



DEPARTMENT OF FIRE AND POLICE PENSIONS

701 E. 3rd Street, Suite 200
Los Angeles, CA 90013
(213) 279-3000

REPORT TO THE BOARD OF FIRE AND POLICE PENSION COMMISSIONERS

DATE: APRIL 16, 2026

ITEM: D.1

FROM: JOSEPH SALAZAR, GENERAL MANAGER

SUBJECT: THIRD QUARTER REPORT OF THE 2025-26 ANNUAL PLAN

THIS REPORT IS PROVIDED TO THE BOARD FOR INFORMATIONAL PURPOSES.

BACKGROUND

The 2025-26 Annual Plan was approved by the Board on June 18, 2025, and includes a total of eight projects, of which three are Strategic Goal Projects and five are Operational Initiatives Projects.

LAFPP's current Vision, Mission, Strategic Goals, Guiding Principles, and Values are provided on page one of the 2025-26 Annual Plan (Attachment II). A summary of the eight projects included in the Annual Plan is provided on pages two and three of Attachment II. Six of the projects are newly added, while two are continuing from the 2024-25 Annual Plan.

PROJECTS ON SCHEDULE AND ON BUDGET

Staff is providing the Third Quarter Report on the status and progress of the 2025-26 Annual Plan projects (Attachments I and II). As reflected in Attachment I, all projects are on schedule and on budget; furthermore, one project has been completed ahead of schedule.

Strategic Goal Project No. 1 – Member Feedback

On March 11, 2026, Pensions Division staff facilitated a focus group to discuss the member survey results and identify and refine future service delivery enhancements. Eight participants attended the focus group, consisting of six retirees, one active member, and one surviving spouse. Staff will use the feedback from the focus group participants to compile a list of proposed improvements that can be implemented over the next year.

Strategic Goal Project No. 2 – Emerging Manager Outreach

On December 18, 2025, the Board approved updates to its Investment Policies including updates to Section 1.5, informally known as the "Manager Referral Policy". Moving forward, prospective private market fund managers, including emerging managers, referred by Board members and staff to respective consultants will be tracked and reported monthly via a new section in the General Manager's Monthly Report titled "Private Investment Funds Referred by Board Members and Staff". Additionally, Investments Division staff contacted 148 emerging managers to complete an anonymous survey regarding LAFPP's Emerging Manager Program webpage to improve clarity, transparency, and accessibility for prospective managers. The survey closed on March 16, 2026, with 29% of the emerging managers responding. Staff are currently reviewing submissions and will

incorporate applicable feedback into the Emerging Manager Program webpage during the next quarter.

Lastly, staff is considering membership in PEWIN (Private Equity Women Investor Network) and \$250 in funding has been included in the 2026-27 Preliminary Budget for membership dues. Staff also joined the Allocator Collective, an organization consisting of 700 allocators from various institutions dedicated to improving diversity in members' teams and portfolios. No membership fee is required.

Strategic Goal Project No. 3 – Mentorship Program

Staff previously reported that LAFPP received eight mentoring applications. One participant has since rescinded their application in order to participate in a different employee development program, reducing the total number of participants to seven. On January 21, 2026, LAFPP staff conducted training for the mentors to define their roles as mentors and equip them with the skills to be effective mentors. Six mentorship pairs began meeting in late January 2026 and one mentorship pair opted to begin meeting in late March 2026. Staff conducted monthly follow-up meetings with the group of mentors to collectively share their experiences and discuss any challenges. All project deliverables remain on schedule and will be implemented with existing resources.

Operational Initiatives Project No. 1 – Popular Annual Report

Communications and Education (C&E) staff completed the Comprehensive Annual Report in February 2026 and subsequently finalized the first full draft for the Popular Annual Report in mid-March 2026. Staff review of the draft extended beyond the March 31, 2026 milestone deadline. However, the report was published on the LAFPP website on April 2, 2026, meeting the milestone with only a two-day delay. C&E staff is evaluating the development process used throughout this project and will apply the findings to refine the timeline for future report cycles.

C&E staff also incorporated feedback from the Board by renaming the publication from the “Popular Annual Report” to the “[Condensed Annual Report](#)” and have reflected the updated title on the LAFPP website. To ensure continuity with the approved project framework and prior updates to the Board, staff has maintained the original project title for reference purposes only.

Operational Initiatives Project No. 2 – Elimination of the Attained Age Database

Medical and Dental Benefits (MDB) staff prepared the conversion file using information from the current Attained Age Database. The file contains the Medicare status of pensioners to be uploaded into the Pension Administration System (PARIS); MDB staff added additional information for Neumo, our system vendor, to link the data from the conversion file to the member records in PARIS. The file was sent to Neumo on March 20, 2026.

