME FOR STAFF AND MEMBERS.

BUDGET

APPROPRIATION: \$21,593,773
 EXPENSE: \$18,052,773
 UNSPENT: \$ 3,541,343



KEY METRICS



AREAS OF IMPROVEMENT

Improvement Area	Progress
Streamline review with LADBS and LAFD	Established direct lines of communications with both departments
Anticipate supply-chain delays	Streamlined purchase approvals for items with long lead times and identified alternative sources for purchases
Close out operations at LA Times	Completed initial move; maintained work space in LA Times for limited operation

MILESTONES OF KEY ACTIVITIES

	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter
Complete Tenant Improvement Work	Floors 3-5 completed	Floors 1 and 2 completed	Complete punch-walk; transfer bldg and train	
Furnish building	furniture received in warehouse	workstation furniture installed; Board room table assembled	Install remaining furniture (conf. rms, common areas)	
Move LACERS Staff and Operations	Contract with move vendor	Complete significant move on Dec 22	Finalize move; decommission and surrender LA Times	Identify and address post-occupancy issues
FitWel certification	Gather submission documents	Submit application; received 1-Star points;	Achieve 2-Star points	Post FitWel building certification
Pass all building inspections to achieve occupancy	Fire Pump permitting delays	Parking striping and security gate delays	Clear all LADBS and LAFD inspections	Present final HQ Project Report
Install building security devices	Security cameras installed	Card readers delayed; gate permitting delay	Security trainings and equip configuration	

INITIATIVE: HQ MOVE

DIVISION(S)/SECTION: ADMINISTRATION /ADMINISTRATIVE SERVICES OFFICE (ASO)

STRATEGIC GOAL(S): CUSTOMER SERVICE, BENEFITS DELIVERY, & ORGANIZATION

REPORT MONTHS: JULY 2022 – DECEMBER 2022

LEAD(S): ISAIAS CANTÚ AND HORACIO ARROYO

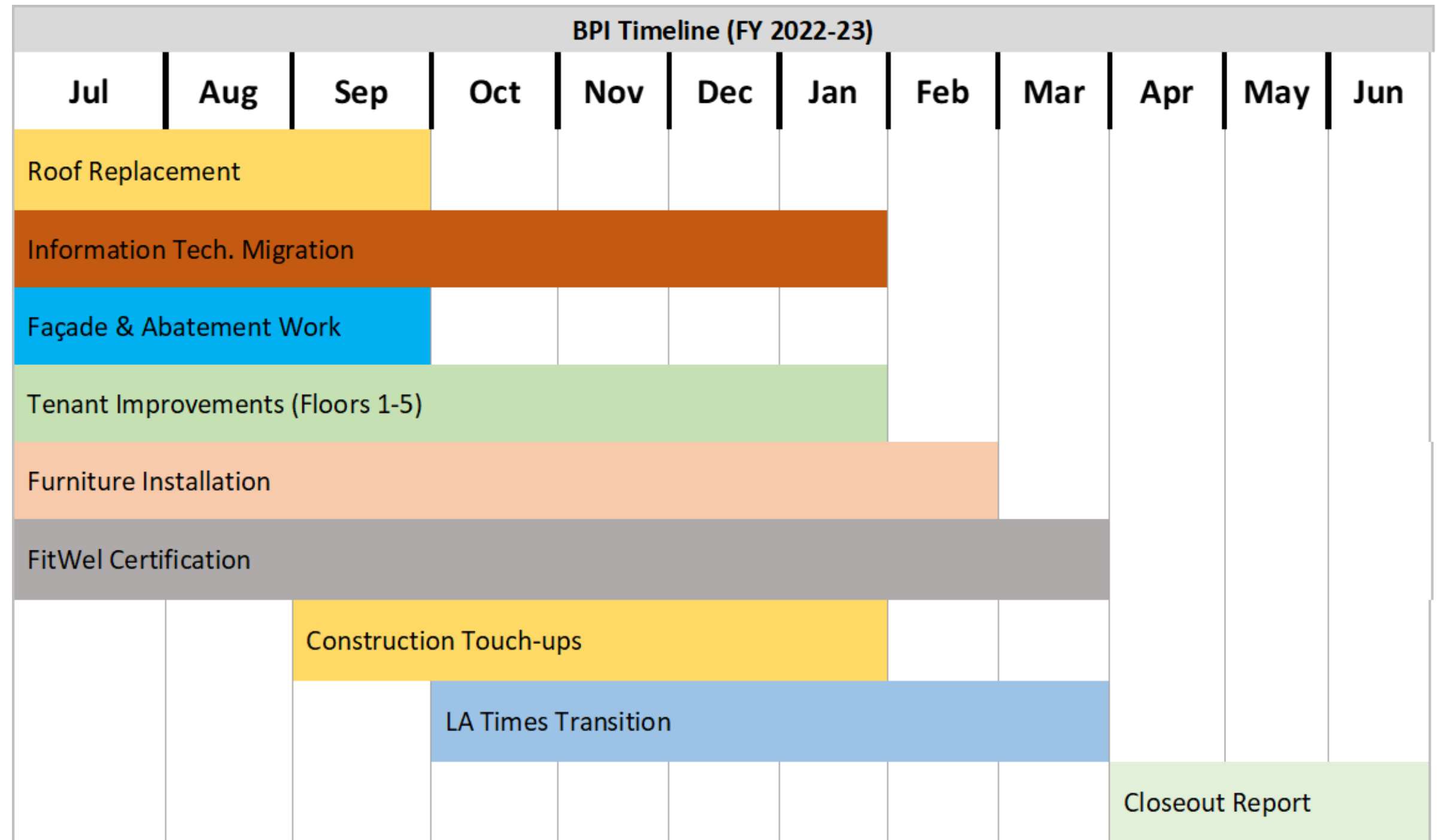
TEAM: KRISTEN SZANTO

INITIATIVE PURPOSE: THE HEADQUARTERS (HQ) MOVE INITIATIVE SEEKS TO RELOCATE LACERS TO ITS NEW HOME AT 977 N BROADWAY. WITH CONSTRUCTION UNDERWAY, THE PROJECT INVOLVES CONSULTANTS, CONTRACTORS, AND KEY LACERS REPRESENTATIVES THAT WORK TOGETHER TO BUILD LACERS’ NEW HOME FOR STAFF AND MEMBERS.

PROGRESS

The Headquarters Move Project has accomplished the following:

- Design Scope
- Building Enclosure Work
- New roof installation
- Abatement Work
- Seismic Strengthening
- Server Room Turnover
- Carpet Installation
- Installation of new back up generator
- Dec 22 Move
- Installation of workstation furniture
- Building Painting Scope
- Lighting Systems installation
- Submission of FitWel application



INITIATIVE: HQ MOVE

DIVISION(S)/SECTION: ADMINISTRATION/ADMINISTRATIVE SERVICES OFFICE

STRATEGIC GOAL(S): CUSTOMER SERVICE, BENEFITS DELIVERY, & ORGANIZATION

REPORT MONTHS: JULY 2022 – DECEMBER 2022

LEAD(S): ISAIAS CANTÚ AND HORACIO ARROYO

TEAM: KRISTEN SZANTO

INITIATIVE PURPOSE: THE HEADQUARTERS (HQ) MOVE INITIATIVE SEEKS TO RELOCATE LACERS TO ITS NEW HOME AT 977 N BROADWAY. WITH CONSTRUCTION UNDERWAY, THE PROJECT INVOLVES CONSULTANTS, CONTRACTORS, AND KEY LACERS REPRESENTATIVES THAT WORK TOGETHER TO BUILD LACERS' NEW HOME FOR STAFF AND MEMBERS.

