



**REPORT TO BOARD OF ADMINISTRATION**  
From: Neil M. Guglielmo, General Manager

**MEETING: AUGUST 27, 2024**  
**ITEM: III - C**

**SUBJECT: FISCAL YEAR END REPORT OF BUSINESS PLAN INITIATIVES FOR THE PERIOD ENDING JULY 30, 2024**

ACTION:  CLOSED:  CONSENT:  RECEIVE & FILE:

**Recommendation**

That the Board receive and file this report.

**Executive Summary**

The LACERS Strategic Plan is achieved through various Board sponsored initiatives that move the organization toward established strategic goals. Highlights of the annual achievements under each goal are provided within this report and the attached Business Plan Initiative (BPI) report details the year-end status of five initiatives adopted into the Business Plan for Fiscal Year 2023-24 (FY24). Three BPIs from FY24 will continue into Fiscal Year 2024-25 (FY25), two initiatives are ongoing but will not continue as BPIs while two new BPIs will be added: Business Continuity Plan and Central Data Repository Modernization.

Business Plan Initiatives	
FY24	FY25
<ul style="list-style-type: none"> <li>• Governance – <b>continuing in FY25</b></li> <li>• Language Access Plan – <b>continuing in FY25</b></li> <li>• Workforce, Diversity, Equity, and Inclusion – <b>*ongoing</b></li> <li>• Environmental, Social, Governance Investing– <b>*ongoing</b></li> <li>• City Human Resources and Payroll System Implementation – <b>continuing in FY25</b></li> </ul>	<ul style="list-style-type: none"> <li>• Governance</li> <li>• Language Access Plan</li> <li>• City Human Resources and Payroll (HRP) System Implementation</li> <li>• Central Data Repository (CDR) Modernization</li> <li>• Business Continuity Plan (BCP)</li> </ul>

*\*Ongoing but not continuing as a BPI in FY25*

## Discussion

LACERS FY24 BPIs and accomplishments, along with introduction of the FY25 BPIs, are all discussed herein.

### **Business Plan Initiatives and Achievements for FY24**

LACERS has demonstrated continuing progress and successes as outlined in the FY24 BPI dashboards and summarized below.

#### Governance

LACERS adopted a new Strategic Plan on June 25, 2024, with revamped mission and vision statements to serve as the organization's roadmap for the coming years. E-blasts and newsletters have already been sent out to encourage Members to review the plan and familiarize themselves with LACERS' future direction. LACERS has also begun showcasing elements of the new Strategic Plan around the office using internal media and more discussions are being made on how to further incorporate the Strategic Plan into LACERS headquarters. The Triennial Board Policy review is close to finalizing the assessment of all existing Board Administrative policies. However, the extra time allocated to address updates to the Board Education and Travel policy along with other unplanned governance items had led to delays in the original proposed schedule. After all existing policies have been reviewed, discussions on new policies will begin this fiscal year, along with further refinements to the Board Education and Travel Policy.

#### Language Access Plan

Prompted by Executive Directive 32 – Strengthening Language Access in the City of Los Angeles, LACERS created the multi-phase Language Access Plan initiative to expand Members' access to information. FY24 realized the beginning phases of the LAP implementation with 20 forms having been translated and incorporating a language access notice to the Board Agenda for translation/interpretation services during Board meetings. Additionally, a three-year contract with a translation, interpretation, and transcription vendor has been finalized to continue to translate documents and expand language access services to threshold populations. The initial batches of translated forms are anticipated to be available to the public by Fall 2024.

#### Workforce Diversity, Equity, and Inclusion

In FY24, Executive and Senior Managers completed an 8-week training focused on improving interdepartmental communication and enhancing the employee experience. As a result of the training, a Senior Leader Committee was established to take part in executive decision-making, budgeting, and project prioritization for the organization. Since the launch of the Senior Leader cohort in FY24, LACERS has introduced a new Executive Committee model, established an office-wide project management approach, and is preparing to initiate projects across divisions aimed at improving internal efficiency. Phase 2 of the curriculum will begin in FY25 for the next level of leadership staff. All materials from the curriculum will be gathered and used to create e-learning modules in the Learning Management System. Enhancements will also be made progressively to the Project

Management Office and Senior Leadership Committee model to increase staff engagement and provide more opportunities for everyone.

