

IN PERSON & VIRTUAL BOARD MEETING

*The Committee meeting will be held following the Board of Retirement meeting scheduled prior.



TO VIEW VIA WEB



TO PROVIDE PUBLIC COMMENT

Members of the public may address the Board orally and in writing. To provide Public Comment, please visit the above link and complete the request form.

Attention: If you have any questions, you may email PublicComment@lacera.gov.

LOS ANGELES COUNTY EMPLOYEES RETIREMENT ASSOCIATION
300 N. LAKE AVENUE, SUITE 650, PASADENA, CA

AGENDA

A REGULAR MEETING OF THE OPERATIONS OVERSIGHT COMMITTEE AND BOARD OF RETIREMENT*

LOS ANGELES COUNTY EMPLOYEES RETIREMENT ASSOCIATION

300 N. LAKE AVENUE, SUITE 810, PASADENA, CA 91101

9:00 A.M., WEDNESDAY, JANUARY 7, 2026**

This meeting will be conducted by the Operations Oversight Committee and Board of Retirement both in person and by teleconference under California Government Code Sections 54953.8.3.

Any person may view the meeting in person at LACERA's offices or online at <https://LACERA.com/leadership/board-meetings>.

The Committee may take action on any item on the agenda, and agenda items may be taken out of order.

COMMITTEE TRUSTEES:

JP Harris, Chair
Nancy M. Durazo, Vice Chair
Aleen Langton, Trustee
Wayne Moore, Trustee
Shawn R. Kehoe, Alternate Trustee

- I. CALL TO ORDER
- II. PROCEDURE FOR TELECONFERENCE MEETING ATTENDANCE UNDER SB707
 - A. Just Cause (Section 54953.8.3)
 - B. Statement of Persons Present at SB707 Teleconference Locations

III. APPROVAL OF MINUTES

- A. Approval of the Minutes of the Regular Meeting of December 3, 2025

IV. PUBLIC COMMENT

(Members of the public may address the Committee orally and in writing. To provide Public Comment, you should visit <https://LACERA.com/leadership/board-meetings> and complete the request [form](#).

If you select oral comment, we will contact you via email with information and instructions as to how to access the meeting as a speaker. You will have up to 3 minutes to address the Committee. Oral comment requests will be accepted up to the close of the Public Comment item on the agenda.

If you select written comment, please input your written public comment within the form as soon as possible and up to the close of the meeting. Written comment will be made part of the official record of the meeting. If you would like to remain anonymous at the meeting without stating your name, please leave the name field blank in the request form. If you have any questions, you may email PublicComment@lacera.gov.)

V. REPORTS

A. **Operations Briefing**

Laura Guglielmo, Assistant Executive Officer
JJ Popowich, Assistant Executive Officer
Kathy Delino, Chief, Information Technology
(Presentation)

B. **2023-2028 Quarterly Strategic Plan Update**

Luis A. Lugo, Acting Chief Executive Officer
JJ Popowich, Assistant Executive Officer
Laura Guglielmo, Assistant Executive Officer
(Presentation)

C. **Social Media Plan – Key Highlights**

Cynthia Martinez, Chief of Communications
Erika Heru, Creative Coordinator
Sara Dubisz, Social Media Specialist
(Presentation) (Memo dated December 29, 2025)

V. REPORTS (Continued)

D. **Annual QA Audit Report**

Bernie Buenaflor, Chief, Quality Assurance & Metrics Division
(Presentation) (Memo dated December 4, 2025)

E. **Privacy Incidents: Personally Identifiable Information**

Chaitanya Errande, Information Security Officer
(For Information Only) (Memo dated December 19, 2025)

VI. ITEMS FOR STAFF REVIEW

(This item summarizes requests and suggestions by individual trustees during the meeting for consideration by staff. These requests and suggestions do not constitute approval or formal action by the Board, which can only be made separately by motion on an agendized item at a future meeting.)

VII. ITEMS FOR FUTURE AGENDAS

(This item provides an opportunity for trustees to identify items to be included on a future agenda as permitted under the Board's Regulations.)

VIII. GOOD OF THE ORDER

(For Information Purposes Only)

IX. EXECUTIVE SESSION

A. **Potential Threats to Public Services or Facilities**

(Pursuant to Subdivision (a) of California Government Code
Section 54957)

Consultation with: LACERA Acting Chief Executive Officer Luis A. Lugo, Assistant Executive Officers JJ Popowich and Laura Guglielmo, Chief, Information Technology Kathy Delino, Information Security Officer Chaitanya Errande, and Other LACERA Staff.

X. ADJOURNMENT

The Board of Retirement has adopted a policy permitting any member of the Board to attend a standing committee meeting open to the public. In the event five or more members of the Board of Retirement (including members appointed to the Committee) are in attendance, the meeting shall constitute a joint meeting of the Committee and the Board of Retirement. Members of the Board of Retirement who are not members of the Committee may attend and participate in a meeting of a Board Committee but may not vote on any matter discussed at the meeting. The only action the Committee may take at the meeting is approval of a recommendation to take further action at a subsequent meeting of the Board.

****Although the meeting is scheduled for 9:00 a.m., it can start anytime thereafter, depending on the length of the Board of Retirement meeting preceding it. Please be on call.**

Any documents subject to public disclosure that relate to an agenda item for an open session of the Committee, that are distributed to members of the Committee less than 72 hours prior to the meeting, will be available for public inspection at the time they are distributed to a majority of the Committee, at LACERA's offices at 300 North Lake Avenue, Suite 820, Pasadena, California during normal business hours from 9:00 a.m. to 5:00 p.m. Monday through Friday *and will also be posted on lacera.com at the same time, [Board Meetings | LACERA](#).*

Requests for reasonable modification or accommodation of the telephone public access and Public Comments procedures stated in this agenda from individuals with disabilities, consistent with the Americans with Disabilities Act of 1990, may call the Board Offices at (626) 564-6000, Ext. 4401/4402 from 8:30 a.m. to 5:00 p.m. Monday through Friday or email PublicComment@lacera.com, but no later than 48 hours prior to the time the meeting is to commence.

MINUTES OF THE REGULAR MEETING OF THE OPERATIONS OVERSIGHT
COMMITTEE AND BOARD OF RETIREMENT*

LOS ANGELES COUNTY EMPLOYEES RETIREMENT ASSOCIATION

300 N. LAKE AVENUE, SUITE 810, PASADENA, CA 91101

10:48 A.M. – 11:25 A.M., WEDNESDAY, DECEMBER 3, 2025

This meeting was conducted by the Operations Oversight
Committee both in person and by teleconference under California
Government Code Section 54953(f)

COMMITTEE TRUSTEES

PRESENT: JP Harris, Chair
Nancy M. Durazo, Vice Chair
Aleen Langton, Trustee
Wayne Moore, Trustee
(Teleconference Due to Just Cause under Section 54953(f))
Shawn R. Kehoe, Alternate Trustee

OTHER BOARD OF RETIREMENT TRUSTEES

Bobbie Fesler, Trustee
Elizabeth Ginsberg, Trustee
Ronald Okum, Trustee
Les Robbins, Trustee

STAFF, ADVISORS AND PARTICIPANTS

Luis A. Lugo, Acting Chief Executive Officer

JJ Popowich, Assistant Executive Officer

Laura Guglielmo, Assistant Executive Officer

Steven P. Rice, Chief Counsel

Kathy Delino, Chief, Information Technology

Chaitanya Errande, Information Security Officer

Judy Tran, Assistant Chief Financial Officer

Michael Huang, Accounting Officer II

I. CALL TO ORDER

This meeting was called to order by Chair Harris at 10:48 a.m.

II. PROCEDURE FOR TELECONFERENCE MEETING ATTENDANCE UNDER AB 2449, California Government Code Section 54953(f)

A. Just Cause

B. Action on Emergency Circumstance Requests

C. Statement of Persons Present at AB 2449 Teleconference Locations

A physical quorum was present at the noticed meeting location. There was one request received from Trustee Moore related to Just Cause (A) due to illness. Trustee Moore confirmed there were no individuals 18 years or older present at the teleconference location. No requests were received for Emergency Circumstances (B).

III. APPROVAL OF MINUTES

A. Approval of the Minutes of the Regular Meeting of November 5, 2025

Trustee Moore made a motion, Trustee Kehoe seconded, to approve the minutes of the regular meeting of November 5, 2025. The motion passed by the following roll call vote:

Yes: Durazo, Langton, Moore, Harris

No: None

IV. PUBLIC COMMENT

There were no requests from the public to speak.

V. REPORTS

A. **Operations Briefing**

Laura Guglielmo, Assistant Executive Officer
JJ Popowich, Assistant Executive Officer
Kathy Delino, Chief, Information Technology
(For Information Only)

The Executive team presented the monthly briefing and was available to answer questions from the Committee. This item was received and filed.

B. **Fiscal Year 2024-2025 Annual Financial Review**

Judy Tran, Assistant Chief Financial Officer
Michael Huang, Accounting Officer II
Ervin Wu, Accounting Officer I
(Presentation) (Memo dated November 18, 2025)

The FY 2024-25 Annual Financial Review was presented and staff was available for questions from the Committee. This item was received and filed.

V. REPORTS (Continued)

C. **Privacy Incidents: Personally Identifiable Information**

Chaitanya Errande, Information Security Officer

(For Information Only) (Memo dated November 21, 2025)

This item was received and filed.

VI. ITEMS FOR STAFF REVIEW

(This item summarizes requests and suggestions by individual trustees during the meeting for consideration by staff. These requests and suggestions do not constitute approval or formal action by the Board, which can only be made separately by motion on an agenda item at a future meeting.)

There was nothing to report.

VII. ITEMS FOR FUTURE AGENDAS

(This item provides an opportunity for trustees to identify items to be included on a future agenda as permitted under the Board's Regulations.)

There was nothing to report.

VIII. GOOD OF THE ORDER

(For Information Purposes Only)

There was nothing to report.

IX. ADJOURNMENT

There being no further business to come before the Committee, the meeting was adjourned at 11:25 a.m.

***The Board of Retirement has adopted a policy permitting any member of the Board to attend a standing committee meeting open to the public. In the event five or more members of the Board of Retirement (including members appointed to the Committee) are in attendance, the meeting shall constitute a joint meeting of the Committee and the Board of Retirement. Members of the Board of Retirement who are not members of the Committee may attend and participate in a meeting of a Board Committee but may not vote on any matter discussed at the meeting. The only action the Committee may take at the meeting is approval of a recommendation to take further action at a subsequent meeting of the Board.**



Operations Briefing

Operations Oversight Committee
January 2026







Operational Initiatives

Organization-Wide Projects

OPERATIONAL INITIATIVES



Objective	Progress	Current FY Budget	Executive Sponsor, Lead, Project Manager	Key Update	Expected Completion
Boardroom Relocation and Expansion Relocation of the Boardroom from the 8 th Floor to the ground floor of Gateway Plaza	 On Track (Planning Phase)	\$700,000	Laura Guglielmo, Ricki Contreras	The Facilities Management and Audio Visual teams are coordinating with the Office of the Building to refine the audio visual requirements and space plans. Pending building permits.	March 2027
COLA Bank Retroactive Changes Board of Retirement approved corrections to the COLA Accumulation Bank, which involved making retroactive corrections, recalculating benefit allowance amounts, and paying members retroactive benefits due to a discrepancy discovered in the COLA Accumulation	 On Track (Execution Phase)	\$0	JJ Popowich, Louis Gittens, Theodore King	We have assembled a team that calculated 663 cases of 1,292 to calculate. We will continue to make steady progress towards our goal.	June 2026
CoPilot Champions Expanding the adoption of Co-Pilot by empowering selected staff to lead adoption efforts, recommend training opportunities, and serve as peer mentors across the organization	 On Track (Execution Phase)	\$0	Laura Guglielmo, Kathy Delino, Penelope Rodriguez (PM)	A second round of Co-Pilot training is being scheduled, with this series focusing on division-specific use cases.	September 2028
Deductions for Dues from Retiree Benefit Payments Policy implementation addressing existing and future members who elect to have dues, fees or premium payments for various third-party agencies deducted from their retirement benefit on a monthly basis to ensure LACERA is compliant with CERL Section 31452.5	 Pending (Planning Phase)	\$0	JJ Popowich, Louis Gittens, Fabio Ramirez	We are in the final stages of updating the Agency contract to align with recent policy changes. The team is also preparing comprehensive communications to ensure all agencies are fully informed about the new business processes and data exchange requirements.	To Be Determined

OPERATIONAL INITIATIVES



Objective	Progress	Current FY Budget	Executive Sponsor, Lead, Project Manager	Key Update	Expected Completion
Disability Retirement Artificial Intelligence Solution Transform the document and record indexing process of the disability retirement application workflow in order to enhance the speed, accuracy, and efficiency of handling member applications	Pending (Initiation Phase)	\$110,000	JJ Popowich, Tamara Caldwell Alonso Favela (PM)	This project will begin in January.	To Be Determined
eDiscovery Solution for the Legal Office and Information Security Teams to conduct eDiscovery which is the process of identifying, collecting, and producing electronically stored information (ESI) in response to a request for production in a lawsuit or investigation, to respond to a Public Records Act, or to facilitate collection of information for other business purposes	Delayed (Planning Phase)	\$120,000	Steven Rice, Chait Errande, Alonso Favela (PM)	A Proof of Concept (POC) was completed successfully. However, the estimated cost to fully meet LACERA's requirements is higher than the amount previously approved by the Board of Retirement. To ensure the revised pricing is both competitive and appropriate, the project team is reviewing additional quotes from qualified vendors.	To Be Determined
LACERA Event Response Team (LERT) Management Solutions Automate the tracking of LACERA incidents and integrating the ServiceNow workflow with LACERA's Pension Administration System (Workspace) and LACERA's Emergency Notification System (On-Solve).	Delayed (Execution Phase)	\$0	JJ Popowich, Chait Errande, David Choe (PM), Iveta Brecko	The integration of the LERT process in ServiceNow with LACERA's Pension Administration System (PAS) has been completed. The LACERA project team is finalizing the member correspondence templates.	December 2025 <i>March 2026</i>
Legal Matter Management (LMM) Solution Solution for the Legal Office Division to Track and Manage Legal Matter Management and integrate with Enterprise Contract Lifecycle Management	Delayed (Execution Phase)	\$150,000	Steven Rice, Christine Roseland, David Choe (PM), Tom DeLuca (PM)	Currently in use by in-house legal staff for logging Public Records Requests, inputting Legal investments transactions, and completed commercial contracts. Training is in process for core users from Admin Services and Investments to begin using LawVu to input matter records.	December 2025 <i>March 2026</i>





OPERATIONAL INITIATIVES



Objective	Progress	Current FY Budget	Executive Sponsor, Lead, Project Manager	Key Update	Expected Completion
Mainframe System Migration Migration of existing pension administration mainframe functionality to modern infrastructure and architecture to enhance scalability, agility, and integration capabilities.	 On Track (Execution Phase)	\$920,000	JJ Popowich , Kathy Delino, Alonso Favela (PM)	Recently added temporary development and analysis staff, are optimizing the migration process using AI and automated testing, and are migrating Tax Reporting and Direct Deposit Prenote processes.	June 2028
Microfiche Digitization Conversion of LACERA's 46 million pages of microfiche to searchable PDF files and store them in an Enterprise Content Management System (ECM). A subset of the PDF files will be shared with the L.A. County Auditor-Controller.	 On Track (Execution Phase)	\$0	JJ Popowich, Kathy Delino, Tom DeLuca (PM)	The mass conversion process of microfiche digital files to searchable PDF files is currently in process and is expected to be completed in January 2026.	January 2026
PEPRA: Annual Benefit Statement Provide an Annual Benefit Statement (ABS) for PEPRA members.	 On Track (Execution Phase)	\$0	JJ Popowich, Cynthia Martinez	Design requirements have been submitted to Systems, and Systems will begin working on additional design and programming in December 2025.	December 2026
PEPRA Final Average Compensation: Scheduled Earnings The Board of Retirement approved a change to the methodology for calculating a PEPRA member's Final Average Compensation (FAC) due to a revised interpretation of PEPRA and CERL. Effective with this decision, LACERA will now use Scheduled Earnings to calculate the FAC, instead of Actual Earnings. This project covers all efforts to implement this change and pay any retroactive benefits.	 On Track (Execution Phase)	\$0	JJ Popowich, Louis Gittens, Kevin Hawkins	The team has updated retirement benefits for routine cases and now has 3 remaining complex cases.	January 2026

OPERATIONAL INITIATIVES



Objective	Progress	Current FY Budget	Executive Sponsor, Lead, Project Manager	Key Update	Expected Completion
Prepaid Bank Card Providing a prepaid bank card option for monthly benefit payments	 On Track (Completion Phase)	\$0	JJ Popowich, Shonita Peterson	Phase I of the LACERA Way2Go Prepaid Mastercard has been completed, and the initial group of payees are receiving payments. Phase II enhancement are in the planning stages.	Completed (Monitoring)
Project Portfolio Management Solution Streamlining project selection, prioritization, and resource allocation, ensuring alignment with business goals in support of improving efficiency, decision-making, and overall project success rates.	 Pending (Initiation Phase)	\$50,000	Luis Lugo, Kathy Delino, Sai Nichal Dasari (PM)	Developing the Request for Proposal (RFP)	To Be Determined
Retroactive Payroll Adjustments: Prospective Correction Collaboration with the Auditor-Controller (AC) to ensure timely and accurate collection of member payroll contributions on retroactive payroll adjustments.	 Pending (Initiation Phase)	\$0	JJ Popowich	LACERA has communicated our concerns with the County. The Auditor-Controller plans to work with Systems to resolve this.	To Be Determined
SASE (Phase II) Implement the core features of a cloud-based networking and security architecture to ensure confidentiality availability and Integrity as we conduct our activities when we are logged in. Features such as SDWAN (Software defined wide area network). Secure Enterprise Browser rollout and Data Loss Prevention strategies will be deployed in this phase.	 On Track (Execution Phase)	\$0	Chait Errande	Available advanced features are now being implemented. We are now testing out the Prisma Access Browser	March 2026

OPERATIONAL INITIATIVES



Objective	Progress	Current FY Budget	Executive Sponsor, Lead, Project Manager	Key Update	Expected Completion
Staff Offboarding Implementing the staff offboarding process into ServiceNow.	● On Track (Completion Phase)	\$0	Laura Guglielmo, Carly Ntoya, Alonso Favela (PM)	The new staff offboarding process has been rolled out in ServiceNow and training has been completed.	Completed (Monitoring)
Virtual Mailroom Document imaging services digitizing member documents and business mail through a virtual mail room solution, enhancing both efficiency and business continuity planning.	● Pending (Planning Phase)	\$150,000	Laura Guglielmo, Ricki Contreras, Ahmad Chishty (PM)	An RFP will be released in 2026.	To Be Determined



IT Trends & Transformation

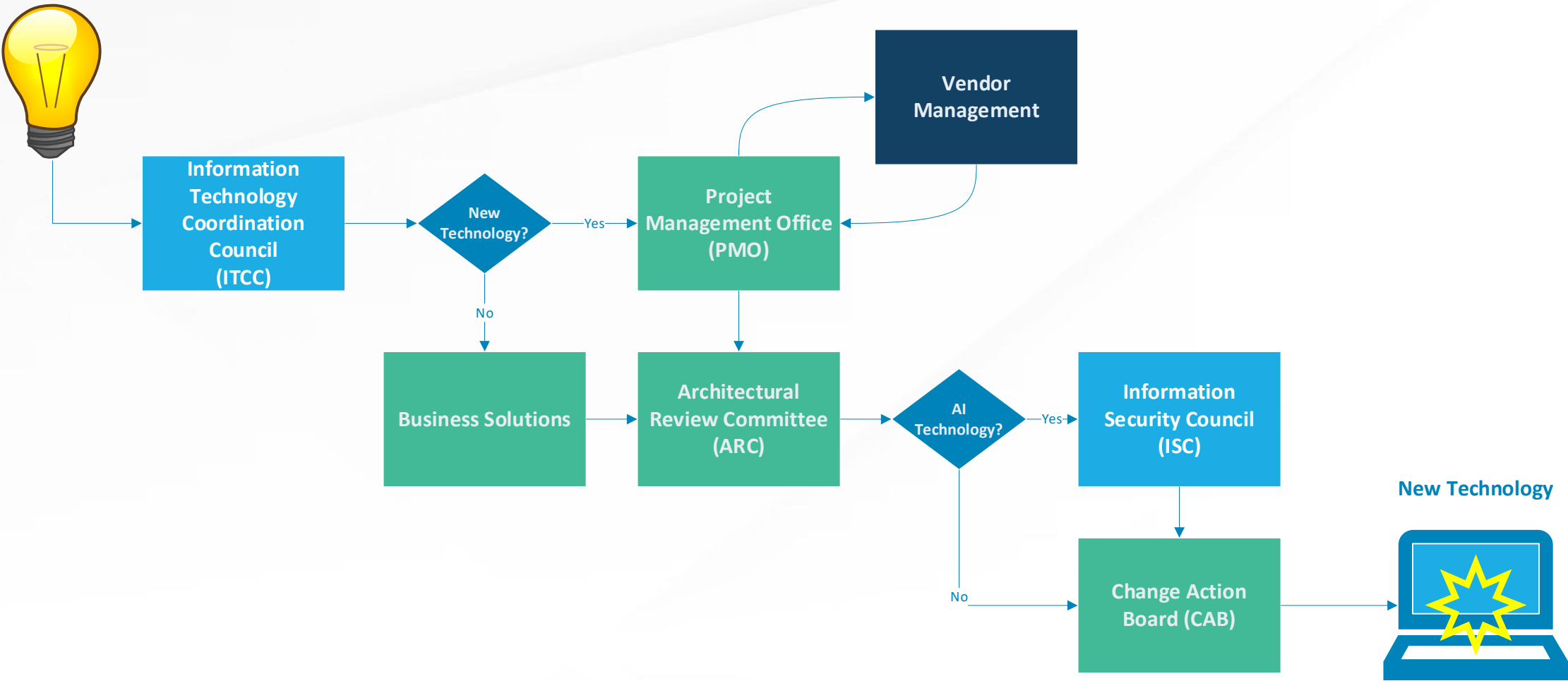
AI & IT Governance

Presented by Kathy Delino, Chief Information Technology

AI & IT Governance



Technology Idea



Enterprise Leadership Team

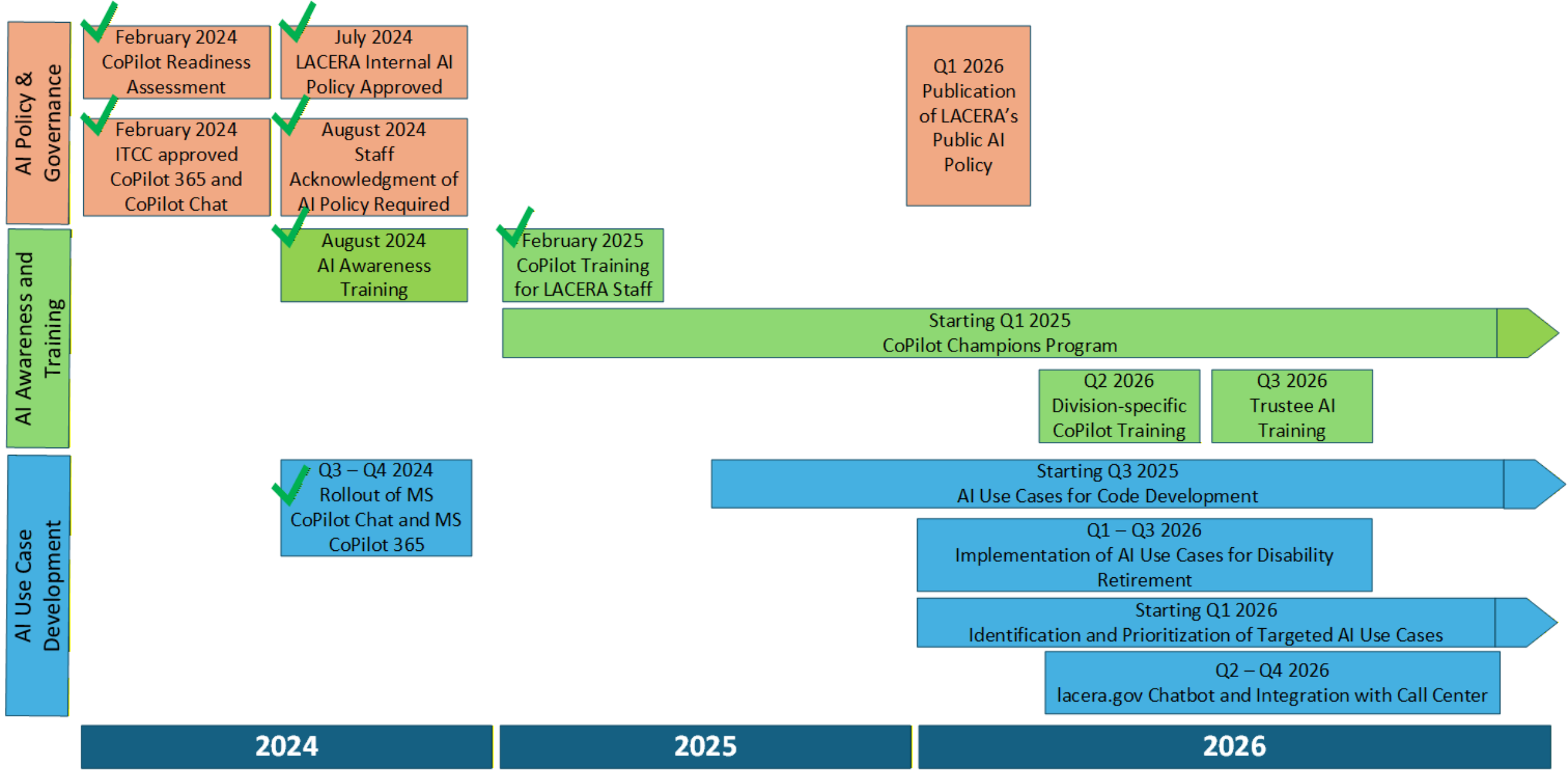


System Division Team



Administrative Services Team

LACERA's Generative and Agentic AI Progress



LACERA AI Solutions Overview



Current AI Applications in Use

- Microsoft CoPilot Chat
- Microsoft 365 CoPilot
- AI Powered Transcription of Public Videos

AI Projects in Development

- Business Intelligence and Data Visualizations
- Lacera.gov Chatbot and Integration with Call Center Solution
- Code Generation using AI Assistants
- Test Case and User Story Generation using AI Assistants

Future AI Projects

- AI for Disability Retirement Medical Report Analysis
- Intelligent Document Processing (IDP) for Incoming Documents

Thank You!



