



REPORT TO BOARD OF ADMINISTRATION

MEETING: FEBRUARY 11, 2020

From: Lita Payne, Executive Officer *Lita Payne*

ITEM: VII-A

SUBJECT: SEMI-ANNUAL REPORT OF BUSINESS PLAN INITIATIVES FOR THE PERIOD ENDING DECEMBER 2019

ACTION: CLOSED: CONSENT: RECEIVE & FILE:

Recommendation

That the Board receive and file this report.

Executive Summary

LACERS' strategic plan goals are achieved through a series of initiatives, with the highest priority initiatives categorized as "business plan initiatives" or "BPIs." This semi-annual report of BPIs aims to keep the Board apprised of the progress of these priorities.

Discussion

In September 2019, the Executive team established seven BPIs to drive the strategic goals of the Department in Fiscal Year (FY) 2019-20. In October 2019, LACERS purchased a new headquarters building and to successfully track and monitor progress on requirements related to ownership and tenancy, the headquarters project was added as a new BPI for FY 2019-20. Additionally, Web-Based Counseling has been merged into the Multi-Channel Outreach Initiative. Finally, the Government Service Buyback (GSB) Calculator Initiative has merged into Phase II of the Website Redesign Initiative along with the implementation of other online calculators for retirement and health benefits.

The updated FY 2019-20 BPIs are:

- Asset Allocation Initiative
- Web Redesign Initiative
- Emergency Preparedness & Business Continuity Plan Initiative
- Multi-Channel Outreach Expansion Initiative
- Recruitment and Retention Initiative
- Headquarters Move Initiative

The attached report provides the status of initiatives through December 2019 in a concise dashboard format. This report is similar to the dashboards reviewed by the BPI Team on a bi-monthly basis. The BPI Team fosters progress on these initiatives by discussing challenges and impediments, actively

engaging in questioning, introducing alternative perspectives, identifying solutions, and seeking opportunities to collaborate across divisions.

As of this reporting, all initiatives are deemed “on-track” to meet their deliverables, though several identify staffing as a risk. All BPI’s will continue to be monitored and acted upon by management to successful conclusion.

The next BPI report to the Board will be in July 2020, and will cover progress through the end of the fiscal year as well as propose the next slate of BPIs for FY 2020-21.

Strategic Plan Impact Statement

The BPI Program seeks to enhance the Strategic Plan Goal 6, Organization, supporting greater organizational effectiveness, efficiency, and resiliency.

Prepared By: Chhintana Kurimoto, Management Analyst

LP/TB/DW/CK

Attachment: Business Plan Initiatives Fiscal Year 2019-20 for the reporting period ending December 2019



LOS ANGELES CITY EMPLOYEES' RETIREMENT SYSTEM

Reporting Period Ending December 2019

A dark blue background with a white network of interconnected nodes and lines, resembling a digital or organizational structure.

BUSINESS PLAN INITIATIVES

FISCAL YEAR 2019-2020

Prepared for

LACERS BOARD OF ADMINISTRATION

FEBRUARY 11, 2020

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LACERS GOALS

1

CUSTOMER SERVICE

To provide outstanding customer service.

2

BENEFITS DELIVERY

To deliver accurate and timely Member benefits.

3

HEALTH AND WELLNESS

To improve the value and minimize costs of Members' health and wellness benefits.

4

INVESTMENT

To optimize long-term risk adjusted returns through superior investments.

5

GOVERNANCE

To uphold good governance practices which affirm transparency, accountability, and fiduciary duty.

6

ORGANIZATION

To increase organizational effectiveness, efficiency, and resiliency.







7

WORKFORCE

To recruit, retain, mentor, empower, and promote a high-performing workforce.

EXECUTIVE SUMMARY DASHBOARD

COMPLETED
ON TRACK
OFF TARGET
NEEDS INTERVENTION

INITIATIVES, GOALS & EXECUTIVE SPONSORS	DECEMBER STATUS	INITIATIVE LEADS
<p>1 ASSET ALLOCATION ACHIEVE INVESTMENT PERFORMANCE/RISK OBJECTIVES Executive Sponsor: Rod June</p>		Lead: Bryan Fujita
<p>2 WEB REDESIGN OUTSTANDING CUSTOMER SERVICE Executive Sponsor: Lita Payne</p>		Lead: Taneda Larios & Thomas Ma
<p>3 EMERGENCY PREPAREDNESS & BCP ORGANIZATION EFFICIENCY Executive Sponsor: Todd Bouey</p>		Lead: Isaias Cantú, John Koontz & Dan Goto
<p>4 MULTI-CHANNEL OUTREACH EXPANSION OUTSTANDING CUSTOMER SERVICE/ TIMELY & ACCURATE BENEFITS Executive Sponsor: Lita Payne</p>		Lead: Gabriel Perez & Nathan Herkelrath Tenah Johnson-Taylor & Delia Hernandez
<p>5 RECRUITMENT & RETENTION HIGH PERFORMING WORKFORCE Executive Sponsor: Neil Guglielmo</p>		Lead: Lin Lin
<p>6 HEADQUARTERS MOVE ORGANIZATION EFFICIENCY Executive Sponsor: Todd Bouey</p>		Lead: Isaias Cantú & Thomas Ma

INITIATIVE: **Asset Allocation**
 DIVISION(S)/SECTIONS: **Investment Division**
 STRATEGIC GOAL(S): **Investment**

STATUS: **On Track**
 REPORT MONTH: **December 2019**
 LEAD(S): **Bryan Fujita**

INITIATIVE SUMMARY

The Investment Division implements the Asset Allocation Policy approved by the Board. The Board seeks to achieve its return target of 7.25% over long periods of time by assuming prudent levels of risk as prescribed in the Risk Budget. The key priorities are:

- Conduct appropriate investment manager searches
 - Issue RFPs and manage the selection process pursuant to Investment Policy
 - Negotiate contract terms and conditions
 - Fund managers and rebalance the portfolio
 - Monitor investment managers pursuant to Investment Policy
 - Report search and manager status to the Investment Committee and Board
- Evaluate and monitor active versus passive exposure

