



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

MEETING: AUGUST 22, 2023
ITEM: VI – A

SUBJECT: FISCAL YEAR-END REPORT OF BUSINESS PLAN INITIATIVES FOR THE PERIOD ENDING JUNE 30, 2023

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 nine initiatives adopted into the Business Plan for Fiscal Year 2022-23 (FY23). Four BPIs from FY23 will continue into Fiscal Year 2023-24 (FY24), five initiatives are ongoing but will not continue as BPIs while one new BPI is added: City Human Resources and Payroll (HRP) System Implementation.

Business Plan Initiatives	
FY23	FY24
<ul style="list-style-type: none"> • Governance – continuing in FY24 • Member Service Modernization – *ongoing • Headquarters Move – *ongoing • Workforce Diversity, Equity, and Inclusion (DEI) – continuing in FY24 • Environmental, Social, and Governance (ESG) Investing – continuing in FY24 • Knowledge Transfer – *ongoing • Language Access Plan – continuing in FY24 • Member Service Metrics – *ongoing • Diversity in Hiring – *ongoing 	<ul style="list-style-type: none"> • Governance • Workforce Diversity, Equity, and Inclusion (DEI) • Environmental, Social, and Governance (ESG) Investing • Language Access Plan • City Human Resources and Payroll (HRP) System Implementation

**Ongoing but not continuing as a BPI in FY24*

Discussion

LACERS FY23 BPIs and accomplishments, along with introduction of the FY24 BPIs, are all discussed herein.

Business Plan Initiatives and Achievements for FY23

LACERS has demonstrated significant progress and success outlined in the FY23 BPI dashboards and summarized below.

Governance

LACERS successfully held a virtual Pension Symposium in February 2023. A survey was conducted after the symposium, with many attendees responding positively to the symposium topics. The Board Governance Consulting Services RFQ concluded with the Board's approval of three firms for the Board Governance Consulting Services bench list. The first anticipated engagement in FY24 for board governance consulting services is for strategic planning services. The Triennial Board Policy review continues to progress according to the timeline.

Member Service Modernization

LACERS launched a Retirement Application Portal (RAP) Phase 2 and Amazon Connect for the purpose of including enhancements to create a better experience for staff and Members at the outset of the pandemic. Improvements and opportunities for expansion of each were identified for implementation this past year. RAP enhancement testing was completed and implemented in the production environment on July 25, 2023. Although met with delays, the Amazon Connect expansion has begun with an anticipated completion date in August 2023.

Headquarters Move

LACERS has successfully transitioned into the new building in March of 2023. While many milestones have been achieved in furnishing and outfitting the building for occupancy, LACERS is focused on the remaining tenant improvement areas such as strengthening building security access, improving the air conditioning system, completing building inspections, and obtaining final permits.

Workforce Diversity Equity, and Inclusion

Aligning with our strategic goal in recruiting, mentoring, and promoting a high-performing workforce, LACERS initiated efforts to implement Diversity, Equity, and Inclusion (DEI) strategies. LACERS partnered with the Experience Institute for Fellowship Consulting Services to develop a LACERS Fellowship program that will guide discovery on frameworks for professional success at LACERS. The project launched with its first cohort of management staff in August continuing into FY24.

Environmental, Social, and Governance Investing

In 2022, the Board approved LACERS' Responsible Investment Policy, designed to align with the broader mission and goals of the Principles for Responsible Investment (PRI) organization and support the six PRI principles. LACERS' ongoing efforts to engage with the Emerging Manager community resulted in two successful Emerging Manager events: Fall 2022 Emerging Manager Symposium and Spring 2023 Emerging Manager Networking Forum. The ESG initiative continues to make significant

strides by evaluating and monitoring the implementation of LACERS ESG Programs, such as developing LACERS ESG Risk Framework and contributing to PRI DEI due diligence questionnaires.

Knowledge Transfer

A two-phased training program was developed to facilitate the knowledge transfer from outgoing senior staff to incoming senior staff to ensure business continuity. In FY23, Retirement Services Division completed 12 training sessions and the Health, Wellness, and Buyback Division completed 25 training sessions. This initiative will continue as an ongoing effort but will not move forward as a BPI for FY24.

Member Services Metrics

LACERS sought to amend the Member Service Agreement (MSA) with defined metrics that would allow real-time tracking of service level delivery to Members. An array of metrics were identified, with two items of the MSA being proposed for adjustment to reflect changes in LACERS operations. This initiative is largely completed, pending Executive review and adoption.

Language Access Plan

Prompted by Executive Directive 32, LACERS created the Language Access Plan initiative to expand Members' access to information by procuring translation and interpretation services. LACERS Language Access Plan has been developed for implementing these services and is currently pending review by the Office of Immigrant Affairs/Community Investment for Families Division (CIFD).

Diversity In Hiring

In efforts to diversify Investment hiring in the City, LACERS is leading the creation of an Investment Associate class in the Bridge to Jobs Program. The initial draft of the class description was created in collaboration with other Pension Peers as part of the engagement process and will be submitted to LACERS Human Resources Unit and the Personnel Department for further review. This initiative continues to be an ongoing effort.

The year-end report on the nine Business Plan Initiatives for FY23 is attached.

Other LACERS Goals Accomplishments

Highlights of other department accomplishments toward LACERS Strategic Goals include:

Outstanding Customer Service

- Increased Member education seminars and engagement sessions by 23%.
- Resumption of Department Personnel Director webinars and in-person meetings with Members.
- Launched new webinars for Legal Processing Unit and Disability.
- The Member Service Center (MSC) established benchmarks, tracked Member data, monitored trends, created phone prompts on the 800-phone line, and utilized artificial intelligence to ensure effective communication and service.

Accurate and Timely Delivery of Benefits

- Service Processing Section (SPS) maintained aging cases at zero and wait time to 5 months.

- Retirement Services Division counseled close to 300 members from six elected offices (five Council districts and the Mayor’s Office), and provided individual counseling to the Mayor, the City Attorney, and the Controller.

Value Health and Wellness Benefits

- Health Enrollment processed 8,000+ enrollment transactions.
- Health Premium Savings:
 - Assumed Actuarial Medical Trend Rate (AAMTR) at 7.5% versus LACERS at 0.92% for 2023.
- Switching the Delta Dental PPO from a fully-insured plan to a self-fund plan in 2019 has resulted in LACERS retaining approximately \$4.6 million in surplus premiums through 2022.
 - Projected 2023 savings of \$460K from self-insured Delta Dental PPO Plan.
 - Projected 2023 savings of \$83K from self-insured Anthem Blue View Vision.
- Wellness received 2,831 program participants with 92% surveyed indicating “Very Satisfied”.
- Health Enrollment and Advocacy units coordinated the creation of a counseling checklist for efficiency in counseling sessions and enrollment document gathering.

Superior Investments

- Held a LACERS Emerging Manager Networking Forum in June 2023.
- Hosted one Emerging Investment Manager Symposium in the Fall of 2022, providing an opportunity for emerging managers to meet with Board and staff to discuss the LACERS Emerging Investment Program.

Good Governance

- Completed the Health Insurance Portability and Accountability Act (HIPAA) regulatory compliance review.

Organizational Effectiveness, Efficiency, and Resiliency

- Completion of HQ Building Project with staff officially moved in on March 6, 2023.
- Finalized the work related to the termination of LACERS' lease agreement with Onni.
- Continued technical cybersecurity assessments on LACERS applications and systems.
- Initiated transition to a cloud-based Central Repository.

High-Performing Workforce

- Deployment of new LACERS intranet.
- Hired 2 employees from the Targeted Local Hire Program and 2 employees from Bridge to Job Program this year for a total of 23 and 8 respectively since program inception.

Business Plan Initiatives for FY24

In the current fiscal year (FY24), five major initiatives are established, and work has started on each as further described below.