Questions?



2023-2028 Strategic Plan Quarterly Update

**Operations Oversight Committee
January 2026**



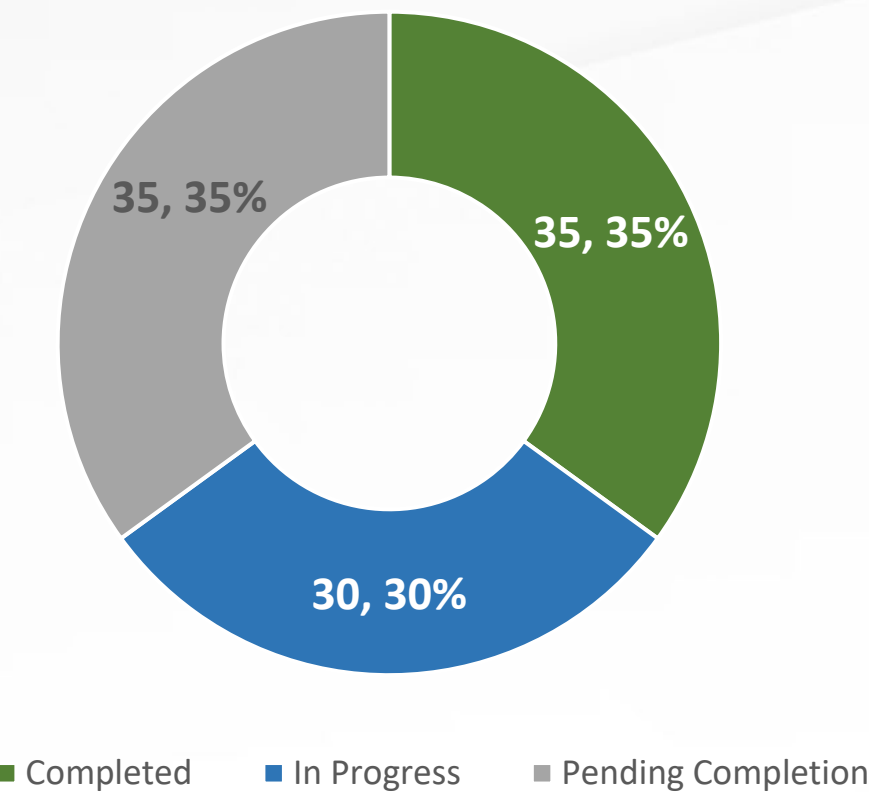
Dashboard

October – December 2025

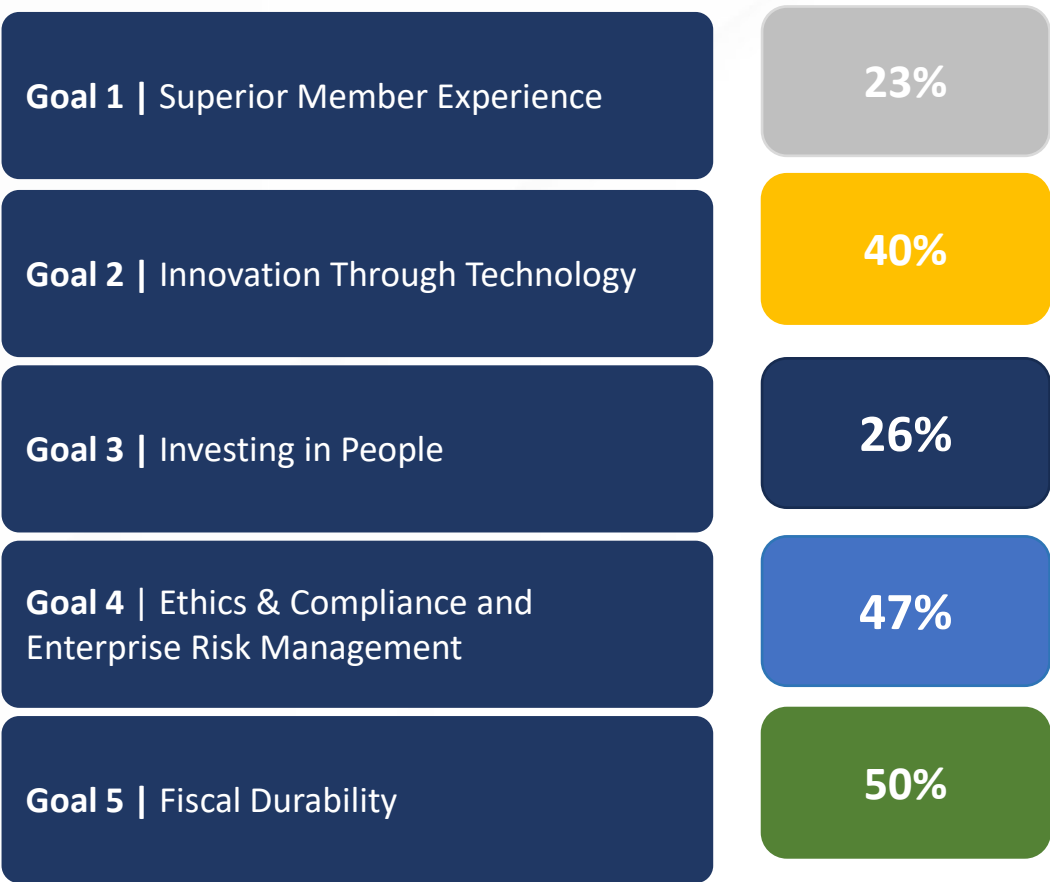
2023-2028 Strategic Plan Progress Summary



Overall Milestone Progress



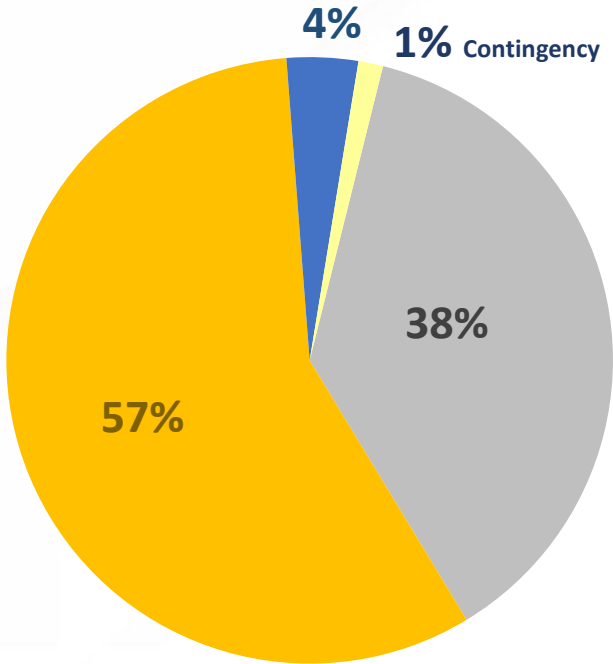
Overall Goal Completion





FY 25-26 Estimated Budget for Strategy Plan Goals

Goal 1 Superior Member Experience	\$714,000
Goal 2 Innovation Through Technology	\$1,095,000
Goal 3 Investing in People	\$0
Goal 4 Ethics & Compliance and Enterprise Risk Management	\$72,500
Goal 5 Fiscal Durability	\$0



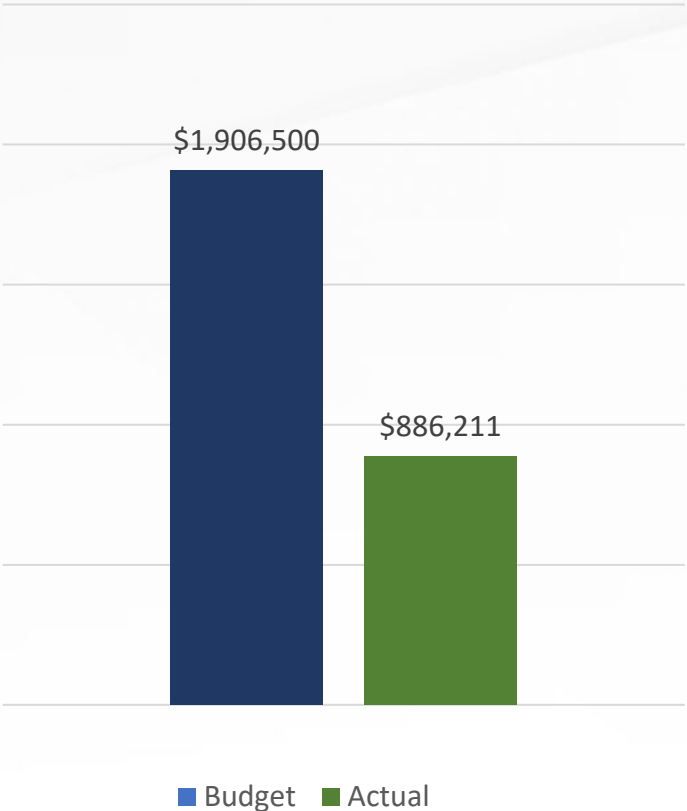
Estimated Budget Total* | \$1,906,500

(Includes Contingency Fund of \$25,000)
(Subject to Change)

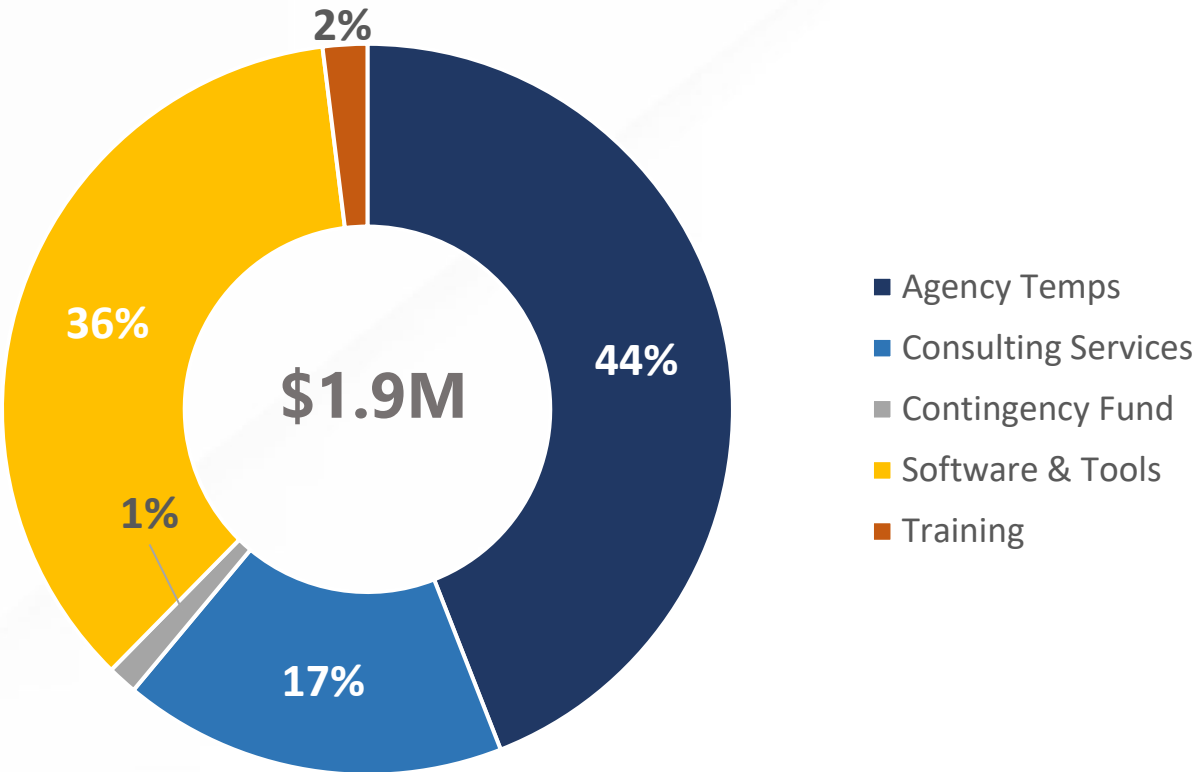
Estimated Budget & Resources



FY 25-26 Estimated Budget Summary



FY 25-26 Estimated Budget Resource Summary



Reporting as of December 30, 2025

Goal Highlights



October through December 2025

Goal 1 | Superior Member Experience

Objective 1.2 Member Educational Content and Communications Plan and 1.3 Digital Strategy are now being reported. The Communication Plan is in the final stages before being implemented. The Member Experience Communication Platform (Genesys) implementation plan is underway.

Goal 2 | Innovation Through Technology

The Business Intelligence Platform has been implemented, and a central repository has been established. Vendors are currently being reviewed for the Enterprise-Wide Knowledge Management Solution.

Goal 3 | Investing in People

Objective 3.2 Employee Training and Development is now being reported. The focus of this objective is developing a standard baseline set of knowledge, skills, and abilities essential for excelling in these roles.

Goal 4 | Ethics & Compliance and Enterprise Risk Management

The Chief Ethics and Compliance Officer (CECO) and Deputy CECO class specifications have been approved by the Board of Supervisors and LACERA may now begin the recruiting process. In addition, progress continues to be made on all the other elements of the approved foundational work plan. Objective 4.2 Enterprise Risk Management is now being reported.

Goal 5 | Fiscal Durability

The Enterprise Contract Lifecycle Management (ECLM) Solution (Cobblestone) has been implemented with the vendor management group and continues to be refined. The Investment Staff Incentive Plan has been presented to the Boards and efforts to finalize the framework are underway.

Milestone Highlight



Goal 1 | Objective 1.2 Member Educational Content and Communication Plan Milestone | Communication Plan: Social Media Campaign

Part of the Communication Plan is using digital platforms to connect with members and support LACERA's Mission.

Social Media Plan Overview

Objective: Increase awareness, build trust, enhance member services through targeted use of digital channels, and promote financial security

Strategic Framework: Focused on member acquisition, consistent messaging, active engagement, community building, and maintaining a positive organizational image

Platform Strategy: Utilizes the “5 Cs to Strengthen Engagement” to guide our presence and activity across platforms

Branding: Emphasizes a unified brand voice and consistent visual identity to foster trust and credibility in LACERA's online persona

Content Strategy: Built on key communication pillars to inform and engage members

Policy and Governance: Our plan includes clear guidelines for responding to member inquiries and managing our social media presence responsibly

Next Steps

January 14, 2026 - Tentative launch date





Strategic Plan Overview

October – December 2025

GOAL 1: Superior Member Experience

Innovate and continuously improve the member experience

Objective	Progress	Current FY Budget	Executive Sponsor, Lead, Project Manager	Key Update	Highlights	Expected Completion
1.1 Ensure a consistent omnichannel member experience at every stage of the member's journey	● On Track (Execution Phase)	\$77,000	JJ Popowich, Tatiana Bayer	New Hire member experience survey released for internal and County stakeholders	Member experience survey content finalized	September 2028
1.2 Enhance member educational content at every stage in their journey and launch LACERA Communication Plan	● On Track (Execution Phase)	\$77,000	JJ Popowich, Cynthia Martinez	Draft Communication Workplan and Strategy Plan in review	Social Media Plan Presented to OOC in January	December 2028
1.3 Develop, implement, and deploy a digital strategy to better serve our members	● On Track (Execution Phase)	\$560,000	JJ Popowich, Cookie Jaranilla (PM), Iveta Brecko (PM)	Selection of the Member Experience Communication Platform (Genesys)	-	December 2028
1.4 Improve and enhance the retiree healthcare experience	● On Track (Execution Phase)	\$0	JJ Popowich, Tionna Fredericks	Retiree Healthcare staff survey focusing on member interaction and experience results received	-	June 2028

Strategic Objective 1.1 | Omni-Channel Experience



Ensure an omni-channel experience at every stage of a member journey

Overall Status
EXECUTION PHASE



Overall Objective Progress



■ Completed ■ In Progress ■ Pending Completion

Key Accomplishments

- Implemented a standardized omnichannel retirement counseling
- Implemented Retiree Healthcare new retiree topics into the Member Services retirement counseling throughout the Call Center to offer a true omnichannel standardized counseling (in alignment with the current Outreach counseling)
- Cross trained Outreach and Call Center staff on all different channels used to provide member counseling

Key Activities Underway

- Identify points of communication in each member journey
- Develop a framework and plan for each omni-channel
- Identify and implement new omni-channel sources
- Communicate omni-channel sources and educational content

Strategic Objective 1.2 – Member Educational Content

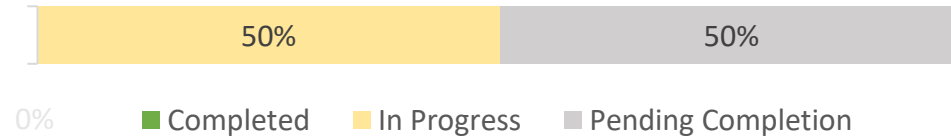


Enhance member educational content at every stage in their journey and launch LACERA Communication Plan

Overall Status
EXECUTION PHASE



Overall Objective Progress



Key Activities Underway

- Finalize LACERA's Communication Plan
- Launch Social Media Plan
- Complete member education needs assessment
- Launch and expand the Resource Library on LACERA.gov
- Execute targeted outreach campaigns
- Implement accessibility enhancements

Strategic Objective 1.3 – Digital Strategy

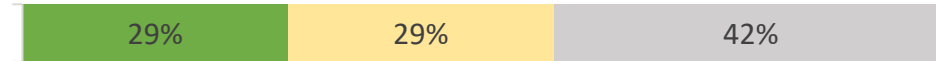


Develop, implement, and deploy a digital strategy to better serve our members

Overall Status
EXECUTION PHASE



Overall Objective Progress



■ Completed ■ In Progress ■ Pending Completion

Key Accomplishments

- Selection of the Member Experience Communication Platform (Genesys)
- Completed first retirement payment within LACERA's Case Management System (SOL) and the workflow is being monitored
- Executive the Disability Retirement and Disability Litigation Case Management (SOL Phase I)

Key Activities Underway

- Streamline foundational processes within SOL, My LACERA, and Workspace (pension administration platform)
- Launch the Member Experience Communication Platform (Genesys) designed to improve member and retiree interactions across multiple channels
- Implement and launch SOL Phase II – Active Death and Retired Death Case Management
- Integrate Empower (401/457 Defined Contribution Plan) and My LACERA portal
- Launch Employer Portal to support LA County Department of Human Resources and new hires
- Launch LACERA mobile application

Strategic Objective 1.4 – RHC Experience



Improve and enhance the retiree healthcare experience

Overall Status
EXECUTION PHASE



Overall Objective Progress



■ Completed ■ In Progress ■ Pending Completion

Key Accomplishments

- Survey results received from the Retiree Healthcare staff regarding member journey and process input

Key Activities Underway

- Creation of a Retiree Healthcare summary chart of the non-medicare plans for members to easily reference
- Launch a member online medical and dental plan comparison for member reference
- Integrate the Social Security Administration (SSA) date exchange for member online plan comparison
- Automate Retiree Healthcare foundational processes
- Distribute a Retiree Healthcare survey to all members
- Implement a Retiree Healthcare online enrollment
- Communicate Retiree Healthcare online enrollment and training to members

Goal 2: Innovation Through Technology

Leverage technological solutions to advance capabilities, increase productivity, and elevate operational maturity

Objective	Progress	Current FY Budget	Executive Sponsor, Lead, Project Manager	Key Update	Highlights	Expected Completion
2.1 Promote an enterprise approach to information gathering, integration, analysis, and sharing that fosters decision-making through the adoption of a business intelligence platform	 On Track (Execution Phase)	\$960,000	Luis Lugo, Kathy Delino, Ahmad Chishty (PM)	The Business Intelligence project team will be meeting with each division to assess reporting and dashboard requirements	MS Fabric Proof of Concept has been completed	December 2027
2.2 Implement an enterprise-wide knowledge management system to digitally capture, document, organize, and access critical business knowledge and information	 On Track (Execution Phase)	\$135,000	JJ Popowich, Eugenia Der, David Choe (PM)	The RFP for the knowledge management solution has been completed and proposed bids are currently being reviewed.	The consultant, Taxonomy Strategies, completed reviewing and content tagging 3,500 knowledge assets and created a taxonomy glossary.	December 2028

Strategic Objective 2.1 – Business Intelligence Platform

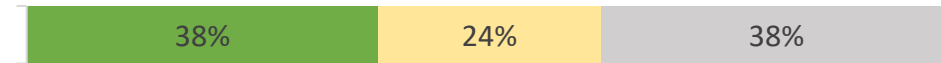


Promote an enterprise approach to information gathering, integration, analysis, and sharing that fosters decision-making through the adoption of a business intelligence platform

Overall Status
EXECUTION PHASE



Overall Objective Progress



■ Completed ■ In Progress ■ Pending Completion

Key Accomplishments

- Selected and implemented a business intelligence platform
- Established a centralized repository for organization-wide information for easy reference

Key Activities Underway

- Establish Business Intelligence governance and role-based access
- Roll out of dashboards to each to include top metrics and visualization requirements, building interactive dashboards with drill-down capabilities, and rolling out dashboards to leadership teams

Strategic Objective 2.2 – Enterprise-Wide Knowledge Management

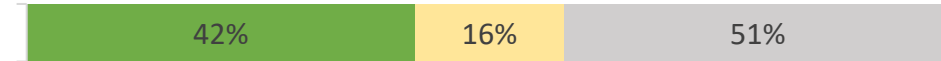


Implement an enterprise-wide knowledge management system to digitally capture, document, organize, and access critical business knowledge and information

Overall Status
EXECUTION PHASE



Overall Objective Progress



■ Completed ■ In Progress ■ Pending Completion

Key Accomplishments

- Taxonomy consultant selected
- Organizational assessment and content tagging of approximately 3,500 knowledge assets from the Member Operations Group and Compass Library completed
- First iteration of LACERA taxonomy glossary completed
- Request for Proposal issued for a Knowledge Management Solution

Key Activities Underway

- Selection of a Knowledge Management Solution Vendor
- Implement and launch Knowledge Management Solution