BUDGET

Appropriation:	\$62,200
Expense:	(\$14,767)
Unspent:	\$47,433

KEY DEPENDENCIES/ASSUMPTIONS

- Board and Investment Committee priorities
- Sufficiency of staffing and consultant resources
- Qualified investment managers respond to RFPs
- Selection process pursuant to Manager Search and Selection Policy remains substantially unchanged

MILESTONES / DELIVERABLES

Q2/FY19

- ✓ Board authorization of RFPs – Oct
- ✓ Launch Private Credit RFP – Dec
- ✓ Active versus Passive Board Education – Dec

Q3/FY19

- ✓ Launch U.S. Small Cap Equities RFP – Feb
- ✓ Launch High Yield/Bank Loans RFP – Feb

Q4/FY19

- ✓ Launch Emerging Market Small Cap RFP – Jun
- ✓ Launch Emerging Market Debt RFP – Jun
- ✓ Initiate transition of Active Large Cap Value Equities to Passive Large Cap Equities – Jun

Q1/FY20

- ✓ Complete Private Credit RFP – Jul
- ✓ Complete transition of Active Large Cap Value Equities to Passive Large Cap Equities - Jul
- ✓ Launch Core Fixed Income RFP – Aug

Q2/FY20

- Complete U.S. Small Cap Equities RFP – Defer to Jan

Q3/FY20

- Execute Private Credit Contracts – Jan
- Complete U.S. Small Cap Equities RFP – Jan
- Fund Private Credit – Feb
- Complete High Yield/Bank Loans RFP – Feb
- Complete Emerging Market Small Cap RFP – Mar

Q4/FY20

- Execute U.S. Small Cap Equities Contracts – Apr
- Complete Emerging Market Debt RFP – Apr
- Fund U.S. Small Cap Equities – May
- Execute High Yield/Bank Loans Contracts – May
- Complete Core Fixed Income RFP – May
- Fund High Yield/Bank Loans – Jun
- Execute Emerging Market Small Cap Contracts – Jun

Q1/FY21

- Fund Emerging Market Small Cap Equities – Jul
- Execute Emerging Market Debt Contracts – Jul
- Execute Core Fixed Income Contracts – Aug
- Fund Emerging Market Debt – Aug
- Fund Core Fixed Income – Sep

KEY INDICATORS

Refer to attached exhibits:

- Exhibit A – Investment Manager Search Schedule
- Exhibit B - Asset Class Exposure Actual versus Target
- Exhibit C - Asset Class Exposure Trend Past 12 Months
- Exhibit D - Active vs. Passive Trend Past 12 Months

ISSUES / CHALLENGES

- Numerous RFP responses and limited Investment and consultant staff have led to extended evaluation periods of candidates.

SEP

OCT

NOV

DEC

JAN

FEB

MAR

APR

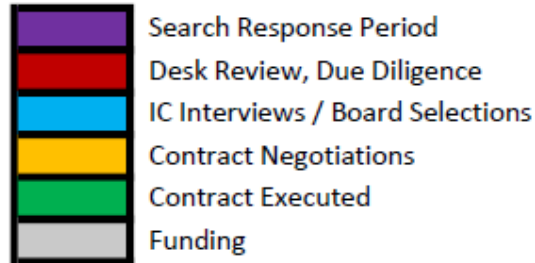
MAY

JUN

BUSINESS PLAN INITIATIVE FY 2019-20 - DASHBOARD

EXHIBIT A

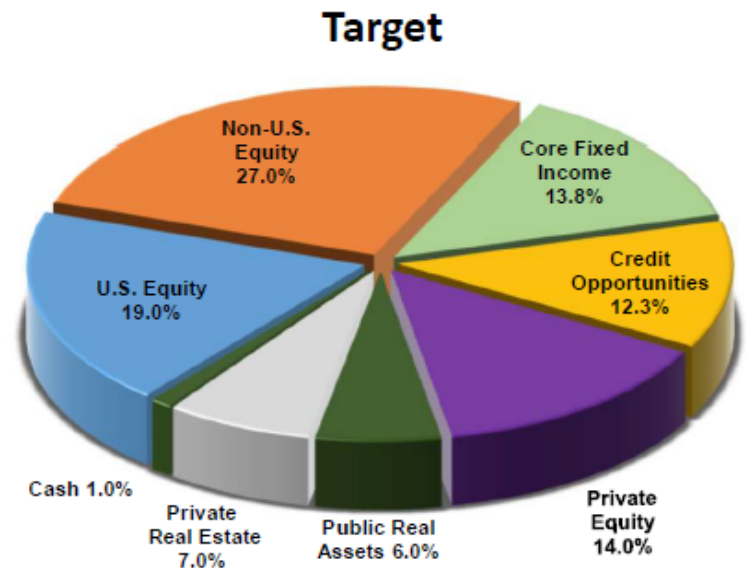
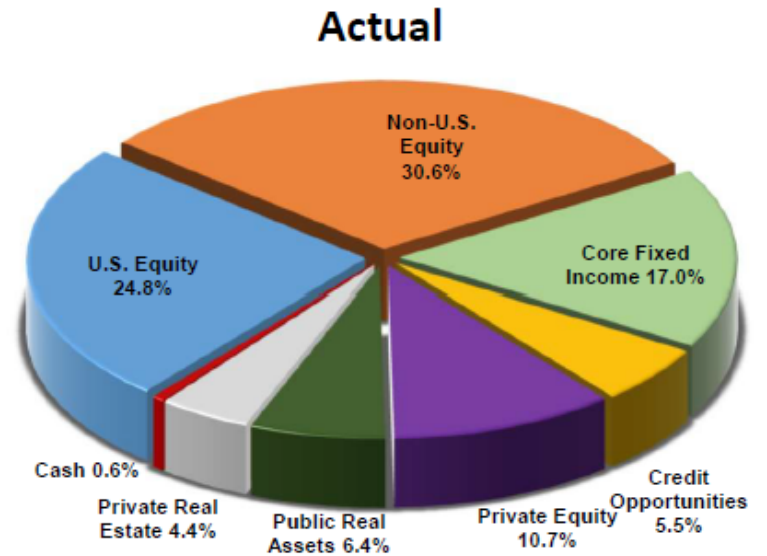
Investment Manager Search Schedule
LACERS
December 31, 2019