Governance

This is a continuing initiative from FY23 to affirm LACERS mission, values, and goals are aligned. LACERS plans to secure a consultant for strategic planning facilitation in the Fall of 2023. The Board Policy review will continue into FY24 with the focus on the implementation of new policies.

Workplace Diversity, Equity, Inclusion (DEI)

LACERS expands on the DEI initiative to foster employee development, promote equity in opportunity, and strengthen cross-divisional relationships in the workplace. With the fellowship program launched in FY23, LACERS seeks to incorporate newfound knowledge into the new learning management system in FY24.

Environmental, Social, and Governance Investing

LACERS continues to evaluate its ESG Program in accordance with its Responsible Investment Policy and the ESG Risk Framework and PRI Action Plan, which are strategic and operational roadmaps based on the six Principles of Responsible Investment. FY24 priorities continue to focus on LACERS ESG-related matters and LACERS DEI initiatives.

Language Access Plan

LACERS continues to improve the Member experience by expanding accessibility to benefits-related information to LACERS Members, including those that are not fluent in English. The second year of this initiative seeks to implement necessary translation and interpretation tasks for Board meetings, summary plan descriptions, and the reception kiosk.

City Human Resources and Payroll (HRP) System Implementation

The HRP system Phase 1, which consisted of its Human Resources operations, went live in May 2022. Phase 2 consists of payroll operations, making it LACERS utmost priority that all HRP functionalities are performing as expected. The expected implementation is December 2023.

A semi-annual report on the progress of these BPIs will be provided in January/February 2024.

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/EA/LL/CK

Attachment: Fiscal Year-End Report of Business Plan Initiatives for the period ending June 30, 2023

FY2023 Business Plan Initiatives

*Fiscal Year-End Report of Business Plan Initiatives
for the Period Ending June 30, 2023*



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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
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**

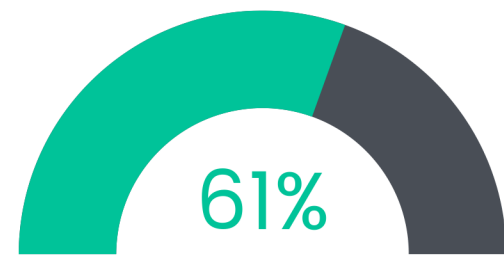
REPORT MONTHS: JULY 2022 – JUNE 2023

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

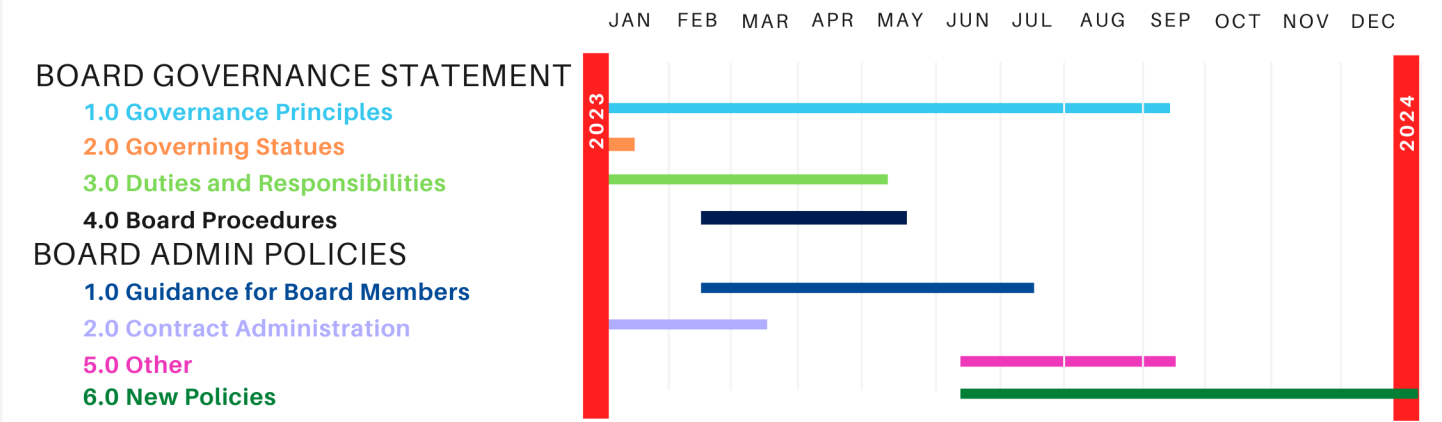


Appropriation	\$40,000
Expense:	\$15,500
Unspent:	\$24,500

KEY METRICS

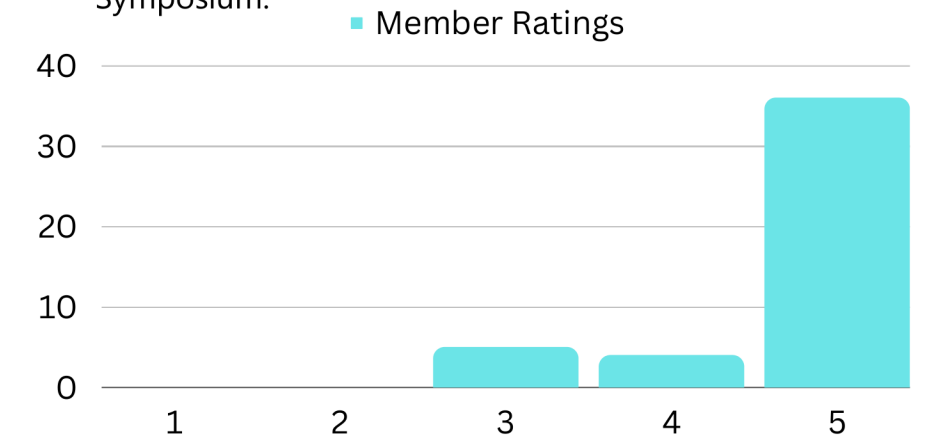


Triennial Board Policy Review



Pension Symposium

- Based on 51 survey responses received after the Pension Symposium.
- 22% of Retired Members enjoyed The Future of Medicare presentation the most, followed by Pension Administration and Asset Allocation at 15%.
- 26% of Active Members enjoyed the Retirement Experience presentation the most, followed by Focus on Member Experience at 22%.
- Members rated an average of 4.6/5 for the Pension Symposium.



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.

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 RFQ	RFQ Posted to RAMPLA and selected RFQ finalists
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 – JUNE 2023

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 established a bench list of qualified firms to provide Board Governance Consulting Services and is currently in the process of securing and finalizing the contracts. The first engagement of services will be the facilitation of the strategic planning process.

Pension Symposium

LACERS successfully held a virtual Pension Symposium on February 22, 2023 educating our Members on topics related to the national perspective of public pensions, risks to public pension funds, aspects of investments, retirement, and what's happening at LACERS.

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

As there are three firms on the bench list, the contract onboarding process will take up a certain amount of time to ensure contract compliance before LACERS can engage in board governance consulting services.

CHALLENGES CONTINUED

Pension Symposium

In preparation of anticipated questions during the Pension Symposium, LACERS staff prepared advance responses to potential questions. For questions that required additional follow-up, staff posted the list of all questions and responses on the LACERS website. Although the Pension Symposium was successful, there were challenges in securing backup presenters as one of the scheduled presenters were unable to attend due to unforeseen circumstances.

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.

NEXT STEPS

Strategic Plan

The Fiscal Year 2023-24 budget package was approved for \$150K, Admin team will move forward to develop a Task Order Solicitation (TOS) 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. LACERS secured a bench of qualified consultants for Board Governance Consulting Services and it is anticipated that a TOS for Strategic Planning services will be released in August FY24.