### Environmental, Social, Governance Investing (ESG)

LACERS is committed to enhancing the long-term risk adjusted returns of the investment portfolio through the implementation of an ESG program that incorporates risk factors into manager selections, develop exposure reporting, and expand network of like-minded organizations, which is consistent with the Board and staff's fiduciary responsibilities. In FY24, LACERS has hosted a Spring 2024 Emerging Manager Symposium to provide additional information to potential Investment Managers and completed a Principles for Responsible Investment report. Despite the cost and availability issues, the Investments Team is continuing to explore various vendors for the development of an ESG database and enhance reporting updates on fossil fuel exposure and PRI discussions to stay ahead of potential ESG issues. Additionally, a schedule has been developed for an annual review of Responsible Investing policies and procedures to remain up to date on operations.

### City Human Resources and Payroll (HRP) System Implementation

Over the past fiscal year, LACERS has worked diligently with other City departments to ensure the successful implementation of the HRP project. Great progress was made on parallel testing with achieving a 97.5% gross salary acceptance rate, and LACERS was able to successfully deploy two critical integration files, INT046 and INT123, which handles inbound Member information and outbound deductions and service contracts. In preparation for the HRP launch, LACERS also actively participated in dress rehearsal activities and online training to ensure that all staff had the necessary security access to enter and approve time entries. However, parallel testing only comprised of two pay periods from a prior year. Therefore, when the HRP project went live in June 2024, LACERS had to resolve many new exceptions during the initial production run. Also due to time constraints, only the base requirements of the integration files were developed, so the full capabilities of the integration files have not yet been realized. Additionally, data conversion issues continue to persist in post-production, thus causing many exceptions to be reported. LACERS will continue to collaborate with other departments to resolve any persisting issues. In the FY25 budget process, the Board did add additional resources for external consulting services and for a dedicated test environment for about a three-month period. The resources have been onboarded and work is just beginning on establishing a test environment. Preliminarily, given the time being spent on issue resolution in lieu of integration improvements, the timeline for resolving issues is likely longer than three months, but staff will continue to report regularly to the Board and advise on any necessary adjustments to timeline and resources.

The year-end report on the six Business Plan Initiatives for FY24 is attached.

### Other LACERS Goals Accomplishments

Highlights of other recent department accomplishments toward LACERS Strategic Goals include:

#### *Outstanding Customer Service*

- Successfully advertised and implemented an appointment-based system for Members to speak with Counselors in person.
- Transitioned Member-facing staff to Amazon Connect for better Member call quality control.

- Completed the Retirement Application Portal (RAP) Scanning Project and transferred 846 case files to OnBase.
- Member outreach to non-office worker employees in June 2023 and pop-up events in January 2024. To date, 26 sites and 517 members (18 Pop-up and 8 Non-Desk) have been visited with more scheduled.

*Accurate and Timely Delivery of Benefits*

- Supported City's development of Charter Amendment for the November ballot to transfer LACERS Sworn Members to Los Angeles Fire and Police Pensions Tier 6.

*Value Health and Wellness Benefits*

- Conducted Medical Plans Request for Proposal resulting in a negotiated premium savings of \$2.8 million.
- Anthem Medicare Supplement added as a plan option in response to our Members' needs.
- LACERS Health Plan Is 104% funded as of June 30, 2023.

*Superior Investments*

- Revised the Proxy Voting Policy to address the most current and common ESG issues.
- Achieved an unaudited total performance return of 8.7% net of investment fees for Fiscal Year Ending June 30, 2024.

*Good Governance*

- Established a Governance Consulting bench of contractors.
- Completed new Strategic Plan, to be launched in FY25.
- Continued review and update of the Board Manual.

*Organizational Effectiveness, Efficiency, and Resiliency*

- Finalized all permits and closed the initial Tenant Improvement Project for LACERS Headquarters building.
- Maximized operational effectiveness by redesigning the Backup & Recovery Infrastructure to replace the existing legacy backup system housed within the data center.
- Successfully completed HRP Integrations and went live in June 2024.
- Network penetration testing incorporated in order to routinely test and secure LACERS data and systems.
- Implementation of LACERS Data Unit website improved transparency, enhanced collaboration, and increased efficiency by creating a centralized website for LACERS' business intelligence.
- Installed ten electric vehicle charging stations in LACERS Headquarters parking garage for use by staff.