Operational Initiatives Project No. 3 – Web-Based Contractor Disclosure Form

Last quarter, Internal Audit staff deployed the Contractor Disclosure Webform (CDW) and Annual Gift Disclosure Webform (AGDW) to all contractors and received a combined 342 responses via CDW and AGDW. Staff tracked completion times and staff hours needed for analysis and compliance tracking. During this quarter, staff used these data points to refine the internal performance metrics for the project.

Staff also developed and deployed a post-submission survey to collect user feedback and suggestions for improvement. By doing so, staff completed the Fourth Quarter milestone early and allowed users to provide feedback and suggestions immediately after using the new submission

format. Feedback gathered from the survey will be reviewed and used to inform enhancements in future iterations of the CDW and AGDW.

Operational Initiatives Project No. 4 – Review and Update of the Los Angeles Administrative Code for LAFPP Board Elections

On December 18, 2025, the Board approved proposed revisions to the Los Angeles Administrative Code (LAAC) sections governing LAFPP’s retired and employee Board member elections. Subsequently, staff transmitted the proposed LAAC amendments to the City Council for consideration and approval. The City Clerk referred the item to the Council’s Personnel and Hiring and Budget and Finance Committees. On February 27, 2026, the Personnel and Hiring Committee approved the proposed LAAC amendments and as of March 31, 2026, the Budget and Finance Committee has yet to schedule the item. After both committees approve the item, it will be referred to the full Council for final approval. All milestones for this project have been completed within budget, but staff will continue to provide updates to the Board on the Council approval process through these quarterly status reports.

Operational Initiatives Project No. 5 – Artificial Intelligence (AI)-Powered Reference Tool

As of March 2026, Disability Pensions staff, in collaboration with Systems staff, have compiled an array of data sources for research, evaluation, and validation regarding the AI platform. Currently, staff are testing and implementing the data sources with Microsoft Copilot and the Microsoft Foundry AI platforms to assess the tools’ efficiency and capabilities to determine the most optimal product for Disability Pensions’ use.

BUDGET

Funding for the Annual Plan projects is included in the 2025-26 Adopted Budget and all projects are on budget.

POLICY

There are no policy changes proposed in this report.

CONTRACTOR DISCLOSURE INFORMATION

There is no contractor disclosure information required with this report.

This report was prepared by:

Brandon Chung, Management Assistant
Administrative Services and Human Resources Section

JS:MTS:WKP:EJH:BTC:ADMN260023

- Attachments: I. 2025-26 Annual Plan Dashboard – Third Quarter Report
 II. 2025-26 Annual Plan (revised January 15, 2026)



**2025-26 ANNUAL PLAN DASHBOARD
THIRD QUARTER REPORT
QUARTER ENDING MARCH 31, 2026**

<u>Strategic Goal Projects</u>					
<u>Strategic Goals</u>	<u>Project Title</u>	<u>Overall Project Duration</u>	<u>2025-26 Milestone Dates</u>	<u>Overall Project Schedule</u>	<u>Overall Project Budget</u>
Goal 1 Enhance Member Experience by Implementing Ongoing Improvements Based on Member Feedback	1. Member Feedback	2024-25 2025-26 2026-27	●	●	●
Goal 2 Enhance Outreach by Promoting Inclusivity and Engagement with Emerging Investment Managers	2. Emerging Manager Outreach	2024-25 2025-26	●	●	●
Goal 3 Enhance Employee Development by Increasing Opportunities for Training and Leadership Development	3. Mentorship Program	2025-26	●	●	●
<u>Operational Initiatives Projects</u>					
<u>Guiding Principles</u>	<u>Project Title</u>	<u>Overall Project Duration</u>	<u>2025-26 Milestone Dates</u>	<u>Overall Project Schedule</u>	<u>Overall Project Budget</u>
Enhance Customer Care and Stakeholder Relations	1. Popular Annual Report	2025-26	●	●	●
Pursue Operational Efficiencies	2. Elimination of the Attained Age Database	2025-26	●	●	●
Pursue Operational Efficiencies	3. Web-Based Contractor Disclosure Form	2025-26	●	●	●
Pursue Operational Efficiencies	4. Review and Update of the Los Angeles Administrative Code for LAFPP Board Elections	2025-26	✓	✓	✓
Pursue Operational Efficiencies	5. Artificial Intelligence-Powered Reference Tool	2025-26	●	●	●

Legend:	●	On schedule or on budget
	●	At risk of falling behind schedule or going over budget
	●	Behind schedule/over budget
	✓	Project completed



LAFPP

LOS ANGELES FIRE AND POLICE PENSIONS

2025-26

FINAL ANNUAL PLAN

As presented on June 18, 2025 to
the Board of Fire and Police Pension Commissioners,
and revised on January 15, 2026.