Goal 3: Investing in People

Attract, motivate, hire, and retain a highly engaged and skilled workforce

Objective	Progress	Current FY Budget	Executive Sponsor, Lead, Project Manager	Key Update	Highlights	Expected Completion
3.1 Develop and implement a frameworks aimed at promoting and embracing diversity, equity, and inclusion (DEI)	 On Track (Execution Phase)	\$0	Laura Guglielmo	LACERA's Statement of Commitment to IDEA shared on social media.	IDEA Platform on LACERA Connect for Staff to access resources and information.	December 2027
3.2 Develop enterprise-wide training and development programs designed to support and encourage employee growth and development	 On Track (Execution Phase)	\$0	Laura Guglielmo, Roberta Van Nortrick	The Strategic Plan Workgroup completed the initiation and workplan for execution.	The Executive Office approved the strategic objective milestones.	June 2028
3.3 Improve and simplify the hiring process, aimed at building a solid foundation for succession planning	 On Track (Execution Phase)	\$0	Laura Guglielmo, Carly Ntoya, Alonso Favela (PM)	Implemented enhancements in NeoGov to allow for improved candidate communication during the recruitment and assessment phases.	Actively working on reducing vacancy rate with a goal of 13% by FYE.	June 2028

Strategic Objective 3.1 – Diversity, Equity, Inclusion



Develop and implement a framework aimed at promoting and embracing diversity, equity, and inclusion (DEI)

Overall Status
EXECUTION PHASE



Overall Objective Progress



■ Completed ■ In Progress ■ Pending Completion

Key Accomplishments

- Established the Inclusion, Diversity, Equity, and Accessibility (IDEA) Council
- Communicated Statement of Commitment to LACERA team members, members via LACERA.gov and to the public via social media
- Created the IDEA platform on LACERA Connect (Intranet) for LACERA team members to go for resources and information

Key Activities Underway

- Launch the IDEA platform internally providing resources and information
- Conduct a needs assessment gap analysis
- Centralize training programs and opportunities to educate LACERA team members via LEARN Management System

Strategic Objective 3.2 – Employee Training and Development



Develop enterprise-wide training and development programs designed to support and encourage employee growth and development

Overall Status
EXECUTION PHASE



Overall Objective Progress



■ Completed ■ In Progress ■ Pending Completion

Key Activities Underway

- Implement an All-Staff Development Plan focused on a standard baseline set of knowledge, skills, and abilities (KSA)
- Implement a Supervisor Learning and Development Plan aiming to equip and enhance each supervisors' skills and knowledge essential for excelling in this role
- Revise and enhance the Career Development Program (CDP)
- Implement a Manager Learning and Development Plan specifically tailored for Division Managers at LACERA aiming to enhance technical and soft skills essential for excelling in this role
- Revise the Temporary Opportunity Program (TOP) providing permanent LACERA employees with a chance to gain hands-on work experience in various parts of our organization through temporary assignments
- Revise the Leadership Development Program (LDP) to align with the Leadership Pipeline including leadership courses and invaluable experience by working as part of a team while developing and utilizing skills that are learned

Strategic Objective 3.3 – Improve & Simplify Hiring Process



Improve and simplify the hiring process, aimed at building a solid foundation for succession planning

Overall Status
EXECUTION PHASE



Overall Objective Progress



■ Completed ■ In Progress ■ Pending Completion

Key Accomplishments



- Developed and implemented a Hiring Manager Playbook to ensure transparency, consistency, flexibility and compliance with civil service rules and standards
- Conducted job analyses to ensure that candidates are assessed based on current needs
- Implemented enhancements in NeoGov to allow for expanded candidate communication during the recruitment and assessment phases

Key Activities Underway

- Update the Employee Handbook
- Simplify the new hiring process by standardizing hire steps, reducing manual tasks through process and tool improvements
- Standardize training for interview raters to provide more consistency in interview practices
- Revise and implement a standardized new hire onboarding process
- Develop a Workforce Plan to mitigate attrition

Goal 4: Ethics & Compliance and Enterprise Risk Management

Adopt and implement compliance and enterprise risk frameworks aimed at facilitating strengthened governance around risk management and compliance

Objective	Progress	Current FY Budget	Executive Sponsor, Lead, Project Manager	Key Update	Highlights	Expected Completion
<p>4.1</p> <p>Develop an enterprise compliance plan and program to ensure adherence to established processes, procedures, policies, and governing rules and regulations</p>	<p> On Track (Execution Phase)</p>	<p>\$72,500</p>	<p>Luis Lugo, Steven Rice, Allison Barrett</p>	<p>The Baseline Culture Survey was completed in August 2025, with an over 65% response rate. The survey was followed by 9 focus groups (consisting of 75 individuals throughout the organization) to take a deeper dive into survey results. Focus group feedback was shared with leadership at the December 2025 management offsite to be followed by the development of action plan inclusive of all staff.</p>	<p>Eight Ethics and Compliance Committee (ECC) members attended the SCCE Academy in 2025. To date, five have become Certified Compliance and Ethics Professionals (CCEP), with an expected additional three in 2026.</p>	<p>December 2028</p>
<p>4.2</p> <p>Implement a comprehensive enterprise risk management framework and structure to facilitate stronger organizational risk management</p>	<p> On Track (Execution Phase)</p>	<p>\$0</p>	<p>Luis Lugo, Richard Bendall</p>	<p>Enterprise Risk Management (ERM) Group has been established.</p>	<p>Internal Audit and the Ethics and Compliance team are taking a collaborative approach to the development of the ERM program as part of an Aligned Assurance model, with Internal Audit acting as project manager.</p>	<p>December 2028</p>

Strategic Objective 4.1 – Ethics & Compliance Plan and Program



Develop an ethics and compliance plan and program to ensure adherence to ethical standards and established processes, procedures, policies, and governing rules and regulations

Overall Status
EXECUTION PHASE



Overall Objective Progress



■ Completed ■ In Progress ■ Pending Completion

Key Accomplishments

- Ethics and Compliance Committee Established
- Policy Management Central Library Created
- Conducted Staff Culture Survey and Focus Groups
- Substantial Progress on All Elements of Board- and ACRE-Approved Foundational Work Plan

Key Activities

- Code of Ethical Conduct Revision and Code Training
- Create Staff Culture Action Plan Based on Survey Results
- Partnered with Internal Audit on Initial Ethics and Compliance Risk Assessment
- Draft Hiring Plan and Hire the Chief Ethics Compliance Officer
- Conduct In-House Ethics and Compliance Training, through Several Vehicles, including the Ethics and Compliance Committee, the Management Offsite, and Direct Staff Interactions
- Draft Stand-alone Nonretaliation Policy and Investigation Policy

Strategic Plan 4.2 – Enterprise Risk Management

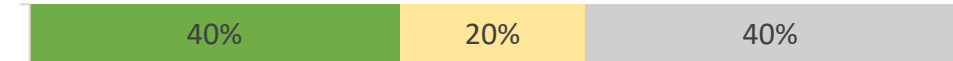


Implement a comprehensive enterprise risk management framework and structure to facilitate stronger organizational risk management

Overall Status
EXECUTION PHASE



Overall Objective Progress



■ Completed ■ In Progress ■ Pending Completion

Key Accomplishments

- Established an Enterprise Risk Management (ERM) Group

Key Activities

- Create and develop an ERM program foundation and framework
- Develop and define an ERM governance structure
- Hire an ERM consultant to advise and assist in the ERM implementation
- Conduct ERM Readiness and Risk Culture Assessment
- Provide risk awareness training program
- Conduct and develop a risk assessment and response process
- Implement risk reporting and monitoring

Goal 5: Fiscal Durability

Exercise care and prudence in managing our resources and fund assets

Objective	Progress	Current FY Budget	Executive Sponsor, Lead, Project Manager	Key Update	Highlights	Expected Completion
5.1 Develop organizational tools to support enterprise-wide fiscal responsibility	 On Track (Execution Phase)	\$0	Laura Guglielmo, Ricki Contreras, Cookie Jaranilla (PM), Penelope Rodriguez (PM)	Internal process and procurement policy being evaluated for efficiency.	The budget software, Questica, has been successfully integrated with eHR. Power BI is being leveraged to generate reports.	June 2028
5.2 Support the LACERA Investment Office in implementing and achieving the BOI's Strategic Plan goals	 On Track (Execution Phase)	\$0	Luis Lugo, Jon Grabel, Jude Perez	The Investment Staff Incentive Plan Program has been presented to the joint Boards and efforts to finalize the framework are underway.	An RFP will be conducted for a public/media relations consultant.	June 2027

Strategic Objective 5.1 – Fiscal Responsibility



Develop organizational tools to support enterprise-wide fiscal responsibility

Overall Status
EXECUTION PHASE



Overall Objective Progress



■ Completed ■ In Progress ■ Pending Completion

Key Accomplishments

- Implemented Accounts Payable (Certify) System
- Implemented a Budget Software (Questica) Solution
- Centralized a vendor management program
- Implemented a Travel and Expense Software (Certify)

Key Activities Underway

- Implement an Enterprise Contract Lifecycle Management (ECLM) Solution (Cobblestone)
- Provide staff with financial training
- Conduct an Enterprise Resource Planning (ERP) tool assessment

Strategic Objective 5.2 – Support the BOI’s Strategic Plan Goals



Support the LACERA Investment Office in implementing and achieving the BOI’s Strategic Plan Goals

Overall Status
EXECUTION PHASE



Overall Objective Progress



■ Completed ■ In Progress ■ Pending Completion

Key Accomplishments

- Approval of the Actuarial Funding Policy and Interest Crediting Policy for Reserves

Key Activities Underway

- Approval of the OPEB Prefunding Policy
- Conduct the classification and analysis of the LACERA Building
- Implement a plan to reclassify the LACERA Building
- Select a Media and Public Relations firm
- Implement an Investment Office Incentive Plan

Thank You!



Questions

FOR INFORMATION ONLY

December 29, 2025

TO: Each Trustee
Operations Oversight Committee

FROM: Cynthia Martinez *CM*
Chief of Communications

Erika Heru *EH*
Creative Coordinator

Sara Dubisz *SD*
Social Media Specialist

FOR: January 7, 2026, Operations Oversight Committee Meeting

SUBJECT: Social Media Plan – Key Highlights

We are pleased to submit a high-level overview of LACERA's Social Media Plan, developed by the Communications Division, for your review and information. This plan establishes a strategic foundation for our social media initiatives and outlines how we intend to use digital platforms to connect with our members and support LACERA's mission.

Social Media Plan Overview:

- **Objectives:** Increase awareness, build trust, enhance member services through targeted use of digital channels, and promote financial security.
- **Strategic Framework:** Focused on member acquisition, consistent messaging, active engagement, community building, and maintaining a positive organizational image.
- **Platform Strategy:** Utilizes the "5 Cs to Strengthen Engagement" to guide our presence and activity across platforms.
- **Branding:** Emphasizes a unified brand voice and consistent visual identity to foster trust and credibility in LACERA's online persona.
- **Content Strategy:** Built on key communication pillars to inform and engage members
- **Policy and Governance:** Our plan includes clear guidelines for responding to member inquiries and managing our social media presence responsibly.

We will report monthly social media metrics to track our progress, evaluate growth, and make data-driven decisions to continuously improve our approach. This information will be periodically featured in LACERA's CEO Report.

RE: Social Media Plan – Key Highlights
December 29, 2025
Page 2

- The complete Social Media Plan is attached for your reference.
- The Social Media Presentation is also attached for your reference.



LACERA SOCIAL MEDIA PLAN

Planning effective engagement across social platforms

Where We Started



Channels

LinkedIn, Facebook, and YouTube



Content

Posting 1-2x per week, using our Content Calendar, to develop our brand identity across platforms

Hire a Social Media Specialist

To help enhance our social media presence



Social Media Plan Where We're Going

Objectives



Raise Awareness

Educate members about benefits and services, improving awareness and understanding

Build Trust

Maintain open communication with members, posting relevant information and updates about LACERA

Improve member services through digital communication channels

Engage members actively through digital platforms to enhance communication and connection

Promote Financial Security and Stability

Provide investment updates, including our approach to corporate governance and stewardship



Strategic Framework

Strategic Goals



Acquisition Focus

Increase follower growth and expand awareness of official social media accounts effectively

Consistent Content

Maintain a steady flow of high-quality posts each month to keep members engaged and informed and maintain consistent branding

Active Engagement

Encourage active interaction with members to build strong communication channels

Positive Image Building

Strengthen trust in the organization's mission and services through positive social media presence

Community Cultivation

Create a welcoming environment fostering member participation and a sense of belonging

The Five Cs used to Strengthen Engagement

- **Channels:** Use each platform according to its strengths and audience
- **Content:** Tailor messaging to be clear, relevant, and accessible
- **Calendar:** Maintain a consistent posting schedule that aligns with member needs
- **Consistency:** Apply a unified tone, style, and branding across platforms
- **Community:** Foster two-way engagement by responding to member questions and feedback





Channels and Branding



Social Media Channels

LACERA's official social media accounts and handles (as of July 1, 2025)

Actively Posting

- Facebook: LACERA
- Instagram: @LACERA
- LinkedIn: LACERA
- YouTube: @LACERA2580

Not Actively Posting

- X (formerly Twitter): @MyLACERA





Branding

Consistent Brand Voice

LACERA uses plain and inclusive language to ensure clarity and accessibility for all members

Visual Brand Elements

The brand uses official logos and colors to maintain a recognizable and cohesive presence across platforms

Trust and Credibility

Adhering to tone, style, and visual standards reinforces credibility and fosters trust among the audience





Content Strategy

Content Pillars



Education

Events &
Webinars

Community

Health &
Wellness

Holidays &
Dates

Announcements

My LACERA

RHC

Safety in
Retirement

Technology

Investments




































Business
Ventures

Job Postings

ICYMI

Channel Snapshot



Content is Relevant	Demographic:	Early to Mid Career	Ready to Retire	Retirees & Survivors
Content is not Relevant				
Age		25-55	55+	60+
Content Pillars	Educational  			
	Community   			
	Events & Webinars   			
	Announcements   			
	Holidays & Important Dates   			
	My LACERA  			
	Health and Wellness  			
	ICYMI   			
	Job Postings 			
	Business Ventures   			
	Investments   			
	Retiree Healthcare 			
	Safety in Retirement   			
	Technology   			



Processes and Reporting

Approval Processes



Structured approval processes ensure professionalism and integrity in LACERA's social media communications

Internal Review Process

Communications team reviews all social media posts to ensure accuracy and alignment with organizational standards before publishing

Comment and Message Response Approval Process:

- Member related inquiry/concern > craft response and have MSC Manager review
- If general inquiry/concern > craft response that directs them online for the information > Division Supervisor and Manager to review
- Sensitive information is disclosed, or incident is out of our scope > escalate to Executive and Legal

Social Media Plan section 7: Policy & Governance

- Social media terms of use guidelines
- Staff guidelines



Analytics and Reporting

Keeping track of social media performance is vital to our growth and strategy

Analytics being tracked on a monthly basis:

- Follower counts
- Impressions/views
- Engagement (reactions, comments, shares)

Growth So Far (June to December)

Facebook 248 → 267 (+8%)

Instagram 44 → 75 (+70%)

YouTube 632 → 707 (+12%)

LinkedIn 3400 → 3881 (+14%)

Posting Frequency

Original Goal: 4-8x month/platform

Current Average Posts per Month: 13x month/platform





Promotion

Internal Promotion



Getting LACERA team members to follow us

Tentative Launch Date: January 14

Channels

- **Brown Bag Announcement**
- **All Staff Email:** Dedicated staff email promoting socials
- **LACERA Connect & 8th Floor Screen:** Banners promoting social media channels
- **Poster:** Promoting social media channels

Messaging Strategy

- Focus on company pride and staying connected
- Encourage engagement (like, comment, share)
- Spotlight staff posts for pride and visibility and include staff in more content for connection and engagement

External Promotion



Getting active and retired LACERA members to follow us

Tentative Launch Date: January 14

Channels

Phase 1

- **LACERA.gov:** Banners and social handles on site footer
- **Email:** Dedicated promotional emails with CTAs and social links
- **Newsletters:** Announcement article in newsletters accompanied with our social handles.
- **1st Floor Screen:** Banners promoting socials
- **LinkedIn:** Use existing following to promote Facebook and Instagram

Phase 2

- **Streamed Meetings:** “Follow us” banner and VOD descriptions on the streaming meeting placeholder
- **Video:** Update videos with logos, handles, in outros
- **My LACERA Portal:** Include links to all socials
- **New Hire Materials:** Follow us message in onboarding kits
- **Outreach Events:** Tabletop signs and trinket incentives for new followers
- **New Publications and Reprints:** Add social handles

Messaging Strategy

- Highlight member benefits: faster info, direct communication, exclusive retiree content
- Informative, straightforward, but with excitement about connecting



Q & A

Social Media Plan for LACERA

1. Executive Summary

This social media plan outlines LACERA's long-term strategy for enhancing engagement, transparency, and education around the pension system. It aligns with organizational priorities by raising awareness, building trust, and improving member services through digital communication channels. Social media provides a proactive way to reach members and beneficiaries, highlight calls to action that direct them to lacera.gov, and demonstrate how we are actively serving them.

The plan is comprehensive, addressing the following:

- Goals and strategies for growth and engagement
- Analytics and reporting
- Policy and governance
- Brand identity and voice
- Step-by-step guidance for implementation

While thorough, the plan is designed to remain flexible and adaptable as LACERA's social media presence grows, new tools are adopted, and we continue learning how members prefer to connect with us online.

The following are LACERA's official social media accounts and handles (as of July 1, 2025):

- Facebook: LACERA
- Instagram: LACERA
- LinkedIn: LACERA
- X (formerly Twitter): MyLACERA (currently inactive)

Oversight of these accounts rests with the Chief of Communications, who provides strategic direction and approval. The Social Media Coordinator manages daily content, monitoring, and security, supported by designated Communications staff.

2. Strategic Goals & Success Metrics

General Social Media Goals

The primary goal of LACERA's social media presence is to educate and inform members about benefits and retiree healthcare by providing timely, accessible, and engaging content. Social media is not intended to replace lacera.gov, which remains the official source of all member information. Instead, posts will serve as a supplemental resource, using brief text, graphics, and videos to highlight events and updates, while linking back to lacera.gov for full details.

Another critical function of social media is to drive calls to action. Whether encouraging members to visit lacera.gov, sign up for My LACERA, or attend an educational webinar, content decisions should reinforce these purposes.

The scope of this plan applies exclusively to the official use of LACERA's social media accounts. It does not regulate or restrict employees' personal use of social media, whether in the workplace or outside of it.

To achieve our primary goal to use social media as another channel to educate and inform members, this social media plan emphasizes five core priorities:

- **Acquisition** – increase follower growth and expand awareness of LACERA’s official accounts.
- **Consistent content** – maintain a steady posting rhythm with high-quality content each month.
- **Engagement** – actively reply to comments, answer questions, and build connections with members and peer agencies.
- **Positive image** – strengthen member trust in LACERA’s mission and services.
- **Cultivate community** – foster a welcoming environment where members feel informed, respected, and encouraged to participate.

Specific Social Media Goals

LACERA’s specific social media goals are focused on measurable growth and improved member engagement:

- Increase My LACERA registrations by setting an annual target and tracking conversions.
- Expand social media followers (target: +50% Facebook, +100% Instagram, +25% LinkedIn in year one; +15% annually thereafter). The higher first-year targets reflect the launch of LACERA’s formal social media strategy, while the lower annual targets anticipate steady growth once initial momentum has been achieved.
- Drive traffic to lacera.gov.
- Improve engagement rates on educational posts.
- Maintain a 100% response rate for relevant private and direct messages.
- Maintain consistent posting frequency across platforms (Facebook/Instagram: 15 posts per month, 20 stories per month; LinkedIn: 12 posts per month).
- Refine goals over time as more social media data becomes available.

The following table summarizes these goals and the key metrics that will be used to measure success.

Strategic Goal	Key Metrics
Increase My LACERA registrations by a defined annual target	<ul style="list-style-type: none"> - Click-through rate (CTR) - Annual registration data - Conversion-driving content analysis
Expand social media followers (50% Facebook, 100% Instagram, 25% LinkedIn in Year 1, then 15% annually)	<ul style="list-style-type: none"> - Follower growth by platform - Annual % growth vs. targets
Drive more traffic to lacera.gov	<ul style="list-style-type: none"> - Linktree referral data - Story swipe-ups (Hootsuite) - Monthly traffic reports
Improve engagement rates on educational posts	<ul style="list-style-type: none"> - Engagement rate (likes, comments, shares) - CTR on educational content
Maintain a 100% response rate for relevant private and direct messages	<ul style="list-style-type: none"> - % of messages responded to within 24–48 hours
Maintain consistent posting frequency across platforms <ul style="list-style-type: none"> • Facebook/Instagram: 15 posts per month, 20 stories per month • LinkedIn: 12 posts per month 	<ul style="list-style-type: none"> - Monthly posting benchmarks - Tracking consistency against platform targets
Adapt goals as more data is collected	<ul style="list-style-type: none"> - Quarterly review of analytics - Updated targets based on performance

3. Audience Analysis

LACERA’s audience is made up almost entirely of LACERA members. These members fall into four categories: Early to Mid-Career, Pre-Retirement, Ready to Retire, and Retirees/Survivors.

Based on demographic data:

- Members aged 40-65 account for more than half (51%) of the total membership.
- Within this group, those aged 50–64 make up more than 31%.
- [Research](#) shows that 69% of people aged 50–64 and 40% of people aged 65+ use at least one social media platform.

These numbers demonstrate that a large portion of LACERA's members are already digitally engaged through My LACERA and email. This indicates a ready-made audience of active and retired members prepared to transition to social media communication.

To better target messaging and platform use, LACERA has defined its audience into a primary demographic and sub-demographics by career stage and age range. This framework helps ensure that social media content is relevant, accessible, and responsive to the needs of different member groups.

Main Demographic: Los Angeles County employees, retirees, and beneficiaries/survivors ages 25–65+

Sub-Demographic:

- Early to Mid-Career
 - Age: 25-55
 - Primary platforms: Instagram, Facebook
- Pre-Retirement and Ready to Retire
 - Age: 55+
 - Primary platform: Facebook
- Retirees and Survivors
 - Age: 60+
 - Primary platform: Facebook

4. Content Strategy

LACERA's Social Media Motto: *LACERA's social media content aims to educate, inform, and inspire trust and confidence in the members we serve.*

High-Level Priorities when Creating Content

All social media content must reflect and reinforce LACERA's mission, vision, and values. These guiding principles ensure that every post communicates with clarity, consistency, and respect for the members we serve. They also provide a framework for decision-making, helping LACERA team members determine not only what to post but how to communicate it in a way that builds trust and credibility.

- Mission, Vision, Values
 - Mission: To produce, provide, and protect the promised benefit
 - Vision: Empowering our members to enjoy a healthy and secure retirement
 - Values: I ACT Values will be at the core of our social media strategy
- I ACT Values and how we apply them to our social media strategy
 - **Integrity:** we will ensure that everything we post is verified, accurate, and serves our members.
 - **Inclusivity:** ADA accessibility and the diversity of our members will always be considered when making and posting content.
 - **Innovation:** we will seek new ways to reach our members in terms of platforms, content types, and messaging strategies.
 - **Accountability:** if we ever make a mistake or information changes, we will promptly correct it in a public post.

- **Collaboration:** we will work with our members and other government organizations and post community-relevant content (e.g., What is LACERA and its members doing for their L.A. County communities?).
- **Transparency:** if any changes are made in the organization that affect our members, we will inform them in a professional, timely manner.

Content Pillars

All of LACERA's social media content will fall into content pillars. These pillars may change and adapt as our channels grow and new content needs emerge. The following outlines the pillars by topic:

By Topic

Content Relevance by Demographic

To maximize effectiveness, each pillar is mapped to the member groups most likely to benefit. This ensures resources are used efficiently and content stays relevant across career stages and retirement groups. The following table maps content pillars to the primary demographics they serve, helping guide where to focus efforts and where content may be less relevant. This framework also supports more efficient resource use, ensuring that content creation is aligned with member needs.

Content is Relevant				
Content is not Relevant	Demographic:	Early to Mid Career	Ready to Retire	Retirees & Survivors
Age		25-55	60+	60+
Content Pillars	Educational			
	Community			
	Events & Webinars			
	Announcements			
	Holidays & Important Dates			
	My LACERA			
	Health & Wellness			
	ICYMI			
	Job Postings			
	Business Ventures			
	Investments			
	Retiree Healthcare			
	Safety in Retirement			
	Technology			

Just as content pillars guide *what* LACERA shares, platform strategies determine *where* that content will have the greatest impact. Each platform reaches members at different stages of their careers and retirements, so aligning content with the right channel ensures maximum relevance and visibility. The following outlines the pillars by platform:

By Platform

Facebook

Education, Events & Webinars, Community, Wellness in Retirement, Holidays & Important Dates, Retiree Healthcare, Safety in Retirement, Retirement & Technology, ICYMI

Instagram

Education, Events & Webinars, Community, Holidays & Important Dates, ICYMI

LinkedIn

Events & Webinars, Community, Holidays & Important Dates, Business Ventures, ICYMI, Job Postings

Content Calendar

The content calendar's purpose is to keep LACERA's social media content organized, accounted for, and up to date. Each platform will have an individualized calendar, and each calendar will contain every piece of content that is to be posted. It will also include a link to the copy, the names of the individual(s) working on the content, and its status. The content calendar should be filled out at least one month in advance (e.g., August's calendar should be filled out by early July).