CHALLENGES

- **PERMITTING DELAYS** - Significant delays encountered through LAFD/LADBS inspections for Fire Pump Replacement, Breezeway Gate, parking space requirements, and Fire & Life Safety requirements. These delays triggered supplemental permitting needs, contractor extensions, and additional costs.
- **SUPPLY CHAIN DELAYS** - The COVID-19 supply-chain delay continues to impact the project in the ability to secure security devices (card readers and related equipment). Certain furniture pieces and technology components also delayed the completion of the furniture installation scope.
- **DELAY IN OCCUPANCY** - Both permitting and supply-chain delays have impacted LACERS' occupancy date. While no clear date has been identified thus far, LACERS must address all LADBS and LAFD corrections prior to occupancy.
- **IMMINENT SURRENDER OF EXISTING LEASE** - LACERS continues to make preparations in anticipation of the March 31, 2023 deadline to surrender the LA Times leased space including decommissioning and lease-required repairs.
- **ADDITIONAL COSTS** - The 977 HQ Project delays continue to trigger additional costs that require the commitment of contingency funds to pay for consultant work, contract extensions, permit fees, and equipment/supply costs.

NEXT STEPS



Limited "Gap Period" Operations

Maintain small operation at LA Times for on-site staff until we achieve occupancy approval.



Coordinate with LAFD and LADBS Depts.

To identify efficient solutions and timeframes to remaining permitting concerns.



Furniture Removal & Decommissioning

Work with GSD Salvage to decommission working furniture; return loaned items



Coordinate Second Move to 977

Following approval to occupy 977, a final move will completely move LACERS out of LA Times



Exit LA Times Lease

Work with Onni and vendor to decommission and surrender LA Times lease



New Tech Trainings

Following the turnover of the building, LACERS will be trained on AV, security, and conferencing solutions



Welcome Home Activities

Conduct a Welcome Orientation for staff



New Building, New Badge

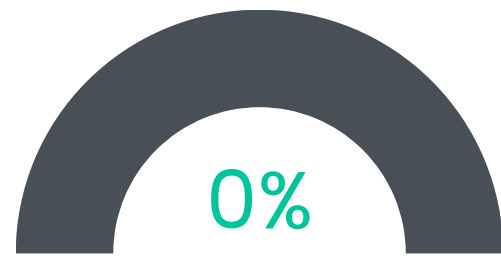
Design a LACERS badge for 977 employees as part of the building's new card reader access control system

INITIATIVE: WORKFORCE DEI
DIVISION(S)/SECTION: EXECUTIVE / HUMAN RESOURCES
STRATEGIC GOAL(S): ORGANIZATION & WORKFORCE

STATUS: **ON TRACK**
REPORT MONTHS: JULY 2022 - DECEMBER 2022
LEAD(S)/TEAM: VIKRAM JADHAV AND CHARLENA FREEMAN

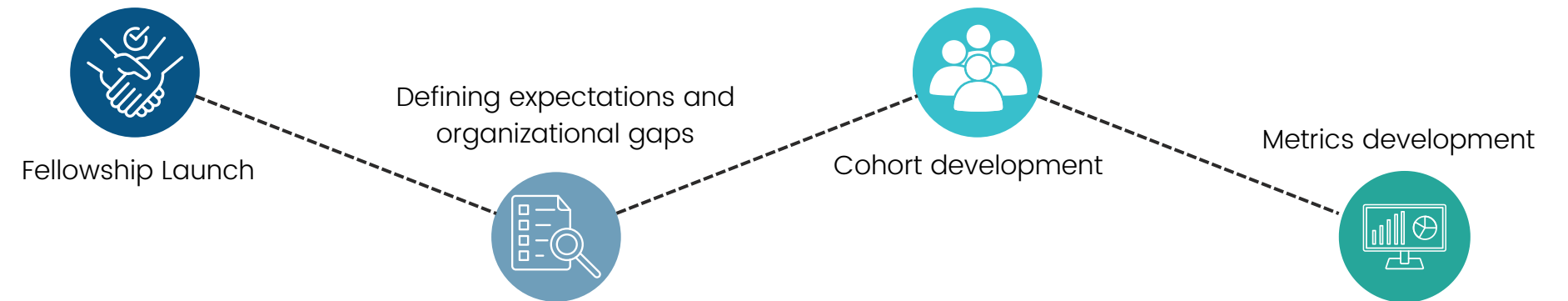
INITIATIVE PURPOSE: IDENTIFY PROCESS AND LEADERSHIP GAPS CURRENTLY INHIBITING ORGANIZATIONAL EFFECTIVENESS AND RESILIENCY WHILE PROMOTING A HIGH-PERFORMING WORKFORCE THROUGH A COHORT BASED PROGRAM DESIGNED TO ADDRESS PROFESSIONAL GROWTH NEEDS OF STAFF

BUDGET



Appropriation	\$75,000
Expense:	\$0.00
Unspent:	\$75,000

KEY METRICS



First year of the Fellowship launch with Senior Managers and Executive in defining expectations and organizational gaps, while setting parameters for growth opportunities within the department.

Employee sentiment will be baselined at the start of the program and will be measured on a bi-annual basis to measure progress along a variety of categories. Creation of these metrics is on-going.

AREAS OF IMPROVEMENT

Improvement Area	Progress
Identify organizational and leadership gaps	Senior Manger specific cohort
Identify and resolve employee growth needs	Staff specific cohort
Mentor and retain future staff	Create learning materials for future use
Resolve organizational and leadership gaps for employee growth	Roadmap for necessary interventions

MILESTONES OF KEY ACTIVITIES

	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter
Project Charter	Established initiative goals and objectives		N/A	N/A
Request for Proposal	Develop RFP	RFP Release and Vendor Selection	N/A	N/A
Project Kick-Off	N/A	N/A	Project Launch with first cohort of Management Staff	Phase 2 TBD

INITIATIVE: WORKFORCE DEI
DIVISION(S)/SECTION: EXECUTIVE/HUMAN RESOURCES
STRATEGIC GOAL(S): ORGANIZATION & WORKFORCE

REPORT MONTHS: JULY 2022 – DECEMBER 2022
LEAD(S)/TEAM: VIKRAM JADHAV AND CHARLENA FREEMAN

INITIATIVE PURPOSE: IDENTIFY PROCESS AND LEADERSHIP GAPS CURRENTLY INHIBITING ORGANIZATIONAL EFFECTIVENESS AND RESILIENCY WHILE PROMOTING A HIGH-PERFORMING WORKFORCE THROUGH A COHORT BASED PROGRAM DESIGNED TO ADDRESS PROFESSIONAL GROWTH NEEDS OF STAFF

PROGRESS

2022 – DEI Committee

- DEI Committee Formed to explore use cases and potential LACERS initiatives
- LACERS fellowship idea proposed, vetted, and approved by group