2025-26 FINAL ANNUAL PLAN

INTRODUCTION

Los Angeles Fire and Police Pensions (LAFPP) prepares an Annual Plan each fiscal year consisting of projects to help accomplish its Strategic Plan Goals, as well as support its Guiding Principles. With preparation of the Annual Plan, LAFPP strives to fulfill our Vision and support our Mission as outlined in the 2025-27 Three-Year Strategic Plan. The Strategic Plan, as approved by the Board on January 18, 2024, established LAFPP's commitment to:

Vision

A secure and prosperous future for our members.

Mission

To advance the health and retirement security of those who dedicate their careers and risk their lives to protect the people of Los Angeles.

The 2025-27 Three-Year Strategic Plan was developed with input from the Board, the General Manager, our Plan member representatives, and LAFPP staff. This collaborative effort resulted in a new framework in which six prior Goals, Objectives, and Strategic Initiatives were retitled as "Guiding Principles" to reflect their role as a driving force behind every action we take as an organization. The new strategic planning framework additionally created three new Strategic Goals designed to set a destination toward which LAFPP will navigate and focus its resources.

Strategic Goals

1. Enhance Member Experience by Implementing Ongoing Improvements Based on Member Feedback
2. Enhance Outreach by Promoting Inclusivity and Engagement with Emerging Investment Managers
3. Enhance Employee Development by Increasing Opportunities for Training and Leadership Development

Guiding Principles

1. Ensure a Financially Sound Retirement System
2. Manage Risk Throughout the Organization
3. Enhance Customer Care and Stakeholder Relations
4. Pursue Operational Efficiencies
5. Build and Support a Talented Workforce
6. Promote Diversity, Equity, and Inclusion (DEI) Throughout the Organization, Including Our Investment Portfolio and Business Partners

Values

- Collaboration
- Respect
- Efficiency
- Accountability
- Transparency
- Ethics
- Diversity

2025-26 FINAL ANNUAL PLAN PROJECT SUMMARY

The 2025-26 Final Annual Plan structures projects into two separate categories: 1) Strategic Goal projects, and 2) Operational Initiatives projects that support our Guiding Principles. Projects are organized further according to the Strategic Goal or Guiding Principle they support. The 2025-26 Final Annual Plan contains eight projects. Six projects are new and two are continuing from the 2024-25 Annual Plan.

2025-26 Strategic Goal Projects

1

Member Feedback

Strategic Goal:

1. Enhance Member Experience by Implementing Ongoing Improvements Based on Member Feedback

Project Lead(s):

Gregory Mack, Pensions Division
Anthony Torres, Pensions Division

Project Objective:

Enact process improvements that will enhance the member experience, based upon feedback from member and beneficiary surveys conducted in 2024-25.

2

Emerging Manager Outreach

Strategic Goal:

2. Enhance Outreach by Promoting Inclusivity and Engagement with Emerging Investment Managers

Project Lead(s):

Bryan Fujita, Investments Division
Annie Chao, Investments Division
Susan Liem, Investments Division
Miki Shaler, Investments Division

Project Objective:

Broaden engagement with emerging investment managers to increase the pool of candidates for LAFPP's investment portfolio, ensuring evaluation of a wide selection of managers capable of delivering superior risk-adjusted returns.

3

Mentorship Program

Strategic Goal:

3. Enhance Employee Development by Increasing Opportunities for Training and Leadership Development

Project Lead(s):

Wilson Poon, Administrative Operations Division

Project Objective:

Increase training and leadership development opportunities that allow employees to be successful at their jobs and careers, create an environment where employees feel the organization is invested in their career development, improve succession planning, and increase retention of institutional knowledge.

2025-26 Operational Initiatives Projects

1

Popular Annual Report

Guiding Principle:
3. Enhance Customer Care and Stakeholder Relations

Project Lead(s):
Nashamah Freeman, Communications and Education Section

Project Objective:
To deliver the Annual Report to stakeholders in a streamlined, accessible, and easy-to-understand format.

2

Elimination of the Attained Age Database

Guiding Principle:
4. Pursue Operational Efficiencies

Project Lead(s):
Jennifer Chan, Medical and Dental Benefits Section

Project Objective:
To retire the Attained Age Database by integrating its functionality and correspondence into the Pension Administration System (PARIS).

3

Web-Based Contractor Disclosure Form

Guiding Principle:
4. Pursue Operational Efficiencies

Project Lead(s):
Jennifer Van, Internal Audit Section
Christian Torres, Internal Audit Section

Project Objective:
To optimize the Contractor Disclosure Reporting Form that currently relies on substantial manual interventions from contractors, Internal Audit staff, and department staff to report, collect, and compile needed information.