Currently the content calendar lives on Excel but will soon move to Hootsuite (as of July 30, 2025).

Content Types

With the calendar as the foundation for scheduling, the next step is identifying the types of content that will be shared. The most common type of content that will be posted on LACERA's social media channels is a banner (or graphic/image) with a caption that may include a link.

We want to focus on posting more video content, particularly short-form vertical videos. We will start with taking existing LACERA videos, including meeting video on demand (VOD) recordings, and creating highlight clips to post.

Other types of content that we will use include stories and story highlights (IG), carousels, and infographics.

Eventually we want to incorporate social media livestreams with member service specialists to answer questions (both FAQs and questions asked during the livestream). Making this a monthly occurrence could help strengthen member trust in LACERA and our Member Services team.

Specific Social Media Tactics

Beyond selecting content formats, LACERA will apply consistent posting practices to ensure quality and clarity across all platforms.

- Clear ideas for the purpose of each post
 - LACERA social media posts should aim to educate and inform
 - Hashtags, calls to action, media, reposts from other accounts
- Accounts have regular posts, so they do not look abandoned

- All media within a post must be high quality to ensure LACERA maintains a professional and competent persona
- Long-term and short-term goals of the Boards and Executive Office
 - As the boards and executive office present us with ideas, we will work to fit them into our social media strategy
- Content to avoid:
 - Humorous or comedic posts including memes, April Fool's Day, and any jokes about LACERA and/or its members.

User-Generated Content

In addition to planned content, member voices play a role in shaping LACERA's social media presence. User-generated content (UGC) typically refers to content created wholly by a user or follower of a social media page. For LACERA, it is unlikely that a member will create content that we can repost; however, it is important to share member stories. LACERA UGC will involve collecting members' stories about their retirement journeys or experiences with LACERA and creating original content from their words and, when possible, their photos or videos. We must have permission from the member before posting their story, name, photo, or video on social media.

Trustee Content

While most content focuses on serving members, trustee-related posts also play an important role in reinforcing transparency and accountability in governance. These highlight leadership milestones, elections, and committee work that directly impact LACERA's members.

- **Social Media Calendar**
 - **Board Elections:** Include posts regarding the importance of Board Elections. Possibly relate these posts to the recently approved Powers and Duties.
 - **New Trustee Introduction:** Prepare and hold posts introducing new trustees until confirmation from Luis.
 - **Milestone-Based Approach:** Develop a social media campaign that introduces *new* Chairs for each Board, followed by Vice Chairs and Secretaries. Then, focus on committees by educating the public on their roles and introducing committee members
 - **Trustee Highlights:** Highlight trustees based on milestones such as major years of service, new trustee introductions, career milestones, and recognition milestones.
- **Election Education**
 - **Outreach Calendar:** Begin building an election outreach calendar that ties into the social media calendar. Include elements like the recent passing of the Powers and Duties.
- **Approval and Feedback**
 - **Review and Update:** Review the current social media calendar and update it to reflect the milestone-based approach and election education plan.
 - **Feedback:** Share thoughts and identify any major barriers to implementing the proposed plans.
- **Calendar Submission:** Submit the updated social media calendar and election outreach calendar for review and approval.

5. Platform Strategy

Overview

It is crucial to meet our audience on the channels they most often use. Each social media platform communicates information differently, and LACERA can use these spaces to engage with members in a

more inclusive, efficient, and timely way. Social media also enables more personal interactions, allowing LACERA to take an active role in educating and supporting members.

As outlined in Section 4, Content Strategy, Systems Division data show that members aged 40–65 make up a significant portion of our population and are already active digital users. Their strong participation in My LACERA and consistent engagement through email highlight both their comfort with online tools and their readiness to adopt new communication channels. This positions social media as a natural next step for connection.

General Strategy

Building on this foundation, LACERA's approach emphasizes the "five Cs" of social media to strengthen engagement with members:

- **Channels:** Use each platform according to its strengths and audience.
- **Content:** Tailor messaging to be clear, relevant, and accessible.
- **Calendar:** Maintain a consistent posting schedule that aligns with member needs.
- **Consistency:** Apply a unified tone, style, and branding across platforms.
- **Community:** Foster two-way engagement by responding to member questions and feedback.

Ultimately, the greatest benefit of social media is its ability to drive calls to action by encouraging members to visit lacera.gov, stay informed about their retirement, and build confidence in LACERA's service. This guiding purpose links the five Cs to each platform-specific strategy that follows.

Channels

Facebook

Primary Audience: Pre-retirement and Retirees

Content Pillars: Educational, Community, Events & Webinars, Holidays & Important Dates, Wellness in Retirement, ICYMI, Retiree Healthcare, Safety in Retirement, Retirement & Technology

Types of Content: graphics, short videos, stories

Posting Frequency Goal: 15 posts a month, 20 stories a month

Pinned Posts: Pinning important posts to the top of our page can help members find the most pertinent information first when visiting our page

Instagram

Primary Audience: New hires and early-career employees

Content Pillars: Educational, Community, Events & Webinars, Holidays & Important Dates, ICYMI

Types of Content: graphics, carousels, short videos, stories

Posting Frequency Goal: 15 posts a month, 20 stories a month

Sharing Posts to our Story: For important posts and posts that will be saved to story highlights, we will add them to our story after posting.

Story Highlights: We will use Instagram story highlights to keep important pieces of content and content series like LACERA Speak in an easily accessible place at the top of our account page.

Pinned Posts: Pinning important posts to the top of our page can help members find the most pertinent information first when visiting our page

Instagram/Facebook Crossover

Facebook and Instagram will have the most crossover between platforms with Facebook having a greater emphasis on retiree content and Instagram having a greater emphasis on content geared toward new hires and early career employees.

Stories: Stories will be posted to Instagram story via mobile and automatically shared to FB story to keep content and look consistent

Banners/Graphics: Any banners created for Facebook will be resized for Instagram.

For some posts like Member Spotlights and LACERA Speak, the banner will be divided into multiple images to create a carousel post.

LinkedIn

Primary Audience: LACERA employees, LACERA members, businesspeople interested in LACERA's investments and business development

Content Pillars: Community, Events & Webinars, Holidays & Important Dates, ICYMI, Job Postings, Business Ventures

Types of Content: graphics, short videos, reposts, text-only

Posting Frequency Goal: 12 posts a month

Other Platforms

YouTube: Educational videos, livestreamed meetings and VODs, YouTube Shorts (vertical short-form videos)

X/Threads (for future use): Announcements, quick tips, event reminders

Email: Applicable staff members will include LACERA social media handles in their email signatures

As part of our long-term approach, LACERA will reserve account handles on emerging platforms to protect our identity and evaluate whether new spaces align with member demographics before committing resources. In addition, each platform will have an exit strategy: if a platform becomes obsolete, accounts will be archived, reasons for closure documented, and handles retained to prevent misuse. See Section 8, Policy & Governance, for more details about archiving accounts.

6. Analytics & Reporting

Analyzing data regarding LACERA's social media performance will be key in optimizing our strategy and tailoring our content to our members. Analytics must be tracked on a frequent basis so that we can make decisions based on our findings.

Measurement and Review of Account Analytics

A spreadsheet of social media metrics will be updated monthly to measure our reach, engagement, growth, and number of posts.

Once the platform has been acquired, we will utilize Hootsuite for more specific data regarding LACERA's social media performance which will help us make data-driven decisions for our social media plan going forward.

In addition to Hootsuite, we can also utilize insights provided by each platform to get more granular data when needed.

We will also create a quarterly review of social media analytics to get a bigger picture of how our social media accounts are performing. Findings from monthly and quarterly reviews will directly inform

adjustments to posting frequency, content type, and targeting to ensure ongoing alignment with member needs.

What constitutes a successful social media post?

Good engagement can be measured in terms of the most important Key Performance Indicators (KPIs): likes, shares, comments, and reposts. It is important to distinguish positive comments from negative comments. A social media post can have lots of engagement but for the wrong reasons, typically resulting in a post with few likes but many comments. We must understand that numbers will never tell the whole story when analyzing performance— sentiment must also be considered.

7. Policy & Governance

LACERA's mission is to produce, protect, and provide the promised benefits to our members. In support of this mission, our social media presence serves as an additional channel to inform members about benefits and retiree healthcare. Social media also allows LACERA to communicate proactively with members and beneficiaries, highlight calls to action that direct them to lacera.gov, and demonstrate how we are actively serving them, strengthening member confidence in our organization.

The following policies ensure LACERA's official social media accounts remain secure, legally compliant, and aligned with our role as a trusted public agency. By following these standards, staff help protect LACERA's reputation, safeguard member information, and reinforce public trust. This policy applies exclusively to official LACERA social media accounts and activities. It does not regulate or restrict employees' personal use of social media, whether in the workplace or outside of it.

Guidelines for Staff Engagement with LACERA Social Media

The following guidance applies to employees who voluntarily choose to engage with LACERA's social media content from their personal accounts. This guidance does not regulate personal social media use, but provides guardrails to protect staff, members, and the organization, and complements the LACERA Employee Code of Ethical Conduct.

LACERA encourages staff to engage with our official social media channels to help share our mission and connect with the community. Participation is entirely voluntary. There is no expectation that employees follow, comment on, or share LACERA content from personal accounts.

If you choose to engage with LACERA content from a personal account, please keep the following principles in mind:

- **Employees may not speak on behalf of LACERA** unless they have explicit authorization to do so. This includes responding to negative comments and feedback. If referencing their employment with LACERA, staff should clearly state that opinions expressed are their own and do not represent LACERA.
- **Confidentiality must always be protected.** Employees may not share internal information, member data, non-public operational details, or any information not already publicly released by LACERA.
- **Professionalism is required at all times.** Personal posts and interactions should reflect the integrity expected of a public agency employee. Content that could harm LACERA's reputation, imply organizational bias, or suggest LACERA's position on legislation, candidates, or political matters is not permitted.
- **Employees should not respond to media inquiries** received through personal social media accounts. Any such inquiries must be referred to the Chief Executive Officer to ensure accurate, consistent, and authorized messaging.

These staff engagement guidelines are intended to supplement, not replace, existing expectations outlined in the LACERA Employee Code of Ethical Conduct and other applicable policies.

Approved Social Media Accounts

1. LACERA's Social Media Coordinator and staff designated by the Chief of Communications shall maintain official accounts for LACERA on the following platforms (as of July 1, 2025):
 - a. Facebook: LACERA
 - b. Instagram: LACERA
 - c. LinkedIn: LACERA
 - d. X: MyLACERA (currently inactive)

Key Components to Consider

2. Password Management
 - a. Passwords should be at least 10 characters containing lowercase and uppercase letters, numbers, and special characters
 - b. Passwords should be changed on a regular basis to preserve the security of accounts
 - c. Passwords must be changed anytime an administrator of social media accounts leaves the company or has a change in responsibility related to social media access
3. Account Administrators
 - a. Communications
 - b. Human Resources
4. Social Media Platforms
 - a. Facebook, Instagram, LinkedIn, X (currently inactive), YouTube (as of July 1, 2025)
 - b. We will continue to create accounts to reserve our LACERA handle as new, popular social media platforms emerge. We will research and consider whether these new platforms engage with our demographics before creating and implementing a strategy
5. Platform Exit Strategy
 - a. How a profile should be abandoned or deleted based on LACERA's needs or the termination of the social media platform (e.g., MySpace)
 - i. Document reasons for termination of account
 - b. Archive all posts
 - c. If applicable, notify current users of other platforms on which LACERA is active
 - d. If applicable, deactivate the profile but keep the LACERA handle to ensure no other entities can use it (to impersonate or otherwise)

Roles and Responsibilities

6. Account Creation: New social media accounts shall be authorized by the Chief of Communications and Executives. A [master list](#) of accounts shall be maintained by the Social Media Coordinator.
7. Management Oversight: The Social Media Coordinator shall be responsible for content, use, and regular monitoring of LACERA's social media accounts to ensure their appropriate usage.
8. Social Media Coordinator's Role and Responsibilities: The Social Media Coordinator is responsible for:
 - a. Administering LACERA's social media accounts, including developing and maintaining program goals, strategies, and guidelines
 - b. Monitoring changes to the terms of service and procedures to ensure that accounts follow all appropriate laws, including Administrative Regulations, and LACERA's policies
 - c. Creating accurate, timely, and engaging content
 - d. Providing training regarding social media activities as needed
 - e. Keeping the passwords for any LACERA social media accounts and providing the login and password information for all such accounts to the Member Services Director

- f. Deactivating social media sites or accounts, as necessary, under the direction of the Chief of Communications or their designee
9. The Chief of Communications and Creative Coordinator are responsible for reviewing and approving all program goals, strategies, guidelines, and procedures to ensure the accounts follow all laws, including Administrative Regulations, and LACERA's policies.

Terms of Service

Social media sites are third-party platforms, which have terms of service and policies that are not governed by LACERA.

10. Public Records Act: Social media accounts and their content created by and for LACERA are subject to the California Public Records Act.
11. Security: Passwords for social media accounts shall be created based on standard complexity requirements, using uppercase and lowercase letters, numbers, and special characters. Credentials for LACERA's social media accounts shall be protected and limited to authorized personnel. In the event an account is compromised, the Social Media Coordinator shall immediately change the password(s) and notify the Chief of Communications who will work with the Information Security Division and Systems to restore security. The Executives will also be notified.
 - a. The public shall have the ability to contact LACERA through LACERA's website. Individual LACERA employee names, titles, direct phone numbers, and contact information shall not be made publicly available except as part of a special announcement or upon unique circumstances, as approved by the Chief of Communications
12. Confidential Information: Posting of confidential or other proprietary information, as is defined by LACERA policies, created by the public or LACERA's staff on social media sites is prohibited. The Social Media Coordinator shall monitor LACERA's social media accounts, remove any prohibited information found, and inform the Chief of Communications who will determine the proper course of action.
13. Intellectual Property: Staff must comply with all laws and LACERA policies related to intellectual property, including copyright and trademark laws regarding posting electronic media to social media websites and providing attributions for third party content.
14. User Disclaimer and Terms of Agreement: Each LACERA social media account shall contain a link to LACERA's Website Privacy Statement when possible. This document contains information regarding general use of social media websites, monitoring, content removal, governing law, and disclaimers by LACERA.

Terms of Use

15. Social Media Terms of Use

Your use of any portion of LACERA social media websites is subject to the following terms and conditions. LACERA does not endorse or take responsibility for content posted by third parties on LACERA Social Media sites. LACERA social media websites are not open forums but are instead limited public forums, and as such LACERA reserves the right to restrict or remove any content that is deemed in violation of this policy or any applicable law.

a. Content Restrictions

All LACERA social media content is subject to monitoring. User-generated posts and comments shall be rejected or removed when the content:

- Contains obscenities or offensive terms
- Contains hate speech
- Is threatening, harassing, or discriminatory
- Solicits commerce
- Contains personally identifiable, confidential, or sensitive information
- Includes personal attacks

- Incites or promotes violence or illegal activities
- Contains information that could compromise public safety
- Advertises or promotes a commercial product or service, or any entity or individual
- Infringes on certain copyright material
- Promotes or endorses political campaigns or candidates
- Is off-subject or out of context
- Is otherwise illegal or violates LACERA's policies or the Los Angeles County Administrative Code

b. Comments by Others Are Not Endorsed

We don't endorse, support, sanction, encourage, verify, or agree with the comments, opinions, or statements posted on any of our social media websites. Any information or material placed online, including advice and opinions, are the views and responsibility of those persons making the comments and don't necessarily represent the views of LACERA or our third-party service providers. By submitting a comment for posting, you agree that LACERA and our third-party service providers are not responsible, and shall have no liability to you, with respect to any information or materials posted by others.

c. Editing & Deletions

We reserve the right to review, edit, move, or delete any material submitted as a comment to the information provided for display or placed on any of our social media websites, in our sole discretion and without notice.

d. Making Comments

We ask that when engaging with LACERA social media accounts, you adhere to our [IACT Values](#) of Integrity, Inclusivity, Innovation, Accountability, Collaboration, and Transparency in your commentary. We encourage active discussions on our social media websites but prohibit comments that go against our Content Restrictions. Any such comments will be removed.

e. Member Inquiries

LACERA's social media sites are not intended to be used for member inquiries. We will remove any user-generated comments that include personal information (e.g., phone numbers, email or postal addresses, or any member account information).

Please [Contact Us](#) if you have a member account inquiry.

f. Voluntary Use

Using and following LACERA social media websites is voluntary. You may unsubscribe or unfollow through third-party service providers of LACERA social media websites at any time.

Social media users participate at their own risk and are solely responsible for their comments, username, and any information they provide.

g. Submissions

You grant LACERA a perpetual, nonexclusive, worldwide, royalty free, sub-licensable license to your submissions. This includes, without limitation, the right for LACERA or any third-party it designates, to use, copy, transmit, excerpt, publish, distribute, publicly display, publicly perform, create derivative works of, host, index, cache, tag, encode, modify, and adapt in any form or media now known or developed hereinafter, for any submission posted by you on or to LACERA social media websites or any other website owned by LACERA, including any submission posted through a third-party service provider.

You are solely responsible for the content of your submissions. We reserve the right to delete, move, or edit submissions that, in our sole discretion, we deem abusive, defamatory, obscene, in violation of copyright or trademark laws, or are otherwise unacceptable.

the public's trust, the Social Media Coordinator shall monitor LACERA's social media accounts on a regular basis to ensure that:

- a. Postings do not disparage LACERA, plan sponsors, members, beneficiaries, retirees, Board Members, Independent Non-Board Members, or staff
 - b. Postings do not use ethnic slurs, personal insults, obscenities, or engage in any conduct that would not be acceptable in the LACERA workplace
 - c. Questions from the media are referred to LACERA's PR contact at EKA Consulting
 - d. Responses are made in a respectful manner and are factually correct
 - e. Political positions are not posted
 - f. Posts do not endorse or disparage products, services, entities, or candidates
 - g. Copyright, fair use, and financial disclosure laws are respected
 - h. Errors made in posts are promptly corrected and acknowledged
 - i. Posts are not deleted unless they violate the content restrictions
 - j. Personal business is not conducted via a social media website or account
 - k. Personal opinions are not posted on behalf of LACERA
 - l. Only electronic media that reflects LACERA's standards of ethical behavior is posted
17. LACERA does not endorse or take responsibility for content posted by third parties on LACERA Social Media sites. LACERA reserves the right to restrict or remove any content that is deemed in violation of this policy or any applicable law.
18. Content Restrictions: The following statement of content shall be included in LACERA's social media accounts, when possible:

All LACERA social media content is subject to monitoring. User-generated posts and comments shall be rejected or removed when the content:

- Contains obscenities or offensive terms
- Contains hate speech
- Is threatening, harassing, or discriminatory
- Solicits commerce
- Contains personally identifiable, confidential, or sensitive information
- Includes personal attacks
- Incites or promotes violence or illegal activities
- Contains information that could compromise public safety
- Advertises or promotes a commercial product or service, or any entity or individual
- Infringes on certain copyright material
- Promotes or endorses political campaigns or candidates
- Is off-subject or out of context
- Is otherwise illegal or violates LACERA's policies or the Los Angeles County Administrative Code

19. Style and Branding: Social media accounts should be consistently branded to communicate a clear association with LACERA. Style and branding considerations include, where possible:

- a. A site name that includes "LACERA"
- b. Link(s) to the official lacera.gov web page
- c. The official LACERA logo incorporated prominently into the site profile
- d. Use of LACERA's official color scheme

See more about LACERA's style and branding in Section 9, Brand Identity & Voice.

Site/Account Specific Policies

20. Facebook

- a. LACERA's primary Facebook page is: <https://www.facebook.com/officiallacera/>
- b. Privacy/Security Settings: The Social Media Coordinator shall adjust the settings on the Manage Permissions section of the page, as appropriate
- c. Posting: LACERA's members, retirees, beneficiaries, and the general public are encouraged to post comments on LACERA's Facebook page
- d. Deletions: LACERA may delete any comments posted on the LACERA Facebook page,

in accordance with this internal policy

21. Instagram

- a. LACERA's primary Instagram account is @LACERA <https://www.instagram.com/lacera>
- b. Privacy/Security Settings: The Social Media Coordinator shall adjust the settings on the Manage Permissions section of the page, as appropriate
- c. Posting: LACERA's members and the general public are allowed to and encouraged to post comments on LACERA's Instagram page. All posts by the Social Media Coordinator shall be approved by the Chief of Communications or their designee before posting
- d. Hashtags: Appropriate, relevant hashtags may be added to posts to increase visibility. Avoid hashtags related to L.A. County and L.A. County jobs as careers at LACERA are not technically L.A. County jobs
- e. Deletions: LACERA may delete any comments posted on LACERA's Instagram page, in accordance with this internal policy

22. Facebook/Instagram Crossover

- a. LACERA's Facebook and Instagram account are connected and integrated via META Business Suite (MBS)
 - i. We can use MBS to view and reply to direct messages on both platforms
- b. Stories posted to Instagram will be shared to Facebook simultaneously
 - i. See Section 5, Platform Strategy, for more about stories
- c. Tags: Any post that LACERA is tagged in will be reviewed first before being shown on our page. Irrelevant tags will be deleted.

23. LinkedIn

- a. LACERA's LinkedIn account is public and can be found at www.linkedin.com/company/LACERA
- b. Privacy/Security Settings: The Social Media Coordinator shall adjust the settings on the "Manage Permissions" section of the page, as appropriate
- c. Posting: LACERA's members and the general public are allowed to and encouraged to post comments on LACERA's LinkedIn page. All posts by the Social Media Coordinator shall be approved by the Chief of Communications or their designee before posting
- d. Hashtags: Appropriate, relevant hashtags may be added to posts to increase visibility. Avoid hashtags related to L.A. County and L.A. County jobs as careers at LACERA are not technically L.A. County jobs. This will be the policy for all posts, not just posts that relate to jobs and careers at LACERA.
- e. Deletions: LACERA may delete any comments posted on LACERA's LinkedIn page, in accordance with this internal policy
- f. Reposting Staff and Trustee Accomplishments and Accolades
 - i. LACERA believes in recognizing and celebrating our staff and trustees as they reach new levels of professional development, are recognized for outstanding achievements, or are promoted to a new position. Promoting these achievements helps show our members and the public that the people serving them are qualified and held in high regard in their respective industries or are caring and dedicated public servants doing work consistent with our Mission, Vision, and Values.
 - ii. Staff: We will post/share/like when a staff member has been promoted, added to a board, received an award or some sort of certification, and/or done something extraordinary that is in line with our Mission, Vision, or Values.
 - iii. Trustees: LACERA will generally promote Trustee engagements when speaking directly on behalf of LACERA, when appointed to a board, or receiving some sort of award. Potential posts or likes should be cleared with the Executive Office and the relative organizational leadership responsible for the event (e.g., Investments: Luis, JJ, Jon, Jude; Medical/Health: Luis, JJ, Cassandra, etc.; Administrative: Luis, Laura, and the appropriate division manager) before posting.
 - iv. Justification: Trustees can operate independently of LACERA and often do. They do so in their personal or non-LACERA capacities and generally do not collaborate, consult, or receive directions from LACERA. As such, when they are fulfilling speaking engagements, they are not specifically speaking on LACERA's

behalf, and therefore it is not appropriate for LACERA to promote the engagement. However, upon approval from the appropriate Executive Office and responsible leadership we may make an exception.

24. X (formerly Twitter) Note: LACERA's X account is not currently in use. LACERA may integrate Threads as an alternative to X, in which case these rules will apply to that platform instead.
- LACERA's X (formerly known as Twitter) account is @MyLACERA, and the X account is located at <https://x.com/MyLACERA>
 - Account: The account is public and can be viewed by the public at any time. LACERA shall only have one X account
 - Posts: All posts made via LACERA's official X account must be official, not personal
 - Reposting: Reposting shall be limited to relevant industry information and/or information from appropriate, reliable sources, such as other government agencies
 - Replying: The Social Media Coordinator may reply to others' posts directed to LACERA's X account as appropriate and with the Chief of Communications or their designee's prior approval
 - Deletions: LACERA may delete any comments posted on LACERA's X feed, in accordance with this internal policy
25. Following: At the Social Media Coordinator's and/or Chief of Communication's discretion, LACERA may follow other government agencies, LACERA's partners, plan sponsors, the media, relevant non-profits, and financial industry accounts

Social Media Mistakes

Even with several channels of creation and review, it is possible that content containing a mistake could still go out.