2022 – LACERS Fellowship Sub-committee Formed

- Sub-committee formed to develop RFP
- DEI Committee review and approves RFP

2022 – RFP Release

- RFP released and receives four qualified responses
- RFP panel committee selects vendor for presentation to Board

2022 – Board Presentation and Approval

- RFP presented to Board to approve contract with selected vendor
- Board approved

CHALLENGES

As an organization, our goal is to be clear with staff on professional expectations of LACERS employees, but also to create pathways and opportunities for all staff to advance in their careers. If executed as designed, we intend to see:

- Employees defining their goals and their professional brand as aligned with LACERS
- The LACERS organization adjusting management practices in alignment with staff needs
- Greater transparency of considerations used by the organization to promote staff
- Specialized training resources to help staff meet their career and earnings goals

NEXT STEPS

Fiscal Year 23/24 will engage all staff, segmented into relevant cohorts, to participate in the learning program co-developed by LACERS and the consultant. Upon completion of the Fellowship program, all usable content will be embedded into the LACERS learning management system and built upon for advanced training, both for current and incoming staff.

INITIATIVE: ENVIRONMENTAL, SOCIAL, AND GOVERNANCE INVESTING

DIVISION(S)/SECTION: INVESTMENTS

STRATEGIC GOAL(S): GOVERNANCE & INVESTMENT

STATUS: ON TRACK

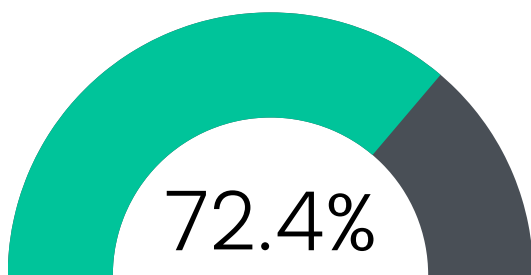
REPORT MONTHS: JULY 2022 – DECEMBER 2022

LEAD(S): JAMES WANG

TEAM: CLARK HOOVER, JEREMIAH PARAS

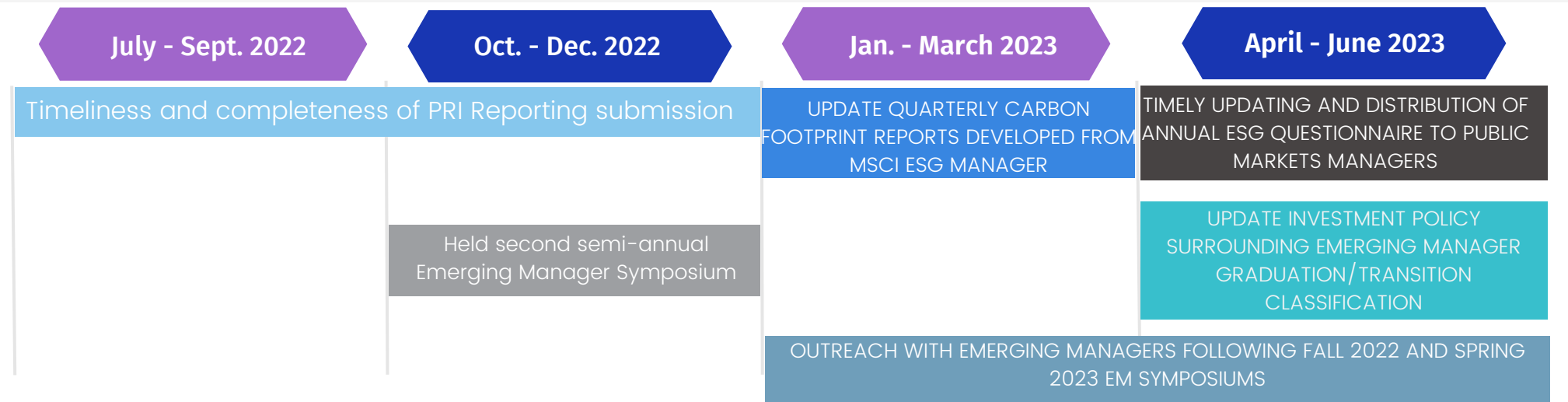
INITIATIVE PURPOSE: ENHANCE THE LONG-TERM RISK ADJUSTED RETURNS OF THE LACERS INVESTMENT PORTFOLIO THROUGH THE IMPLEMENTATION OF A ROBUST ESG PROGRAM GUIDED BY A COMPREHENSIVE RESPONSIBLE INVESTMENT POLICY, AN ESG RISK FRAMEWORK, THE PRINCIPLES FOR RESPONSIBLE INVESTMENT, AND DIRECTIONS OF THE BOARD.

BUDGET



Appropriation	\$18,125
Expense:	\$15,717
Unspent:	\$2,408

KEY METRICS



AREAS OF IMPROVEMENT

Improvement Area	Progress
Further incorporate ESG Risk Factors into the investment manager selection process	Staff updated and reviewed ESG questions
Continue to develop LACERS ESG investment risk exposure reporting through internal and third-party software.	Developing fossil fuel exposure reporting with MSCI.
Continue to develop LACERS ESG database and reporting functionalities.	Staff is exploring various vendors.
Expand network of like-minded institutional investors and organizations to collaborate on ESG matters.	Staff served on ESG panels, participated in several meetings exchanging ESG ideas with other institutional investors and industry organizations.
Review and update Responsible Investment Policy, ESG Risk Framework Action Plan, Proxy Voting Policy, and PRI Action Plan.	Staff is in continuous liaison with PRI to discuss reporting and data portal updates and to review PRI Questionnaire results for LACERS.

MILESTONES OF KEY ACTIVITIES

	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter
Fall 2022 Emerging Manager Symposium	Completed 11/2022			
Evaluation of additional third-party ESG analytical tools and resources	Ongoing	Ongoing	Ongoing	Ongoing
Development of analysis and metrics reporting from MSCI ESG Manager	Ongoing	Ongoing	Ongoing	Ongoing
Review of PRI and ESG Risk Framework Action Plans and delegation of subtasks	Ongoing	Ongoing	Ongoing	Ongoing
Review PRI Assessment and Transparency Report			Targeted for Completion	
Review of Emerging Investment Manager Policy (to incorporate graduation/transition classification)				Targeted for Completion
Update of Annual ESG Questionnaire for public markets managers				Targeted for Completion
PRI Reporting				Report starting Q4
Spring 2023 Emerging Manager Symposium				Scheduled for Q4

INITIATIVE: ENVIRONMENTAL, SOCIAL, AND GOVERNANCE INVESTING

DIVISION(S)/SECTION: INVESTMENTS

STRATEGIC GOAL(S): GOVERNANCE & INVESTMENT

REPORT MONTHS: JULY 2022 – DECEMBER 2022

LEAD(S): JAMES WANG

TEAM: CLARK HOOVER, JEREMIAH PARAS

INITIATIVE PURPOSE: ENHANCE THE LONG-TERM RISK ADJUSTED RETURNS OF THE LACERS INVESTMENT PORTFOLIO THROUGH THE IMPLEMENTATION OF A ROBUST ESG PROGRAM GUIDED BY A COMPREHENSIVE RESPONSIBLE INVESTMENT POLICY, AN ESG RISK FRAMEWORK, THE PRINCIPLES FOR RESPONSIBLE INVESTMENT, AND DIRECTIONS OF THE BOARD.