4

Review and Update of the Los Angeles Administrative Code for LAFPP Board Elections

Guiding Principle:
4. Pursue Operational Efficiencies

Project Lead(s):
JC De La Cruz, Administrative Services and Human Resources Section
Brandon Chung, Administrative Services and Human Resources Section

Project Objective:
To update the Los Angeles Administrative Code (LAAC) Division 23, Chapter 5, Article 5 and 5.5, as well as the Board Operating Policies and Procedures Section 6.0, which govern the administration of the elections for the Board of Fire and Police Pension Commissioners' four elected commissioner seats.

5

Artificial Intelligence-Powered Reference Tool

Guiding Principle:
4. Pursue Operational Efficiencies

Project Lead(s):
Timothy Morita, Disability Pensions Section
Kyle Susswain, Disability Pensions Section
Stevie De Jong, Disability Pensions Section

Project Objective:
To accelerate training and ensure knowledge transfer of Disability Pension-specific references (e.g., City Charter, Los Angeles Administrative Code, Summary Plan Descriptions, etc.) and guides through Artificial Intelligence (AI)-powered learning tools.

Strategic Goal Project #1

Member Feedback

<i>Strategic Goal No.:</i>	1 – Enhance Member Experience by Implementing Ongoing Improvements Based on Member Feedback
<i>Duration:</i>	2024-25, 2025-26, and 2026-27
<i>Project Lead(s):</i>	Gregory Mack, Assistant General Manager, Pensions Division Anthony Torres, Chief Benefits Analyst, Pensions Division
<i>Project Participants:</i>	Pensions Division staff
<i>Stakeholders:</i>	LAFPP Members

OBJECTIVE

Enact process improvements that will enhance the member experience, based upon feedback from member and beneficiary surveys conducted in 2024-25.

BACKGROUND

LAFPP members, retirees, and their beneficiaries rely on LAFPP to administer their pension and retiree health benefits. This project will seek to identify areas where improvements can be made to enhance the member experience. In 2024-25, Pensions Division staff worked with the Fire/Police Relief Associations, Unions, and Los Angeles Retired Fire and Police Association (LARFPA) representatives to gather ideas on improvements that LAFPP can make to enhance the member experience. Staff also developed and released a series of surveys to gather feedback from members and beneficiaries.

2025-26 DELIVERABLES

Pensions Division staff will complete the review of the survey responses and compile all suggested process improvements. Additionally, at least one focus group of members will be conducted to further delve into survey feedback and help prioritize suggested process improvements. Information from the surveys and the focus group(s) will be used to identify enhancements that can be implemented in 2025-26 and 2026-27.

2025-26 MILESTONES

BY DECEMBER 31, 2025:

Complete the review and analysis of the responses received from the surveys conducted in 2024-25.

Strategic Goal Project #1

Member Feedback

2025-26 MILESTONES (cont.)

BY MARCH 31, 2026:

Conduct and complete member focus group(s) to discuss, identify, and solicit member feedback on potential process improvements suggested by survey responses for implementation.

BY JUNE 30, 2026:

- a) Implement identified process improvements that can be completed quickly and within existing resources; and,
- b) Determine the process improvements for implementation in 2026-27.

METRICS

- a) Conduct at least one focus group; and,
- b) Identify at least one process improvement.

RESOURCES

No additional resources are required. All project deliverables will be implemented with existing resources. Future process improvements in 2026-27 may require additional funding that will be determined as part of the 2026-27 Budget development process.

Strategic Goal Project #2

Emerging Manager Outreach

<i>Strategic Goal No.:</i>	2 – Enhance Outreach by Promoting Inclusivity and Engagement with Emerging Investment Managers
<i>Duration:</i>	2024-25 and 2025-26
<i>Project Lead(s):</i>	Bryan Fujita, Chief Investment Officer, Investments Division Annie Chao, Investment Officer III, Investments Division Susan Liem, Investment Officer III, Investments Division Miki Shaler, Investment Officer II, Investments Division
<i>Project Participants:</i>	Executive Management, Investments staff, General Investment Consultant, Private Equity, Private Credit, and Real Estate Consultants
<i>Stakeholders:</i>	Board Members, LAFPP Members, and Investments staff

OBJECTIVE

Broaden engagement with emerging investment managers to increase the pool of candidates for LAFPP's investment portfolio, ensuring evaluation of a wide selection of managers capable of delivering superior risk-adjusted returns.

BACKGROUND

The Board adopted the 2025-2027 Strategic Plan, which includes Strategic Goal No. 2 – Enhance Outreach by Promoting Inclusivity and Engagement with Emerging Investment Managers. This goal aims to strengthen the Board's longstanding Emerging Manager Program by expanding outreach channels to emerging managers when evaluating investment opportunities. In Year 1 (2024-25) of this project, two of the initiatives that Investments staff focused on included updating the Emerging Manager Program webpage on the LAFPP website and participating in emerging manager industry events. In Year 2 (2025-26), Investments staff will further LAFPP's engagement by leveraging the accomplishments of Year 1.