What to do if this happens:

- Identify the mistake
 - The mistake may be caught by the social media coordinator, internal staff, or by an audience member
- Assess the severity of the mistake
 - Mistakes can range from small typos in the caption to big oversights in imagery (e.g., putting out an image that does not reflect our values) to spreading misinformation
- Take proper measures to correct the mistake
 - For small, easily corrected mistakes like typos in the caption, edit the post to correct
 - If there is a typo or incorrect information on the banner, remove the post and repost once the banner has been corrected
 - For bigger errors like misinformation, the post must be corrected ASAP
 - If it has not been live for long, remove immediately then post the corrected version
 - If it has been live long enough for many audience members to see it, we must reference and address the mistake in the new, corrected post

9. Brand Identity & Voice

Tone and Voice of Accounts

We are accountable to our members, various stakeholders, and the public. In line with our goals, our voice in all social media materials should be **professional, inclusive, and helpful**. Tone should be appropriate to the topic at hand and should always convey LACERA as an organization that is **trustworthy, informative, and supportive**.

To help create content that is clear, useful, and accessible, keep the following in mind:

- Before writing, be able to answer: What purpose does this serve? Who is going to read it? What

exactly do they need to know?

- Present your message in a straightforward, organized manner appropriate to the medium, in line with plain language guidelines.
- Member materials: Whenever possible, speak directly to members in the second person (“you”), using plain language and a friendly tone.
- Communicate in a manner that takes into account our diverse audience, which spans multiple generations, ethnicities, identities, education levels, and economic backgrounds. See Inclusive Language below for more details.
- Focus on providing helpful, relevant, and engaging information to members
- All posts, captions, comments, and private messages are to be produced with a member-first mentality
- Avoid humor. We’re centered around providing very important information that can affect the livelihood of LACERA members. Any communication about news, benefits, meetings, changes to plans, etc., should be presented in a serious tone. Everything else *can* be more lighthearted, such as community spotlights and holidays, but we should not ever try to be funny as this can misconstrue our intentions as a serious organization
- Be thoughtful with the engagement of comments:
 - Members’ comments directed at LACERA should be replied to with as much care as possible
 - Negative comments and critiques should be addressed from a place of empathy and understanding
 - If a member misrepresents LACERA or presents incorrect information about LACERA in a comment, the response must carefully correct the information without chastising the commenter
 - More details about responding to comments can be found in the [Social Media Processes](#) document

Plain Language

The Plain Writing Act of 2010 requires federal agencies to use clear communication that the public can understand and use. While plain language is not specifically required by law in California, it is nonetheless part of LACERA’s obligation as a public agency.

As relates to communications with our members, following plain language guidelines in our communications is directly linked to providing good service, as it **aids comprehension and retention, reduces reading time, facilitates better search results, and improves the user experience**—translating to fewer calls for explanations, fewer errors on forms, savings in personnel time and resources, and better overall satisfaction.

Utilizing plain language is also extremely important in providing **accessibility** and **inclusivity**. Having clear and unambiguous content facilitates interaction with assistive devices and enhances understanding for those with limited English skills. In addition, clear and straightforward language improves the accuracy of translated content on lacera.gov through our website plug-in.

Basic principles of plain language include:

- Writing in a conversational tone and addressing the user (use “you”)
- Using the active voice, meaning the subject performs the action. (Passive voice is acceptable if you are unsure of who is performing the action.)
 - Active: *The CEO wrote an email to members.*
 - Passive: *An email was sent to members.*
- Avoiding jargon

- Writing in inverted pyramid style, meaning the most important information is presented first, followed by supporting details
- Structuring content and formatting to aid scanning (e.g., using short paragraphs, limiting hashtags, and keeping space between sections)
- As much as possible, distilling information, avoiding unnecessary detail, and writing it in a way that is understandable on the first read, recognizing that LACERA information can be complex

The Plain Language Action and Information Network (PLAIN) has an excellent website further explaining the benefits of plain language, with guidelines and helpful, relevant examples:

[Federal plain language guidelines | plainlanguage.gov.](https://www.plainlanguage.gov/)

The guidelines can be downloaded at: <https://www.plainlanguage.gov/media/FederalPLGuidelines.pdf>

Inclusive Language

At LACERA we recognize the rights and dignity of all individuals, regardless of age, disability, identity, gender, sexual orientation, race, ethnicity, or socioeconomic status. As part of promoting our value that everyone deserves fair, respectful treatment and service, we mindfully use bias-free, accessible language in our communications and include representative imagery to create trust and encourage engagement with LACERA.

Visual Identity

As with any organization, it is important for LACERA to create an identity through brand colors and styles. Our goal for all content is for members to identify content as LACERA's with or without seeing the logo.

Image Guidelines

When using images in content, whether internal or stock, we must be mindful of how the image may be perceived by our members. Aspects to consider include:

- Diversity, Inclusion, and Demographics: Does the image represent our members? Can our members relate to the image? Are we utilizing images that speak to different parts of our audience?
- Clear Messaging: Does the image clearly communicate the topic of the post?
- Clear Visuals: Can the image be clearly viewed and are its contents easily understandable?

Branding Color Guide

The colors used in our imaging and graphics should be drawn from the Branding Color Guide found below. When using these colors we must consider:

- Is the graphic easily readable?
- Are colors clashing?
- Are colors unintentionally related to an irrelevant topic? (e.g., did we accidentally represent a country's flag in a design?)



Deep Sea
CMYK 100, 45, 0, 60
RGB 0, 57, 101
HEX 003965
PMS 2955



Golden Sunburst
CMYK 0, 41, 93, 0
RGB 250, 165, 45
HEX f0a52d



Sky Blue
CMYK 51, 0, 0, 0
RGB 107, 207, 246
HEX 6bcfff

The primary color palette consists of three vibrant and impactful colors that represent our brand identity. These colors should be used consistently across all brand materials to maintain a cohesive and recognizable brand presence.

In addition to the primary colors, the following secondary colors can be used to complement the brand palette. These secondary colors have been thoughtfully chosen to complement our primary colors and add depth and versatility to our brand identity.



Sand Dune
CMYK 25, 27, 29, 0
RGB 193, 178, 171
HEX c1b2ab



Zest Green
CMYK 45, 15, 100, 0
RGB 156, 179, 59
HEX 9cb33b



Forest
CMYK 72, 39, 65, 21
RGB 73, 111, 93
HEX 496f5d



Ocean Calm
CMYK 72, 18, 39, 0
RGB 67, 161, 160
HEX 43a1a0



Coral Red
CMYK 0, 82, 68, 0
RGB 240, 85, 80
HEX f05550



Orange Ember
CMYK 3, 66, 88, 0
RGB 236, 118, 55
HEX ec7637



Moonstone
CMYK 70, 22, 24, 0
RGB 71, 159, 181
HEX 479fb5



Papaya Whip
CMYK 1, 4, 17, 0
RGB 253, 240, 214
HEX fdffd6



Midnight Indigo
CMYK 100, 99, 22, 17
RGB 42, 40, 108
HEX 2a286c



Lavender Mist
CMYK 45, 29, 1, 0
RGB 142, 164, 209
HEX 8e04d1

Logo Standards

Logo Standards

LACERA WITH "LOS ANGELES COUNTY EMPLOYEES RETIREMENT ASSOCIATION"

This logo is spelled out and is the primary logo to use in external communication and is mandatory for all public facing assets visible to non-members. For example, the website uses this logo. It is important to never change the colors or distort the logo in its appearance or style.



LACERA-ACRONYM

This is the secondary logo for internal usage. However, if it is used on external communications it must be used in conjunction with the primary.



LACERA BUG

The bug type logo, if used internally it must be used with the secondary or primary logo. If it's used externally, it must be used in conjunction with the primary logo.



COLOR

The primary color is dark blue. It is important to never change the colors or distort the logo in its appearance or style.



TEXTA FONT FAMILY

The Texta font family is used online. This font type is ADA compliant and is good for online usage because it differentiates "O" and "0" and "I" and "l", which can be difficult to differentiate with other fonts.

PRIMARY

Texta Regular

AaBbCc123

We Produce, Protect, and

Provide the Promised Benefits

ONLINE USAGE

Texta Regular

AaBbCc123

We Produce, Protect, and

Provide the Promised Benefits

Brand Messaging Pillars

Brand messaging pillars are the key themes or benefits used in marketing materials to highlight what makes the brand unique and appealing. For LACERA's purposes, brand messaging pillars focus on the key communication topics used to benefit our members. See Section 4, Content Strategy, for platform-specific applications.

Pillars of Brand Messaging:

- **Member Services:** how we are serving our members, both through the member services team and through communication on social media. Content can include highlighting work the member services team has done (e.g., testimonials and new features) and how LACERA is serving our community (e.g., community events and outreach).
- **Pension Security:** how LACERA's Boards are working to ensure security to the pension plans and how any outside news and changes may or may not impact the pension fund. Content can include meetings, changes to the Boards, LACERA financial moves (investments, etc.), and how relevant news stories impact LACERA members.
- **Retirement Readiness:** how LACERA helps its members prepare for and thrive in retirement. Content can include LACERA-specific programs and workshops, as well as general education and tips about retirement.
- **Financial Literacy:** how LACERA educates its members on the various financial aspects of the pension system. Content can include meetings and workshops, as well as educational content outlining pension plan features in plain language.

10. Best Practices

Regarding social media best practices, there are rules that apply to all companies and organizations using a social media presence to reach their audiences. The main point of focus for a government organization's social channels is information, with a heightened responsibility to inform their audience through clear, honest communication.

Best practices can be divided into two categories: **Tangibles** and **Intangibles**.

Tangibles are the actionable and measurable aspects of social media. This can include types of content, posting frequency, hashtags, and other logistical matters.

Intangibles are the less-defined, more general goal-oriented aspects of social media like informing and educating audiences and inspiring confidence in the organization.

Tangibles

Optimal word count for each platform:

Platform	Post Caption	Notes
Facebook	1–80 characters	
LinkedIn	25 words	After 140 characters, post says “see more”
Instagram	138–150 characters	
X	71–100 characters	

Alt Text

Definition: Alternate text, or more commonly “alt text,” is an accessibility feature adopted by all major social media platforms to help communicate images for those who may have visual impairments. It can be added during the posting process when adding graphics and captions.

Alt text should be included in almost every post. It should include a brief description of the photo or graphic and any writing on the image that is not included in the post's caption.

When to use:

Posts that contain a text-heavy graphic must include the text word for word in the alt text *if* the text on the graphic is not included or paraphrased in the caption. Additionally, posts that contain an image with content integral to the understanding of the messaging must include an image description in the alt text.

Example:



Because this post's graphic has lots of text that is not included in the caption, it must be included in the alt text.

The alt text for this post:

The graphic contains a photo of Chris Fedoroff and the following text: Chris Fedoroff, Pre-Retirement Member Official Court Reporter, Court Support Services Division. Notable Contributions: Chris Fedoroff is set to retire on August 8, after 27 years of service. As an Official Court Reporter, Chris documents official court proceedings and keeps safe records of his transcriptions for future reference. He started in municipal courts reporting misdemeanor trials and slowly moved up to covering felony trials at the L.A. Superior Court. Retirement Plans: Chris has a long list of things he wants to do once he retires. At the top of that list is spending time with his wife, solving jigsaw puzzles, and watching movies. Special Job Skills: Certified by the State of California to transcribe four simultaneous speakers at 200 words per minute with 95% accuracy. Interests & Hobbies: Enjoys making music in his home recording studio. He also loves playing golf, pickleball, and surfing.

When not to use:

Including alt text is never discouraged, but there are instances in which it is unnecessary. Simple graphics with short text included in the caption (even if worded differently) do not need alt text.

Example:



Because the graphic does not contribute to the understanding or visualization of the message, it does not need to be described and because the message is written in the caption, it does not need to be reiterated in the alt text.

Respond to our Community's Questions and Concerns

Social media can serve as a type of public forum and a place for government organizations to communicate back-and-forth with constituents. This two-way channel of communication can help inspire trust in LACERA through members getting to “know” the organization.

Serving as a timelier alternative to email, phone calls, or face-to-face meetings, social media platforms make government organizations more accessible. In a situation where a member posts a question that requires an in-depth answer, we can point that person to someone who *can* help, such as member services.

Emphasize Visual Content

Visual content in the form of videos, infographics, follower photos, and memes are among the most-shared across social media. According to [The 2024 Social Media Content Strategy Report](#), visual posts that include videos or static images are the top-performing content types across platforms. But in the government sector, visual content remains a largely untapped opportunity. The [2025 Content Benchmarks Report](#) found that video content makes up only a small portion of the content Government accounts post across Facebook, Instagram, and X.

As LACERA grows its social media presence, we should aim to include more video content on our channels. Video is getting pushed by nearly every platform because it is what social media audiences have grown accustomed to. As we create more video content, we should see an increase in audience interaction.

Use Community and Event-specific Hashtags

This is particularly helpful for government accounts with large followings but may also benefit LACERA as we grow.

As we engage more with our members, using specific hashtags for events and other LACERA-specific items can help us find user-generated content (UGC) with which we can engage.

Here's a helpful link about [hashtag marketing](#).

Respond to our Members in a Timely Manner

Although government accounts are not responsible for customer service per se, they are expected to respond to followers in a timely manner.

Set aside time to reply to mentions and questions posed to us via social. This signals that we care about our community and take our responsibility of being an official resource seriously.

Responding to questions is a way to have meaningful back-and-forth conversations with our followers and show that our account is an active forum for members.

Publish Social Content to Multiple Channels

Our target audience is likely fragmented between platforms. As such, it is important for LACERA to publish to a variety of channels and look for social media expansion opportunities when possible.

Intangibles

Be a Source of Community News and Updates

Perhaps the biggest and most obvious role of government social media accounts is serving as a source of community updates. This includes retirement plan changes, member spotlights, LACERA business ventures, meetings, and events.

Educate our Community and Better Their Lives

Government use of social media should center around information and helping your community. For LACERA, there should be a particular emphasis on helping members.

Education also includes clarifying potential misinformation in addition to educating your followers. Given how quickly social media moves and rumors can spread, government accounts serve as an important source for followers looking to fact-check claims made elsewhere.

Platforms

Facebook

Use High-Quality Media

People may be more likely to pause on, interact with, and respond positively to posts with media that capture their attention. Every Facebook post should include media, like images, GIFs or videos. Make sure these creative assets are high quality. Do not use blurry images or videos. Avoid media that does not accurately reflect LACERA's brand or message.

Make Posts Actionable

Try different tactics to grab your audience's attention and drive them to take actions you care about:

- Share articles from LACERA's website
- Provide links to the newsletter sign-up form
- Ask the audience to answer a question or share their opinions in the comment section of your post
- Post stories with CTAs

While not every post needs to encourage action, actionable posts may increase engagement and provide business value when the action is directly related to your business goals.

Know your Audience

Understand who is in our audience to develop engaging posts. If you are unsure who our audience is or how to connect with them, try using Page Insights to learn more about where they are from and the types of posts they have interacted with in the past. If you are still trying to grow your audience on Facebook and do not have enough insights yet, try creating different types of posts. Pay attention to the engagement each post gets. Look for spikes in the number of likes, comments, or shares and ask yourself questions like:

- Did the post ask people to take an action?
- Did I use a specific type of media?
- Did the post contain a compelling message?

There is no one solution to capture an audience's attention but, with practice, you can find tactics that work for you.

Keep Posts Simple

In general, simple posts with clean creatives are best at capturing an audience's attention. Try these steps:

- Keep LACERA's color scheme clean and consistent by using brand colors
- Include recognizable images and LACERA's logo
- Use minimal, concise, and impactful text

Pin Significant Posts

If LACERA has major news or announcements, pin the most recent to the top of the Facebook page. Anyone that visits will see it first. It can encourage engagement or inform members of upcoming changes or events. Make sure to keep track of your pinned post, so it does not become outdated.

Instagram

Post One to Two Stories per day

Note: LACERA is not yet at daily posting capability, but this is our goal.

Hootsuite's [Instagram Stories experiment](#) found that posting one to two Instagram Stories per day generates higher engagement than posting five or more.

Use Instagram Pinned Posts

Pinning a post or Reel places it at the top of LACERA's Instagram feed, ensuring visitors see it first. Up to three posts can be pinned, which will be used to highlight priority content and refreshed on a monthly basis.

Put Hashtags in the First Comment

Hootsuite experimented and found having hashtags in the first comment [increased engagement by 60%](#). We will adhere to this suggestion.

Engage

Replying to comments and direct messages can improve visibility and foster stronger audience relationships. It provides an [engagement rate boost](#).

Post at the Best Time

We will implement Hootsuite's [best time to publish](#) tool to optimize impressions on our content.

LinkedIn

Optimize for Search

LinkedIn Pages are SEO-friendly. Google previews up to 156 characters of page text, so be sure that our description leads with powerful, keyword-rich copy. On LinkedIn, members can search for companies by keyword, so include words and phrases that describe LACERA's business, expertise, and industry focus.

Share Rich Content Daily

Note: LACERA is not yet at daily posting capability, but this is our goal.

Post at least once per weekday. Consistent posting encourages engagement and fosters familiarity. Updates posted in the morning usually earn the highest engagement, with a slight bump occurring again after business hours. Experiment to see what works best for LACERA. Posting daily updates is the most effective way to start a conversation, drive word of mouth, and directly engage with your target audience.

Share organizational news, industry articles, or thought leadership pieces—or ask followers to weigh in on hot topics. Posts will appear on your LinkedIn Page and in the news feed on the homepage of each of your followers across all devices and platforms.

Upgrade Visuals

Stand out in the news feed. Always include an image or some type of rich media. Images generally result in a 98% higher comment rate. Links to YouTube videos play directly in the LinkedIn feed and usually result in a 75% higher share rate.

Optimize Headlines and Introductions

Think like a journalist: Don't bury the lead. Concise intros and snappy headlines are more likely to result in higher engagement. Ask thoughtful questions to involve our audience. Include a clear call to action, like a link.

Track Progress

LinkedIn Pages include helpful analytics that show changes in the size and composition of our follower community, as well as activity on our page. Set targets for acquiring followers who are current and retired LACERA members, as well as anyone else interested in how LACERA functions as a business.

Set Engagement Targets

Your Analytics page displays monthly engagement metrics for all your posts collectively. As you optimize your updates based on individual performance, you should see an uptick in your overall engagement month over month.

11. Engagement & Community Management

Overview

LACERA works to serve our members first and foremost. Because they represent our core community, engaging with them on social media must be done diligently and thoughtfully.

Engagement with Community

Most of our communication with our community will happen through written replies to comments and direct messages. Beyond replying to comments and direct messages, we must also strive to engage with our community when we have the opportunity.

Replying to Community

Direct Messages

Aim to respond to relevant direct messages within 24 hours of receiving them. Spam messages may be deleted without a response. Responses can be selected from a [preapproved list](#) of standard response templates.

Comments

Aim to respond to all comments on our posts. This increases engagement and shows that we are connected to our community and open to having a two-way conversation.

Response Process

Before responding, select a comment from the list, make additions (like the commenter's name) and adjustments if necessary to fit the context, then send to a supervisor for approval before replying.

Livestreams

One way to engage directly and in real time with our community is to host livestreams on Facebook and Instagram. These livestreams can feature a retirement benefits specialist answering preapproved questions from our members while the social media coordinator moderates.

Crisis Management

Crisis management will largely fall onto the shoulders of the C Suite and upper management. The social media coordinator will post about a crisis after getting word from someone in charge.

Tangible Crisis

In the event of a tangible crisis, LACERA's Officers will follow the [Crisis Response Plan](#) first and foremost. After all steps are followed as the plan outlines, the social media coordinator will be notified about whether to post information about the crisis to LACERA's social media pages.

PR Crisis

In the event of a PR crisis, the Chief of Communications will work with LACERA's PR firm to craft a response that the social media coordinator will post to LACERA's social media pages.

12. Social Media How-Tos

The [Social Media Process Doc](#)

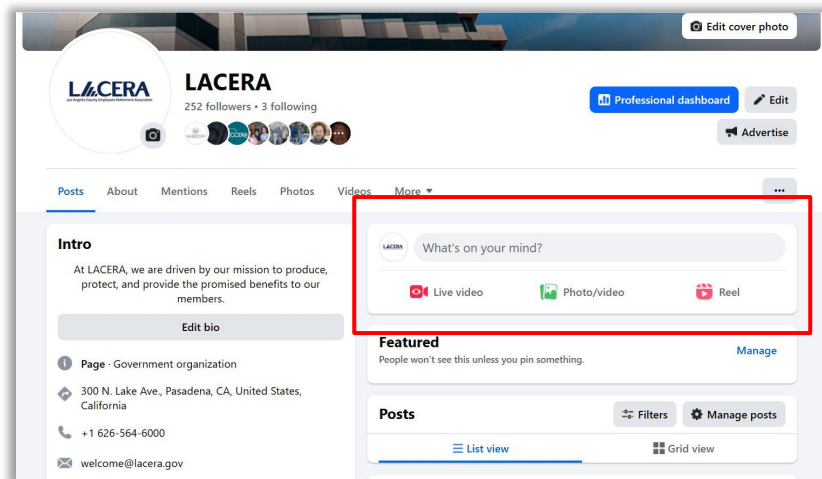
How to Post on Social Media

Facebook

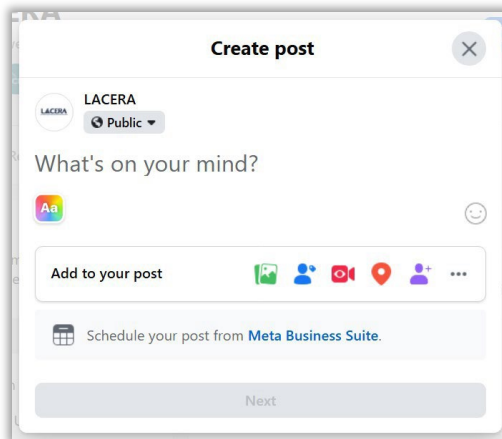
Steps to create a post on Facebook

This guide will go step by step through how to post on Facebook after all assets have been created (graphics, copy, etc.)

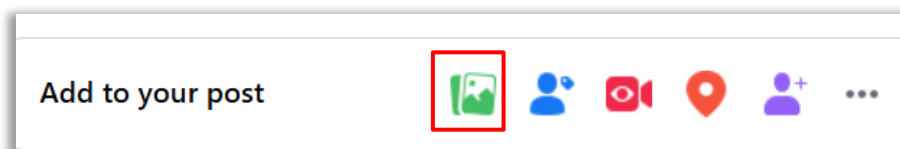
1. Once logged into Facebook, go to [LACERA's page](#)
2. Locate the box that says, "What's on your mind?"



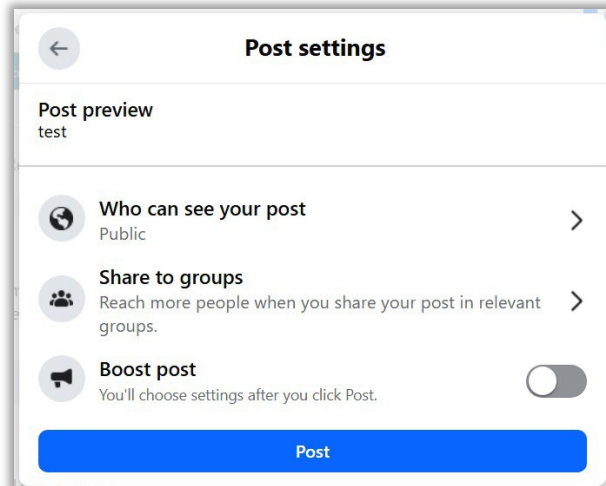
3. Click on “What’s on your mind?” and you will be taken to this window:



4. Click over “What on your mind?” and add the copy for the post.
5. Once the copy is added, select the green picture graphic to add an image to the post



6. Once all assets are added, click “Next” and you will be taken to this window:



7. Ensure the post looks good and click “Post”
8. View the post to double check that everything has been uploaded properly and you’re done!