Search	Q3 FY 19-20			Q4 FY 19-20			Q1 FY 20-21		
	2020 JAN	2020 FEB	2020 MAR	2020 APR	2020 MAY	2020 JUN	2020 JUL	2020 AUG	2020 SEP
Private Credit									
U.S. Small Cap Equities									
High Yield/Bank Loans									
Emerging Markets Small Cap Equities									
Emerging Market Debt									
Core Fixed Income									

LACERS Investment Portfolio

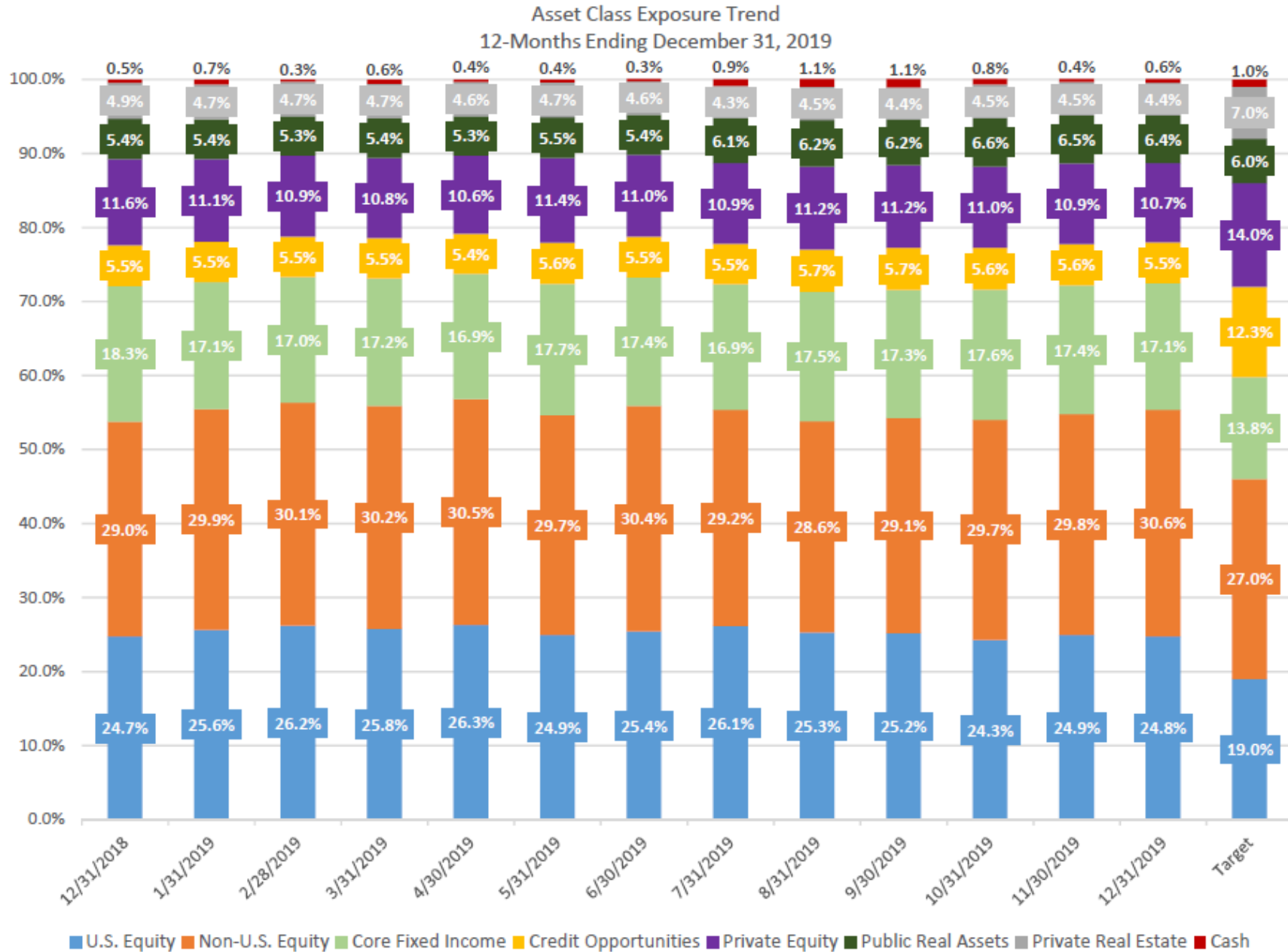
ASSET CLASS BY MARKET VALUE & ALLOCATION						
Asset Class	as of ► December 31, 2019					
	Actual (\$ B)	Actual (%)	Target (%)	Actual-Target*	Min (%)	Max (%)
U.S. Equity	4.67	24.8%	19.0%	5.8%	12.0%	26.0%
Non-U.S. Equity	5.77	30.6%	27.0%	3.6%	18.0%	36.0%
Core Fixed Income	3.21	17.0%	13.8%	3.3%	10.8%	16.8%
Credit Opportunities	1.04	5.5%	12.3%	-6.7%	8.3%	16.3%
Private Equity	2.02	10.7%	14.0%	-3.3%	N/A	N/A
Public Real Assets	1.21	6.4%	6.0%	0.4%	4.0%	8.0%
Private Real Estate	0.83	4.4%	7.0%	-2.6%	N/A	N/A
Cash	0.11	0.6%	1.0%	-0.4%	0.0%	2.0%
TOTAL FUND	18.87	100.0%	100.0%	0.0%	N/A	N/A



*Current asset allocation targets approved in April 2018. Transition to new targets in progress.