2025-26 DELIVERABLES

Investments staff will explore new relationships with emerging manager organizations and will gather feedback and suggestions from emerging managers to further refine the updated Emerging Manager Program webpage. Investments staff will also plan and host/co-host an emerging manager educational event. Investments staff will review Board Investment Policies Section 1.5 – Board Member and Staff Referral Restrictions for Potential New Investments with the Board's consultants for potential clarifications and process enhancements. Investments staff will also explore ways to enhance tracking of emerging managers introduced to consultants.

Strategic Goal Project #2

Emerging Manager Outreach

2025-26 MILESTONES

BY SEPTEMBER 30, 2025:

- a) Research additional emerging manager organizations for consideration to be affiliated with or become members of;
- b) Review Board Investment Policies Section 1.5 – Board Member and Staff Referral Restrictions for Potential New Investments for possible clarifications and process enhancements; and,
- c) Begin planning process for an emerging manager educational event, including meeting and collaborating with potential partners organizations such as like-minded public pension plans, investment consultants, and emerging manager organizations.

BY DECEMBER 31, 2025:

- a) Draft and present updates to the Board of Board Investment Policies Section 1.5;
Host/co-host emerging manager education event:
- b) Coordinate with potential partner organizations and LAFPP staff on broad marketing and promotion of the event, and,
- c) Arrange event details and logistics with LAFPP staff.

BY MARCH 31, 2026:

- a) Collect feedback and suggestions from emerging managers on the updated Emerging Manager Program webpage on the LAFPP website;
- b) Develop a new tracking mechanism for emerging managers referred to consultants; and,
- c) Consider membership options for LAFPP to join additional emerging manager organizations.

BY JUNE 30, 2026:

- a) Review and update the Emerging Manager Program webpage based on the feedback received;
- b) Begin incorporating the new tracking mechanism for emerging managers referred to consultants per Board Investment Policies Section 1.5; and,
- c) Budget for potential membership fees and join additional emerging manager organizations.

Strategic Goal Project #2

Emerging Manager Outreach

METRICS

- a) Number of meetings with emerging managers taken by Investments staff;
- b) Number of emerging managers that participate in the emerging manager educational event hosted by Investments staff;
- c) Number of emerging manager events attended by Investments staff; and,
- d) Number of emerging managers that complete the new manager intake form on the LAFPP website.

RESOURCES

The costs associated with supplies for the emerging manager educational event hosted by Investments staff are included within the 2025-26 Final Budget.

Strategic Goal Project #3

Mentorship Program

<i>Strategic Goal No.:</i>	3 – Enhance Employee Development by Increasing Opportunities for Training and Leadership Development
<i>Duration:</i>	2025-26
<i>Project Lead(s):</i>	Wilson Poon, Chief Management Analyst, Administrative Operations Division
<i>Project Participants:</i>	LAFPP staff
<i>Stakeholders:</i>	LAFPP staff

OBJECTIVE

Increase training and leadership opportunities that allow employees to be successful at their jobs and careers, create an environment where employees feel the organization is invested in their career development, improve succession planning, and increase retention of institutional knowledge.

BACKGROUND

In 2024-25, staff conducted research on existing mentorship programs across the City and other public pension systems. Using this research, LAFPP will develop its own mentorship program that seeks to provide informal, non-technical guidance to LAFPP's workforce.

2025-26 DELIVERABLES

This project seeks to implement a three-month mentorship pilot program. At the conclusion of the pilot, the mentor and mentee can opt to extend the program for an additional three months or longer. Potential mentees will be required to attend a mandatory open house and complete a survey, which will require them to identify personal goals and areas of employee development. Mentors will be identified based on the results of these surveys and will work with the mentee to develop a mentorship plan. Discussions between mentors and mentees are treated as confidential to allow both parties to speak freely and honestly.

2025-26 MILESTONES

BY SEPTEMBER 30, 2025:

- a) Develop mentorship program guidelines and expectations for both mentors and mentees; and,
- b) Solicit feedback from senior managers on the proposed guidelines.

Strategic Goal Project #3

Mentorship Program

2025-26 MILESTONES (cont.)

BY DECEMBER 31, 2025:

- a) Host a mandatory open house event for interested participants to learn about the program and discuss expectations and commitment level; and,
- b) Distribute survey instrument to all potential participants.

BY MARCH 31, 2026:

- a) Conduct training for mentors; and,
- b) Pair mentors and mentees.

BY JUNE 30, 2026:

- a) Conduct three-month follow-up with mentors and mentees; and,
- b) Develop a survey to measure the effectiveness of the mentorship program, to be distributed in 2026-27.