PROGRESS

- Staff updated and reviewed ESG questions in the manager selection process
- Developing useful ESG reporting with MSCI
- Expand access to additional ESG related databases
- Staff served on ESG panels and participated in several meetings exchanging ESG ideas with other institutional investors and industry organizations
- Continue to engage in thought leadership in the ESG space. For example, developing LACERS ESG Risk Framework and contributing to PRI DEI due diligence questionnaires.

CHALLENGES

- Keeping up with new guidelines established by industry organizations such as PRI.
- Challenges to compare against benchmarks due to lack of data.
- Cost and availability issues. Staff is exploring various vendors.
- Travel and operational constraints to attend further meetings.
- Staying ahead of what potential ESG issues could be material to LACERS.

NEXT STEPS

- Identify ESG risk factors that are most relevant to investment returns and incorporate into manager selection process.
- Continue to explore LACERS ESG exposure metrics and identify best metrics to capture.
- Continue to develop LACERS ESG reporting and explore further data sources and vendors.
- Continue to engage ESG organizations and attend future ESG conferences.
- Continue to explore LACERS DEI initiatives.
- Explore ESG based strategies from current and potential investment managers.
- Continue to update ESG questionnaires based on PRI guidelines.
- Explore progress measures for environmental, social, and governance aspects in LACERS portfolio.

INITIATIVE: KNOWLEDGE TRANSFER

DIVISION(S)/SECTION: RETIREMENT SERVICES DIVISION (RSD)

STRATEGIC GOAL(S): CUSTOMER SERVICE, BENEFITS DELIVERY, ORGANIZATION, & WORKFORCE

STATUS: ON-TRACK

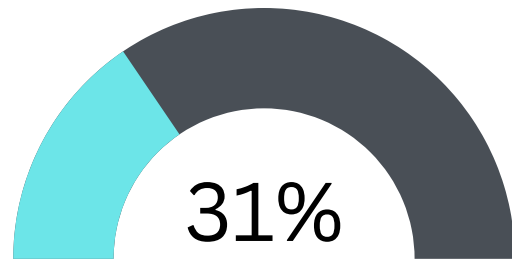
REPORT MONTHS: JULY 2022 - DECEMBER 2022

LEAD(S): FERRALYN SNEED, DELIA HERNANDEZ, AUDREY DYMALLY

TEAM: LADY Y. SMITH, ESTELLA PRIEBE, SUSANN HERNANDEZ, CAROL REMBERT

INITIATIVE PURPOSE: DEPLOY A TWO-PHASED APPROACH FOR INSTITUTIONAL KNOWLEDGE TRANSFER FROM RETIRING SENIOR STAFF TO NEW STAFF. THIS BPI IS A CROSS-DIVISIONAL COLLABORATION BETWEEN DIVISIONS WITHIN THE BENEFITS ADMINISTRATION, THEREFORE, THE BUDGET FOR THIS INITIATIVE IS SHARED.

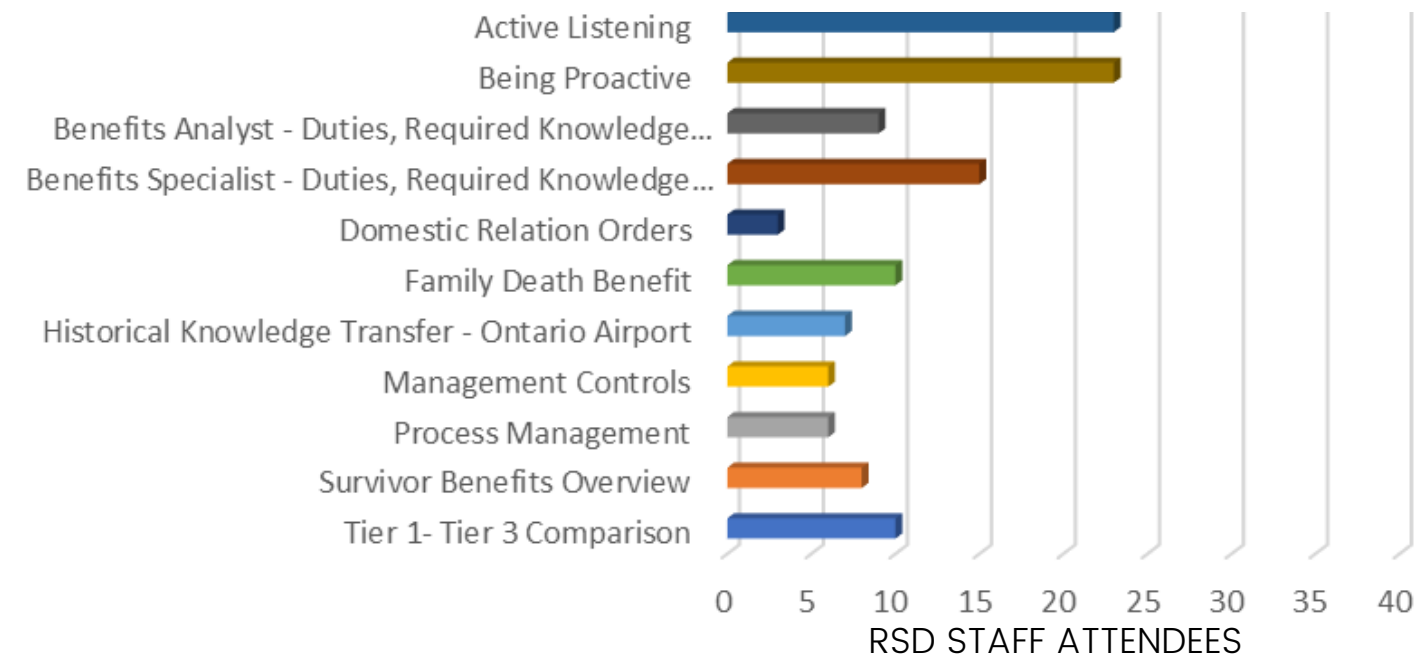
BUDGET



Appropriation	\$7,500
Expense	\$2,300
Unspent	\$5,200

KEY METRICS

Retirement Services Division (RSD) Training Q1 and Q2



**Targeted trainings to specific unit and specific staff

AREAS OF IMPROVEMENT

Improvement Area

Progress

Develop knowledge management application to provide on demand training for all future staff while reducing strain on Senior Managers	Board approved \$20,000 expenditure in January 2023 to retain vendor
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MILESTONES OF KEY ACTIVITIES

✓ General Staff
✓ Senior Staff

Subject Area	Training Materials	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter
Active Listening	✓	✓			
Being Proactive	✓	✓			
Domestic Relation Orders	✓	✓			
Management Controls	✓	✓			
Process Management	✓	✓			
Survivor Benefits Overview	✓	✓			

Subject Area	Training Materials	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter
Benefits Analyst - Duties, Required Knowledge Base and Expectations	✓		✓		
Benefits Specialist - Duties, Required Knowledge Base and Expectations	✓		✓		
Family Death Benefit	✓		✓		
Historical Knowledge - Ontario Airport	✓		✓		
Tier 1 - Tier 3 Comparison	✓		✓		