*High-Performing Workforce*

- Hired 10 employees from the Targeted Local Hire Program, 8 employees from Bridge to Job Program, and 2 employees from the Pathways Program in FY24.
- LACERS Division Chief recognized for exceptional leadership and impact on communication strategies and tools by the National Conference on Public Employee Retirement Systems.

## **Business Plan Initiatives for FY25**

In the current fiscal year (FY25), five major initiatives are established, and work has started on each as further described below.

### Governance

This a continuing initiative from FY24 to carry on the Triennial Board Policy Review. A revamped Strategic Plan was finalized and adopted in FY24, so FY25 will be dedicated to the development of new Board Policies as recommended in the most recent Management Audit report and execution against the new Strategic Plan.

### Business Continuity Plan (BCP)

To reinforce LACERS' rapid response to significant disruption of operations after an unexpected event or disaster, the BCP initiative will launch a series of tabletop exercises to increase employee preparedness and awareness of their roles and responsibilities. LACERS aims to secure a tabletop consultant in FY25 for the development of exercises for various scenarios.

### Central Data Repository Modernization

The Central Data Repository initiative aims to provide a modern and centralized platform to store data that can be managed and accessed by authorized users. A portal with a robust infrastructure has already been developed. In FY25, LACERS will be working with the HRP team to develop report connectivity and establish a data flow process for systematically processing and refreshing data, thus reducing manual intervention.

### Language Access Plan

LACERS continues to bridge the language gap between benefit plan materials and English Language Learners. With the securement of a translation, interpretation, and transcription vendor, LACERS will be able to more effectively and efficiently translate benefit plan materials into Spanish. The Planning for Retirement seminar materials are slated to be reviewed next in FY25.

### City Human Resources and Payroll (HRP) System Implementation

Continuing from FY24, LACERS remains committed to bringing awareness and transparency to the HRP project, with emphasis on integration files and post-production activities to ensure that the platform is properly equipped with the necessary business processes to enable LACERS to fulfill its responsibility of delivering timely and accurate Member benefits.

A semi-annual report on the progress of these BPIs will be provided in January/February 2025.

Prepared By: Chhintana Kurimoto, Management Analyst

NMG/TB/EA/LL/CK

Attachment: Fiscal Year-End Report of Business Plan Initiatives for the period ending June 30, 2024





**BOARD Meeting: 08/27/24**  
Item: III-C  
Attachment

FY2024

# ***BUSINESS PLAN INITIATIVES***

***FISCAL YEAR-END REPORT OF  
BUSINESS PLAN INITIATIVES FOR  
THE PERIOD ENDING JUNE 30, 2024***





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# LACERS GOALS

## **Customer Service**

Provide outstanding customer service

## **Benefits Delivery**

Deliver accurate and timely Member benefits

## **Health and Wellness**

Improve value and minimize costs of Members' health and wellness benefits

## **Investment**

Optimize long-term risk adjusted returns through superior investments

## **Governance**

Uphold good governance practices which affirm transparency, accountability, and fiduciary duty