METRICS

Surveys will be distributed after three months to evaluate the effectiveness of the mentorship program and to assess any new job skills or knowledge that was acquired through the program.

RESOURCES

No additional resources are required. All project deliverables will be implemented with existing resources.

Operational Initiatives Project #1

Popular Annual Report

<i>Guiding Principle No.:</i>	3 – Enhance Customer Care and Stakeholder Relations
<i>Duration:</i>	2025-26
<i>Project Lead(s):</i>	Nashamah Freeman, Management Analyst, Communications and Education Section
<i>Project Participants:</i>	Communications and Education staff, Investments staff, Executive Management, and LAFPP staff
<i>Stakeholders:</i>	LAFPP staff, Board Members, and LAFPP Members

OBJECTIVE

To deliver the Annual Report to stakeholders in a streamlined, accessible, and easy-to-understand format.

BACKGROUND

Due to the timeline required for graphic design, drafting, and editing, the Comprehensive Annual Report does not become available until February. Communications and Education staff seeks to provide a condensed version of the Comprehensive Annual Report to be made available to LAFPP stakeholders, containing highlights of the most important components of the Comprehensive Annual Report. This will allow for a condensed summary of the Comprehensive Annual Report, including information contained in the valuation reports, financial statements, and LAFPP section contributions.

2025-26 DELIVERABLES

A streamlined and easy-to-understand online version of LAFPP’s Comprehensive Annual Report (hereinafter, the “Popular Annual Report”).

2025-26 MILESTONES

BY SEPTEMBER 30, 2025:

Review the current development timeline of the Comprehensive Annual Report.

BY DECEMBER 31, 2025:

- a) Develop the design and theme of the Popular Annual Report; and,
- b) Work with various project participants to ensure that required documents and financial data are received on time (e.g., Annual Actuarial Valuation, Department-wide contributions, etc.).

Operational Initiatives Project #1

Popular Annual Report

2025-26 MILESTONES (cont.)

BY MARCH 31, 2026:

- a) Post the Popular Annual Report to LAFPP's website; and,
- b) Evaluate Popular Annual Report development process and adjust where necessary.

BY JUNE 30, 2026:

- a) Survey stakeholders; and,
- b) Enhance design based on survey feedback.

METRICS

- a) Post the Popular Annual Report; and,
- b) Assess the results of stakeholder survey and feedback.

RESOURCES

No additional resources are required. All project deliverables will be implemented with existing resources.

Operational Initiatives Project #2

Elimination of the Attained Age Database

<i>Guiding Principle No.:</i>	4 – Pursue Operational Efficiencies
<i>Duration:</i>	2025-26
<i>Project Lead(s):</i>	Jennifer Chan, Senior Benefits Analyst II, Medical and Dental Benefits Section
<i>Project Participants:</i>	Medical and Dental Benefits staff, Systems staff, and Pension Administration System vendor
<i>Stakeholders:</i>	Medical and Dental Benefits staff, Systems staff, and LAFPP Members

OBJECTIVE

To retire the Attained Age Database by integrating its functionality and correspondence into the Pension Administration System (PARIS).

BACKGROUND

The Attained Age Database is used to track the Medicare status of LAFPP pensioners and generate correspondence to members nearing Medicare and/or subsidy eligibility age. A monthly listing from PARIS is needed to update the database to generate Attained Age correspondence to pensioners. This listing and database maintenance requires resources from Systems staff.

2025-26 DELIVERABLES

PARIS will be upgraded with Medicare tracking functionality and Attained Age correspondence. Medicare data currently held in the Attained Age database will be converted into PARIS.

2025-26 MILESTONES

BY SEPTEMBER 30, 2025:

- a) Identify functionality and correspondence requirements; and,
- b) Send functionality and correspondence requirement specifications to the PARIS vendor (Neumo, formerly known as Avenu).

BY DECEMBER 31, 2025:

Neumo to deliver the change request and quote for project.

BY MARCH 31, 2026:

Deliver the conversion file from the Attained Age Database to Neumo.

Operational Initiatives Project #2

Elimination of the Attained Age Database

2025-26 MILESTONES (cont.)

BY JUNE 30, 2026:

Neumo to deliver functionality and correspondence upgrades to the PARIS testing environment.

METRICS

Cost savings attributed to no longer needing to maintain the Attained Age Database and improvement in process efficiency attributed to the elimination of redundant data entry.

RESOURCES

\$25,000 has been included within the 2025-26 Final Budget for the PARIS change request and conversion.