Pension Symposium

The Pension Symposium held virtually on February 22, 2023, had 394 total attendees. 51 attendees responded to a survey on their experience with the Symposium. Between a rating from 1 to 5, with 5 being best, satisfaction with the symposium averaged 4.6 with an average of 4.5 satisfaction rate for the presentations. Highly rated presentations included "Retirement Experience" from Active employees' responses and "The Future of Medicare" from Retired employees' responses. LACERS will take in consideration of these survey results when planning for the next Pension Symposium.

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, 2, and 5 of the Board Administration Policies (BAP), before advancing into the development of new policies to be added to the Board Governance Manual.

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

STATUS: OFF-TRACK

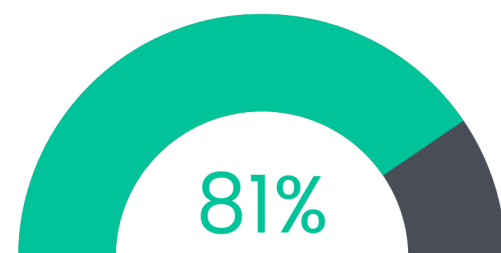
REPORT MONTHS: JULY 2022 - JUNE 2023

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

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

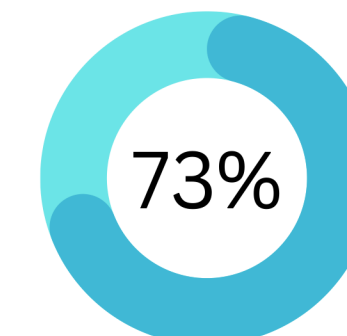
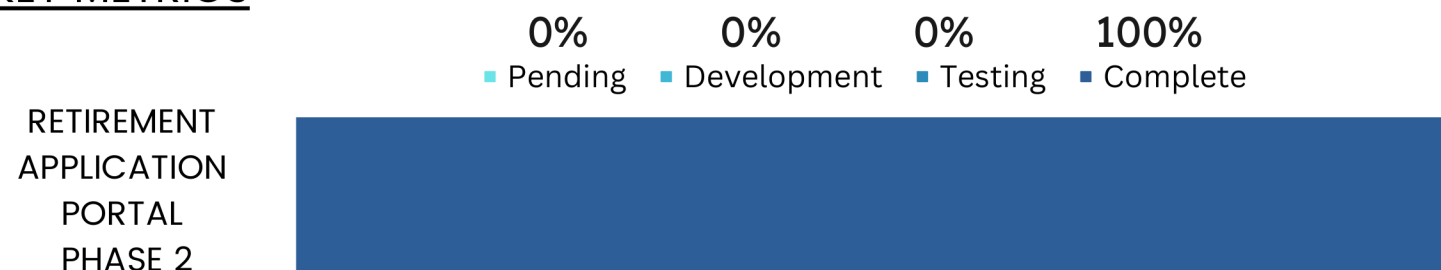
INITIATIVE PURPOSE: THE RETIREMENT APPLICATION PORTAL (RAP) WILL PROVIDE MORE EFFICIENCY FOR OUR STAFF, AND A BETTER USER EXPERIENCE FOR MEMBERS. AMAZON CONNECT ACROSS THE DEPARTMENT WILL ALLOW US TO PROVIDE BETTER CUSTOMER SERVICE THROUGH THE TOOLS BUILT IN.

BUDGET



Appropriation	\$75,000
Expense:	\$61,042
Unspent:	\$13,958

KEY METRICS



73% OF ELIGIBLE USERS RETIRED THROUGH RAP IN FY 22/23

AREAS OF IMPROVEMENT

Improvement Area	Progress
Amazon Connect	
Coordination	Due to competing priorities, coordination and support posed challenges to implementation in early 2023. Therefore, began implementation in July 2023 and implementation will be completed in August 2023.
Implementation	Additional testing was conducted in June and July 2023 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. Completed July 25, 2023
Department-wide Amazon Connect	Testing of Quick Connect functionality	Draft proposal for Executive review	Delayed Implementation due to LACERS Headquarters Move	Staff Training and Platform Implementation Conducted in July and August 2023

INITIATIVE: MEMBER SERVICE MODERNIZATION**DIVISION:** COMMUNICATIONS & STAKEHOLDER RELATIONS**STRATEGIC GOAL(S):** OUTSTANDING CUSTOMER SERVICE; ACCURATE AND TIMELY DELIVERY OF MEMBER BENEFITS; INCREASE ORGANIZATIONAL EFFECTIVENESS, EFFICIENCY, AND RESILIENCY**REPORT MONTHS:** JULY 2022 – JUNE 2023**LEAD(S):** GABRIEL PEREZ, TIFFANY OBEMBE, 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 DEPARTMENT WILL ALLOW US TO PROVIDE BETTER CUSTOMER SERVICE THROUGH THE TOOLS BUILT IN.

PROGRESS

RAP

- The final code drop was implemented on July 25, 2023. RAP Phase 2 is officially complete.

Amazon Connect

- The timing of the LACERS Headquarters move pushed the priority of completing this project behind two months. However, final completion is expected by August 2023.

CHALLENGES

RAP

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

Amazon Connect

- With the extended move to the new LACERS Headquarters building, the priority temporarily shifted away from this project. However, in July 2023, after being established at the new LACERS Headquarters, staff was able to begin implementation with an expected completion date in August 2023.

NEXT STEPS

RAP

- RAP phase 2 is complete. Staff will monitor progress made to determine when it will be feasible to implement future RAP improvements and accessibility. Ideally, Tier 1 Enhanced, Deferred Vested, and Tier 3 will be included with future enhancements.

Amazon Connect

- Early July 2023: all Member facing units were notified via email that an informal onboarding meeting for Amazon Connect would take place at the end of the month. The notification provided a schedule for when units will have their designated training period and instructions on equipment they should look into purchasing (headsets). This also gave them time to inform their staff of the new software that will be coming and to prepare any questions they may have for the meeting.

INITIATIVE: MEMBER SERVICE MODERNIZATION

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

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

REPORT MONTHS: JANUARY 2023 – AUGUST 2023

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 DEPARTMENT WILL ALLOW US TO PROVIDE BETTER CUSTOMER SERVICE THROUGH THE TOOLS BUILT IN.

NEXT STEPS CONT.

Amazon Connect Cont.

Late July 2023: The Introductory onboarding meeting took place. A brief overview of the system was provided, and questions were answered.

August 2023: Official onboarding will occur by units/groups according to the following schedule:

- August 1: Service Purchasing Section
- August 8: Health and Wellness
- August 15: Service Retirement Unit
- August 27: Member Processing Unit, Legal Processing Unit, Disability Retirement Unit, Survivor Benefits Unit, and Benefits Determination Unit

By the end of August 2023, all Member facing units will have been successfully onboarded, and thus the BPI will be completed.

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 – JUNE 2023

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

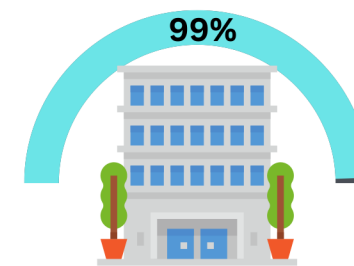
APPROPRIATION: \$21,593,773
 EXPENSE: \$21,377,395
 UNSPENT: \$ 216,378

99%

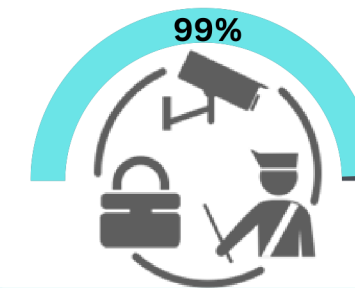
KEY METRICS



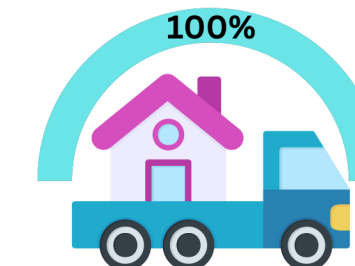
TENANT IMPR. WORK



CERTIFICATE OF OCCUPANCY



INSTALL 123 SECURITY DEVICES



MOVE BY MARCH 3, 2023



CLOSE OUT LAT BY MARCH 31, 2023



ACHIEVE 2-STAR CERTIFICATION

AREAS OF IMPROVEMENT

Improvement Area	Progress
Streamline review with LADBS and LAFD	Established direct lines of communications with both departments
Anticipate supply-chain delays	Purchased alternative products for items with long lead times
Improve functionality of installed A/V equipment	Coordinating with vendor on programming, training, and troubleshooting activities