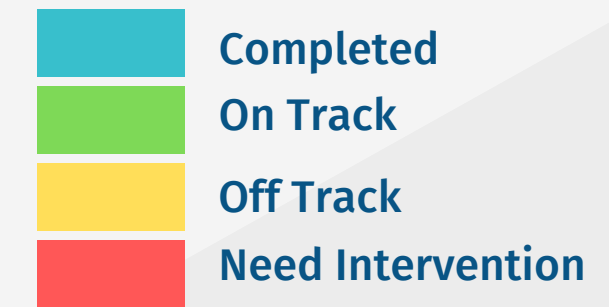
## **Organization**

Increase organization effectiveness, efficiency, and resiliency

## **Workforce**

Recruit, retain, mentor, empower, and promote a high-performing workforce

# EXECUTIVE SUMMARY DASHBOARD



INITIATIVES	GOALS	STATUS	EXECUTIVE SPONSORS	INITIATIVE LEADS
1. Governance	Governance	<span style="color: green;">■</span>	Todd Bouey	Edwin Avanesian & John Koontz
2. Language Access Plan	Customer Service, Benefits Delivery, Governance, & Organization	<span style="color: green;">■</span>	Dale Wong-Nguyen	Tiffany Obembe, Gabriel J. Perez, & Heather Ramirez
3. Environmental, Social, and Governance Investing	Governance & Investment	<span style="color: green;">■</span>	Rod June	James Wang
4. Workforce Diversity, Equity, and Inclusion	Organization & Workforce	<span style="color: green;">■</span>	Neil Guglielmo	Vikram Jadhav
5. City HRP System Implementation	Organization	<span style="color: yellow;">■</span>	Todd Bouey	Andy Chiu

**INITIATIVE:** GOVERNANCE  
**DIVISION(S)/SECTION:** ADMINISTRATION  
**STRATEGIC GOAL(S):** GOVERNANCE

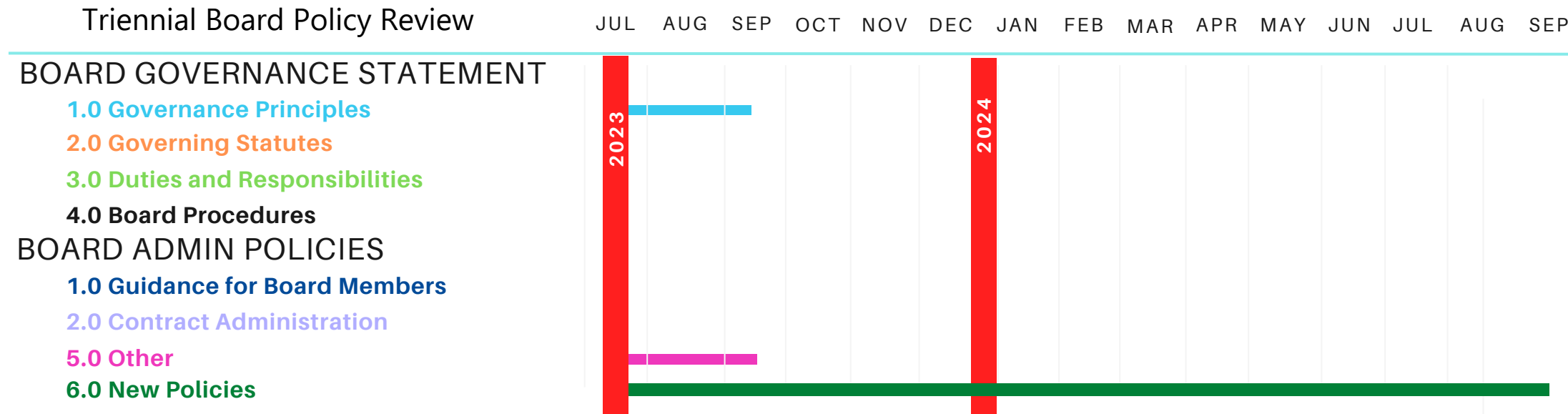
**STATUS:** **ON TRACK**  
**REPORT MONTHS:** JULY 2023 – JUNE 2024  
**LEAD(S):** EDWIN AVANESSIAN, JOHN KOONTZ  
**TEAM:** CHHINTANA KURIMOTO, LISA LI

**BUDGET**  
 Appropriation: \$150,000  
 Expense: \$150,000  
 Unspent: \$0



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

**KEY METRICS**



**PROGRESS**

- Consultants collaborated with Staff to finalize and present LACERS Strategic Plan. The Board approved and adopted on June 25, 2024.
- While seeking to complete the review of all existing Board Governance and Administrative Policies by the end of FY24, additional time was needed to address concerns with the Board Education and Travel Policy and other unplanned governance items, pushing the schedule back approximately 6 months.

**CHALLENGES**

- Revisions of the Strategic Plan to align with the Board’s intent led to minor delays but ultimately adopted by fiscal year end.
- Once the review of all existing Board policies has been completed, forward progress may further slow as we move into the development of new policies never adopted by LACERS before. These are the policies which were recommended in a recent management audit report.