Operational Initiatives Project #3

Web-Based Contractor Disclosure Form

<i>Guiding Principle No.:</i>	4 – Pursue Operational Efficiencies
<i>Duration:</i>	2025-26
<i>Project Lead(s):</i>	Jennifer Van, Internal Auditor IV, Internal Audit Section Christian Torres, Internal Auditor II, Internal Audit Section
<i>Project Participants:</i>	Internal Audit staff and LAFPP staff
<i>Stakeholders:</i>	Board Members, Senior Management, Contractors, and Consultants

OBJECTIVE

To optimize the Contractor Disclosure Reporting Form that currently relies on substantial manual interventions from contractors, Internal Audit staff, and department staff to report, collect, and compile needed information.

BACKGROUND

The current Contractor Disclosure process requires substantial manual interventions from contractors, Internal Audit Section (IAS) staff, and Department staff to complete. This can result in time-consuming back and forth communications, potential errors, and the need for extensive review to compile and analyze responses. This project seeks to optimize this process by using a web-based form that's easy to read and retrieve, that can automate manual processes, incorporate proactive data validation, and enhance the user experience for department contractors.

2025-26 DELIVERABLES

IAS staff will leverage an available JotForm enterprise license to develop, test, and implement a web-based form that strives to streamline the submission and intake processes for quarterly and annual Contractor Disclosure requirements. IAS staff will also explore features available through JotForm to improve the analysis and maintenance of Contractor Disclosure compliance data. These efforts seek to automate the most manual procedures in the Contractor Disclosure process, freeing up staff time and improving the user experience for department contractors required to comply with the policy. IAS staff will also work with the Communications and Education Section staff to create a centralized Contractor Disclosure subpage on LAFPP's website containing the Contractor Disclosure Policy and other resources.

2025-26 MILESTONES

BY SEPTEMBER 30, 2025:

- a) Track staff time to receive, process, and analyze required filings using current method of compliance reporting to establish a benchmark;

Operational Initiatives Project #3

Web-Based Contractor Disclosure Form

2025-26 MILESTONES (cont.)

BY SEPTEMBER 30, 2025: (cont.)

- b) Track time for contractors to submit forms using the current method of submitting forms to establish a benchmark;
- c) Prepare a draft template and method of analysis of the quarterly form in place for testing for the Contractor Disclosure Q3 (ending September 30, 2025) reporting period with willing beta testers or internal staff;
- d) Prepare a draft template and method of analysis for the annual gift form in place for testing for the Contractor Disclosure Q4 (ending December 31, 2025) reporting period; and,
- e) Work with Communications and Education Section staff to create a sub-page on the LAFPP website centralizing the Contractor Disclosure Policy.

BY DECEMBER 31, 2025:

- a) Develop messaging for the new form type and provide education to LAFPP staff and contractors;
- b) Deploy final quarterly and annual gift forms for the Contractor Disclosure Q4 (ending December 31, 2025) reporting period;
- c) Track time (in business days) for contractors and staff completion for the quarter to begin analysis of performance using new tool; and,
- d) Update the Contractor Disclosure Policy sub-page with revised resources and access to new forms.

BY MARCH 31, 2026:

Refine metrics showing average time for contractors to complete and submit forms, as well as IAS staff time to analyze and report compliance data.

BY JUNE 30, 2026:

- a) Adjust and/or develop a quarterly reporting form to allow contractors that are required to report each fiscal year in the same manner as other filers; and,
- b) Develop a survey to distribute to contractors to get their feedback on the new form and suggestions for improvement.

METRICS

- a) Number of business days for contractors to complete forms before and after JotForm implementation;

Operational Initiatives Project #3

Web-Based Contractor Disclosure Form

METRICS (cont.)

- b) Number of business days for IAS staff to collect, analyze, and summarize compliance before and after JotForm implementation; and,
- c) Contractor survey results rate overall satisfaction with form reporting.

RESOURCES

No additional resources are required. All project deliverables will be implemented with existing resources.

Operational Initiatives Project #4

Review and Update of the Los Angeles Administrative Code for LAFPP Board Elections

<i>Guiding Principle No.:</i>	4 – Pursue Operational Efficiencies
<i>Duration:</i>	2025-26
<i>Project Lead(s):</i>	JC De La Cruz, Management Analyst, Administrative Services and Human Resources Section Brandon Chung, Management Assistant, Administrative Services and Human Resources Section
<i>Project Participants:</i>	Administrative Services and Human Resources Section, Pensions Division staff, Office of the City Attorney staff, Office of the City Clerk – Election Division staff, and Personnel Department staff
<i>Stakeholders:</i>	Board Members and LAFPP Members

OBJECTIVE

To update the Los Angeles Administrative Code (LAAC) Division 23, Chapter 5, Articles 5 and 5.5, as well as the Board Operating Policies and Procedures Section 6.0, which govern the administration of the elections for the Board of Fire and Police Pension Commissioners' (Board) four elected commissioner seats.