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	Completed T.I. scope; began punch-walk list	Closed T.I. project scopes
Furnish Building	Furniture received in warehouse	Workstation furniture installed; Board room table assembled	All workstation furniture installed	All common area furniture installed
Move LACERS Staff and Operations	Contract with move vendor	Complete significant move on Dec 22	Completed final move from LAT to 977	Decommission complete and LAT lease deposit received
FitWel Certification	Gather submission documents	Submit application; received 1-Star points;	Achieved 2-Star point certification	Ordered FitWell decals
Pass all Building Inspections to Achieve Occupancy	Fire Pump permitting delays	Parking striping and security gate delays	Temporary Certificate of Occupancy received	LAFD corrections ongoing; delays to final LADBS sign-off
Install Building Security Devices	Security cameras installed	Card readers delayed; gate permitting delay	All cameras and card readers installed/configured	Access cards delayed

INITIATIVE: HQ MOVE

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

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

REPORT MONTHS: JULY 2022 – JUNE 2023

LEAD(S): ISAIAS CANTÚ AND HORACIO ARROYO

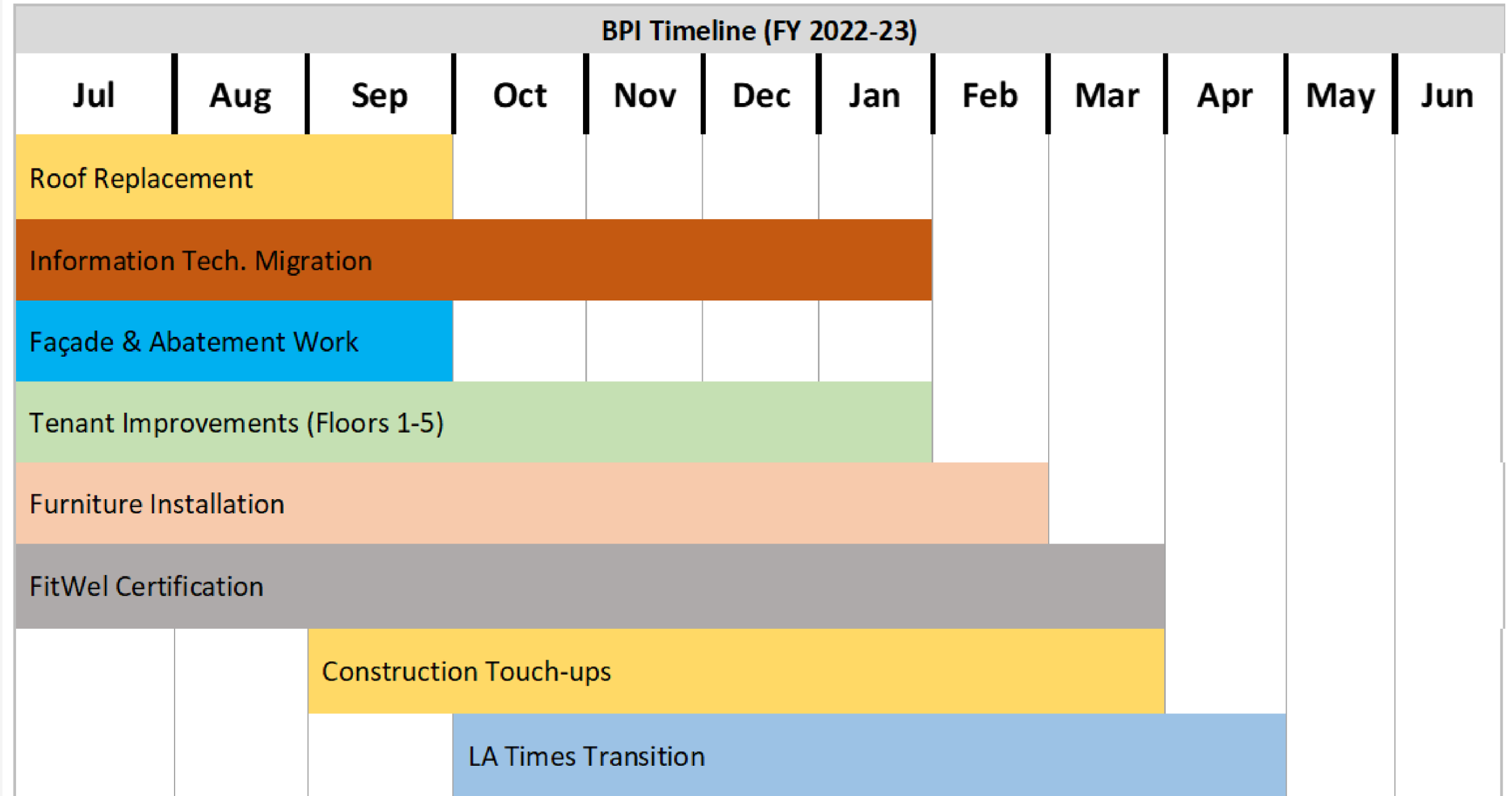
TEAM: KRISTEN SZANTO

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 Buildout and Turnover
- Carpet and Flooring Installation
- Installation of New Backup Diesel Generator
- Relocation from LA Times (LAT) to 977
- Decommissioned LAT and Lease Surrendered
- Installation of Workstation Furniture
- Building Painting Scope
- Lighting Systems installation
- Achieved 2-Star FitWel Certification



INITIATIVE: HQ MOVE

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

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

REPORT MONTHS: JULY 2022 – JUNE 2023

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 have been encountered through LAFD/LADBS inspections of the Fire Pump Replacement, Breezeway Gate, Parking Space Requirements, and Fire & Life Safety requirements. These delays prevented the transition of operations and migration of staff from LAT to 977, triggered supplemental permitting obligations, caused contract extensions with vendors, and resulted in additional project expenses.
- **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.
- **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



Coordinate with LAFD and LADBS Depts.

To identify efficient solutions and timeframes to remaining permitting concerns.



New Building, New Badge

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



New Tech Trainings

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



Fine-tune A/V Equipment

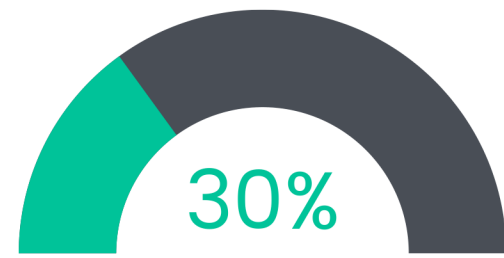
Additional resources will be dedicated to improving the functionality of the A/V equipment.