**NEXT STEPS**

- Update LACERS media: newsletter, website, and Member e-blast, to showcase new Strategic Plan.
- Begin staff discussions on the development and implementation of new policies for the Board’s consideration.

**MILESTONES**

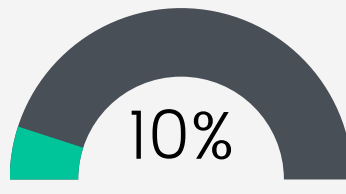
	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter
Strategic Plan	TOS issued to Consultants for Strategic Planning	Engagement with Consultants		New Strategic Plan Goes Live
Triennial Board Policy Review	Complete the Review of all Existing Board Governance Statement Provisions		Complete the Review of all Existing Board Administrative Policies	

**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 2023-JUNE 2024  
**LEAD(S):** LISSETH GRANDE, AMELIA HERRERA-ROBLES  
**TEAM:** LISSETH GRANDE, AMELIA HERRERA-ROBLES, CARLOS JOVEL JR., TANEDA LARIOS

**BUDGET**

Appropriation:	\$40,000
Expense:	\$3,275
Unspent:	\$36,725



**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.

KEY METRICS



Spanish Language Bilingual Staff -Premium Levels 1 & 2 have been identified and confirmed

- The three-year contract with Languages4You was approved for \$75,000.
- 20 forms/documents have been translated into Spanish.
- The Planning for Retirement for T1 & T3 presentation (133 slides) have been translated into Spanish.

Translation of LACERS Documents to Spanish

- PROGRESS
- 20 forms have been translated and are in the review stage and batch three is being translated into Spanish.
  - Staff training presentation has been developed and was delivered to Spanish Bilingual Bonus staff.
  - Tracking board has been improved to gather the data needed for the LAP annual report.
  - Staff have been trained on the review of translation documents.
  - The language access notice has been added to the Board Agenda and external forms.

- CHALLENGES
- Two rounds of review consisting of 20+ pages of comments and suggestions from Community Investment For Families Department (CIFD) to comply with the implementation factors without regard for the difference in our audience type from the general public.
  - ITA's translation equipment was inoperable initially when needed for LACERS' Board meeting.
  - Competing department priorities diverted staff resources from this project.

MILESTONES

	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter
LAP 1st Draft Revision	✓			
LAP Liaison- Benefits Analyst Recruitment and Training; Translation of Forms (5) to Spanish		✓		
Second batch (13) forms were translated to Spanish and currently under final review.			✓	
Contract with Languages4You was approved by the Board. Spanish Planning for Retirement Seminar for Tier 1 and Tier 3 was developed. Revised language incorporated on agendas, print materials, and website providing notice of the availability of interpretation services in Spanish.				✓

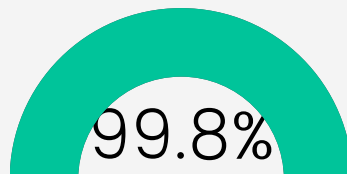
- NEXT STEPS
- The Planning for Retirement presentation (133 slides) and the glossary of terms review will be completed by 08-31-2024.
  - Finalize the list of documents to be sent to Languages4You for written translation (e.g. HBG & SPDs).
  - Implement the LAP waiver for Members who choose to use their own translator.
  - Finalize the first two batches of Spanish forms and make them available to the public by fall of 2024.
  - Complete the translation of Batch 3 (15 forms) translation and submit them for feedback by October 2024.

**INITIATIVE:** ENVIRONMENTAL, SOCIAL, AND GOVERNANCE INVESTING  
**DIVISION(S)/SECTION:** INVESTMENTS  
**STRATEGIC GOAL(S):** GOVERNANCE & INVESTMENT

**STATUS:** **ON TRACK**  
**REPORT MONTHS:** JULY 2023 – JUNE 2024  
**LEAD(S):** JAMES WANG  
**TEAM:** CLARK HOOVER, JEREMIAH PARAS