Steps to create a story on Facebook

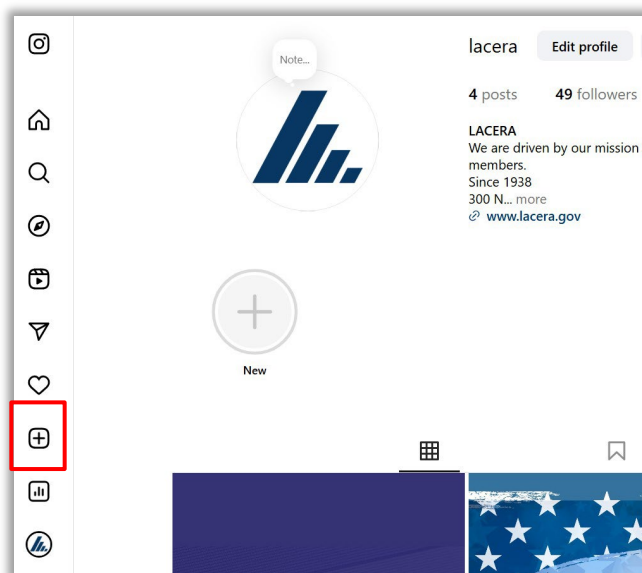
As a standard practice, we will post a story to Instagram and select the option to also post to our Facebook story. See the following instructions for posting a story on Instagram.

Instagram

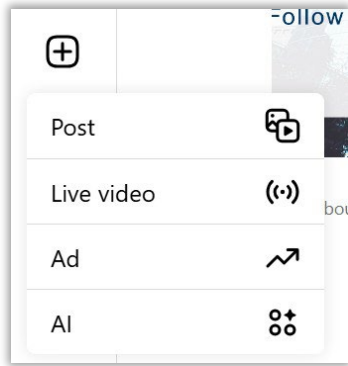
Steps to create a post on Instagram

This guide will go step by step through how to post on Instagram on desktop after all assets have been created (graphics, copy, etc.)

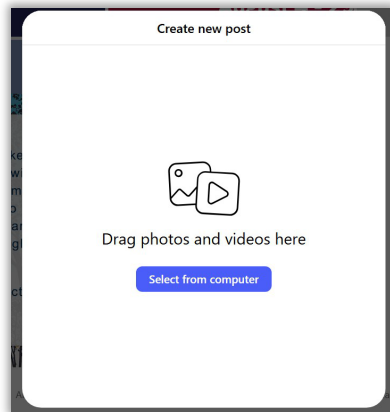
1. Once you are logged into LACERA’s Instagram account, click the plus sign in a square on the left-hand side



2. This menu will pop up:

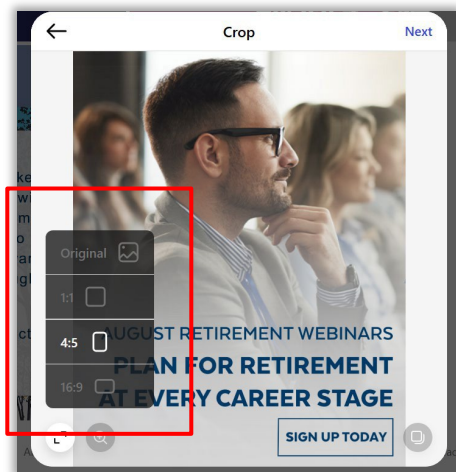


3. Click “Post” and this menu will pop up:



4. Select the image(s) for the post

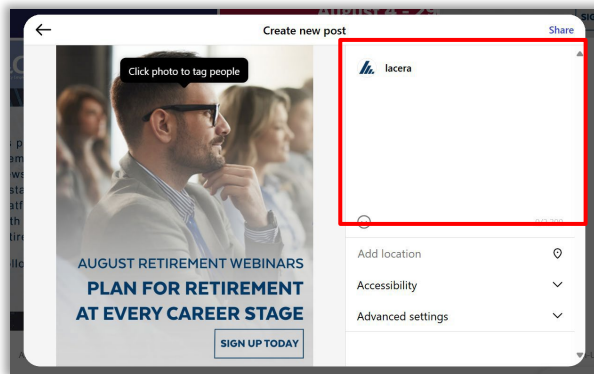
5. Ensure that the correct ratio is selected. Per our guide we post images with a 4:5 ratio



6. Click “Next” in the top right corner. It will take you to the next page to apply filters to the image. Do not select any filters. Click “Next” once more.

7. Add the copy to the white space highlighted in the photo below and add alt text in the accessibility tab, if applicable (see 10. Best Practices to determine if alt text is necessary).

8. View the post to double check that everything has uploaded properly and you're done!



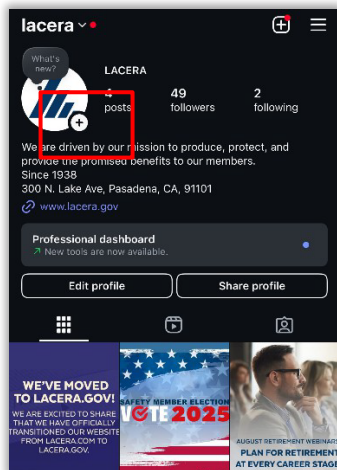
9. Ensure the image and copy are correct and click "Share"

Steps to create a story on Instagram

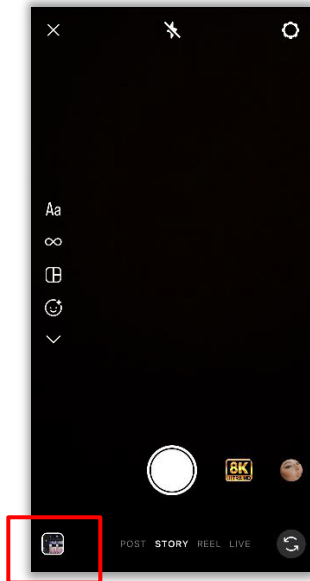
This guide will go step by step through how to post on Instagram on the mobile app after all assets have been created (graphics, copy, etc.)

Note: Instagram stories cannot be posted via desktop. They must be posted via the mobile app or Hootsuite. Directions for posting via Hootsuite will come later.

1. Once you are logged into LACERA's Instagram account, go to LACERA's account.
2. On LACERA's account page, tap on the plus sign on the circular profile picture

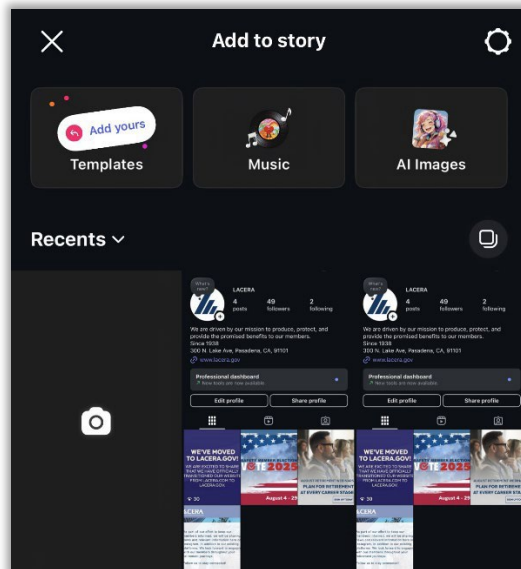


3. Tap on the plus sign and you'll be taken to this screen:



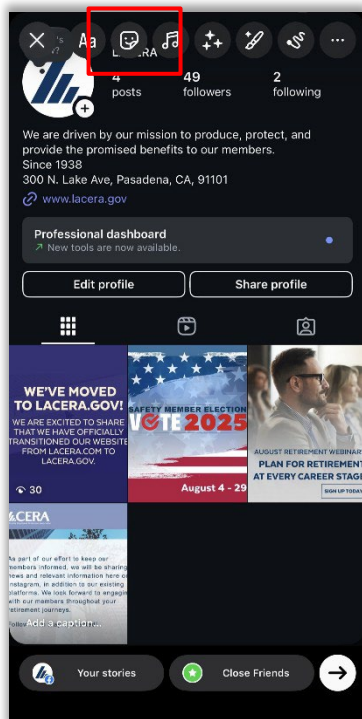
- Tap on the box in the lower left corner to add an image from your photo library

4. Select the image from your photo library to add it to your story:

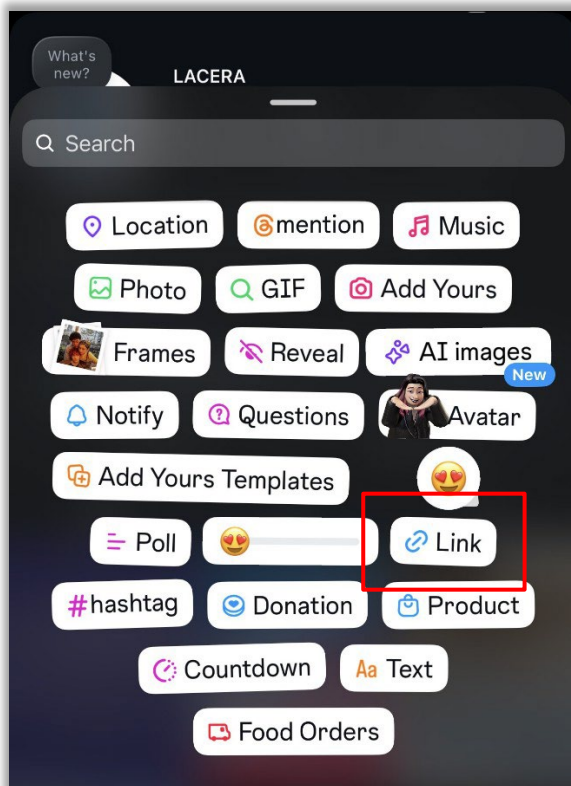


5. Once you choose the image to add to the story, you can add extras on top of the image. There are many options but for our purposes we will likely only be adding a link.

- Tap on the smiley face in a square on the top menu bar:

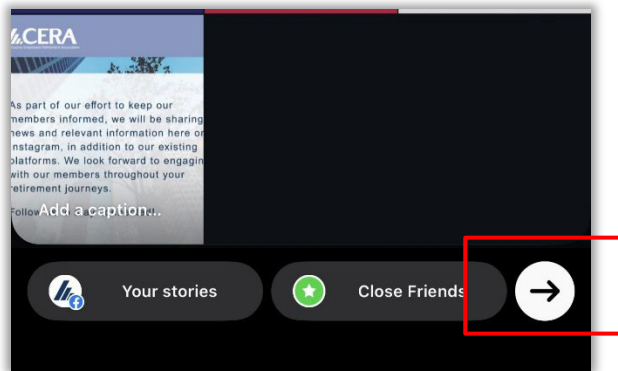


- Then tap on “link” to add a link:

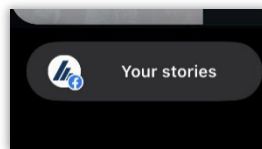


6. Add the URL and customize the text that appears on the link

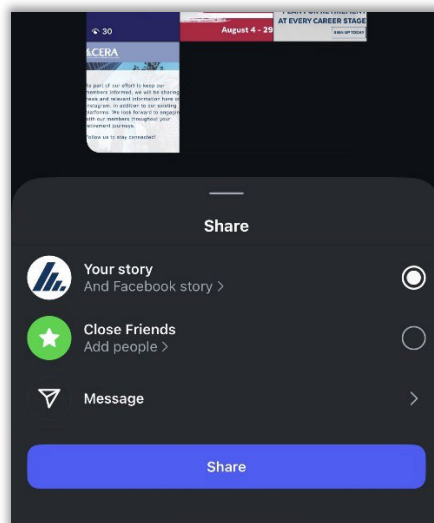
7. Once everything is ready, tap on the arrow on the bottom right side



- This will prompt you to share on Instagram and give you the option to share or not share to Facebook stories. Note: we will likely always share to Facebook too, in which case you can tap on the bubble that says “Your stories”



8. Tap “Share”



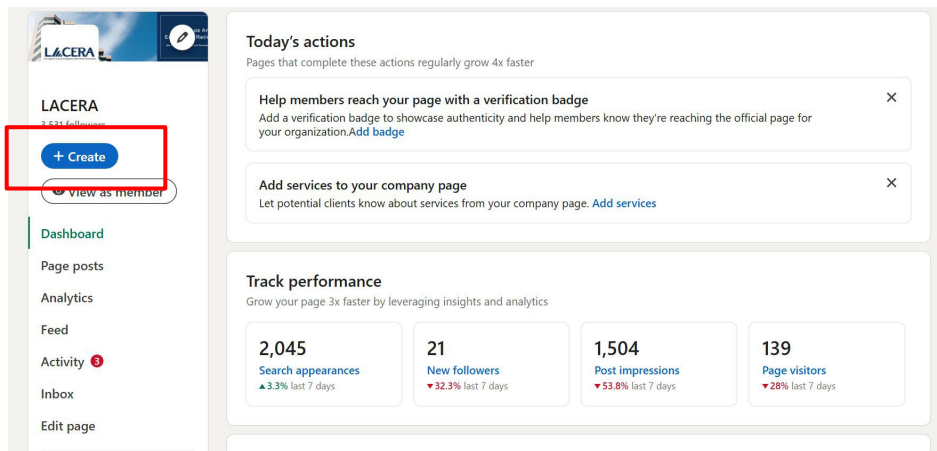
9. Tap on LACERA’s profile picture to see the story you just posted to ensure everything looks good and you’re done!

LinkedIn

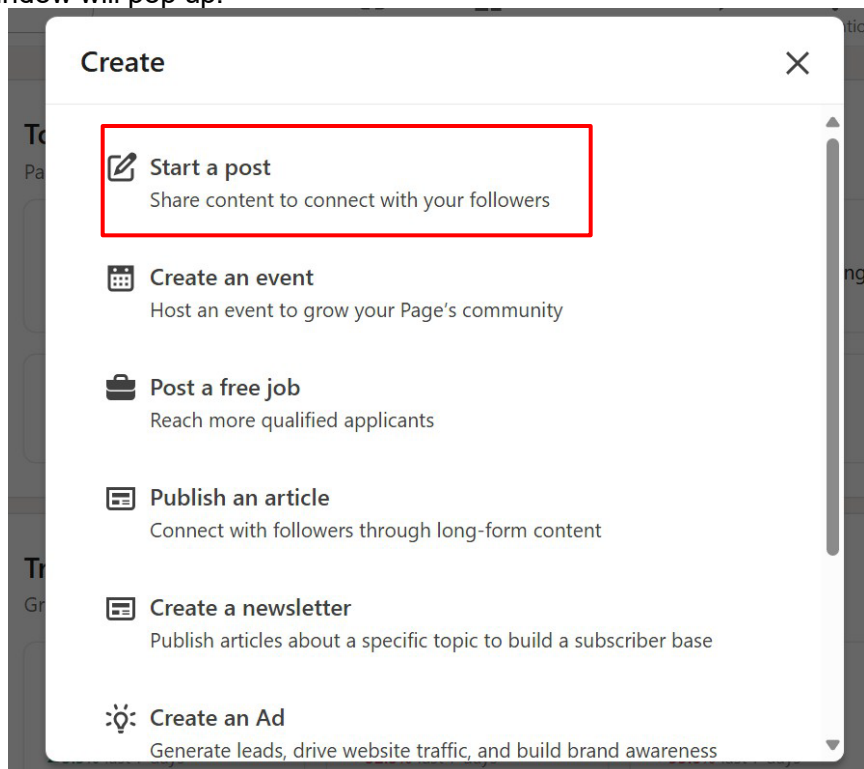
Steps to create a post on LinkedIn

This guide will go step by step through how to post on LinkedIn after all assets have been created (graphics, copy, etc.)

1. Once logged into LinkedIn, go to LACERA’s [page](#) and locate the “+ Create” button on the left side. Click it.

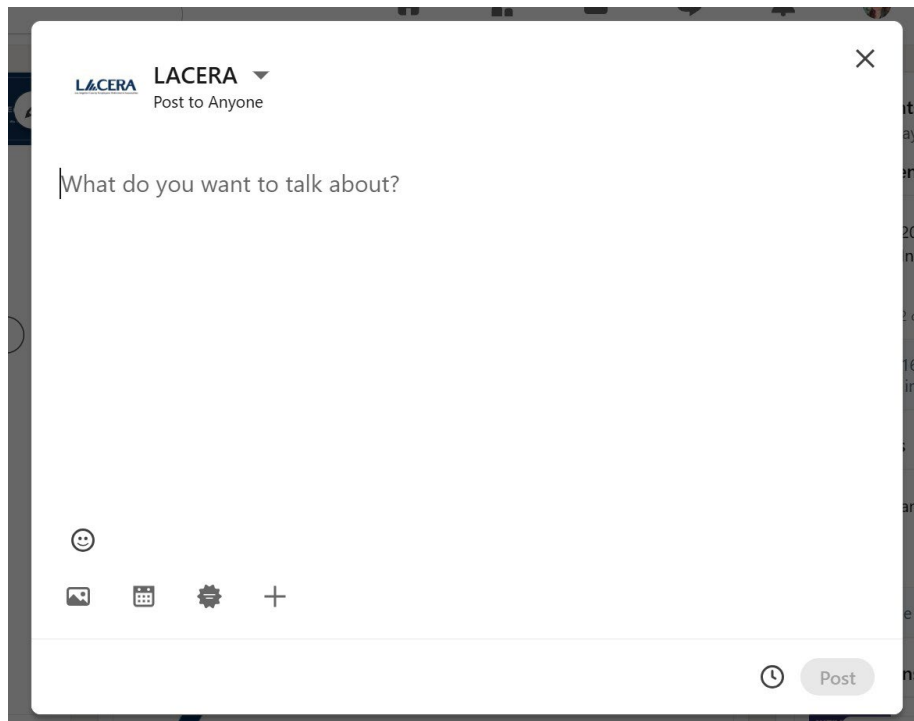


2. This window will pop up:



- Click "Start a Post"
3. Add the copy to the text box and add an image by clicking the photo icon in the bottom left corner.






4. Once all of the assets are added, click on “Post” in the bottom right corner
5. View the post to ensure everything looks correct and you’re done!

December 4, 2025

TO: Operations Oversight Committee
JP Harris, Chair
Nancy Durazo, Vice Chair
Aleen Langton
Wayne Moore
Shawn Kehoe, Alternate

FROM: Bernie Buenaflor 
Chief, Quality Assurance & Metrics Division

FOR: January 7, 2026, Operations Oversight Committee Meeting

SUBJECT: **Annual QA Audit Report**

Enclosed is the annual Quality Assurance Division (QA) audit report to the Operations Oversight Committee (OOC) outlining the results of the quality audit for fiscal year 2024-2025. QA Staff will be present at the January 7, 2026, OOC meeting to provide an overview of the report and answer any questions or concerns that you may have.

As discussed in this report, during FY 2024-2025, although short-staffed itself, QA helped address staff shortages in the Member Operations Group (MOG) by conducting a Specialist Basic Training class. The class began June 3, 2024 and concluded May 31, 2025. Note that the training program continues to be evaluated and updated to reflect changing business needs. We are working on adding components of customer service and counseling training so that trainees can be more productive when they graduate and begin working in Benefits and Member Services as hybrid specialists. Despite this significant increase in the scope and complexity of the training program, QA maintained all scheduled audits of member transactions and kept pace with the peak production season, known as "March Madness".

FY 2024-2025 had other achievements as well. The following positive developments in QA's audit work also occurred within the last fiscal year:

- 1) To improve member service and accuracy, all current audits, except first payment and data input are performed on a pre-completion basis. Pre-completion audits enable LACERA to correct errors before they impact the member and to coach Staff before errors can be repeated. Note that errors are still recorded for purposes of QA's assessment.
- 2) QA improved the communication and follow up processes generated through the MOGAP, which is the audit management application developed last fiscal year jointly with Systems and the Process Management Group (PMG), resulting in the resolution of all transactional audits from Fiscal Year 2024/2025, as reflected in the attached report.
- 3) In its effort to enhance accuracy and add value to LACERA's operations, QA worked closely with Benefits, the Legal Office, and Systems to analyze the processes and business rules involved in:
 - a. Account settlement transactions (i.e.: member account correction and collections activities),

Page 2

- b. PEPRA Member contribution and final average compensation calculations,
- 4) An Annual Audit Plan for QA has been formalized and submitted to Executive Office for review and approval. This includes regular review of QA's Discovery Sampling and Control Self-Assessment Process to help maximize the benefits from audit observations.
- 5) QA submitted Key Performance Indicators for QA staff items to the Executive Office for review and is in the process of refining these.

Looking forward, QA plans to pursue the following initiatives in its audit work:

- 1) Reorganize for greater independence and objectivity
- 2) Achieve full staffing for QA Division
- 3) Expand scope of audits based on risk levels. (This goal is dependent on staffing.)
 - a) More processes
 - b) Call monitoring
 - c) Member Surveys
- 4) Work with our partners to explore new tools and techniques for clearing member account exceptions
- 5) Instill the "auditor mindset" into all MOG staff through Advanced CERL Education (ACE) training.

QA continues to diligently pursue its mission of providing a critical quality control function for the Member Operations Group (MOG). By independently and objectively measuring the accuracy of the work performed by the MOG teams, using a systematic and risk-based approach, QA is able to report that the MOG teams, excluding the work of trainees in the Specialist Basic Training Program, during the fiscal year ending June 30, 2025, met the 98% standard of quality set by LACERA. Meanwhile, the Specialist Basic Training participants achieved a 95% accuracy level at the close of training which, historically, has boded well for their future success in the MOG.

Reviewed and Approved



John Popowich
Assistant Executive Officer, LACERA

Encl.

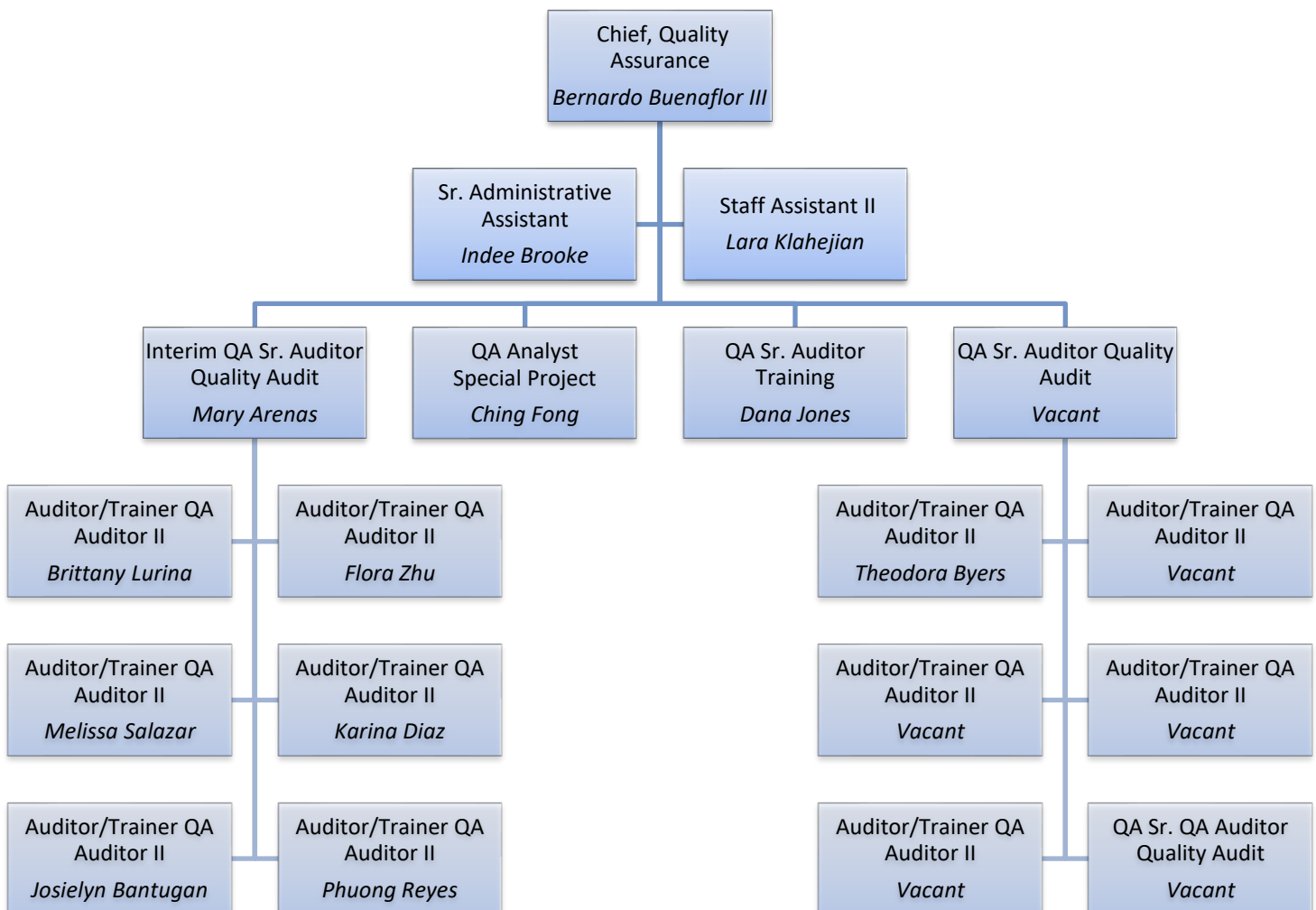


QA SUMMARY

INTRODUCTION TO QUALITY ASSURANCE

The Executive Office has defined the responsibilities of LACERA's Quality Assurance Division (QA) and aligned them with LACERA's strategic plans. QA provides independent and objective quality monitoring to support the accurate, efficient, and timely delivery of benefits provided by LACERA's Member Operations Group (MOG). To do this QA has designed an audit plan that categorizes transactions according to the level of risk and applies a sampling plan that is appropriate to their risk level.