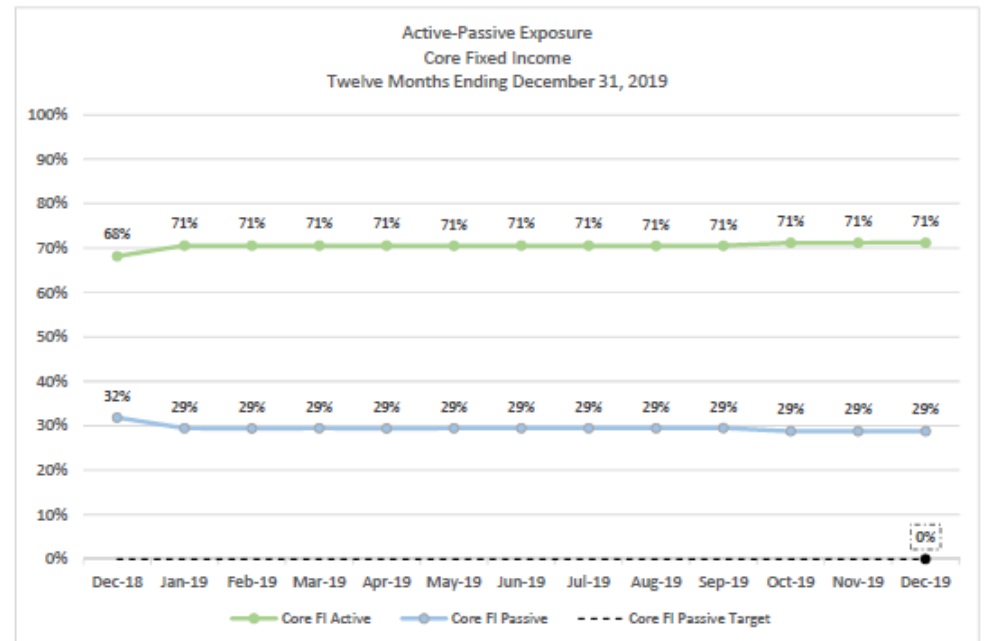
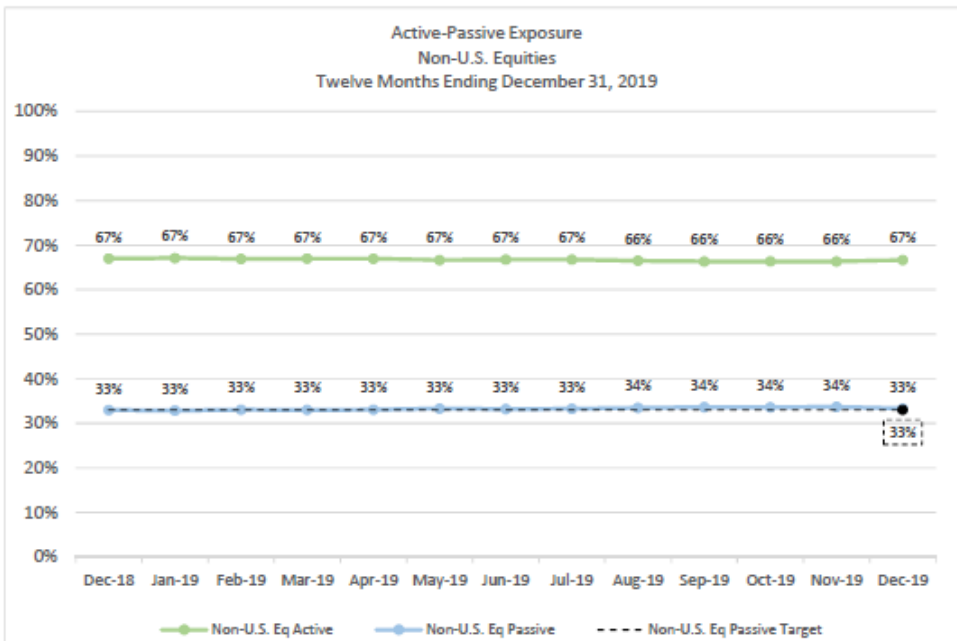
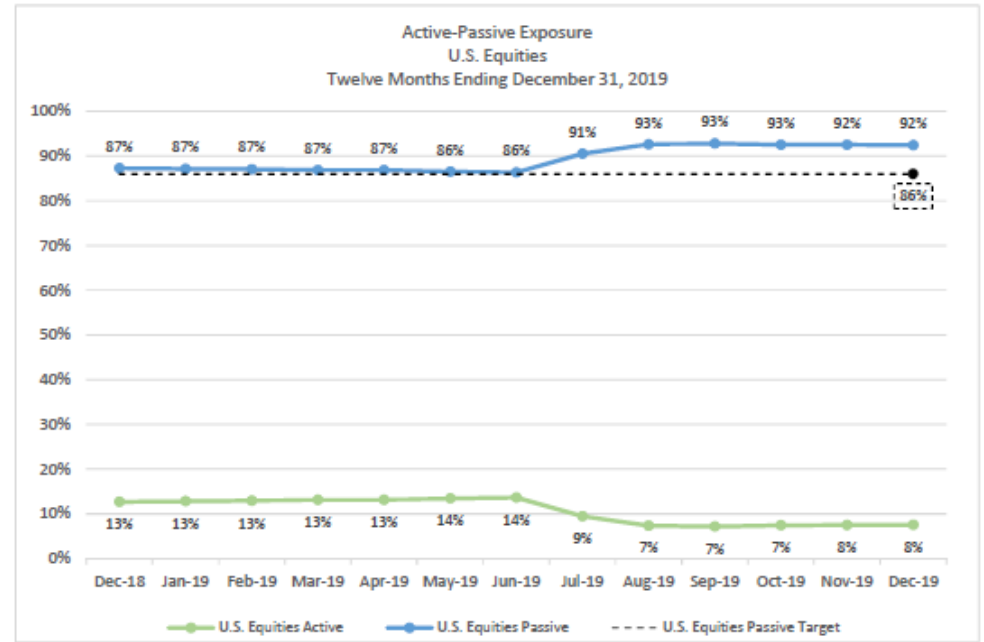
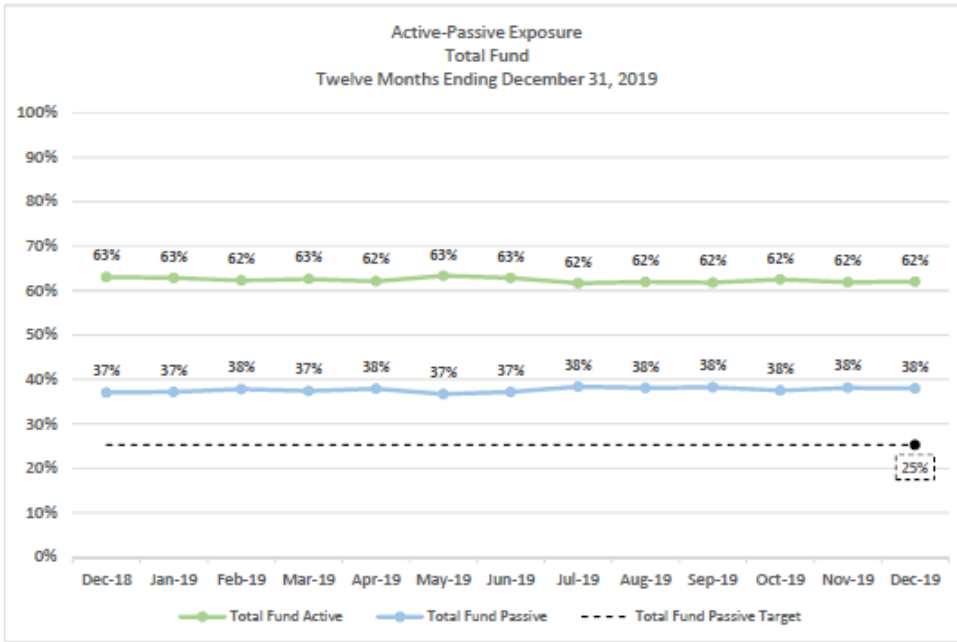
BUSINESS PLAN INITIATIVE FY 2019-20 - DASHBOARD