INITIATIVE: KNOWLEDGE TRANSFER

DIVISION(S)/SECTION: HEALTH, WELLNESS, AND BUYBACK DIVISION (HWABD)

STRATEGIC GOAL(S): CUSTOMER SERVICE, BENEFITS DELIVERY, ORGANIZATION, & WORKFORCE

STATUS: **ON-TRACK**

REPORT MONTHS: JULY 2022 – DECEMBER 2022

LEAD(S): STEPHANIE SMITH

TEAM: RAINBOW SUN, ANNI QUACH, MARICEL MARTIN, JAMES KAWASHIMA, ADA LOK, GLEN MALABUYOC, EDELIZA FANG, MARGARET DRENK

INITIATIVE PURPOSE: DEPLOY A TWO-PHASED APPROACH FOR INSTITUTIONAL KNOWLEDGE TRANSFER FROM RETIRING SENIOR STAFF TO NEW STAFF. THIS BPI IS A CROSS-DIVISIONAL COLLABORATION BETWEEN DIVISIONS WITHIN THE BENEFITS ADMINISTRATION, THEREFORE, THE BUDGET FOR THIS INITIATIVE IS SHARED.

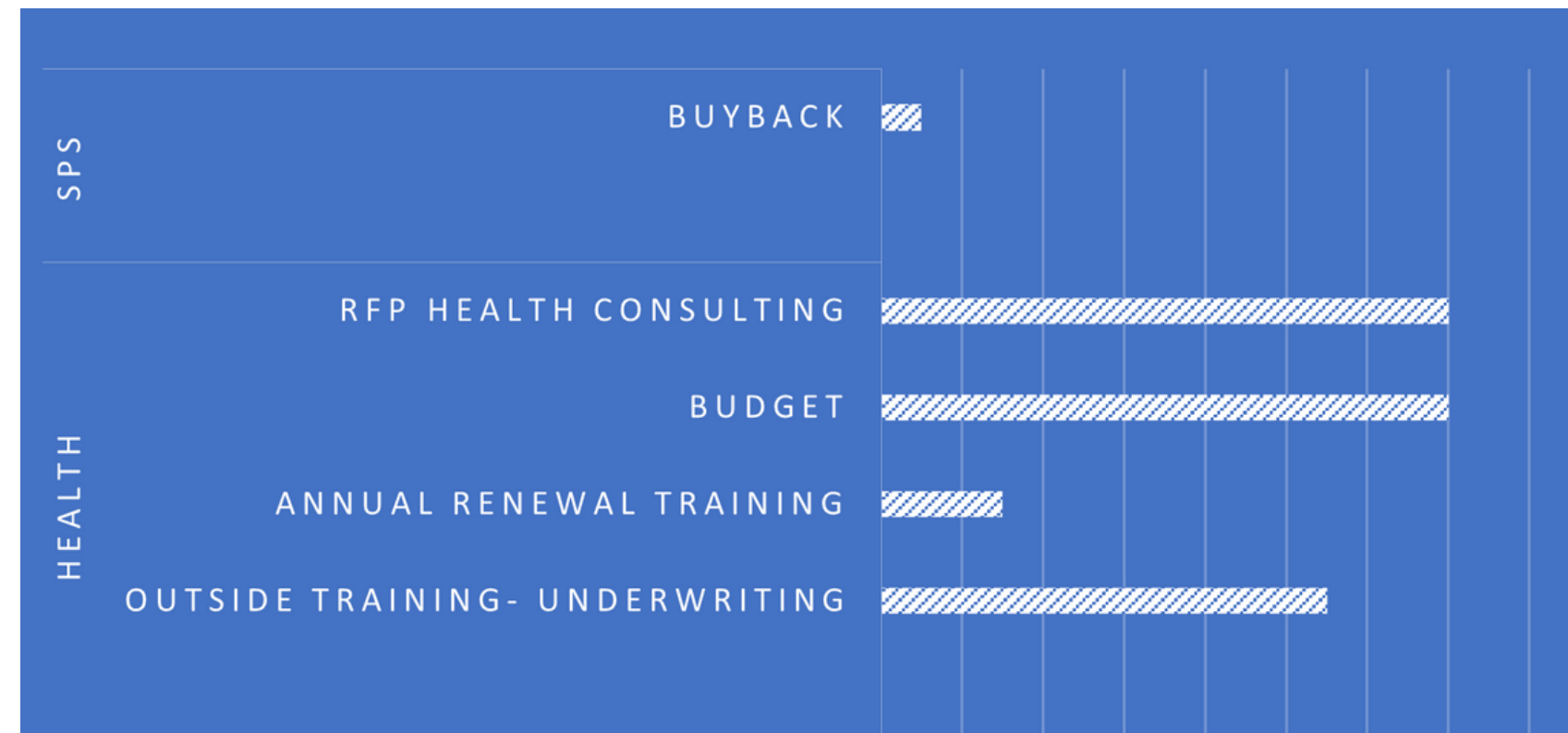
BUDGET

Please see budget in RSD's Knowledge Transfer Dashboard as this is a shared budget.

AREAS OF IMPROVEMENT

Improvement Area	Progress
Develop knowledge management application to provide on demand training for all future staff while reducing strain on Senior Managers	Board approved \$20,000 expenditure in January 2023 to retain vendor

KEY METRICS



**Targeted trainings to specific unit and specific staff

MILESTONES OF KEY ACTIVITIES

	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter
Completed Trainings	Completed 11/25 Trainings Planned for FY2023			
Upcoming Trainings			<ul style="list-style-type: none"> Organizational skills & Culture Training Formal Policies and Procedures Internal Supervisory Training Geriatrics Medicare 	

INITIATIVE: KNOWLEDGE TRANSFER

DIVISION(S)/SECTION: RSD AND HWABD

STRATEGIC GOAL(S): CUSTOMER SERVICE, BENEFITS DELIVERY, ORGANIZATION, & WORKFORCE

REPORT MONTHS: JULY 2022 – DECEMBER 2022

LEAD(S): FERRALYN SNEED, DELIA HERNANDEZ, AUDREY DYMALLY, AND STEPHANIE SMITH

TEAM: LADY Y. SMITH, ESTELLA PRIEBE, SUSANN HERNANDEZ, CAROL REMBERT, RAINBOW SUN, ANNI QUACH, MARICEL MARTIN, JAMES KAWASHIMA, ADA LOK, GLEN MALABUYOC, EDELIZA FANG, MARGARET DRENK

INITIATIVE PURPOSE: DEPLOY A TWO-PHASED APPROACH FOR INSTITUTIONAL KNOWLEDGE TRANSFER FROM RETIRING SENIOR STAFF TO NEW STAFF. THIS BPI IS A CROSS-DIVISIONAL COLLABORATION BETWEEN DIVISIONS WITHIN THE BENEFITS ADMINISTRATION, THEREFORE, THE BUDGET FOR THIS INITIATIVE IS SHARED.

PROGRESS

The Team deployed a series of trainings to staff with senior personnel currently building out training manuals for Tier 1 and Tier 1E, planned for in the near future.