The Quality Auditors and Administrative staff are:



BACKGROUND

During Fiscal Year 2024-2025, QA's scope of auditing remained below its budgeted capacity due to the prolonged vacancies, but QA continued to audit at levels on par with the prior fiscal year.

STAFF SHORTAGES

Starting November 2020, QA lost to normal attrition almost all its division leadership, including 4 out of 5 Senior Auditors. At the peak of this staffing shortage, 9 out of 19 budgeted positions experienced turnover. As of this reporting, there are still 6 vacancies (3 Senior Auditors and 3 Auditor II's). Despite our efforts to fill the vacancies, QA was only able to fill one Senior position. QA's staff shortages hindered its capacity and potential opportunities to expand its audit scope or implement significant process improvements. In the coming fiscal year, QA will work with HR to address this issue.

Despite the setbacks, Quality Assurance did have a noteworthy achievement:

- Successful completion and graduation of the Specialist Basic Training Class of 2025

INCREASE PRE-COMPLETION AUDITS

QA has significantly shifted its audits from Post-completion to Pre-completion audits to help ensure that the end-product that is delivered to our members is correct. 20 out of 24 processes are audited on a pre-completion basis (83.33%).

INTRODUCTION TO QUALITY AUDITS

Executive Management has determined a target accuracy rating of 98% overall for all audited transactions. QA performs three (3) types of audits:

- **Pre-Completion Auditing** is performed prior to the delivery of a MOG transaction end-product to the member. This helps ensure that the transaction meets LACERA's quality standards upon delivery.
- **Post Completion Auditing** assesses the accuracy of a completed MOG transaction to help management in overseeing the associated business processes and staff performance and to correct transactions requiring rework.
- **Specialist Basic Training Audit** is performed prior to the delivery of a Trainee's live production end-product to the member. This helps ensure that the transaction meets LACERA's quality standards upon delivery. It also helps Management evaluate the trainee's performance in support of their hiring decision.

QA, in conjunction with MOG Divisions, reviews and revises the existing Audit Criteria on an annual basis, as business rules evolve, or as recommended through process-specific risk assessments. The MOG Division Management role is to ensure that the subject production process is accurately presented in the audit criteria, while QA's role is to design the sampling and testing parameters that best address the assessed risks for that process. After approval by MOG Division Management, QA, and the Executive Office, these criteria are posted in the MOGAP database, where they are used by auditors to rate the accuracy of each audited transaction.

When a Retirement Benefit Specialist uploads a case to the MOGAP, a Risk Level is assigned to that specific case. Risk Levels are based on the characteristics of a particular case that are known from audit experience to pose various levels of risk to the accuracy of the case. QA audits 100% of high-risk cases while random samples of lower-risk cases are audited on a pre-determined percentage basis.

The Audit conducted by QA generates feedback regarding work performed by MOG staff in the form of Audit Review Notes. This feedback is provided to the MOG staff's immediate Supervisor, Section Head, and Division Manager. Periodically, QA prepares audit reports for the respective Division Management, the Executive Office, and the Operations Oversight Committee of LACERA's Board of Retirement. There are three kinds of QA Audit Review Notes, as follows:

- **Action Items** are conditions resulting from a tested transaction that did not meet (or pass) the established quality standards. The impact of an action item on a transaction's accuracy rating is calculated based on the associated audit criteria and that criteria's pre-determined weighting. LACERA requires all action items to be addressed or rejected by the appropriate level of management before an auditor can close those action items, as well as the underlying test selection. If QA Action Items were not issued, the test selection is deemed 100% accurate.
- **QA Referrals** are conditions not resulting from the audited work, but which warrant follow up to ensure the integrity of the related member's account. For each QA Referral, an auditor will issue a service request to the appropriate work queue so that the necessary follow-up can be performed by the appropriate party.
- **Other Recommendations** are audit observations not directly relevant to the member whose transaction was audited, but which are relevant to the quality and to the timeliness or efficiency of the process or business unit being audited.

OVERALL PRODUCTION ACCURACY, SAMPLES, AND ACTION ITEMS BY AUDIT TYPE FY 2024-2025

TABLE 1

	Pre-Completion Audit	Post Completion Audit	Specialist Basic Training Audit	Totals
Accuracy	97.76%	98.79%	97.50%	98.02%
Samples	7,499	1,781	1,551	10,831
Action Items	1,057	67	330	1,454
Outstanding Action Items	0	0	0	0

PRE-COMPLETION AUDIT

The purpose of the Pre-Completion Audit is to help ensure accurate processing of outgoing member requests by auditing the transaction prior to its completion and delivery to the member. While pre-completion audits can be performed by members of the MOG divisions as well as QA, for purposes of independence and objectivity, QA only factors in the audit work performed by QA when it reports on the quality of the work performed. Any pre-completion audits performed by the MOG division staff are excluded from QA's reports, but they do help management to manage their processes and staff performance.

In fiscal year 2024-2025, the Pre-Completion Audit reviewed 20 business processes. The sampling method is based on an agreement with the Benefits division that staff upload 100% of the production in the MOGAP for Pre-Completion Audit. QA audited 49.01% of the total production for the 20 processes.

The number of members' transactions audited in the Pre-Completion Audit was 7,499, resulting in 1057 Action Items. Staff strive to resolve all Action Items within a pre-defined timeframe to minimize the negative impact on members.

Overall, the accuracy rate increased from the last fiscal year by 0.02% from 97.74% to 97.76% as shown in Table 2. The increase in accuracy was due to improvement in the following processes:

- Agreed Upon Procedures
- Service Retirement Agenda
- Other Public Agency

TABLE 2

	2024	2025
Accuracy	97.74%	97.76%
Samples	6,846	7,499
Action Items	904	1,057

There were 5 out of 20 processes that met or exceeded the target accuracy rate of 98%:

TABLE 3

Organization Goal 98% and Above	%	Quality Audit Goal 95% to 98%	%	Observation Audit Below 95%	%
1. Felony Forfeiture	100.00	6. Temporary Time	97.93	16. Redeposit	94.77
2. Member Death	99.96	7. 30 Year Cancellation	97.84	17. Retirement Estimates	93.53
3. Sick Without Pay	99.00	8. Reciprocity	97.79	18. Plan E Rescissions ¹	91.25
4. Military/Federal	98.33	9. General to Safety	97.75	19. Administrative Appeals ¹	87.50
5. Service Retirement Agenda	98.21	10. Other Public Agency	97.15	20. Executive Referrals ¹	80.00
		11. Incremental Buyback	96.96		
		12. Termination	96.45		
		13. Account Settlement	96.07		
		14. Open Window Plan Transfer	95.87		

At the end of the 2024-2025 fiscal year, all pre-completion action items were addressed. Two cases were closed according to existing business rules and may be re-opened as new audits if further guidance is received from Legal in the next fiscal year.

1. The limited number of transactions available for audit, along with the complexity of cases reviewed under Plan E Rescissions, Administrative Appeals, and Executive Referrals, contributed to greater fluctuations in accuracy results.

MOG Management's Action Plan:

The audit findings for Redeposit, Plan E Rescission, and Retirement Estimates were due to the complexity of the individual cases audited. The relatively low number of auditable transactions for Redeposits and Plan E Rescissions increased the volatility of the resulting accuracy results. To address this, refresher training sessions will be implemented and reference materials, like checklists, distributed. Collaboration among Supervisors, the Benefits Process Management Group, and Quality Assurance will facilitate the identification of optimal approaches to increase accuracy.

Administrative and Executive Referrals do not conform to specific guidelines and can require a multitude of complex tasks. The Benefits leadership team will work with staff to provide the necessary support as we encounter these cases. Benefits Management intends to develop enhanced business rules and additional resources to better assist staff.

POST COMPLETION AUDIT

The purpose of the Post Completion Audit is to assess the accuracy of business processes and the staff performing the work. Post Completion Audits are performed after the subject transactions are completed. To maintain audit independence, these audits are performed solely by QA. Data from these audits are used to identify process improvement and training opportunities. The auditee division supervisors are responsible for following up with staff regarding action items to ensure immediate correction and thus minimize delay in completing rework. QA auditors must verify that staff have addressed the Action Items connected with their work before QA auditors can close out their test selection.

In fiscal year 2024-2025, the Post Completion Audit reviewed 4 business processes using random sample selections from completed transactions. The number of member transactions audited was 1,781, resulting in 67 Action Items. Staff resolved all Action Items within a fixed timeframe to minimize the negative impact on members.

Overall, the accuracy rate increased from the last fiscal year by 0.10% from 98.69% to 98.79% as shown in Table 4. The increase in sample size may have affected the increase in accuracy ratio of Post Completion Audits.

TABLE 4		2024	2025
Accuracy	98.69%	98.79%	
Samples	1,641	1,781	
Action Items	65	67	

There were 3 out of 4 processes that met or exceeded the target accuracy rate of 98%:

TABLE 5					
Organization Goal 98% and Above	%	Quality Audit Goal 95% to 98%	%	Observation Audit Below 95%	%
1. Direct Deposit	99.78	4. Beneficiary Designation	97.28		
2. First Payment	99.14				
3. Federal/State Tax	99.03				

At the close of 2024-2025 Fiscal Year, all post-completion action items have been resolved.

MOG Management's Action Plan:

Staff assigned to the Beneficiary queue displayed overall issues with their accuracy. The supervisor has worked closely with them to address areas of deficiency.

SPECIALIST BASIC TRAINING AUDIT

The purpose of the Specialist Basic Training Audit is to assess the quality of the work processed by newly trained new hires in response to actual member requests, to provide such audit feedback in a safe learning environment, and to ensure that such work meets LACERA's standard of quality when completed prior to being sent to members. Audits are performed by a cross-functional team, consisting of members of the MOG divisions in partnership with members of QA. MOG division managers and QA use the combined accuracy measurements to evaluate the performance of the students in the training class and to help determine how training can be adjusted or augmented to improve trainees' performance prior to completion of training.

In fiscal year 2024-2025, the Training Audit reviewed 8 business processes using 100% sampling. The number of members' transactions audited was 1,551, resulting in 330 action items. All action items are required to be resolved prior to completion and delivery of the end-product to the member.

Overall, the accuracy rate increased from the last fiscal year by 1.44% from 96.06% to 97.50% as shown in Table 6. The decrease in the number of samples audited during the fiscal year 2024-2025 resulted from having fewer trainees available to process cases, compared to the previous SBT class.

TABLE 6		2024	2025
	Accuracy	96.06%	97.50%
	Samples	1,883	1,551
	Action Items	471	330

There were 8 out of 8 processes that met or exceeded the Specialist Basic Training target accuracy rate of 95%:

TABLE 7

Organization Goal 98% and above	%	Specialist Basic Training Audit Goal 95% to 98%	%	Observation Audit Below 95%	%
1. 30 Year Cancellation	100.00	3. Other Public Agency	97.99		
2. Military/Federal	98.82	4. Incremental Buyback	97.73		
		5. Sick Without Pay	97.29		
		6. Temporary Time	97.28		
		7. Reciprocity	96.60		
		8. General to Safety	96.50		

It should be noted that, out of the 18 trainees that started in the SBT program, 12 were able to graduate. While the attrition rate was significant in this fiscal year, those who continued on as Retirement Benefit Specialist II's were the ones who were able to meet LACERA's quality expectations.

QA REFERRALS

QA Referrals are conditions not resulting from the audited work but which warrant follow up to ensure the integrity of the related member's account. For each QA Referral, an auditor will issue a service request to the appropriate work queue to address the additional item(s) that fall outside the criteria of the audited transaction.

During the fiscal year 2024-2025, out of 10,831 Benefits Transactions audited by QA, 107 referrals were issued as shown in Table 8. At the close of 2024-2025 Fiscal Year, all QA Referrals have been resolved.

TABLE 8

Description	Number of Referrals Issued	Number of Referrals Outstanding	Percentage Outstanding (%)
Account Settlement	47	0	0.00%
Refunds or Discharge Cancellation	48	0	0.00%
General	12	0	0.00%
Total	107	0	0.00%

OTHER RECOMMENDATIONS

Other Recommendations are issues resulting from an audit observation unrelated to a specific member transaction or account. It is applicable to the quality, timeliness, or efficiency of the process or business unit being audited. The associated MOG Division Manager, Section Head, and QA Senior Auditor review and respond to other recommendations by indicating their concurrence or nonconcurrence, as well as any action plan and timeline for addressing the issues described.

In fiscal year 2024-2025, five recommendations were issued. Of these, four remain open in addition to two outstanding recommendations from the previous fiscal year.

- TT as OPA service credit calculation
- BRU 315 (PEPRA FAC) Unresolved Issues
- Request Legal Review on COLA eligibility for Plan E ARC
- FAC Calculation for Intermittent Members
- Requesting Legal Guidance on NSCD statutes
- Requesting clarification on when members eligible for Plan E service credit under Section 31488(g)

CLOSING COMMENTS

The Quality Assurance Division is committed to improving processes through continuous planning, monitoring, assessments, and evaluations. We utilize the data from the three (3) categories of audits to improve the design and contents of technical training conducted by QA for the benefit of MOG staff. QA also participates in:

- specialized functions, such as the review of new pay codes for pensionability, and
- quality and compliance control for special projects, such as the implementation of changes in law or legal judgments.

Despite the challenges previously described, QA continues to make progress and is looking forward to pursuing the following initiatives in the future, with the support of the Board of Retirement:

- Develop a formalized QA Annual Production Plan
- Develop Key Performance Indicators for QA
- Further re-organize QA to enhance its independence and objectivity
- Conduct onboarding exams through HR to fully staff the QA Division

- Increase QA's scope of audits to include more processes and allocate resources to those processes based on their relative risk
- Take on additional audit-related functions in support of LACERA's goal of improving the Member Experience Journey, such as Call Monitoring, reviewing Member Correspondence, and Member Surveys
- Continue to increase the proportion of audits performed on a pre-Completion basis so we can continue to catch errors before they affect our members
- Work with our partners to explore new tools and techniques for clearing member account exceptions
- Create an Account Certification system to perform a comprehensive analysis, documentation, rectification, and certification of the accuracy and completeness of an account
- Instill the "auditor mindset" and greater analytical skills into all MOG staff through Advanced CERL Education (ACE) training so that they are better prepared to support LACERA's Vision: technological innovation, investing in its people, and enhancing the member experience through multi-channel service, including self-service.

The Quality Assurance Division strives to contribute to LACERA's quality eco-system, which includes continual improvement activities and a focus on compliance and risk management. QA will continue to consult with their partners throughout LACERA, such as the other MOG Divisions, Legal, and Systems, to enhance QA's value to LACERA and its members. We are hopeful that these efforts will lead to additional increases in accuracy, better member experiences, and process efficiency, with the ultimate goal being 100% accuracy.



Pre-Completion Audit

Chart A – Pre-Completion Audit: Comparative Accuracy Rates, Fiscal Years ending 2021-2025

Process	2025	2024	2023	2022	2021	% Increase (-Decrease)			
						2024-25	2023-24	2022-23	2021-22
30 Year Cancellation	97.84%	97.54%	96.67%	99.17%	98.00%	0.30%	0.87%	-2.50%	1.17%
Account Settlement	96.07%	96.75%	93.78%	-	-	-0.68%	2.97%	-	-
Administrative Appeal	87.50%		100.00%	-	-	87.50%	-100.00%	-	-
Agreed Upon Procedures	95.50%	92.55%	96.04%	-	-	2.95%	-3.49%	-	-
Executive Referrals	80.00%	100.00%	78.13%	-	-	-20.00%	21.87%	-	-
Felony Forfeiture	100.00%	100.00%	100.00%	-	-	0.00%	0.00%	-	-
Member Death	99.96%	99.51%	99.29%	98.79%	-	0.45%	0.22%	0.50%	-
Plan E Rescission	91.25%	100.00%	90.00%	-	-	-8.75%	10.00%	-	-
<i>Plan Transfer</i>									
<i>a) Open Window</i>	95.87%	94.76%	92.98%	94.04%	100.00%	1.11%	1.78%	-1.06%	-5.96%
<i>b) Incremental Buy Back</i>	96.96%	97.06%	98.14%	97.52%	95.25%	-0.10%	-1.08%	0.62%	2.27%
<i>Previous Service Contracts</i>									
<i>a) General to Safety</i>	97.75%	98.15%	97.48%	96.77%	95.92%	-0.40%	0.67%	0.71%	0.85%
<i>b) Military / Federal Time</i>	98.33%	98.42%	99.29%	98.77%	96.45%	-0.09%	-0.87%	0.52%	2.32%
<i>c) OPA</i>	97.15%	96.08%	97.09%	95.54%	95.58%	1.07%	-1.01%	1.55%	-0.04%
<i>d) Redeposit</i>	94.77%	96.22%	94.43%	96.70%	95.31%	-1.45%	1.79%	-2.27%	1.39%
<i>e) SWOP</i>	99.00%	99.18%	98.51%	98.07%	98.64%	-0.18%	0.67%	0.44%	-0.57%
<i>f) Temporary Time</i>	97.93%	98.63%	98.31%	98.28%	98.20%	-0.70%	0.32%	0.03%	0.08%
Reciprocity	97.79%	98.12%	97.56%	97.56%	97.41%	-0.33%	0.56%	0.00%	0.15%
Retirement Estimate	93.53%	93.60%	93.60%	98.37%	97.78%	-0.07%	0.00%	-4.77%	0.59%
Service Retirement Agenda	98.21%	97.83%	98.11%	97.86%	97.20%	0.38%	-0.28%	0.25%	0.66%
Termination Letters	96.45%	97.46%	96.75%	94.16%	91.91%	-1.01%	0.71%	2.59%	2.25%
AVERAGE	97.76%	97.74%	97.82%	97.77%	96.74%	0.02%	-0.08%	0.05%	1.03%



Chart B – Percent of Pre-Completion Cases Audited – Fiscal Years ending 2021-2025

Process	2025			2024			2023			2022			2021			% Increase (-Decrease)			
	Pre-Completion	Audited	%	Pre-Completion	Audited	%	Pre-Completion	Audited	%	Pre-Completion	Audited	%	Pre-Completion	Audited	%	2024-25	2023-24	2022-23	2021-22
30 Year Cancellation	156	51	32.69%	83	57	68.67%	70	15	21.43%	294	24	8.16%	53	5	9.43%	-35.98%	47.25%	13.27%	-1.27%
Account Settlement	3041	598	19.66%	2937	547	18.62%	903	106	11.74%	-	-	-	-	-	-	1.04%	6.89%	-	-
Administrative Appeal	4	4	100.00%	0	0	-	1	1	100.00%	-	-	-	-	-	-	-	-	-	-
Agreed Upon Procedures	58	58	100.00%	39	39	100.00%	21	21	100.00%	-	-	-	-	-	-	0.00%	0.00%	-	-
Executive Referrals	5	5	100.00%	2	2	100.00%	16	16	100.00%	-	-	-	-	-	-	0.00%	0.00%	-	-
Felony Forfeiture	1	1	100.00%	1	1	100.00%	1	1	100.00%	-	-	-	-	-	-	0.00%	0.00%	-	-
Member Death	125	125	100.00%	163	163	100.00%	154	154	100.00%	129	129	100.00%	-	-	-	0.00%	0.00%	0.00%	-
Plan E Rescission	4	4	100.00%	1	1	100.00%	2	2	100.00%	-	-	-	-	-	-	0.00%	0.00%	-	-
Plan Transfer																			
<i>a) Open Window</i>	120	63	52.50%	98	50	51.02%	51	29	56.86%	83	33	39.76%	30	8	26.67%	1.48%	-5.84%	17.10%	13.09%
<i>b) Incremental Buy Back</i>	271	140	51.66%	282	158	56.03%	249	94	37.75%	327	118	36.09%	153	104	67.97%	-4.37%	18.28%	1.67%	-31.89%
Previous Service Contracts																			
<i>a) General to Safety</i>	397	213	53.65%	204	151	74.02%	331	147	44.41%	322	141	43.79%	119	96	80.67%	-20.37%	29.61%	0.62%	-36.88%
<i>b) Military / Federal Time</i>	544	234	43.01%	312	175	56.09%	763	216	28.31%	612	207	33.82%	329	238	72.34%	-13.08%	27.78%	-5.51%	-38.52%
<i>c) OPA</i>	740	328	44.32%	440	287	65.23%	1015	360	35.47%	864	296	34.26%	407	208	51.11%	-20.90%	29.76%	1.21%	-16.85%
<i>d) Redeposit</i>	148	106	71.62%	93	82	88.17%	120	82	68.33%	118	64	54.24%	59	48	81.36%	-16.55%	19.84%	14.10%	-27.12%
<i>e) SWOP</i>	1025	402	39.22%	597	359	60.13%	1443	458	31.74%	966	336	34.78%	520	377	72.50%	-20.91%	28.39%	-3.04%	-37.72%
<i>f) Temporary Time</i>	2708	1005	37.11%	1868	928	49.68%	3303	1135	34.36%	2318	824	35.55%	1197	1011	84.46%	-12.57%	15.32%	-1.19%	-48.91%
Reciprocity	276	144	52.17%	430	196	45.58%	427	109	25.53%	363	60	16.53%	68	13	19.12%	6.59%	20.05%	9.00%	-2.59%
Retirement Estimate	202	88	43.56%	211	128	60.66%	498	93	18.67%	849	77	9.07%	290	14	4.83%	-17.10%	41.99%	9.61%	4.24%
Service Retirement Agenda	3687	3687	100.00%	3283	3283	100.00%	3340	3340	100.00%	4048	3983	98.39%	3454	3454	100.00%	0.00%	0.00%	1.61%	-1.61%
Termination Letters	1788	243	13.59%	1869	239	12.79%	1204	142	11.79%	1318	73	5.54%	275	12	4.36%	0.80%	0.99%	6.26%	1.18%
TOTALS / AVERAGE % Audited	15,300	7,499	49.01%	12,913	6,846	53.02%	13,912	6,521	46.87%	12,611	6,365	50.47%	6,954	5,588	80.36%	-4.00%	6.14%	-3.60%	-29.88%

**Post-Completion Audit****Chart C – Post Completion Audit: Comparative Accuracy Rates from Fiscal Years ending 2021-2025**

Process	2025	2024	2023	2022	2021	% Increase (-Decrease)			
						2024-25	2023-24	2022-23	2021-22
Beneficiary Change	97.28%	97.33%	98.36%	97.50%	98.58%	-0.05%	-1.03%	0.86%	-1.08%
Direct Deposit	99.78%	99.78%	99.91%	99.81%	99.79%	0.00%	-0.13%	0.10%	0.02%
Federal / State Tax	99.03%	98.96%	98.30%	98.61%	99.09%	0.07%	0.66%	-0.31%	-0.48%
First Retirement Payment	99.14%	98.71%	97.76%	97.29%	96.62%	0.43%	0.95%	0.47%	0.67%
AVERAGE	98.79%	98.70%	98.58%	98.30%	98.52%	0.10%	0.11%	0.28%	-0.22%

Chart D – Post Completion Audit: Number of Samples from Fiscal Years ending 2021-2025

Process	2025	2024	2023	2022	2021	# Increase (-Decrease)			
						2024-25	2023-24	2022-23	2021-22
Beneficiary Change	479	480	428	351	330	-1	52	77	21
Direct Deposit	480	480	428	360	330	0	52	68	30
Federal / State Tax	479	480	353	359	330	-1	127	-6	29
First Retirement Payment	343	201	96	70	238	142	105	26	-168
TOTAL	1,781	1,641	1,305	1,140	1,228	140	336	165	-88

**Specialist Basic Training Audit****Chart E – Specialist Basic Training Audit: Comparative Accuracy Rates Fiscal Years ending 2021-2025**

Process	2025	2024	2023	2022	2021	% Increase (-Decrease)			
						2024-25	2023-24	2022-23	2021-22
<i>Plan Transfer</i>									
<i>a) Open Window</i>					86.46%	-	-	-	-86.46%
<i>b) Incremental Buy Back</i>	97.73%	90.86%	98.24%		98.37%	6.87%	-7.38%	98.24%	-98.37%
<i>Previous Service Contracts</i>									
<i>a) General to Safety</i>	96.50%	95.10%	95.29%		97.05%	1.40%	-0.19%	95.29%	-97.05%
<i>b) Military / Federal Time</i>	98.82%	98.21%	97.84%	98.08%	97.96%	0.61%	0.37%	-0.24%	0.12%
<i>c) OPA</i>	97.99%	94.42%	97.10%	95.85%	91.29%	3.57%	-2.68%	1.25%	4.56%
<i>d) Redeposit</i>		84.17%	94.69%	93.01%	93.06%	-84.17%	-10.52%	1.68%	-0.05%
<i>e) SWOP</i>	97.29%	96.19%	96.77%	96.98%	98.68%	1.10%	-0.58%	-0.21%	-1.70%
<i>f) Temporary Time</i>	97.28%	96.10%	96.98%	96.41%	97.03%	1.18%	-0.88%	0.57%	-0.62%
Account Settlement		96.49%							
Reciprocity	96.60%	95.66%	97.46%	99.02%		0.94%	-1.80%	-1.56%	99.02%
Retirement Estimate		-	96.40%		96.72%	-	-	96.40%	-96.72%
30 Year Cancellation	100.00%	98.00%	98.13%			2.00%	-0.13%	98.13%	0.00%
Termination Letter		-	97.59%		93.99%	-	-	97.59%	-
AVERAGE	97.50%	96.95%	96.56%	95.06%	96.10%	0.55%	0.39%	1.50%	-1.04%

**Specialist Basic Training Audit****Chart F – Specialist Basic Training Audit: Number of Samples from Fiscal Years ending 2021-2025**

Process	2025	2024	2023	2022	2021	% Increase (-Decrease)			
						2024-25	2023-24	2022-23	2021-22
<i>Plan Transfer</i>						0	0	0	0
<i>a) Open Window</i>		-	-	-	5	-	-	-	-
<i>b) Incremental Buy Back</i>	33	29	142	-	50	4	-113	-	-
<i>Previous Service Contracts</i>									
<i>a) General to Safety</i>	40	125	104	-	58	-85	21	-	-
<i>b) Military / Federal Time</i>	144	312	118	117	81	-168	194	1	36
<i>c) OPA</i>	183	275	232	237	122	-92	43	-5	115
<i>d) Redeposit</i>		8	16	39	37	-8	-8	-23	2
<i>e) SWOP</i>	327	412	118	334	84	-85	294	-216	250
<i>f) Temporary Time</i>	761	571	199	530	197	190	372	-331	333
Account Settlement		140	-	-	-				
Reciprocity	48	6	127	95	-	42	-121	32	-
Retirement Estimate		-	134	-	137	-	-	-	-
30 Year Cancellation	15	5	16	-	-	10	-11	-	-
Termination Letter		-	110	-	21	-	-	-	-
AVERAGE	1551	1883	1316	1352	792	-332	567	-36	560



APPENDIX A - QUALITY ASSURANCE AUDIT METHODOLOGY

The Quality Assurance and Metrics Division performs regular audits of benefit-related transactions to measure the accuracy and quality of the work, to ensure that the end-product meets LACERA's standards of quality as expressed in the audit criteria, and to identify areas of improvement. A risk assessment was conducted to determine which processes were going to be included in the audit plan.

