"To enrich lives through effective and caring service"
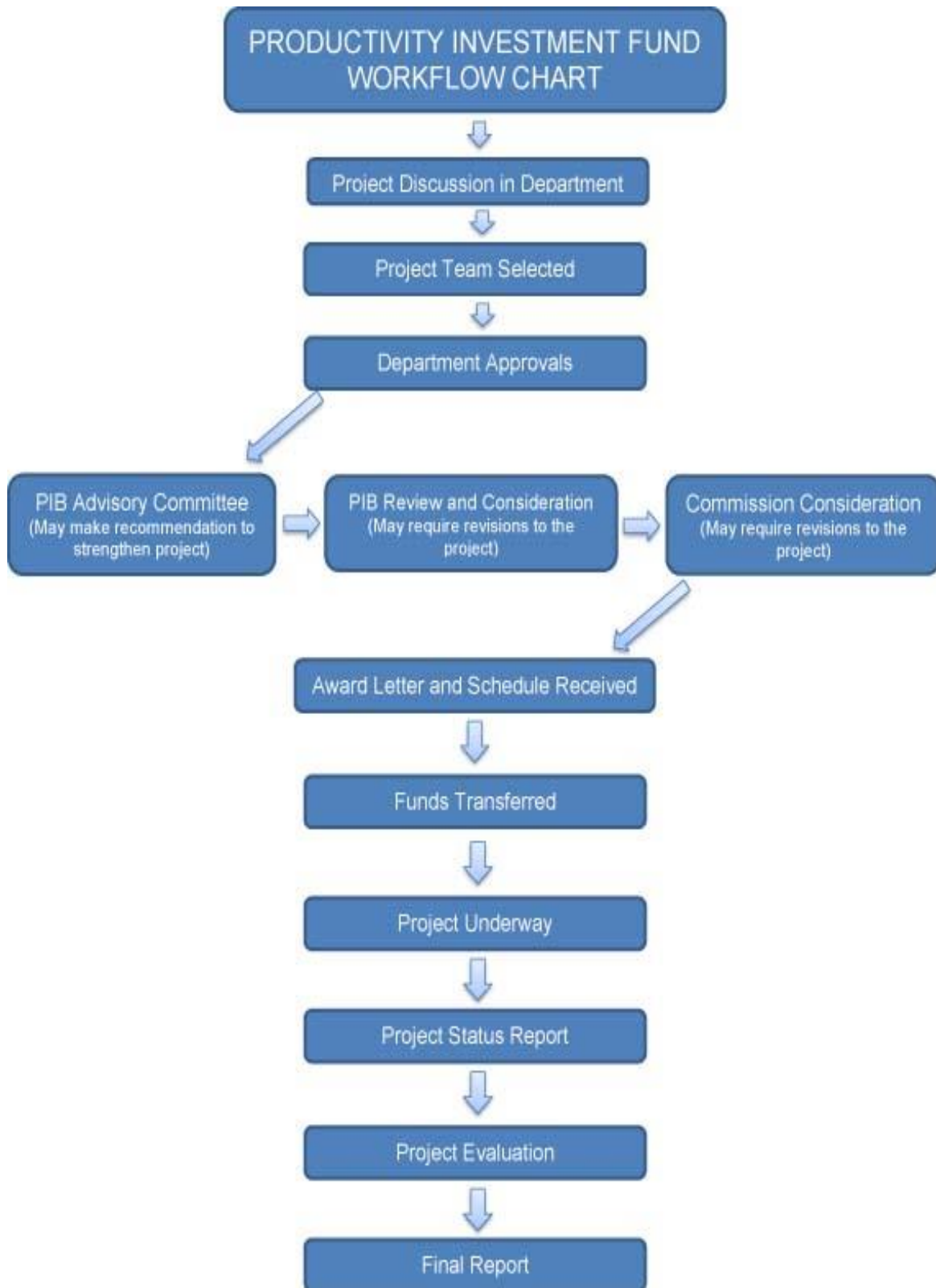
County of Los Angeles
Quality and Productivity Commission

Productivity Investment Fund Guidelines

April 15, 2025

PRODUCTIVITY INVESTMENT FUND WORKFLOW CHART

Project Discussion in Department

Project Team Selected

Department Approvals

PIB Advisory Committee
(May make recommendation to strengthen project)

PIB Review and Consideration
(May require revisions to the project)

Commission Consideration
(May require revisions to the project)

Award Letter and Schedule Received

Funds Transferred

Project Underway

Project Status Report

Project Evaluation

Final Report

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I. WHAT IS THE PRODUCTIVITY INVESTMENT FUND?