EXHIBIT C



BUSINESS PLAN INITIATIVE FY 2019-20 - DASHBOARD

EXHIBIT D



INITIATIVE: **LACERS Web Redesign**
 DIVISION(S)/SECTIONS: **Member Engagement/Systems**
 STRATEGIC GOAL(S): **Customer Service**

STATUS: **On Track**
 REPORT MONTH: **December 2019**
 LEAD(S): **Taneda Larios/Thomas Ma**

INITIATIVE SUMMARY

Systems and Member Engagement are co-leads on technical and business requirements/development of a new LACERS internet site focused on the following key priorities:

- A New Website with Prevailing Design
- Functionality and Usability
- Scalability (Desktop/Mobile)
- Ease of Use/Approachability
- Integration of Social Media Platforms
- Content Management System
- Supportability

BUDGET

Appropriation:	\$221,000
Expense:	(\$95,250)
Unspent:	\$125,750

KEY DEPENDENCIES/ASSUMPTIONS

- Fund availability
- Staffing resources
- Leverage existing agreement

MILESTONES / DELIVERABLES

Q1/FY20

- ✓ Design Prototype – Jul 18
- ✓ Board Presentation – Jul 23
- ✓ Design Selection – Aug 8
- ✓ Mobile & Interior Page Development – Aug 15
- ✓ Content Planning – Aug 22
- ✓ Sitemap & Information Architecture – Aug 30

Q2/FY20

- ✓ Video Sharing Interface – Sep 1
- ✓ Marketing Platform Interface – Oct 3
- ✓ Content Review & Prioritization – Nov 25
- ✓ Content Migration & Data Conversion – Dec 31

Q3/FY20

- Train Internal Staff on New Site
- Sandbox Site
- Soft Launch
- User and Member Testing
- Surveys & Fine Tuning
- Penetration Testing
- Go Live of New Internet Site

Q4/FY21

- Online Calculators (Benefit, Health, & Government Service Buyback)

ISSUES / CHALLENGES

- Internal operational requirements compete for personnel resources
- Adequate testing and readiness
- Extensive process of contents curation
- Expeditious response to quality review and updates

KEY INDICATORS

- **Refer to attached Exhibit A**
- Web Analytics (Comparison of Legacy)
 - Total Visitors
 - Most Access Pages
 - Unique Users
- Operational Efficiencies
 - Service Center Reports
 - User Administration & Maintenance
- Member Satisfaction & Ratings
 - Accessibility
 - Ease of Use
- Compliance
 - 508 & ADA
 - Penetration Testing & Security

EXECUTIVE ACTION ITEMS

- Website review and approval of launch
- Content administration roles & responsibilities