AUDIT CRITERIA

Each process was broken down into several agreed upon audit criteria (approved and accepted by Management) shown as follows. For example, the Previous Service process has the following criteria, risk levels and weight of each criterion.

TABLE 9

Criteria	Risk	Weight
Eligibility	HIGH	35%
Worksheet	HIGH	35%
Salaries (if applicable)	AVERAGE	15%
Data Entry (if applicable)	AVERAGE	15%
Service Credit	AVERAGE	10%
▪ Cost Letters/ ▪ Documents scanned	AVERAGE	5%



MOGAP QUALITY AUDIT REVIEW NOTES

Quality Review Notes	Audit Description
QA Action Item	Conditions resulting from the audited work that adversely impact the accuracy or effectiveness of the audited transaction and require immediate corrective action. QA will monitor the status of Action Items until they are satisfactorily addressed or are rejected by someone at least two supervisory levels above the individual performing the audited work.
QA Referral	Conditions not resulting from the audited work, but which warrant follow up to ensure the integrity of the member's account and its related transactions. QA closes the QA Referral once the auditor issues one or more Service Requests in Workspace to address the concerns documented in the QA Referral. It is the responsibility of the MOG Division to complete the service request in accordance with normal MOG processes.
Other Recommendations	Audit observations not directly relevant to the audited member's account, but relevant to the quality, timeliness or efficiency of the process being audited or to the general operations of the audited business unit. A QA Supervisor monitors Other Recommendations until they are addressed to the satisfaction of both QA and the MOG Division Manager.

THE THREE COMPONENTS OF A REVIEW NOTE

The Audit Review Note consists of three components which communicate Quality Assurance's observations to the auditee.

1. Criteria

LACERA's official standard by which the accuracy of a process is measured as adopted by Quality Assurance and its counterparts in Member Operations Group and approved by the Executive Office.

2. Conditions / Causes

The conditions are the relevant facts and evidence supporting the assessment and accuracy of the audit.

The causes are the reasons that the conditions do not meet the criteria.



3. Recommendations and Corrective Action Plan

These are the steps that Quality Assurance suggests be taken to resolve any issues identified in the audit and to meet the standard of the established criteria.

The three qualities of a good recommendation and corrective action plan addresses the following:

1. Historical conditions to correct past issues
2. Immediate current transactions
3. Root cause to prevent future issues

ACTION ITEMS

Action Items are issued when the tested transaction did not meet (or pass) the standards of the quality audit criteria. All action items are communicated to the divisions and are distributed to supervisors and staff for immediate corrective actions. After the divisions have corrected the action items, they are returned to QA for approval. QA reviews the responses to the action items and marks each action item as one of the following:

TABLE 10

Approved	=	Accepted (action item was resolved)
Action Required	=	Correction still Required
NA	=	No longer Applicable (the exception is no longer an issue due to changes in the member's account subsequent to the audit)

As required by LACERA, all action items must be corrected before reaching the member or before being implemented into our system for the payment of benefits. After the action item is resolved, the member's request can be completed. If no QA Action Items are issued for the transaction, it is deemed 100% accurate. If a QA Action Item is issued for the transaction, the transaction's accuracy rating is measured based on which audit criteria was involved. Each audit criterion is assigned a weight, which allows QA to calculate a weighted, risk-based accuracy rating and an unweighted, stratified accuracy rating.



APPENDIX B – QA AUDIT – SAMPLE ACCURACY CALCULATIONS

Calculation of accuracy rates using Weighted Criteria

As mentioned earlier, each sample is measured against the agreed upon criteria or check points. Accuracy is calculated based on the number of action items issued and which audit criteria is involved.

EXAMPLE: in the audit month, the total of audited work objects for the Sick Without Pay process is three. Workflow shows that Specialist A completed two of these work objects while Specialist B completed one and the table on the next page shows the results of the audit review.

TABLE 10

	Eligibility	Worksheet	Salaries	Lump Sum Cost	Data Entry	Service Credit	Cost Letter / Documentation	
	35%	10%	15%	10%	15%	10%	5%	= 100%
	7	2	3	2	3	2	1	= 20
Sample 1 Specialist A	Pass	Fail	Fail	Pass	Fail	Pass	Pass	
Sample 2 Specialist A	Pass	Pass	Pass	Pass	Pass	Pass	Fail	
Sample 3 Specialist B	Pass	Fail	N/A	N/A	Fail	Fail	Pass	

To be able to calculate the accuracy rate, we know that Sick Without Pay has 7 criteria or check points. We then assign each criterion a value depending on the assigned weighted value, which is based on the level of risk and the criterion's importance to the business process.



ACCURACY RATE FOR SPECIALIST A

The criterion factors used to determine the accuracy rate of the two Sick Without Pay transactions completed by Specialist A can be viewed as shown here. The % value for each criterion is shown on line 2 (total = 100%); the weighted numeric value assigned to each criterion is shown on line 3 (total = 20).

TABLE 11

	Eligibility	Worksheet	Salaries	Lump Sum	Data Entry	Service Credit	Cost letter / Documents scanned	
	35%	10%	15%	10%	15%	10%	5%	= 100%
	7	2	3	2	3	2	1	= 20 value
Sample 1 Specialist A	Pass	Fail	Fail	Pass	Fail	Pass	Pass	12/20 = (60%)
Sample 2 Specialist A	Pass	Pass	Pass	Pass	Pass	Pass	Fail	19/20 = (95%)
Accuracy by individual criterion	14/14 = 100%	2/4 = 50%	3/6 = 50%	4/4 = 100%	3/6 = 50%	2/2 = 100%	1/2 = 50%	[31/40 = total accuracy 77.5%]

Specialist A's accuracy rate is then calculated using the data for all the samples. The overall accuracy rate for Sick Without Pay would be calculated as follows:

1. the total value of the criteria with the "Pass" mark
(Sample 1, value 12 + Sample 2, value 19 = 31 total)
2. is divided by the total value of all applicable criteria in this sample
(Sample 1, value 20 + Sample 2, value 20 = 40 total)
3. which is equal to a 77.5% overall accuracy rate on the two Sick Without Pay transactions completed by Specialist A.

ACCURACY RATE FOR SPECIALIST B

Specialist B's accuracy rate on the single sample transaction is calculated as follows:

1. the total value of the criteria with the "Pass" mark (see bottom line of grid: total accuracy criteria = 8)
2. is divided by the total value of all applicable criteria in this sample
 - See 2nd line of grid: total value of pertinent criteria = 15 out of 20 since 5 are not applicable to Sample 3.
 - See 3rd line (audit analysis of sample) where N/A status is indicated under each inapplicable criterion.
3. which is equal to a 53.3% accuracy rate on the Sick Without Pay transaction completed by Specialist B

TABLE 12

	Eligibility	Worksheet	Salaries	Lump Sum	Data Entry	Service Credit	Cost letter / Documents scanned	
	35%	10%	15%	10%	15%	10%	5%	= 100%
	7	2	3	2	3	2	1	= 20 value
Sample 3 Specialist B	Pass	Fail	N/A	N/A	Fail	Fail	Pass	8/15 = (53.3%)
Accuracy by individual criterion	7/7 = 100%	0/2 = 0%	N/A	N/A	0/3 = 0%	0/2 = 0%	1/1 = 100%	[8/15 = total accuracy of 53.3%]



ACCURACY RATE FOR BUSINESS PROCESS – WEIGHTED

The overall accuracy rate for the Sick Without Pay process is then calculated using the data for all the samples. The overall accuracy rate for Sick Without Pay calculated as follows:

1. the total value of the criteria with a “Pass” mark (for all 3 samples: bottom line: total accuracy value = 39)
2. is divided by the total value of all applicable criteria for all 3 samples (applicable criteria total = 55)
 - See bottom line: total value of pertinent criteria = 55 out of 60 since 5 are not applicable to Sample 3.
3. which is equal to an overall accuracy rate of 70.9% for the Sick Without Pay business process.

TABLE 13

	Eligibility	Worksheet	Salaries	Lump Sum Cost	Data Entry	Service Credit	Cost Letter / Documents	
	35%	10%	15%	10%	15%	10%	5%	= 100%
	7	2	3	2	3	2	1	= 20 value
Sample 1 Specialist A	Pass	Fail	Fail	Pass	Fail	Pass	Pass	12/20 = (60%)
Sample 2 Specialist A	Pass	Pass	Pass	Pass	Pass	Pass	Fail	19/20 = (95%)
Sample 3 Specialist B	Pass	Fail	N/A	N/A	Fail	Fail	Pass	8/15 = (53%)
PROCESS Accuracy by individual criterion	21 / 21 = 100%	2 / 6 = 33.33%	3 / 6 = 50%	4 / 4 = 100%	3 / 9 = 33.33%	4 / 6 = 66.67%	2 / 3 = 66.67%	[39/55 = TOTAL ACCURACY 70.9%]



TERMS TO KNOW

- **Action Item** = Action Items are conditions resulting from a tested transaction that did not meet (or pass) the established quality standards. The impact of an action item on a transaction's accuracy rating is calculated based on the associated audit criteria and that criteria's pre-determined weighting. LACERA requires all action items to be addressed or rejected by the appropriate level of management before an auditor can close those action items, as well as the underlying test selection. If QA Action Items were not issued, the test selection is deemed 100% accurate.
- **Agreed Under Procedures (AUP)** = Agreed Upon Procedures is a miscellaneous category of complex work that does not fit a particular set of guidelines.
- **ARC** = Additional Retirement Credit. Credit that was purchased on or before December 31, 2012 to increase a member's service credit total. It was not based on actual employment and does not count toward retirement eligibility, vesting, or retiree healthcare subsidy. ARC purchases were discontinued under PEPRA as of January 1, 2013.
- **COLA** = Cost of Living Adjustment. LACERA retirement and survivor allowances are subject to an annual cost-of-living adjustment (COLA), helping to protect your fixed income from inflation. The adjustment is driven by changes in the cost of living over the previous 12-month period as of December 31.
- **MOGAP** = Member Operations Group Auditing Platform
- **NSCD** = Nonservice-Connected Disability. A disabling condition unrelated to the member's County employment.
- **Other Recommendations** = Other Recommendations are audit observations not directly relevant to the member whose transaction was audited, but which are relevant to the quality and to the timeliness or efficiency of the process or business unit being audited.
- **Post-Completion Audit** = Post Completion Auditing assesses the accuracy of a completed MOG transaction to help management in overseeing the associated business processes and staff performance and to correct transactions requiring



rework. Post Completion Audits are performed after the subject transactions are completed. To maintain audit independence, these audits are performed solely by QA.

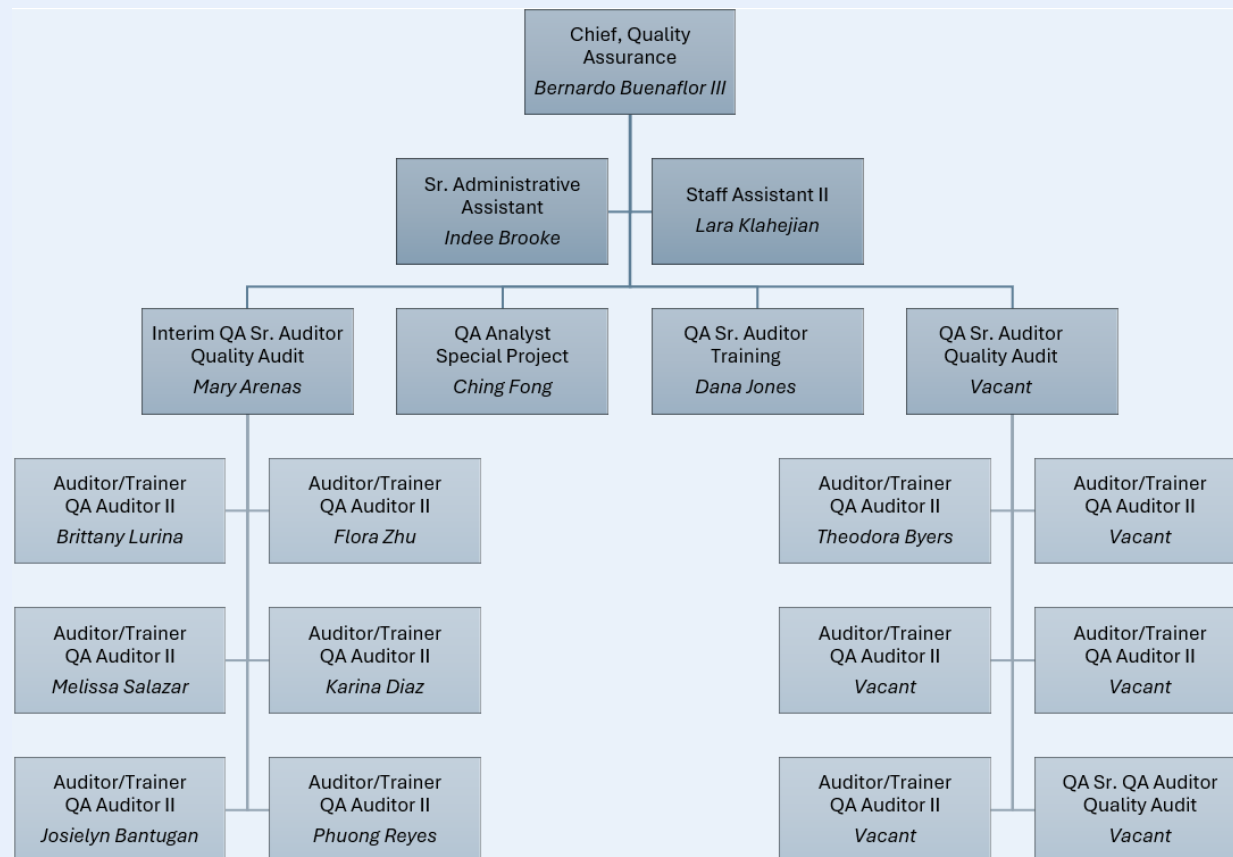
- **Pre-Completion Audit** = Pre-Completion Auditing is performed prior to the delivery of a MOG transaction end-product to the member. This helps ensure that the transaction meets LACERA's quality standards upon delivery.
- **QA Referral** = QA Referrals are conditions not resulting from the audited work, but which warrant follow up to ensure the integrity of the related member's account. For each QA Referral, an auditor will issue a service request to the appropriate work queue so that the necessary follow-up can be performed by the appropriate party.
- **Specialist Basic Training Audit** = Specialist Basic Training Audit is performed prior to the delivery of a Trainee's live production end-product to the member. This helps ensure that the transaction meets LACERA's quality standards upon delivery. It also helps Management evaluate the trainee's performance in support of their hiring decision.
- **TT as OPA** = Temporary Time calculated as Other Public Agency

QA Annual Audit Report FY 2024 - 2025



Presenter: Bernie Buenaflor,
Chief Quality Auditor

Organizational Structure



19 Budgeted Positions

- Chief Quality Auditor
- 5 Senior Quality Auditors
- 11 Quality Auditor II
- 1 Senior Secretary
- 1 Staff Assistant

Audit Results – FY 2024 - 2025

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	Pre-Completion Audit	Post Completion Audit	Specialist Basic Training Audit	Totals
Accuracy	97.76%	98.79%	97.50%	98.02%
Samples	7,499	1,781	1,551	10,831
Action Items	1,057	67	330	1,454
Outstanding Action Items	0	0	0	0

3 Types of Audits

1. Pre-Completion Audit
2. Post Completion Audit
3. Specialist Basic Training Audit

Achievements



- Increase Pre-Completion Audits
 - Over 83.33%
- Process Improvements
 - Completed revision of calculation of PEPRA FAC
- QA has developed and submitted for executive approval two governance documents, namely:
 - QA Key Performance Indicators
 - QA Staff Development and Training Standards
- Executive Office approved (to be presented in May/June of 2026):
 - 2025/2026 Annual QA Production/Audit Plan

Improvement Opportunities



- Business Rule Updates – QA and MOG partner collaborations
 - PEPRA FAC business rule change
- Other Recommendations
 - Other Recommendations serve as opportunities for business process improvement
 - 6 Items Remained Outstanding

Setbacks

- Division Staffing Shortages

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QA's Future Initiatives




- Reorganize for Greater Independence and Objectivity
- Full Staffing
- Expand Scope of Audits Based on Risk Levels
 - More Processes
 - Call Monitoring
 - Member Surveys
- Explore New Tools and Techniques for Clearing Member Account Exceptions
- Instilling the “Auditor Mindset” and Analytical skills to prepare Staff for the workplace of the future
 - Advanced CERL Education (ACE) Training

December 19, 2025

FOR INFORMATION ONLY

TO: Operations Oversight Committee
JP Harris, Chair
Nancy M. Durazo, Vice Chair
Aleen Langton, Trustee
Wayne Moore, Trustee
Shawn R. Kehoe, Alternate Trustee

FROM: Chaitanya Errande 
Information Security Officer

FOR: January 7, 2026, Operations Oversight Committee Meeting

SUBJECT: **Privacy Incidents: Personally Identifiable Information**

EXECUTIVE SUMMARY

The Information Security Office has been investigating and reporting on privacy-related events. Potential privacy breaches are now classified as "events" until investigations confirm them as "incidents." To address prior Board feedback, we have enhanced the readability of this report through concise language, structured formatting, and a clear summary table.

A total of **2** events were investigated, with **2** confirmed as incidents, including **2** involving Personally Identifiable Information (PII) and **0** involving Protected Health Information (PHI). Severity levels are low. As a standard practice, affected members are provided with one-year membership to Experian's Identity Theft Protection Services to mitigate risks.

DISCUSSION

Process Improvements

The following changes have been implemented in our privacy incident management process:

1. **Oversight:** The Information Security Office now leads the investigation and reporting of all privacy-related events.
2. **Workflow Improvements:** We discovered that two case files were opened at the same time by a Benefits Division Specialist. We recommended that cut-and-paste activities should be restricted to template documents to further minimize the potential for exposure of sensitive information.
3. **Readability Improvements:** Per Board feedback; this memo uses clear section headings, a summary table, and concise language to enhance comprehension.
4. **Education:** The Information Security Office has engaged in discussions with the Benefits Division Section Heads to review workflow procedures. It has been established that any future investigations involving the exposure of Personally Identifiable Information (PII) within the Benefits Division must first be discussed and reviewed with the appropriate Section Head. As part of this process, the Section Head will coordinate with the relevant Benefits Specialist to identify and assess the root cause of any potential exposure. This collaborative approach is intended to ensure thorough investigation, accountability, and implementation of corrective actions to mitigate future risks.
5. **Divisional Privacy Practices Assessments:** The ISO office will be conducting divisional assessments to evaluate existing practices to suggest improvements.

Incident Summary

Incidents	Under Investigation	Closed	PII Incidents	PHI Incidents
2	0	2	2	0

One incident was under investigation from September

A total of **2** events were investigated, with **2** confirmed as incidents, including **2** involving Personally Identifiable Information (PII) and **0** involving Protected Health Information (PHI). Severity levels are low. As a standard practice, affected members are provided with one-year membership to Experian's Identity Theft Protection Services to mitigate risks.

Incident Details

	Details
Incident Date	November 14, 2025
Discovery Date	November 24, 2025
Status	Closed
Description	Unsealed envelope containing Cost Notification and Service Credit information.
# of Members affected	1
PII Exposure	Member name, address
Cause	Member notified LACERA after receiving an Address Changed Confirmation letter intended for his ex-spouse. As part of the address change process, notifications are sent to both the previous and new addresses. In this instance, the ex-spouse's address was inadvertently disclosed to the member, resulting in exposure of personally identifiable information (PII).
Remediation / Corrective Action	To reduce the likelihood of similar incidents in the future, the Benefits Division should strengthen and regularly review its workflow procedures for "Legal Split" member address change notifications, ensuring that all personal information is handled with heightened diligence and in accordance with established privacy protocols.

	Details
Incident Date	December 04, 2025
Discovery Date	December 05, 2025
Status	Closed
Description	PII information
# of Members affected	1
PII Exposure	Member name, address, Benefits information
Cause	<p>DPC Quality Control process discovered that Death Benefit Claim letter for a deceased member was indexed to another member account.</p> <p>The Benefits Division specialist was managing two active cases and mistakenly sent the document intended for one member to the other.</p>
Remediation / Corrective Action	<p>The Section Head of the Benefits Division will notify the original Benefits Specialist regarding the identified indexing error.</p> <p>Furthermore, the Section Head has recognized the necessity for enhanced training to prevent recurrence of similar incidents. It is recommended that Benefits Division Specialists manage cases individually and avoid handling multiple cases simultaneously, thereby minimizing the potential for errors.</p>

Reviewed and approved:



Luis A. Lugo
Acting Chief Executive Officer

CE:ZF:nm

C: JJ Popowich, Assistant Executive Officer

Documents not attached are exempt from disclosure under the California Public Records Act and other legal authority.

**For further information, contact:
LACERA
Attention: Public Records Act Requests
300 N. Lake Ave., Suite 620
Pasadena, CA 91101**