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

STATUS: **ON TRACK**
REPORT MONTHS: JULY 2022 – JUNE 2023
LEAD(S)/TEAM: VIKRAM JADHAV

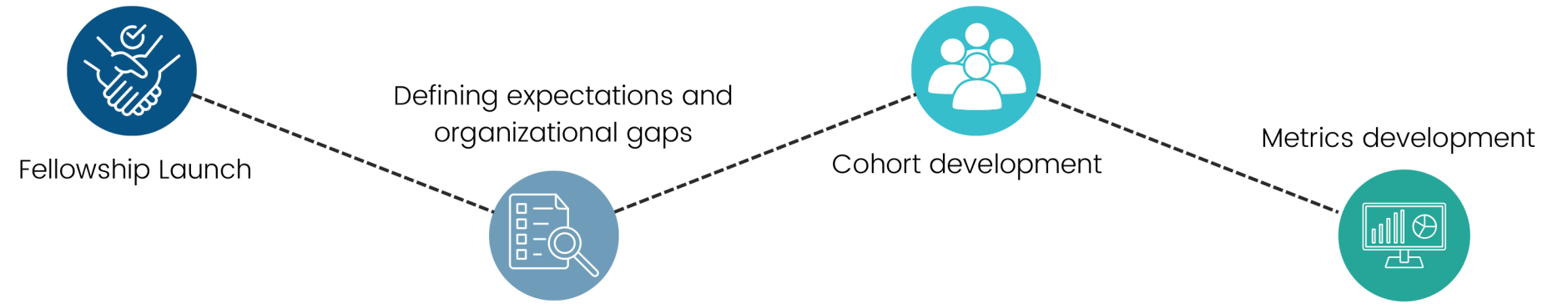
INITIATIVE PURPOSE: IDENTIFY PROCESS AND LEADERSHIP GAPS CURRENTLY INHIBITING ORGANIZATIONAL EFFECTIVENESS AND RESILIENCY WHILE PROMOTING A HIGH-PERFORMING WORKFORCE THROUGH A COHORT BASED PROGRAM DESIGNED TO ADDRESS PROFESSIONAL GROWTH NEEDS OF STAFF

BUDGET



Appropriation	\$75,000
Expense:	\$22,500
Unspent:	\$42,500

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
Staff Interviews and Assessments	N/A	N/A	Interviews conducted with all Sr. Managers	N/A
Project Launch	N/A	N/A	N/A	Project Launch with first cohort of Management Staff

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

REPORT MONTHS: JULY 2022 – JUNE 2023
LEAD(S)/TEAM: VIKRAM JADHAV

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

Experience Institute has been chosen as the vendor to develop and lead the fellowship program. Select senior staff were selected to engage in interviews with the Vendor for program assessments and design.

With the sentiments from the interviews gathered in mind, the program launched towards the end of Q4.

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

With the program launched and slated to run through November 2023, staff will continue to engage with the program on a weekly basis to develop organization and staff expectations.

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

STATUS: **ON TRACK**

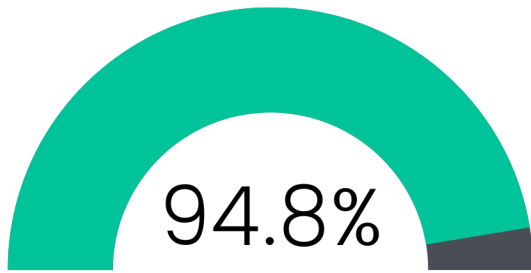
REPORT MONTHS: JULY 2022 – JUNE 2023

LEAD(S): JAMES WANG

TEAM: CLARK HOOVER, JEREMIAH PARAS

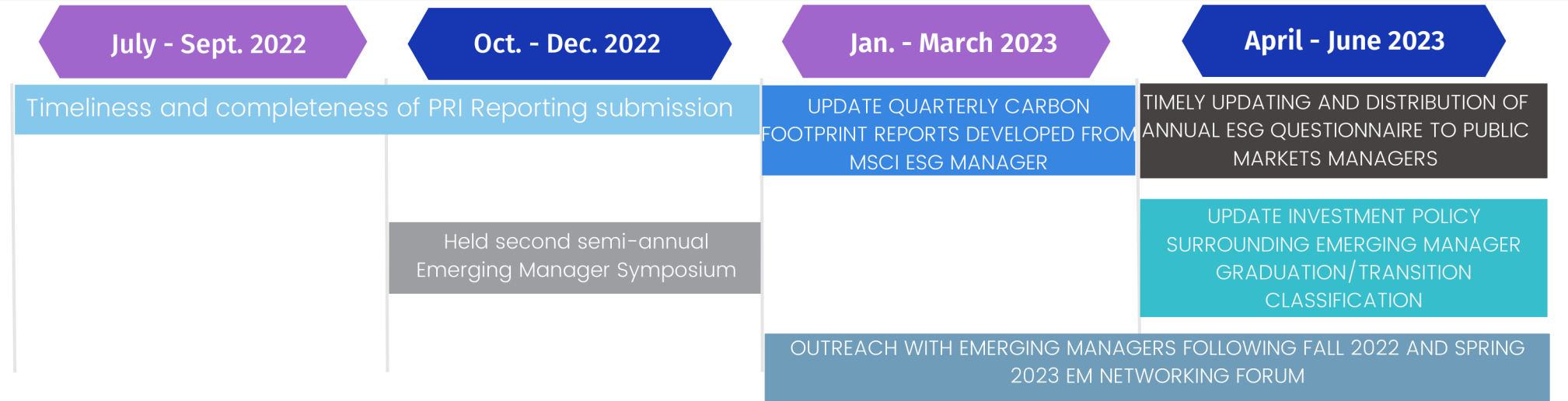
INITIATIVE PURPOSE: ENHANCE THE LONG-TERM RISK ADJUSTED RETURNS OF THE LACERS INVESTMENT PORTFOLIO THROUGH THE IMPLEMENTATION OF A ROBUST ESG PROGRAM GUIDED BY A COMPREHENSIVE RESPONSIBLE INVESTMENT POLICY, AN ESG RISK FRAMEWORK, THE PRINCIPLES FOR RESPONSIBLE INVESTMENT, AND DIRECTIONS OF THE BOARD.

BUDGET



Appropriation	\$18,125
Expense:	\$17,183
Unspent:	\$942

KEY METRICS



AREAS OF IMPROVEMENT

Improvement Area	Progress
Further incorporate ESG Risk Factors into the investment manager selection and monitoring processes	Staff updated and reviewed ESG questions in TFPs including Custodian Bank Search RFP
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 six 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.	The PRI Action Plan ESG Risk Framework, and Proxy Voting Policy are planned to be brought back to the Board in Q1 FY 24

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				Completed
Review of Emerging Investment Manager Policy (to incorporate graduation/transition classification)				Targeted for Q1 FY 24
Update of Annual ESG Questionnaire for public markets managers				Completed
PRI Reporting				Report starting Q1 FY 24
Spring 2023 Emerging Manager Networking Forum				Completed

INITIATIVE: ENVIRONMENTAL, SOCIAL, AND GOVERNANCE INVESTING

DIVISION(S)/SECTION: INVESTMENTS

STRATEGIC GOAL(S): GOVERNANCE & INVESTMENT

REPORT MONTHS: JULY 2022 – JUNE 2023

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 and monitoring processes
- Developing useful ESG reporting with MSCI
- Expand access to additional ESG related databases
- Staff served on six 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.
- PRI case study on LACERS' ESG Risk Framework

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**

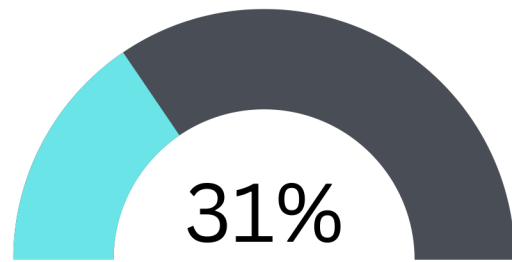
REPORT MONTHS: JULY 2022 – JUNE 2023

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 AND CURRENT 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

RSD	
Subject Area	# of Staff
Training Kickoff	38
Plan Authoritative Documents	47
Vesting and Eligibility	47
Tier 1 Enhanced and Public Safety Group	42

BDU	
Subject Area	# of Staff
Cost of Living Adjustment	8
Disposable Income after Support	8
Calculating In-Kind Community Property	8
Post Retirement In-Kind Community Property	8
Calculating Remaining Contributions	8