To ensure institutional knowledge is captured by the organization for use of future staff, a proposal to build out a knowledge base in the cloud was approved by the Board in January 2023. The vendor has been selected and the contract process is in motion.

CHALLENGES

Completing the contracting process and training the AI enabled knowledge base for use by staff via Teams will require coordination and speed.

NEXT STEPS

The vendor will be secured in February 2023, with project kick-off commencing shortly after.

The key next steps include:

- Secure Vendor
- Assemble project team
- Schedule kick-off
- Hand-over all training material to vendor for inclusion into knowledge base
- Senior managers train AI over a 6 week period

INITIATIVE: LANGUAGE ACCESS PLAN

DIVISION(S)/SECTION: COMMUNICATIONS & STAKEHOLDER RELATIONS

STRATEGIC GOAL(S): CUSTOMER SERVICE, BENEFITS DELIVERY, GOVERNANCE, & ORGANIZATION

STATUS: ON - TRACK

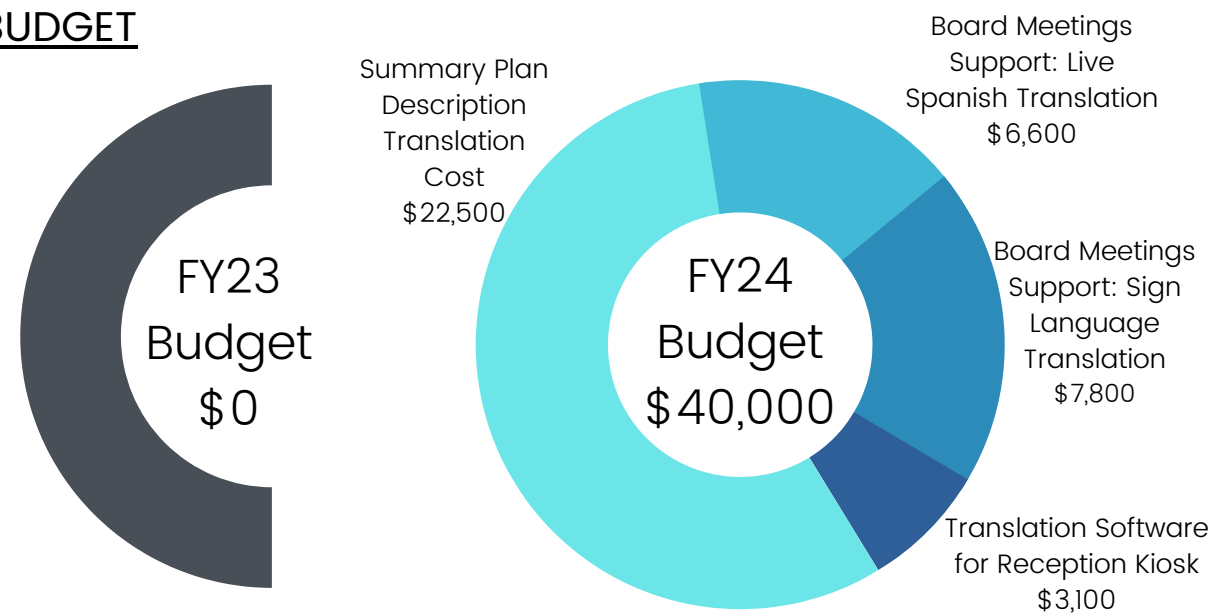
REPORT MONTHS: JULY 2022 - DECEMBER 2022

LEAD(S): TANEDA K. LARIOS

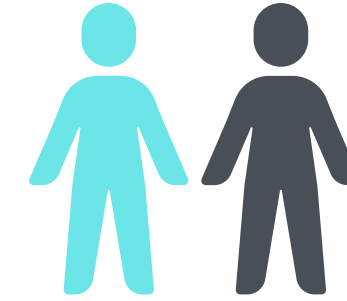
TEAM: HEATHER RAMIREZ, TIFFANY OBEMBE, CARLOS JOVEL JR., AND JESUS NAVARRO

INITIATIVE PURPOSE: CREATE A LACERS LANGUAGE ACCESS PLAN (LAP) THAT GOVERNS THE PROCESS FOR PROVIDING MULTILINGUAL SERVICES TO OUR THRESHOLD POPULATIONS. THIS WILL RESOLVE ACCESS ISSUES TO INFORMATION AND FURTHER OUR COMMITMENT TO SERVING ALL PERSONS WITHIN OUR DIVERSE POPULATION.

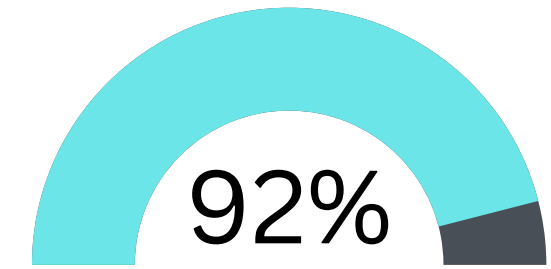
BUDGET



KEY METRICS



Spanish and American Sign Language have been identified as the most requested services



Survey response rate from 2nd-level bilingual staff

AREAS OF IMPROVEMENT

Improvement Area	Progress
Budget	Budget package submitted with a better approximation of the costs for the procurement of a vendor to provide translation costs.
Coordination	Increased flexibility towards meeting and reporting frequencies.

MILESTONES OF KEY ACTIVITIES

	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter
Language Access Plan	<ul style="list-style-type: none"> Review Mayoral Directive Determine first steps 	<ul style="list-style-type: none"> Develop Spanish Glossary of Terms Prepare and send Survey for LACERS Bilingual Staff Submit Future Budget Request 	<ul style="list-style-type: none"> Submit Final Plan to Executive Team Submit Final Plan to Office of Immigrant Affairs 	<ul style="list-style-type: none"> Develop Plan for Implementation and Prioritize Translation Tasks

INITIATIVE: LANGUAGE ACCESS PLAN

DIVISION(S)/SECTION: COMMUNICATIONS & STAKEHOLDER RELATIONS

STRATEGIC GOAL(S): CUSTOMER SERVICE, BENEFITS DELIVERY, GOVERNANCE, & ORGANIZATION

REPORT MONTHS: JULY 2022 – DECEMBER 2022

LEAD(S): TANEDA K. LARIOS

TEAM: HEATHER RAMIREZ, TIFFANY OBEMBE, CARLOS JOVEL JR., AND JESUS NAVARRO

INITIATIVE PURPOSE: CREATE A LACERS LANGUAGE ACCESS PLAN (LAP) THAT GOVERNS THE PROCESS FOR PROVIDING MULTILINGUAL SERVICES TO OUR THRESHOLD POPULATIONS. THIS WILL RESOLVE ACCESS ISSUES TO INFORMATION AND FURTHER OUR COMMITMENT TO SERVING ALL PERSONS WITHIN OUR DIVERSE POPULATION.

PROGRESS

The team has met twice a month to review the Language Access Plan Mayoral Directive. During the second quarter, a Spanish Glossary of Terms was created, and a survey was developed and sent to the LACERS bilingual staff.