SEP

OCT

NOV

DEC

JAN

FEB

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APR

MAY

JUN

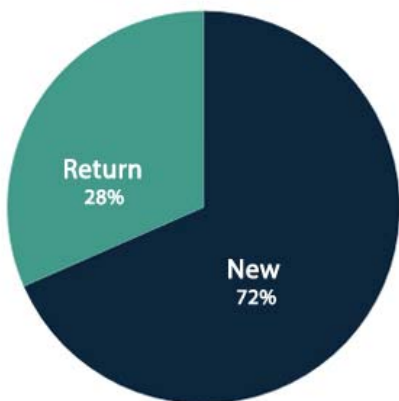
BUSINESS PLAN INITIATIVE FY 2019-20

Exhibit A

December 2019 Website Metrics

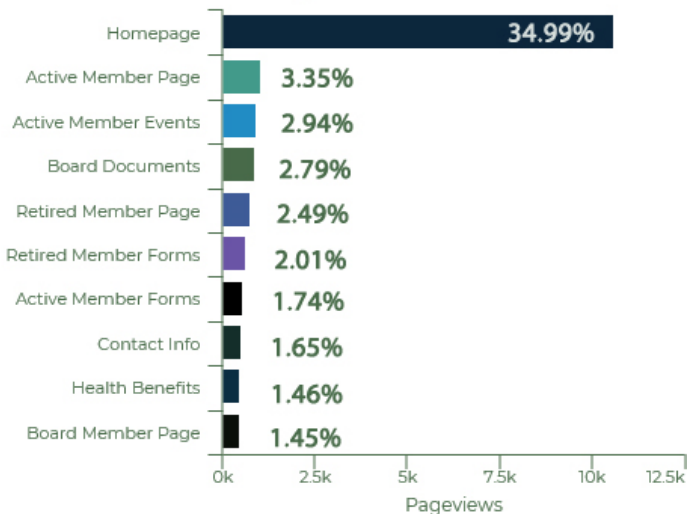
WEBSITE USERS

Total Visitors: 8,302



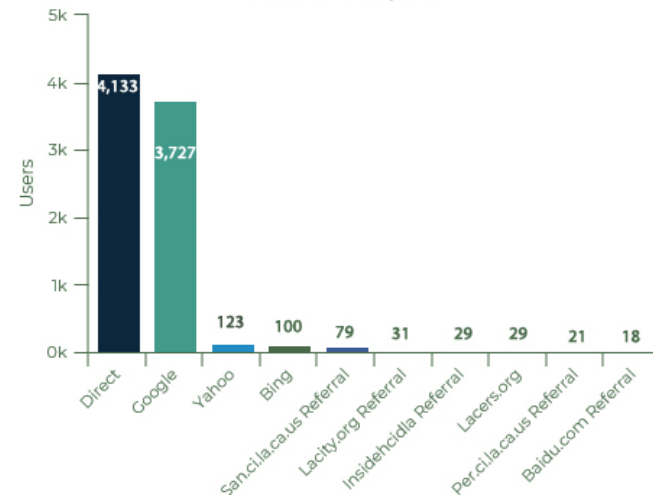
TOP ACCESS PAGES

Total Pageviews: 30,257



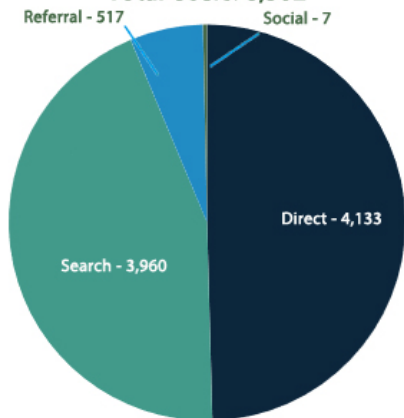
TRAFFIC SOURCE

Total Users: 8,302



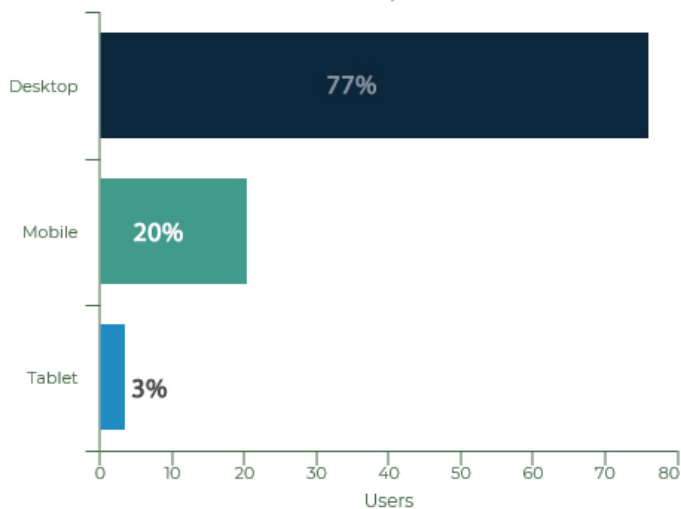
CHANNELS

Total Users: 8,302



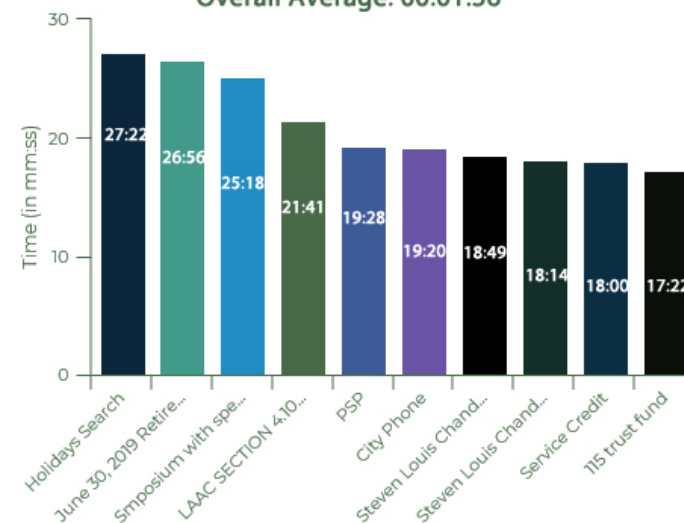
DEVICES

Total Users: 8,302



AVERAGE TIME ON PAGE

Overall Average: 00:01:56



INITIATIVE SUMMARY

Encompassing both Life Safety and Business Continuity concerns, this initiative drives LACERS' investment in emergency planning and disaster recovery, and staff's ongoing training and exercises of those plans.

BUDGET

Appropriation:	\$67,500
Expense:	(\$2,894)
Unspent:	\$64,606

KEY DEPENDENCIES/ASSUMPTIONS

- Identification of sufficient ASO staff hours in light of the demands associated with the HQ buildout and relocation project
- Staff being released to attend training

MILESTONES / DELIVERABLES

Q1/FY20

- ✓ CERT Training/ERT Team – July
- ✓ MOU with SFERS – July
- ✓ Fire Evacuation Drill – Aug
- ✓ MOU with LAFPP – Aug
- ✓ BCP Earthquake Tabletop Exercise – Sep
- ✓ Monthly MIR3 Updates – Sept
- ✓ Monthly New Employee BCP Orientation/Evacuation Walkthrough
- ✓ Annual Updates of Key Contacts for Emergency Preparedness Roles – Sep
- ✓ Annual Meeting with Northern Trust - Sep
- ✓ Monthly MIR3 Updates – Sep
- ✓ Monthly Emergency Management Team Meeting – Sep
- ✓ Quarterly Emergency Preparedness Tips – Sept

Q2/FY20

- ✓ Annual Earthquake Drill – Oct
- ✓ Register Key Staff in GETS – Oct
- ✓ Register Key Staff in WPS – Oct
- ✓ Monthly Evacuation Route Tour/BCP Orientation – Dec
- ✓ Monthly MIR3 Updates – Dec
- ✓ Monthly Emergency Management Team Meetings – Oct, Nov, Dec

Q3/FY20

- ✓ Annual Submittal of Emergency Preparedness Plan to EMD – Jan (on schedule)
- MOU with General Services – Jan (in process)
- ✓ MOU with LADOT – Jan
- MOU with LAPD – Jan (in process)
- MOU with LASan – Jan (in process)
- LACERS Emergency Preparedness Quick Guide – Feb
- Annual Update of the Data Upload to Agility – Feb
- Monthly Evacuation Route Tour/BCP Orientation – Mar
- Monthly MIR3 Updates – Mar
- Quarterly Emergency Preparedness Tips – Mar
- Purchase Alternate Communication Equipment (Two Way Radios w/ Repeaters) – Mar
- Bi-Annual Two-Way Radio Training – Mar
- Annual Two-Way Radio Test – Mar
- Walkie Talkie Training – (rescheduled from Oct)