The Los Angeles County Board of Supervisors (Board) set up the Productivity Investment Fund (PIF) to nurture and support creative and innovative projects to improve the effectiveness of County service.

Funding awards are available for a project or program that improves productivity and quality, but for which funds are not budgeted or available.

Projects do not need to show cost savings or revenue generation, but should demonstrate an increase in a department's quality of service to the public or increase in productivity.

Funding is not to be used for:
- Making or changing County policy, by-passing actions or intentions of the Board, or funding projects disapproved for cause (other than lack of funds) by the Board
- Replacing or augmenting day-to-day operating budgets, or paying wages, salaries, or other compensation to County employees

Any revenue or savings actually or projected to be achieved through PIF funding must be reallocated within the proposed PIF-funded program or returned to the PIF, except as otherwise required by County policy.

Who is eligible?
One or more departments are eligible to receive PIF funding. Loans and grants, or a combination of both, are available to all departments and other collaborating County government agencies.

County departments may collaborate with non-county agencies for funding. The County department is always the lead agency in these partnerships and should benefit directly from the project.

PIF awards are available for individual projects that improve productivity and quality, but for which alternative funds may not otherwise be available. The Quality and Productivity Commission (Commission), on occasion, may access PIF funds for special Commission-sponsored projects.

How did the PIF start?
The Board established the PIF during fiscal year 1984-85. The Board and the CEO (formerly CAO) provided $500,000 "seed money" to improve the County's existing productivity efforts. Subsequently, the Commission created a seven-member Productivity Investment Board (PIB) to review and evaluate proposals and make recommendations for funding.

The Productivity Managers' Network (PMN), consisting of managers from each County department, is responsible for marketing, coordinating, and advancing proposals to the PIB.

In 1988, a Productivity Managers' PIF Subcommittee (PIF Subcommittee) was formed with representatives from the PMN. In 2006, the PIF Subcommittee was renamed the Productivity Investment Board Advisory Committee (PIB Advisory Committee) to better reflect their mission.

The PIB Advisory Committee is a Committee of the PMN. Currently, members include Productivity Managers from the Chief Executive Office (CEO), CEO-Chief Information Office (CIO), Auditor-Controller, Internal Services, Economic Opportunity, Health Services, Human Resources, Regional Planning, Children and Family Services, and Commission staff.

II. WHAT TYPES OF FUNDS ARE AVAILABLE?

Conventional Loans (Payback plus Interest)
A conventional loan requires payback under conditions and rates determined at the time of loan approval. Projects receiving this type of funding are normally low risk, but viewed as necessary productivity improvement projects for which funds are not budgeted or available. Repayment of loans is typically from "hard dollar" savings, and most often, includes a payback period of 36 months. In some cases, the terms for loan payback can extend beyond 36 months.

Loans or Grants for Information Technology Projects
PIF information technology projects provide an opportunity to collaborate with the CEO-CIO's Information Technology Fund (ITF). The ITF provides one-time funding for innovative projects that creatively apply new knowledge, technologies, methodologies or processes to improve the delivery of services to the public, generate operational improvements to one or more departments or programs, and improve inter-departmental or inter-agency collaboration.

Collaborating projects would use both PIF and ITF funding to focus on valuable technology solutions that improve County services. Departments interested in pursuing joint PIF/ITF funding are encouraged to work with their Department Chief Information Officer/Information Technology Manager to submit projects to the CEO-CIO **prior** to pursuing PIF funding. Once the ITF funding is determined, then departments may apply for PIF funding for project components outside of the ITF funding scope.

A proposal for special consideration of PIF and ITF funding will follow the usual PIF process. This partnership is a win-win opportunity for the departments that qualify. **However, the Commission and CEO/CIO partnership does not preclude a department from receiving PIF funding only.**

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Departments seeking to apply for PIF funding or joint PIF/ITF funding should work with their respective department information technology (IT) organization to vet the proposed technology project to:

1. Confirm alignment with their department's IT environment and provision of sustaining system maintenance and support;
2. Develop a reasonable cost estimate for the project funding request, including hardware, software and professional services;
3. Consider an appropriate acquisition strategy; and
4. Ensure ongoing IT representation on the project and preparedness to begin executing the project.