CHALLENGES

- With the move to 977, staff resources have been a challenge. The team distributed a survey to gather information on translation requests received from Members. However, the team had to follow up more than what is typical to achieve the desired result.
- As we coordinate the various units and their bilingual staff, we will continue communicating and following up with them to ensure they complete the necessary items to keep this project moving forward.
- Funding to implement this initiative is being requested during the FY24 budget process. The amount allocated will determine how quickly and how many services can be provided.
- For translation verification, the bilingual LACERS' staff will work with the selected vendors to verify that the translated materials are correct where that expertise is not available at LACERS.

NEXT STEPS

Our immediate next steps are to analyze the survey results. Additionally, we will complete the Four-Factor Analysis as outlined in the Citywide Language Access Plan Template to determine which language(s) to provide services for (likely Spanish and American Sign Language). The budget request for FY24 has been reduced based on preliminary research of costs on an existing contract for translation services. A plan to prioritize assets from translation is also being developed and is contingent upon the final allocated budget amount for FY24.

INITIATIVE: MEMBER SERVICES METRICS

DIVISION(S)/SECTION: ALL

STRATEGIC GOAL(S): CUSTOMER SERVICE & ORGANIZATION

STATUS: ON-TRACK

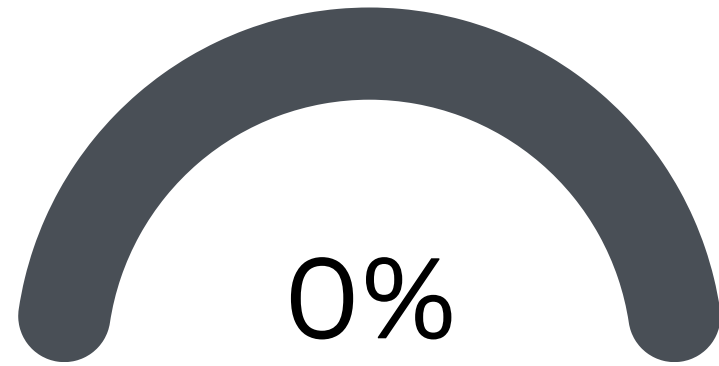
REPORT MONTHS: JULY 2022 - DECEMBER 2022

LEAD(S): TANEDA K. LARIOS, AND VIKRAM JADHAV

TEAM: AUDREY DYMALLY, CARLOS JOVEL, KHIA MOORE, LAUREN MCCALL, NATHAN HERKELRATH, SANDRA FORD-JAMES

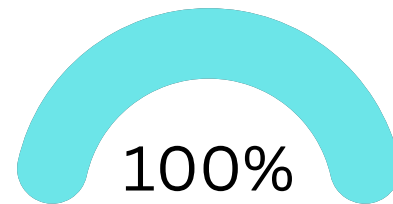
INITIATIVE PURPOSE: UPDATE THE CURRENT MEMBER SERVICE AGREEMENT WITH DEFINED METRICS THAT WOULD ENABLE REAL TIME TRACKING AND DASHBOARDING TO FACILITATE RESOURCE AND BUDGET NEEDS.

BUDGET - Not Applicable

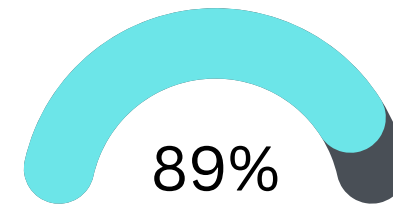


KEY METRICS

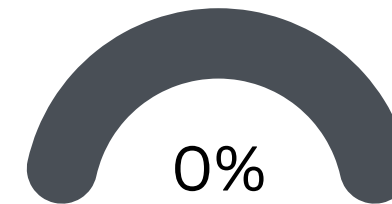
Establish Committee



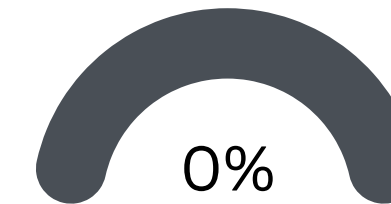
Survey Responses Recv'd



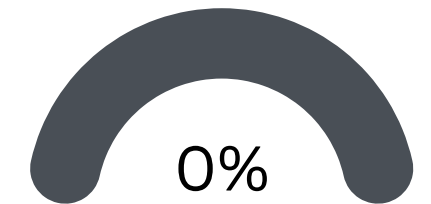
Adopt Metrics



Revise MSA



Create Dashboards



AREAS OF IMPROVEMENT

Improvement Area	Progress
Non-responsive participants	Routine Follow-up, Further escalation

MILESTONES OF KEY ACTIVITIES

	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter
Unit Metrics	Establish roles, Create plan	Develop Survey, Hold Unit Feedback Mtg	Send/Collect/Analyze Survey Responses	Finalize Metrics with Exec Approval
Service Commitments	Review Service Level Agreements	Create Plan for Revision	Identify New Metrics Based on Surveys	Finalize MSA w/Exec approval and publish

INITIATIVE: MEMBER SERVICES METRICS
DIVISION(S)/SECTION: ALL
STRATEGIC GOAL(S): CUSTOMER SERVICE

REPORT MONTHS: JULY 2022 -DECEMBER 2022
LEAD(S): TANEDA K. LARIOS AND VIKRAM JADHAV
TEAM: AUDREY DYMALLY, CARLOS JOVEL, KHIA MOORE, LAUREN MCCALL,
NATHAN HERKELRATH, SANDRA FORD-JAMES

INITIATIVE PURPOSE: UPDATE THE CURRENT MEMBER SERVICE AGREEMENT WITH DEFINED METRICS THAT ENABLE REAL-TIME TRACKING AND DASHBOARDING TO FACILITATE RESOURCING AND BUDGETING NEEDS.

PROGRESS

The Team created a survey and held a briefing for all involved parties, typically Sr. Benefits Analyst and above, to provide an overview of the BPI goals, their roles, tasks, and associated deadlines. The survey was created on a Monday.com board and discussed amongst the team, finalized, and distributed to staff. Each Team member was assigned to be the liaison to three units and assist them with any questions staff had in completing the survey.

CHALLENGES

Competing workloads caused some minor delays in response times. However, all units have ultimately responded.

NEXT STEPS

The Team has commenced their analysis of their assigned units' responses, which will provide them with the necessary information to assist the units in identifying critical components of their work that are the most impactful to member service. This work lays the foundation for each unit to determine its performance metric(s) and establish baseline workload standards that will inform the budget process and identify efficiencies and new work that can be accomplished as a result of any efficiency in the process gained. Once the metrics have been defined and adopted, the BPI Team will work with LACERS Chief Data Officer to create dashboards from the Central Repository (in development).