Q4/FY20

- Annual MIR3 Callout Test – May
- Annual CPR/AED Training – Jun
- Update of the Mission Essential Functions – Jun
- Emergency Management Team Training – Jun
- Board Member Emergency Management Orientation – Jun

- Monthly Evacuation Route Tour/BCP Orientation – Jun
- Monthly MIR3 Updates – Jun
- Quarterly Emergency Preparedness Tips – Jun
- Annual Update of Emergency Preparedness Data Kit for EMT Members – Jun
- Annual Update of Emergency Preparedness Data Kit for Posting to LACERSMART – Jun
- Annual Replacement of Expired Emergency Kit Supply Items – Jul

KEY INDICATORS

Emergency Preparedness and BCP Progress

- **Attendance of 2 hours of Emergency Preparedness (EP) Training by 90% of LACERS staff**
Status: Pending Compilation of Results
- **Response to annual MIR3 notification test by 86% of LACERS staff**
Status: Scheduled for May 2020
- **Evacuation of all LACERS employees from Suite 500 within 4 minutes**
Status: Staff cleared floor in 4:09
- **Quarterly Issuance of EP Tips**
Status: ASO has issued EP Tips for Q1 and Q2

ISSUES / CHALLENGES

With the addition of the responsibilities for transitioning to the new headquarters, staff time that can be dedicated to this BPI has become limited.

INITIATIVE: **Multi-Channel Outreach Expansion**
 DIVISION(S)/SECTIONS: **Member Engagement, Member Service Center, Retirement Services and Health Divisions**
 STRATEGIC GOAL(S): **Customer Service and Benefits Delivery**

STATUS: **On Track**
 REPORT MONTH: **December 2019**
 LEAD(S): **Gabriel Perez/Nathan Herkelrath
 Tenah Johnson-Taylor/Delia Hernandez**

INITIATIVE SUMMARY

Expand the channels that LACERS utilizes to educate and counsel Members about their retirement and benefits by:

- Multi-Channel Outreach (MCO)
Leads: Perez/Herkelrath
 - Webinars
 - Podcasts
 - Videos
- Web Based Counseling (WBC)
Leads: Johnson-Taylor/Hernandez
 - Additional Path of Communication in real life
 - Option for Members with Mobility Challenges
 - Available to Members in Remote Locations

BUDGET

Appropriation:	TBD
Expense:	TBD
Unspent:	TBD

KEY DEPENDENCIES/ASSUMPTIONS

- MCO: Staff & time resources to lead this effort
- MCO: Divisions meet timelines
- MCO: Access to Director of Innovation
- WBC: Staff & time resources to lead this effort
- WBC: Members' use of Service
- WBC: Software Procurement

MILESTONES / DELIVERABLES

Q1/FY20

- ✓ WBC: Assemble Team - September

Q2/FY20

- ✓ MCO: Kickoff Meeting with Team Members
- ✓ MCO: Team Member Survey
- ✓ MCO: Review Potential Channels and Costs
- ✓ WBC: Core Team Meetings
- ✓ WBC: Subject Matter Expert Team Meeting – Initial
- ✓ WBC: Test Various Web Based Meeting Software
- ✓ WBC: Subject Matter Expert Team Meeting – Follow-up
- ✓ WBC: Select Software Vendor

Q3/FY20

- MCO: Selection of Channels to Utilize
- WBC: Core Team Meetings
- WBC: Acquiring Web Based Meeting Software
- WBC: Develop Business Processes and Survey Mechanism
- WBC: Training Staff

Q4/FY20

- MCO: Prioritization of Content
- MCO: Prioritization of Channel to Utilize
- WBC: Core Team Meetings
- WBC: Soft Launch Campaign
- WBC: Soft Launch
- WBC: Go Live Campaign
- WBC: Go Live

Q1/FY21

- MCO: 1st Creation of Content Posted
- MCO : Post Mortem Review with Team Members

KEY INDICATORS

Multi-Channel Outreach:

- Media produced for each unit within LACERS
- Engagement tracking and goals
- Ongoing surveys and improvement
- Reduction in time and cost to produce

Web Based Counseling:

- Response to Surveys
- Counseling Sessions by Unit
- Appointments Scheduled
- Number of Participants
- Length of the Sessions

ISSUES / CHALLENGES

- MCO : Need FY21 Budget Items Approved (\$7K)
- WBC: Budget and Equipment Overlap with Multi-Channel Outreach BPI
- WBC: Encountered technical challenges with testing due to quality of equipment
- WBC: Need funding of \$1,000
- WBC: Funding not directly allocated for this initiative but available in the HBACD budget

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INITIATIVE SUMMARY

Recruit, Retain, Mentor, Empower, and Promote a High Performing Workforce by:

- Career Path (CP)
- Recruitment Web Page (RW)
- LACERS Training Vision (TV)
- Compensation Study (CS)

BUDGET

Appropriation:	\$50,000
Expense:	
Unspent:	\$50,000

KEY DEPENDENCIES/ASSUMPTIONS

- Staff & time resources to lead this effort
- Divisions meet timelines

MILESTONES / DELIVERABLES

Q1/FY20

- ✓ CP: Work with Personnel Department

Q2/FY20

- ✓ CP: Benefits Specialist Bulletin change – Oct 2019
 - Added college units and work experience
 - Changed to continuous exam, 6 month interval on trial basis
- ✓ CP: Benefits Analyst & Senior Benefits Analyst
 - Pending CAO salary correction
- ✓ TV: New NEO Kick off meeting – Nov

Q3/FY20

- CP: Benefits Specialist exam
 - Advisory essay Jan 2020
 - Interview Feb 2020
- TV: Feedback re: New NEO – Jan
- TV: Review and update Tuition Reimbursement
- RW: Target web content – Feb
- CS: Develop Proposal

Q4/FY20

- CP: Benefits Specialist assessment – Apr
- TV: Assess changes to NEO - Apr
- RW: Launch web content – May
- CS: Release proposal for bid- Apr

ISSUES / CHALLENGES

- City approval processes

KEY INDICATORS

- New Employee Orientation (NEO)

	PRIOR NEO		NEW NEO		
	Q1 Day 1	Q1 Day 2	Q2	Q3	Q4
Scheduled	10	10	8		
Attended	8	7	8		
%	80%	70%	100%		

- New NEO Evaluations: December 19, 2019 to January 9, 2020 meeting feedback results received excellent ratings.