SBU	
Subject Area	# of Staff
Reporting a Death	8
Initiating Contact with Survivors	8
Understanding LACERS Benefits	7
Calculating Remaining Contributions	8

AREAS OF IMPROVEMENT

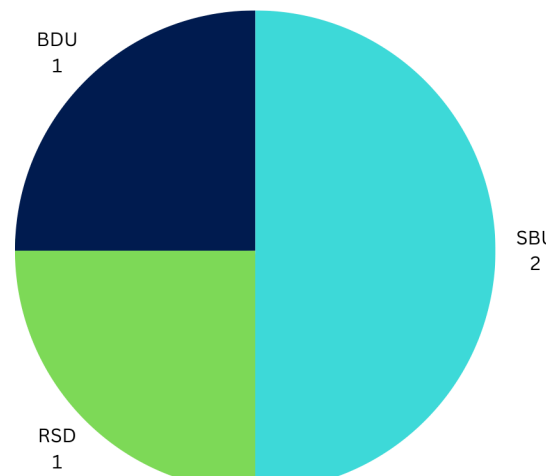
Improvement Area

Progress

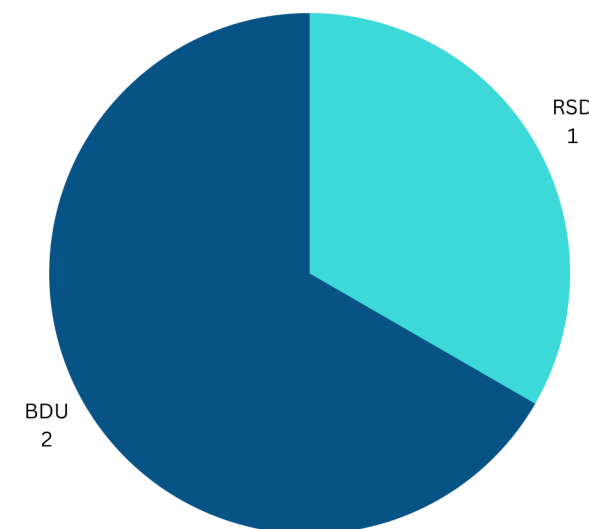
Develop RFP for Knowledge Transfer Vendor	Board approved \$20,000 expenditure in January 2023 to retain vendor
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MILESTONES OF KEY ACTIVITIES

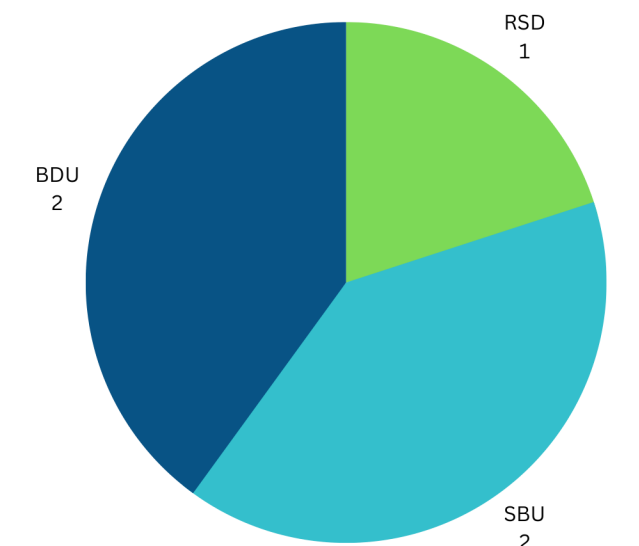
APRIL 2023 - # COMPLETED TRAININGS



MAY 2023 - # COMPLETED TRAININGS



JUNE 2023 - # COMPLETED TRAININGS



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 – JUNE 2023

LEAD(S): KAREN FREIRE, RAINBOW SUN, ANNI QUACH

TEAM: MARICEL MARTIN, LOURDES QUINTOS, 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 AND CURRENT STAFF. THIS BPI IS A CROSS-DIVISIONAL COLLABORATION BETWEEN DIVISIONS WITHIN THE BENEFITS ADMINISTRATION, THEREFORE, THE BUDGET FOR THIS INITIATIVE IS SHARED.

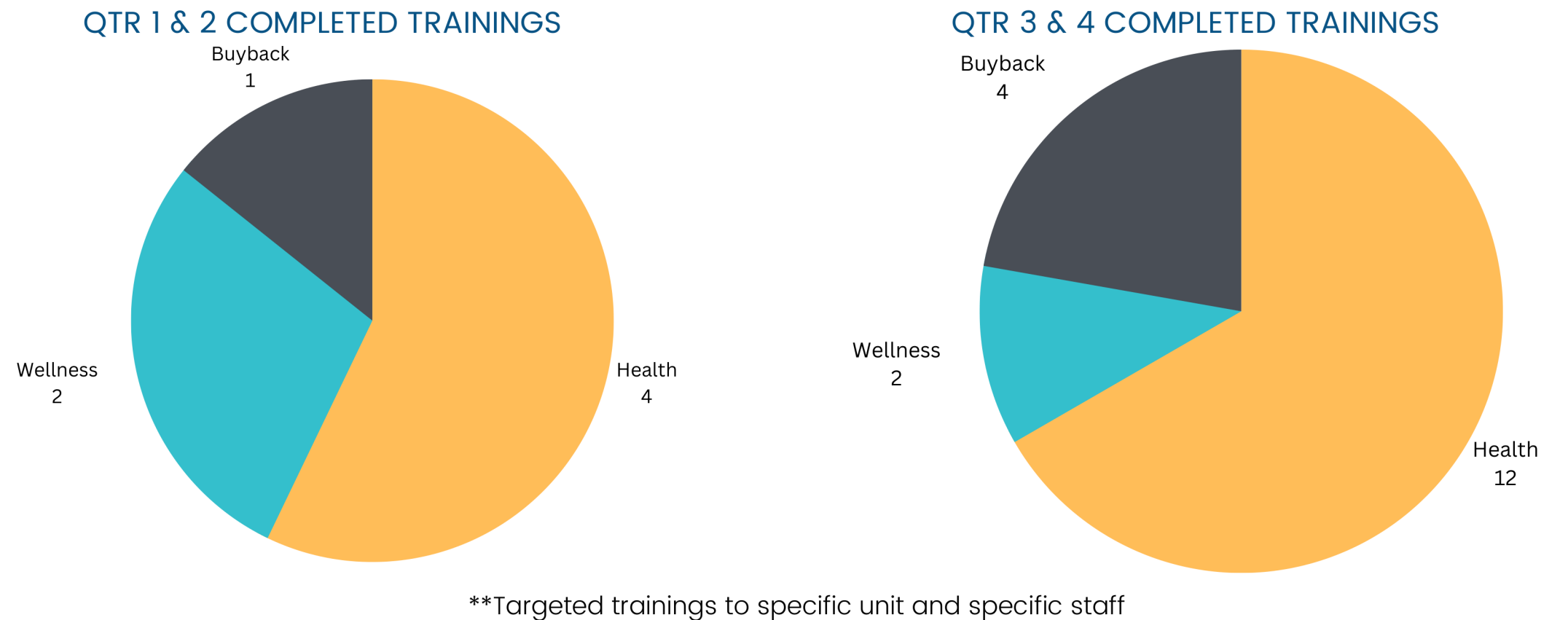
BUDGET

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



MILESTONES OF KEY ACTIVITIES

	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter
Completed Trainings	Health: RFP Health Consulting, Budget, Annual Renewal, Underwriting Wellness: RFP Health Consulting, Annual Renewal SPS: Buyback		Health: Health Counseling, Health Forms, Plan Authoritative Documents, multiple cross-trainings, City Exams, 3 RSD-hosted & 2 carrier-hosted Wellness: City Exams, LACERS Well Event Planning Training SPS: Cross-Training, Health Counseling, City Exams	
Proposed Trainings for FY24	Organizational Skills & Culture	Strategic Planning & Methodologies	Understanding Geriatrics	Benefits Administration

INITIATIVE: KNOWLEDGE TRANSFER

DIVISION(S)/SECTION: RSD AND HWABD

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

REPORT MONTHS: JULY 2022 – JUNE 2023

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 AND CURRENT STAFF. THIS BPI IS A CROSS-DIVISIONAL COLLABORATION BETWEEN DIVISIONS WITHIN 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.