In short, the immediate next steps are:

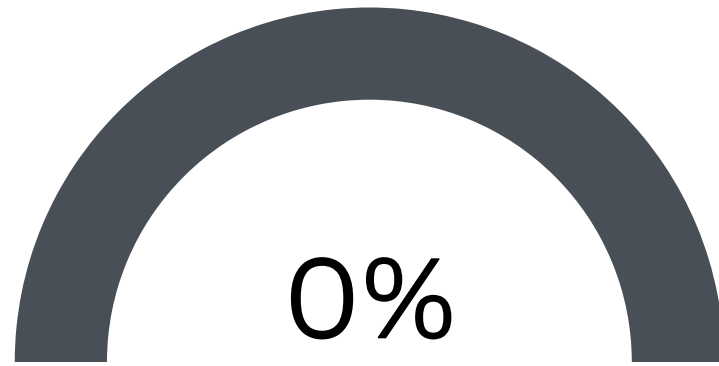
- Define and adopt metrics
- Dashboarding and report templating
- Tools integration support (if necessary)

INITIATIVE: DIVERSITY IN HIRING
DIVISION(S)/SECTION: INVESTMENTS
STRATEGIC GOAL(S): WORKFORCE

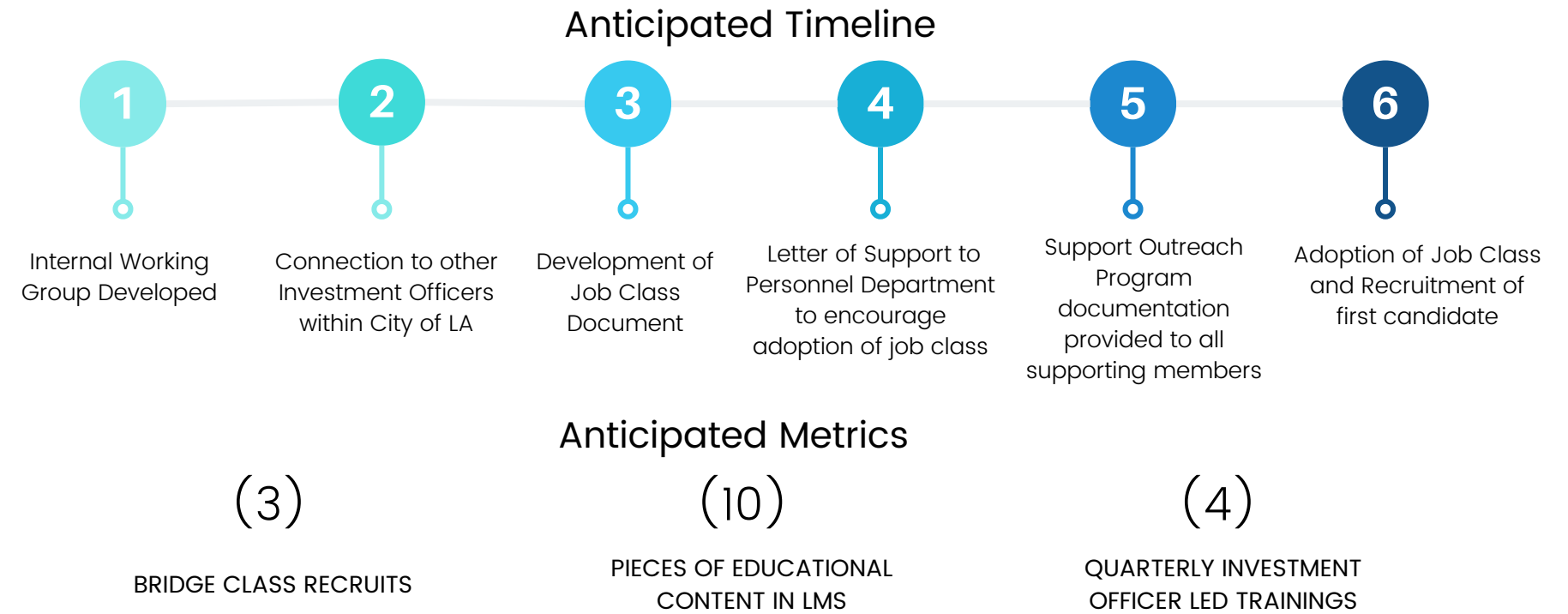
STATUS: **ON-TRACK**
REPORT MONTHS: JULY 2022 – DECEMBER 2022
LEAD(S)/TEAM: CLARK HOOVER AND VIKRAM JADHAV

INITIATIVE PURPOSE: DEVELOP INVESTMENT OFFICER BRIDGE CLASS TO RECRUIT NON-TRADITIONAL CANDIDATES AND DEVELOP DIGITAL LEARNING PROGRAM AND EDUCATIONAL OPPORTUNITIES FOR BRIDGE CLASS STAFF TO MATRICULATE INTO THE INVESTMENT OFFICER CLASS

BUDGET - Not Applicable



KEY METRICS



AREAS OF IMPROVEMENT

Improvement Area	Progress
Bridge Class Templates	Retrieve current examples of bridge job class specifications
Pension Plans Engagement	Form coalition to demonstrate pension wide interest in developing a Bridge Class

MILESTONES OF KEY ACTIVITIES

	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter
Form working group	LACERS internal working group formed.			
Engagement with Pension Peers			Ongoing	Ongoing
Research and Requirements Gathering for Bridge Job Class Specification			Ongoing	Ongoing

INITIATIVE: DIVERSITY IN HIRING
DIVISION(S)/SECTION: INVESTMENTS
STRATEGIC GOAL(S): WORKFORCE

REPORT MONTHS: JULY 2022 – DECEMBER 2022
LEAD(S)/TEAM: CLARK HOOVER AND VIKRAM JADHAV

INITIATIVE PURPOSE: DEVELOP INVESTMENT OFFICER BRIDGE CLASS TO RECRUIT NON-TRADITIONAL CANDIDATES AND DEVELOP DIGITAL LEARNING PROGRAM AND EDUCATIONAL OPPORTUNITIES FOR BRIDGE CLASS STAFF TO MATRICULATE INTO THE INVESTMENT OFFICER CLASS

PROGRESS

LACERS has created an internal working group Led by a revolving volunteer group of Investment staff, with support from the Project Management Office (PMO).

The working group has met to discuss the roadmap of how the adoption of the job class should proceed and will continue to meet until a solid framework has been developed.

CHALLENGES

- Developing wide spread support across City to create Bridge Class
- Recruiting throughout the City for qualified Bridge Class candidates
- Adoption of Bridge Class specifications into City job classes

NEXT STEPS

The working group will continue efforts in the following:

- Source and draft Bridge Class specifications
- Assemble City wide coalition members
- Begin procedures to adopt Bridge Class specifications

Continuing into Fiscal Year 2024:

- Adopt Bridge Class
- Begin Recruiting for Qualified Bridge Class Candidates

INITIATIVE: [NAME OF BUSINESS PLAN INITIATIVE]
DIVISION(S)/SECTION: [DIVISION NAME/SECTION UNIT]
STRATEGIC GOAL(S): [ASSOCIATED STRATEGIC GOAL AREAS]

COMPLETED
ON-TRACK
OFF-TRACK
INTERVENTION NEEDED



STATUS: **ON TRACK**
REPORT MONTHS: [REPORTING MONTHS AND YEAR]
LEAD(S): [FIRST AND LAST NAMES]
TEAM: [FIRST AND LAST NAMES]

INITIATIVE PURPOSE (BRIEF DESCRIPTION)

BUDGET

[Appropriation]
 [Expense]
 [Unspent]

KEY METRICS

[Provide measurements of successful implementation]

AREAS OF IMPROVEMENT

Improvement Area	Progress
[Organization]	
[Flexibility]	

MILESTONES OF KEY ACTIVITIES

	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter
[Milestone #1]				
[Milestone #2]				
[Milestone #3]				
[Milestone #4]				