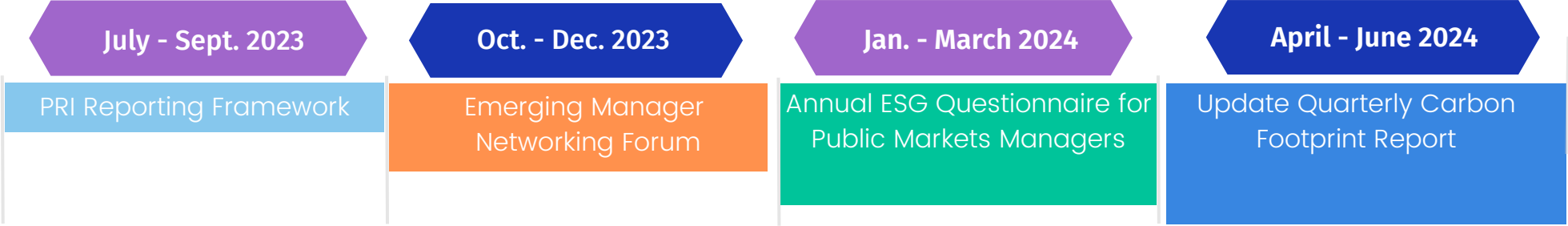
**BUDGET**

Appropriation:	\$18,750
Expense:	\$18,705
Unspent:	\$45



**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.

**KEY METRICS**



**MILESTONES**

	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter
Emerging Manager Symposium				Event Complete
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	Complete			
Review PRI Assessment and Transparency Report			Complete	
Review of Emerging Investment Manager Policy (to incorporate graduation/transition classification)			Complete	
Update of Annual ESG Questionnaire for public markets managers		Complete		
PRI Reporting				Complete
Review and amend the Responsible Investing Policy				Ongoing
Review and amend the Proxy Voting Policy				Complete

**PROGRESS**

- LACERS presented its Spring 2024 Emerging Manager (EM) Symposium on April, 2024 which focuses on providing Investment Managers additional information about LACERS’ EM Program.
- The Investments Team has also reviewed the PRI Assessment and Transparency Report and has submitted the annual PRI report.

**CHALLENGES**

- Cost and availability issues. Staff is exploring various vendors for the development of LACERS ESG database and reporting functionalities.
- Keeping up with new guidelines established by industry organizations and staying ahead of potential ESG issues.

**NEXT STEPS**

- The Investments Team will continue to identify and improve reporting updates, which includes fossil fuel exposure and PRI discussions.
- Additionally, a schedule has been developed to review and amend policies for better management.




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

**STATUS:** **ON TRACK**  
**REPORT MONTHS:** JULY 2023 – JUNE 2024  
**LEAD(S):** VIKRAM JADHAV  
**TEAM:** LIN LIN

**BUDGET**

Appropriation:	\$65,000
Expense:	\$65,000
Unspent:	\$0



**INITIATIVE PURPOSE:** ALIGN ORGANIZATION AND STAFF ON PERFORMANCE NEEDS AND SUPPORT REQUIREMENTS TO ENABLE PROFESSIONAL GROWTH.

KEY METRICS

**2023 Senior Leaders Roadmap**

1	2	3	4	5	6	7
August	September	October	November	December	January	April
<ul style="list-style-type: none"> <li>Phase 1 Kickoff</li> <li>First Session - Empowering Others</li> </ul>	<ul style="list-style-type: none"> <li>Practicum 1</li> <li>Second Session: Navigating Change</li> </ul>	<ul style="list-style-type: none"> <li>Practicum 2</li> <li>Third Session: Amplifying Communication</li> </ul>	<ul style="list-style-type: none"> <li>Practicum 3</li> <li>Fourth Session: Enhancing Collaboration</li> </ul>	<ul style="list-style-type: none"> <li>Phase 1 completion</li> <li>Final Session</li> </ul>	<ul style="list-style-type: none"> <li>Senior Leader Committee Meeting Model Kick-off</li> </ul>	<ul style="list-style-type: none"> <li>Secured two-year contract extension for Phases 2 and 3</li> </ul>

PROGRESS

- Successfully completed Phase 1 of program. Milestones included:
  - DiSC Profiles of Senior Management.
  - Completion of all sessions and modules by Senior Management.
  - Presentation of group projects on Employee Engagement initiatives by Senior Management to Executive team.
- Successfully launched Senior Leader Committee and internal consulting model
- Scheduled monthly Senior Leader Committee meetings
- Secured two-year contract extension and budget of \$119,000 for Phase 2 and Phase 3 services
- Completed project kick-off for Phase 2