To confirm department IT participation in the project proposal, departments must obtain their department CIO/IT Manager endorsement and sign-off on the PIF application for all IT related PIF projects. In addition, you must apply for Information Technology Funds (ITF) with the CEO-CIO first before applying for Productivity Investment Funding. If your IT project was not approved by the CEO-CIO, please indicate the reason it was not approved and/or the status of the project.

The Commission will evaluate project loans or grants for IT projects on the same basis as for non-IT projects.

Grants
PIF grants are funds given to a department to carry out and evaluate an innovative project with the purpose of improving the delivery of services. A grant may be combined with a loan, subject to the standard terms and conditions for repaying the loan portion. The Commission bases approval of grants on one or any combination of the following guidelines:

1. The project is innovative and expected to enhance performance or service, or expand impact, but it may not yield cost savings.

2. The project has the potential to generate revenue. The risk of failure of the project is high, but if successful, it will generate revenue. Under this condition, the PIB typically requires revenue-sharing. (See recoverable grants section below).

3. The grant is matched or more than matched by other sources. If PIF funds are not made available in the form of a grant, the other funds will not be forthcoming and the project will not take place.

Recoverable Grants
Recoverable grants entail a degree of risk with the possibility of a cost benefit. This type of grant may have potential to recover the initial investment and achieve savings or

added revenue. Under these circumstances, the Commission may elect to share in the risk and return.

Terms and conditions are established at the time of grant approval. During deliberations, the Commission may seek a fixed amount or a percentage. For example, the Commission could request an ongoing 2 to 5 percent benefit share on the rate of return or could request a return of some or all allocated funds if ongoing cost recovery or revenue is sufficient to allow it.

III. WHAT DO I NEED TO COMPLETE AN APPLICATION?

Quarterly Solicitations and Review Process
Though applications are welcome throughout the year, the Commission solicits and reviews proposals quarterly. The application form and guidelines may be found at https://qpc.lacounty.gov/commission-programs/productivity-investment-fund.

There is a three-step process for approving PIF projects:
1. **PIB Advisory Committee**
2. **Productivity Investment Board**
3. **Full Commission**

Productivity Manager's Role
The Productivity Managers are the coordinators for all PIF projects within their departments. They are the points of contact for all questions about PIF applications.

STEP I: Complete the Application
The PIF application includes five sections:

1. **Summary of Project, Benefits and Measures:** Summarize the project. Signatures are required from the Department Head, Productivity Manager, Project Manager, Budget/Finance Manager, and Department CIO/IT Manager (required for IT projects).

2. **Questions:** Answer questions regarding the project.

3. **Implementation Plan**: Provide key milestones, funds needed, and start dates.

4. **Line Item Budget Detail:** Provide budget details of the project. Include Services and Supplies, including maintenance; other charges such as design and permit; and fixed assets. Please be clear and specific regarding how PIF funds will be used; if there are other sources of funding, please explain how they will be used. If applicable, please discuss potential for revenue increase, service enhancement, future cost avoidance, cost savings, whether as a whole or on a per unit basis, e.g., per capita, transaction, case, etc. You may wish to work with your budget/finance officer to make these calculations.

5. **Support Letters**: Support letters should specify the role or degree of in kind contributions (service, equipment, or staff) or direct financial contribution. The letter should be beyond a simple endorsement of the project. It should include the specific role the department/agency will be playing with respect to the project.

STEP II: Prepare a brief cover letter and submit application

1. The requesting department prepares a cover letter to the Chair of the PIB, signed by the Department Head. The department's Productivity Manager ensures the letter is complete. Any proposal presented without the accompanying letter of request will be returned to the department.

2. The cover letter should clearly summarize the project to be funded and should include information about:
   - What is the amount needed?
   - Why funding is needed? Was the funding discussed at the time of budget preparations and, if so, why was it not included in the budget?
   - What will be achieved and how will it enhance quality or productivity?
   - What outcomes or performance measures will be used to evaluate the success of the goals?
   - Has the project been reviewed by the Department's Chief Information Officer/Information Technology Manager if it involves information technology (IT) systems?

3. The department e-mails a digital copy of the cover letter, application (on Word or PDF document), and other supporting documents to the Commission Office, Jane Lam, jalam@bos.lacounty.gov. Wet, scanned, or electronic signatures are accepted.

STEP III: Meet with the PIB Advisory Committee

1. The PIB Advisory Committee performs a peer review of all applications before submission to the PIB. The department Productivity Manager, and other management or project representatives, present the project to the PIB Advisory Committee and answer questions.