BACKGROUND

Los Angeles Fire and Police Pensions (LAFPP) conducts elections for Employee and Retired Members of the Board in accordance with the City Charter, LAAC, and Board Operating Policies and Procedures. The LAAC governing Employee Members was codified in 1972 and updated in 1995, 2000, and 2017, while the LAAC for Retired Members was codified in 2000 and updated in 2004 and 2017. The 2017 revisions standardized the processes for both groups, which until that time lacked uniformity due to their separate development timelines. Board elections are currently administered under this version of the LAAC.

In 2020, the COVID-19 Pandemic disrupted LAFPP's election administration process in unforeseen ways, requiring immediate procedural adaptations not considered in the 2017 LAAC revision. Various procedures originally designed for in-person interactions among LAFPP staff, City staff, and LAFPP members had to be quickly transitioned to virtual alternatives. Additionally, operational changes implemented by our partner City agencies in response to the pandemic, as well as implementation of a new Citywide payroll system, led to compressed election timelines, reducing flexibility in election administration.

Operational Initiatives Project #4

Review and Update of the Los Angeles Administrative Code for LAFPP Board Elections

2025-26 DELIVERABLES

The updated LAAC, if adopted by the City Council, will align with election procedures adopted and continued since the COVID-19 Pandemic. Additionally, the election timeline will be adjusted to reflect post-pandemic operational changes and provide staff and the Board with greater flexibility in administering Board elections.

2025-26 MILESTONES

BY SEPTEMBER 30, 2025:

- a) Meet with Pensions Division staff, Office of the City Clerk – Election Division staff, Personnel Department staff, and Office of the City Attorney staff to solicit input on potential enhancements to the LAAC; and,
- b) Document all recommendations, assess feasibility, and present the proposed revisions to Executive Management.

BY DECEMBER 31, 2025:

- a) Present a draft of the LAAC revisions for consideration by the Board; and,
- b) Integrate any revisions requested by the Board.

BY MARCH 31, 2026:

- a) Present a final draft of LAAC revisions for consideration by the Board; and,
- b) Transmit the Board-approved LAAC revisions to the City Council for adoption.

METRICS

- a) Host at least one consultation with each project participant; and,
- b) Number of operational improvements approved by the Board.

RESOURCES

No additional resources are required. All project deliverables will be implemented with existing resources.

Operational Initiatives Project #5

Artificial Intelligence-Powered Reference Tool

<i>Guiding Principle No.:</i>	4 – Pursue Operational Efficiencies
<i>Duration:</i>	2025-26
<i>Project Lead(s):</i>	Timothy Morita, Senior Benefits Analyst I, Disability Pensions Section Kyle Susswain, Senior Benefits Analyst II, Disability Pensions Section Stevie De Jong, Senior Benefits Analyst I, Disability Pensions Section
<i>Project Participants:</i>	Disability Pensions staff, and Systems staff
<i>Stakeholders:</i>	LAFPP Members, Disability Pensions staff, and Pensions Division staff

OBJECTIVE

To accelerate training and ensure knowledge transfer of Disability Pension-specific references (e.g., City Charter, Los Angeles Administrative Code, Summary Plan Descriptions, etc.) and guides through Artificial Intelligence (AI)-powered learning tools.

BACKGROUND

AI is transforming industries, including government operations, at an unprecedented pace. Staff plans to unlock AI potential through a pilot program to optimize internal operations, specifically enabling retrieval of information from consistent source documents, thereby increasing efficiency and productivity with regards to tasks and research. This project would also serve as a proof-of-concept to determine scalability for additional non-member-facing operations throughout the Pensions Division.

2025-26 DELIVERABLES

An AI-powered chat interface trained on publicly available, non-confidential data for use by Disability Pensions staff with consistent information retrieval and research functionality. The tool may also support additional tasks and capabilities as available. Once completed, other Pensions Division Sections will also be able to perform the same information retrieval and research.

2025-26 MILESTONES

BY SEPTEMBER 30, 2025:

- a) Assess LAFPP's current technology platform and systems to determine what solution is viable within our existing setup and capabilities; and,
- b) Obtain approval from the Information Technology Agency (ITA) and ensure compliance with the AI Safety Checklist, as required per Council File 23-1020 regarding safe facilitation of AI usage.

Operational Initiatives Project #5

Artificial Intelligence-Powered Reference Tool

2025-26 MILESTONES (cont.)

BY DECEMBER 31, 2025:

Research and select solution for the proof-of-concept and use case.

BY MARCH 31, 2026:

Conduct data source research, evaluation, and validation.

BY JUNE 30, 2026:

- a) Implementation and testing of AI tool; and,
- b) Staff training of AI tool for its intended use.

METRICS

Recollection accuracy, with potential for additional metrics based on adopted AI model.

RESOURCES

\$40,000 has been included within the 2025-26 Final Budget for this project.