MILESTONES

	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter
Sessions	3 sessions completed	Remaining Sessions Completed		
Contract				Secured two-year contract extension

NEXT STEPS


- Phase 2 kickoff scheduled for September 2024
- Finalize Phase 2 cohort
- Begin internal messaging

**INITIATIVE:** CITY HRP SYSTEMS IMPLEMENTATION  
**DIVISION(S)/SECTION:** ADMIN / DATA UNIT  
**STRATEGIC GOAL(S):** ORGANIZATION EFFECTIVENESS, EFFICIENCY, AND RESILIENCY

**STATUS:** OFF TRACK  
**REPORT MONTHS:** JULY 2023 – JUNE 2024  
**LEAD(S):** ANDY CHIU  
**TEAM:** LAUREN MCCALL, JASON LEUNG, THOMAS MA

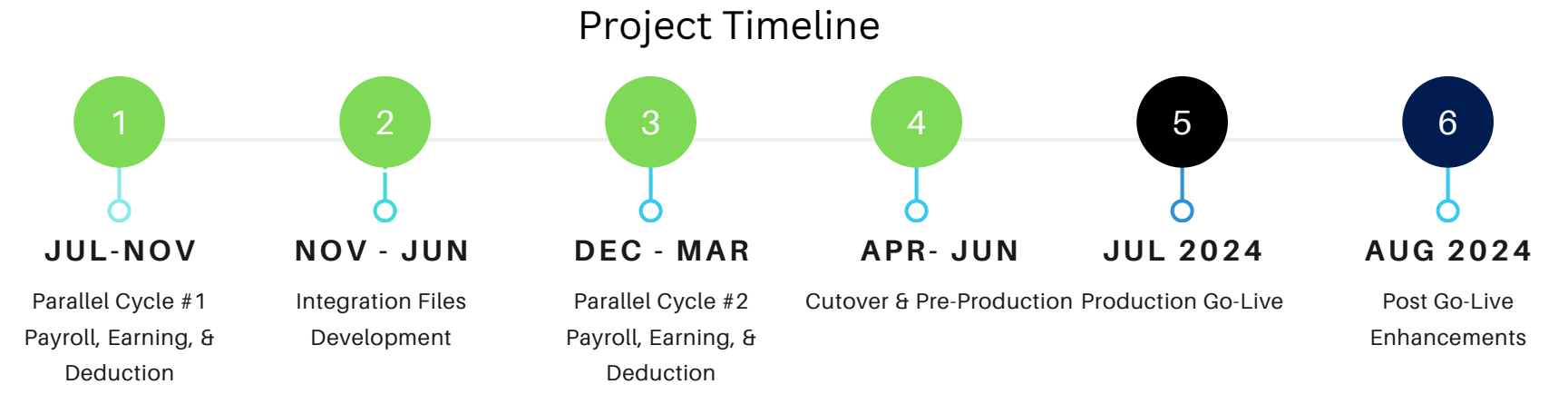
**BUDGET**

Appropriation: \$120,000  
Expense: \$120,000  
Unspent: \$0  
\*\$175k spent on PAS development to date