Rather than pursue a contract in FY 22-23, LACERS has elected to develop and release an RFP in FY 23-24.

CHALLENGES

The Silicon Valley Bank closure severely impacted the selected vendor forcing LACERS to reconsider its approach. Instead of pursuing a vendor hampered by financial insecurity, LACERS staff elected to pursue an RFP to find a more suitable vendor.

NEXT STEPS

Develop and release an RFP to select a vendor for an AI enabled knowledge base to capture training protocols and procedures.

INITIATIVE: LANGUAGE ACCESS PLAN

DIVISION(S)/SECTION: COMMUNICATIONS & STAKEHOLDER RELATIONS

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

STATUS: ON - TRACK

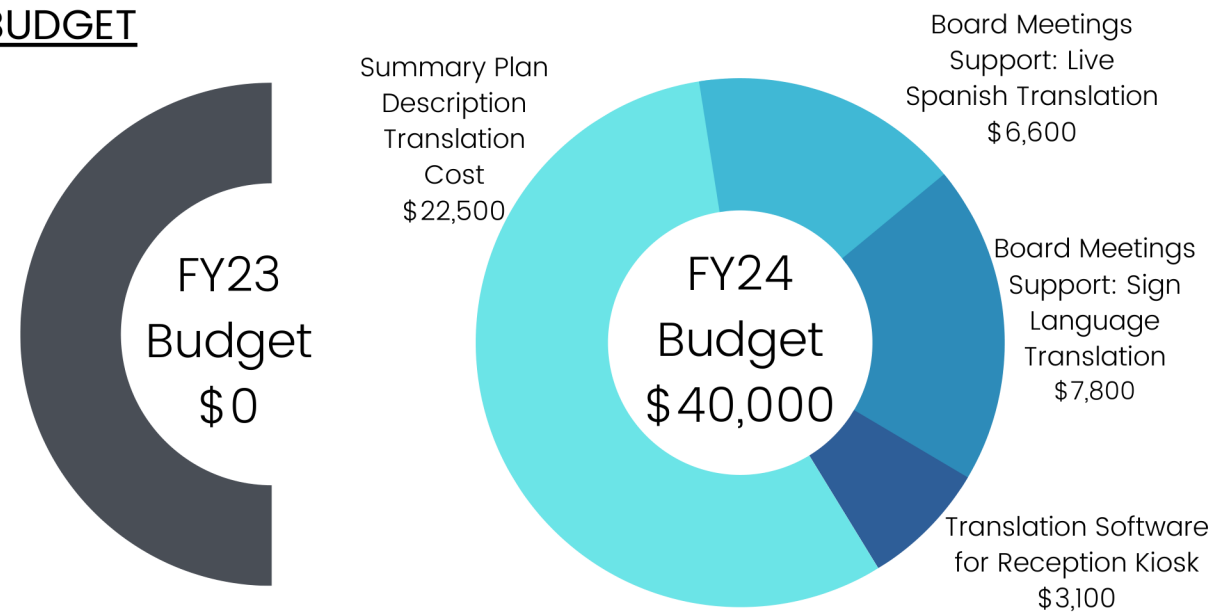
REPORT MONTHS: JULY 2022 - JUNE 2023

LEAD(S): TANEDA K. LARIOS

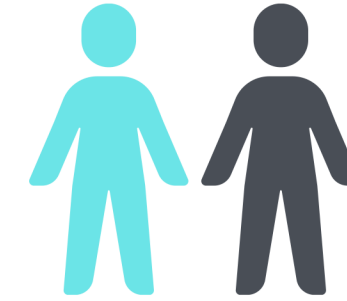
TEAM: HEATHER RAMIREZ, TIFFANY OBEMBE, CARLOS JOVEL JR., AMELIA HERRERA-ROBLES, AND JESUS NAVARRO

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.

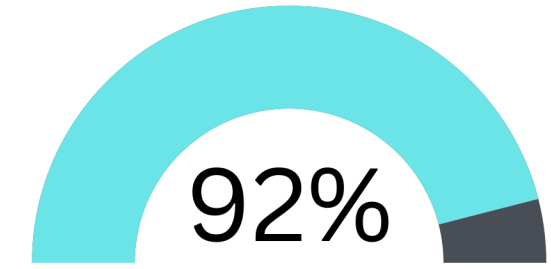
BUDGET



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
Staffing	In the process of filling a key vacant position to begin work. Currently utilizing staff across various units to accomplish tasks

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/CIFD new Lead Agency for Bass Administration 	<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 – JUNE 2023

LEAD(S): TANEDA K. LARIOS

TEAM: HEATHER RAMIREZ, TIFFANY OBEMBE, AMELIA HERRERA-ROBLES, 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. During the third quarter, the Language Access Plan was submitted to the Executive Team and the final plan was submitted to the Office of Immigrant Affairs/CIFD, the new Lead Agency for the Bass Administration.

CHALLENGES

- The LACERS HQ move to 977, inevitably created staff resources as 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.
- Staff vacancies in key positions have placed a burden for the remaining staff. This will delay implementation of larger efforts until sufficiently staffed.

NEXT STEPS

Immediate next steps are to:

- Respond to feedback from CIFD on the LACERS LAP
- Translate the ADA in Spanish to place on Board and Committee agendas
- Generate a Bilingual Waiver Forms Folder on Box.com
- Develop an internal dashboard to track non-member translation activity
- Develop a Spanish Planning for Retirement Seminar for Tier 1 & Tier 3
- Cross-reference the Four-Factor Analysis as outlined in the Citywide Language Access Plan Template to determine which applications, forms and documents and health insurance benefits will require resources and immediate access

INITIATIVE: MEMBER SERVICES METRICS

DIVISION(S)/SECTION: ALL

STRATEGIC GOAL(S): CUSTOMER SERVICE & ORGANIZATION

STATUS: OFF-TRACK

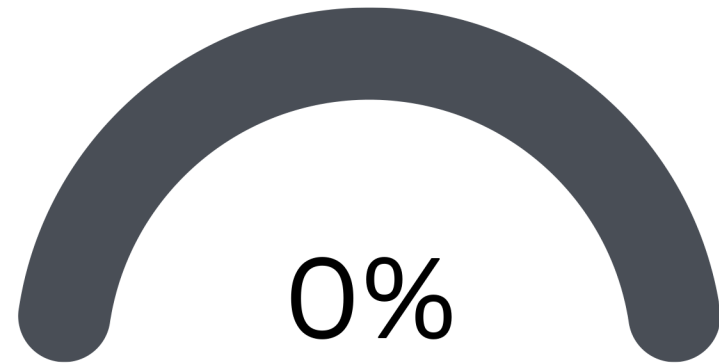
REPORT MONTHS: JULY 2022 – JUNE 2023

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

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

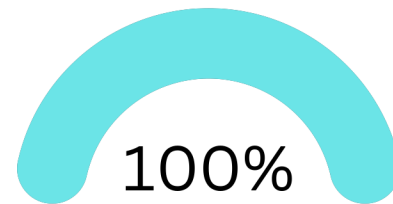
INITIATIVE PURPOSE: UPDATE THE CURRENT MEMBER SERVICE AGREEMENT WITH DEFINED METRICS THAT WOULD ENABLE REAL TIME TRACKING AND DASHBOARDING TO FACILITATE RESOURCE AND BUDGET NEEDS.