EXECUTIVE ACTION ITEMS

Request additional staffing to support enhanced training program.

SEP

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INITIATIVE: **Headquarters Move – Phase 1**
 DIVISION(S)/SECTIONS: **ASO/Systems**
 STRATEGIC GOAL(S): **Tracking Move-Related Progress**

STATUS: **On Track**
 REPORT MONTH: **December 2019**
 LEAD(S): **Isaias Cantú/Thomas Ma**

INITIATIVE SUMMARY

The Headquarters (HQ) Move Initiative (HMI) tracks the transition of LACERS from its current headquarters to its new location and will focus on the following key priorities:

- Develop Progress Tracking Mechanism Roadmap (PTMR) involving Task Prioritization, Phase & Task Deadline identification
- PTMR as reference for Staff, Consultants, and Vendors
- Facilitate & clarify context related to the Board for HQ Move Quarterly Board Reports
- Phase One Move completion by 3rd Quarter of FY20

BUDGET

TBD	In development
-----	----------------

KEY DEPENDENCIES/ASSUMPTIONS

- Work with vendors begins 2nd quarter of FY20
- 6 month completion time
- Key milestones & deliverables progress subject to change
- Staffing resources & funding availability

MILESTONES / DELIVERABLES

Q3/FY20

- Invesco & LACERS completion of asset management contract, budgets, capital plan approval, and board report presentation
- Investments & Member Engagement (ME) Divisions complete relocation steps including backfill plan
- Space & technology plan preparedness, specifications, procurement, installation, and policies
- Migration to a mobile work environment

- Migration to online document management system
- Move coordination and execution
- Other relocation preparations & implementations including Emergency Preparedness Plan (EPP) draft, safety & security plans, & Phase One of potential future adjustments evaluation

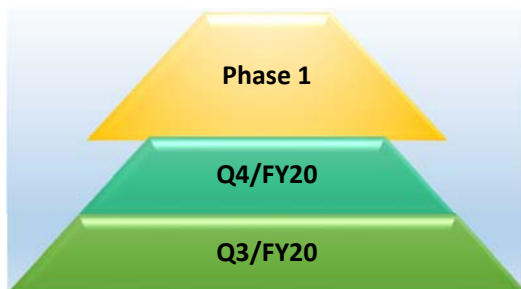
Q4/FY20

- Invesco & LACERS FY20, 3rd Quarterly Report
- Begin Phase Two Planning and timeline
- Present HQ Budget to the Board

ISSUES / CHALLENGES

- Uniqueness of managing one's own building
- New team of staff and consultants/vendors needing to mobilize quickly

KEY INDICATORS



- Transition of Investment & Member Engagement Divisions to the building
- Approval of 2nd floor design plans
- Connectivity of network for necessary services
- Data migration to Box.com
- Furniture installation completed
- Deployment of mobile workforce tools

EXECUTIVE ACTION ITEMS

- Request dedicated staffing to support expanded facilities manager role

SEP

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APPENDIX A – BUSINESS PLAN INITIATIVE TEMPLATE

INITIATIVE: **Name of Business Plan Initiative**
 DIVISION(S)/SECTIONS: **[Division/Section Name]**
 STRATEGIC GOAL(S): **[Associated Strategic Goal Area]**

Shade the cells according to status:

- Completed
- On Track
- Off Track
- Intervention Needed

STATUS: **[On Track] [Off Track]**
 REPORT MONTH: **[Reporting Month][Year]**
 LEAD(S): **[First and Last Names]**

INITIATIVE SUMMARY

[Provide 1-2 line description of initiative. Bullet the major components.]

- [Component 1]
- [Component 2]
- [Component 3]

BUDGET

Appropriation:	\${Whole Dollars}
Expense:	\${Whole Dollars}
Unspent:	\${Whole Dollars}

[Add budget notes here]
 [Budget should reflect expenses, excluding salaries, unless requesting new positions mid-year.]

KEY DEPENDENCIES/ASSUMPTIONS

- [Bullet assumptions of certain resources or prioritizations that are required for timely implementation of this initiative.]
- [For example: Funding availability, staffing availability, other resource availability, key cooperation.]

MILESTONES / DELIVERABLES

Q1/FY20

- ✓ [List key completed items/milestones this quarter. Use check mark bullet.]
- [List key upcoming items/deliverables this quarter. Use the box bullet.]

Q2/FY20

- ✓ [List key completed items/milestones this quarter. Use check mark bullet.]
- [List key upcoming items/deliverables this quarter. Use the box bullet.]

Q3/FY20

- ✓ [List key completed items/milestones this quarter. Use check mark bullet.]
- [List key upcoming items/deliverables this quarter. Use the box bullet.]

Q4/FY20

- ✓ [List key completed items/milestones this quarter. Use check mark bullet.]
- [List key upcoming items/deliverables this quarter. Use the box bullet.]

ISSUES/CHALLENGES

- [Identify any current or future barriers to the achievement of deliverables. Keep it brief.]

KEY INDICATORS

- [Provide quantitative measurements of successful implementation. Graphical representations are encouraged.]

Survey Feedback

"How helpful was this medical section for you?"

"Do you feel like you have a better understanding of how your medical benefits work now?"



Choice	Count	%	Choice	Count	%
Extremely helpful	6	42.9%	Yes, definitely	7	29.2%
Very helpful	3	21.4%	Yes, a little	9	37.5%
Somewhat helpful	3	21.4%	Maybe	2	8.3%
Not very helpful	1	7.1%	No, not really	4	16.7%
Not at all helpful	1	7.1%	No, definitely not	2	8.3%

EXECUTIVE ACTION ITEMS

- Sitemap review and approval
- Content administration roles & responsibilities

Side bar represents the status over the months in the FY. Change the color accordingly.

SEP
OCT
NOV
DEC
JAN
FEB
MAR
APR
MAY
JUN