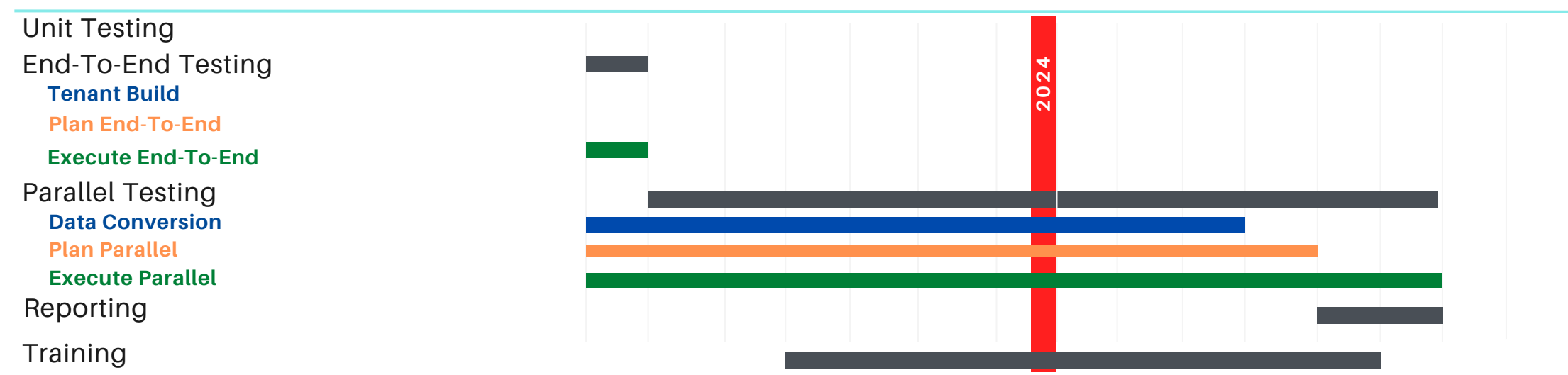


INITIATIVE PURPOSE: GO-LIVE OF THE HUMAN RESOURCE PLANNING (HRP) PLATFORM WITH DEPLOYMENT OF PAYROLL FUNCTIONALITIES, INTEGRATED WITH THE PENSION SOFTWARE.

KEY METRICS



**Phase 2 Deliverables**



PROGRESS

- Parallel Cycle #2. Completion of parallel cycle #2, while reaching 97.5% gross salary acceptance by March 2024.
- Integration Files. Successful deployment of two critical integration files, INTO46 & INT123, with plans for enhancements thereafter.
- Post-Live Preparation. Preparation for post production enhancements, establishing statement of work for dedicated resources.

CHALLENGES

- Limited Development. Shared resources for development of the integration files, limiting base requirements for cutover, and post enhancements.
- Limited Payroll Testing. Payroll testing was mostly comprised of two pay periods from prior year, PP26 & PP1. The gap of 1 year resulted in handling new exceptions at the initial trial pre-cutover.
- Data Conversion. While not critical for cutover, there are residual data conversion activities relating to balances such as sick time, vacations, and others.

MILESTONES

	FY24 1st Quarter	2nd Quarter	3rd Quarter	4th Quarter	FY25 1st Quarter
Parallel Cycle #1	Deduction Testing				
Parallel Cycle #2		Gross Salary Testing	Deduction Testing		
Deployment				Cutover & Pre-Production	Production Go-Live
Training		Pre-Training	Online Training	Staff Training	Onsite Support
Integration Files		Guidebook	INT046, INT093, INT123	Deployment	Enhancements

NEXT STEPS

- Business Support. Dedicated resource assisting with business support to lead post cutover collaboration, priorities, plans, onsite support, and training.
- Redesign Integration. Redesign of the INTO46 to utilize payroll components for accuracy with pensionable records, and handling retros.
- Tenant Setup. Dedicated tenant for testing and further development of integration files, utilized by the developers assisting the department.

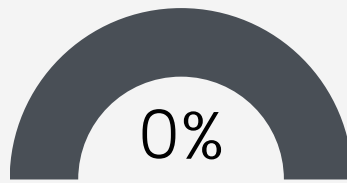
**INITIATIVE:** [NAME OF BUSINESS PLAN INITIATIVE]  
**DIVISION(S)/SECTION:** [DIVISION NAME/SECTION UNIT]  
**STRATEGIC GOAL(S):** [ASSOCIATED STRATEGIC GOAL AREAS]

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]

**BUDGET**

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



PURPOSE: [BRIEF DESCRIPTION]  
STRATEGIC GOALS: [ASSOCIATED STRATEGIC GOAL AREAS]

KEY METRICS

[Provide measurements of successful implementation]

CHALLENGES

- [Part of narrative. What challenges have been encountered during the reporting months? Consider the operational or business impact and recommendation of a solution or action.]

PROGRESS

- [Part of narrative. What has been done so far during the reporting months?]

NEXT STEPS

- [Part of narrative. What are the next steps in advancing the BPI?]

MILESTONES

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