BUDGET – Not Applicable

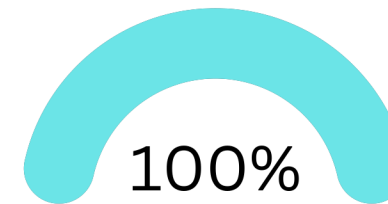


KEY METRICS

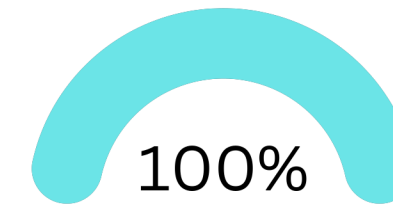
Establish Committee



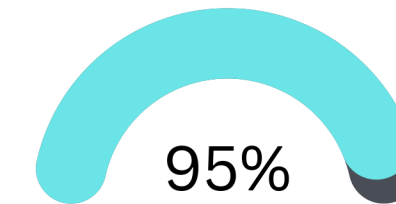
Survey Responses Recv'd



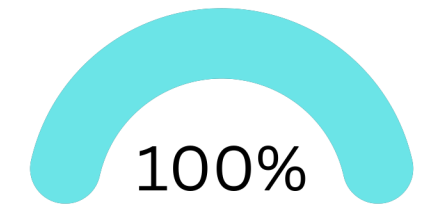
Adopt Metrics



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–JUNE 2023
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 survey was completed in late January 2023 by all 18 units designated as having a member service impact. BPI Team Members were assigned to review and analyze a set of unit submissions, including discussing the findings with the unit designees. Each member presented their findings during the BPI biweekly meetings, where they received additional guidance and feedback. Once completed, the Team submitted their final findings and recommendation on a template that was developed during the review process. The areas repeatedly stated in the submissions were the desire for more communication, training on technology, and adjusting processes to achieve enhanced service to internal partners and Members.

The current Member Service Level Agreement was reviewed and it was determined that the stated goals were largely sufficient to maintain excellent customer service and that only slight changes were needed to bring it current. Two items are proposed to be replaced by more current expressions of those items, and another is to be amended. The following is the proposed revised agreement:

- LACERS will answer all calls on average within five (5) minutes
- LACERS will respond to emails within one (1) business day
- LACERS will respond to voicemails within one (1) business day
- If a question or request takes longer than one business day to respond to, the responsible staff member will establish regular touchpoints with the Member to assure them that they are continuing to work on their question and/or request
- LACERS will achieve a first-call resolution rate of 75% for all Member inquiries.
- LACERS will provide same-day communication via the lacers.org website, our mainline, and any other available channel regarding any disruption to service or benefits and include alternative options for service

CHALLENGES

- Participation was a challenge due to various factors.

NEXT STEPS

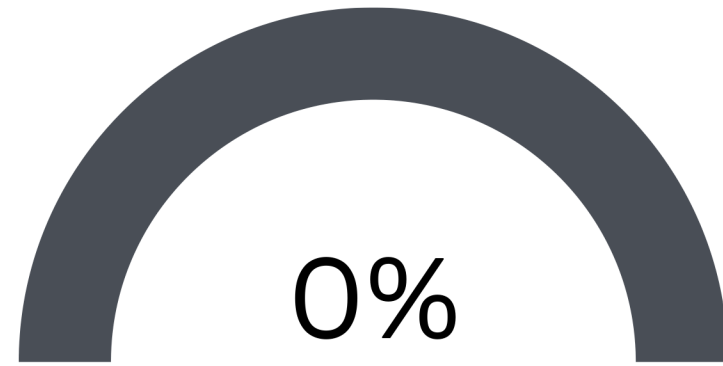
- This task is largely complete. The only outstanding task is to finalize a Service Metrics Dashboard.

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

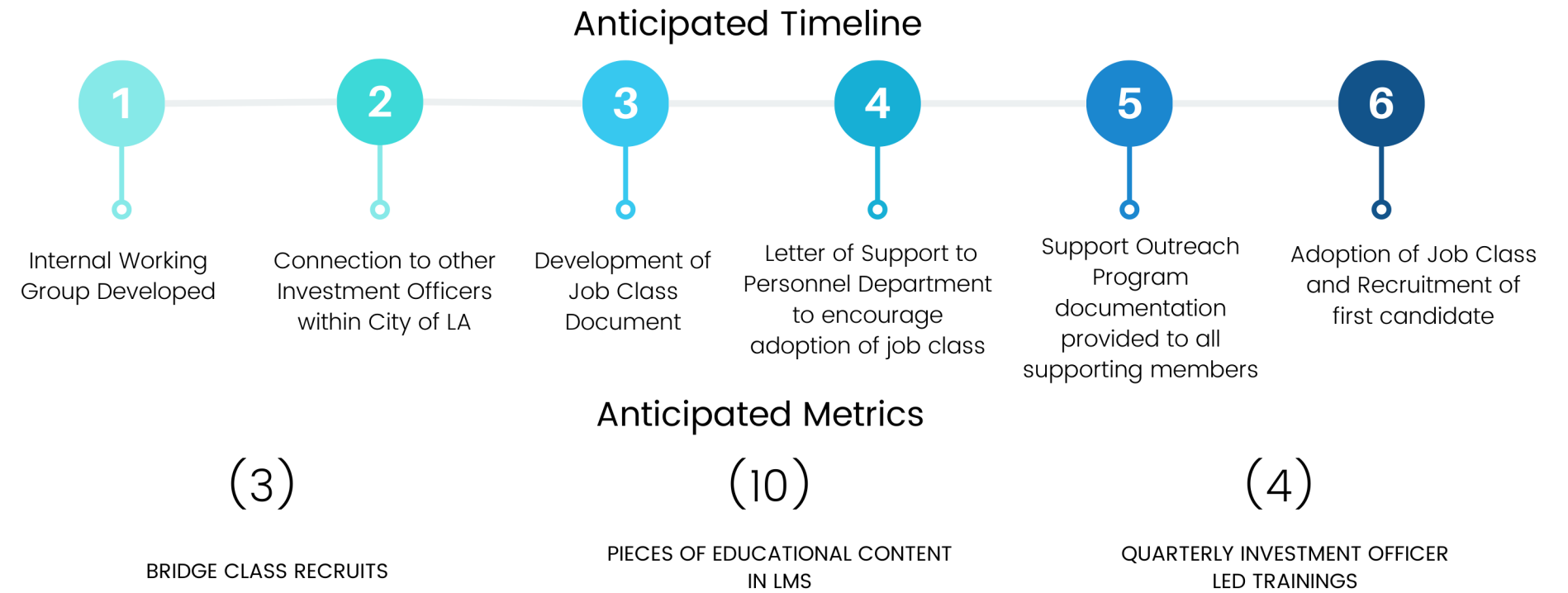
STATUS: **ON-TRACK**
REPORT MONTHS: JULY 2022 – JUNE 2023
LEAD(S)/TEAM: CLARK HOOVER AND VIKRAM JADHAV

INITIATIVE PURPOSE: DEVELOP INVESTMENT ASSOCIATE 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			Completed	
Draft of Bridge Class Job Description				Completed

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

REPORT MONTHS: JUNE 2022 – JUNE 2023
LEAD(S)/TEAM: CLARK HOOVER AND VIKRAM JADHAV

INITIATIVE PURPOSE: DEVELOP INVESTMENT ASSOCIATE 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

The research and requirements gathering phase was concluded in Q3. However, while in progress it has also launched the engagement process with other Pension Peers to discuss the pertinent requirements of the Investment Associate Bridge job class, while also attempting to rallying support for such a class.

The initial draft of the Bridge Job Class description was created in Q4 and is currently pending review by the entirety of the working group. Feedback will continue to be incorporated to finalize the job class description before submitting it to HR for review.

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

- Finalize internal draft of Bridge Class Job Description
- Submit to HR for review
- Finalize changes and submit to Personnel Department

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



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]				