2. This PIB Advisory Committee reviews the proposal, provides advice, and formulates a recommendation to the PIB. The suggestion includes type of funding, terms and conditions, repayment, etc., as appropriate. The purpose of the peer review is to help the applicant prepare for success at the PIB meeting. The Productivity Manager attends the meeting. After the meeting, the Productivity Manager is notified of the Committee's findings and advised of the date when the proposal will be placed on the PIB agenda.

3. The PIB Advisory Committee's recommendations are forwarded to the PIB for review prior to the quarterly PIB meeting and presented at the PIB meeting.

STEP IV: Meet with the PIB

1. The PIB is a standing committee of the Commission. Its meetings are open to the public and subject to Brown Act requirements.

2. At the meeting, a department subject matter expert makes a brief presentation of the project to the PIB and answers questions. The PIB also hears any applicable recommendations from the PIB Advisory Committee. The Department Head is strongly encouraged to attend. If the Department Head cannot attend, a senior department representative must be present (e.g., Chief Deputy).

3. The PIB takes action by majority vote, and if appropriate, identifies the type and amount of funding, including the terms and conditions.

4. Generally, PIB actions fall into one of the following categories:
   - Recommend Commission approval, typically with conditions related to the amount and type of funding as well as programmatic parameters
   - Forward the proposal for Commission review without recommendation
   - Refer the proposal back to the department for programmatic revision and resubmission directly to the PIB
   - Recommend Commission disapproval of the proposal
   - Continue the proposal to a future PIB meeting

5. Pursuant to the Commission's rules of order, the PIB reserves the right to continue any item for any reason.

STEP V: Full Commission approval and ratification

1. All PIB recommendations to the Commission, other than for disapproval, are placed on the next available Commission meeting agenda as action items. PIB recommendations for disapproval are placed on the agenda as receive-and-file items. At the discretion of the Commission, PIB recommendations for disapproval may be placed on the agenda as an action item at a future meeting.

2. A department may withdraw its proposal at any time. Withdrawals received more than 72 hours before the Commission meeting will not appear on the agenda.

3. Pursuant to the Commission's rules of order, the Commission may hear reports and discussion of all pending PIB recommendations before acting on them. The Department Head and members of the project team must be present to provide pertinent project updates and answer questions.

4. The Commission reserves the right to continue any item for any reason, including but not limited to the absence of the department head and/or the project team leader.

5. Pursuant to the Commission's rules of order, each PIB recommendation to allocate funds is treated as a privileged motion from committee, subject to amendment by the Commission.

IV.   IS THERE A CHECKLIST TO MAKE SURE I INCLUDE EVERYTHING?

√ 1. **Be accurate and specific.** Your numbers should add up and be very clear what you intend to accomplish with the PIF funding. If you refer to a set of numbers in the budget and then refer to it in the actual PIF form, the numbers should be consistent.

√ 2. **Send a cover letter and the forms to the Chair of the PIB.** The cover letter must be signed by your Department Head. The letter should clearly summarize the project to be funded, the amount requested, why funding is necessary, was the project discussed in the budget process, what will be achieved, and how will the project lead to enhanced productivity.

√ 3. **Use plain language.** It is important that the information you are trying to convey is clear and understandable. Take a step back! Look at the project as a layperson – someone who does not work in your department and is not familiar with common ideas and jargon in your department (<u>define acronyms</u>).

√ 4. **Submit a budget with your proposal.** Make sure things add up! Make sure the numbers in the budget can relate to what you put in the letter or on the forms. Additionally, identify any project cost savings, cost avoidance, or revenue generation. Be prepared to justify costs and support your numbers with the source of funds for each activity. Remember that while PIF funds may not be used to compensate County employees/staff, other funding sources (including the department itself) may be free of such limitations—but the full cost of the entire project must be accounted for.

√ 5**. Read the proposal one last time to make sure it is complete and is submitted by the deadline.**

√ 6. **Obtain appropriate signatures on the forms.** Do not just type in the names. The Department Head must sign the proposal. If your project is an information technology project, ensure you have also obtained sign off from your department's CIO/IT manager. (Electronic signatures are acceptable).

√ 7**. Ensure the Project Manager and other necessary staff attends the PIB Advisory Committee and PIB presentations.** If basic questions cannot be answered about the proposal, it will generally be evaluated as incomplete.

√ 8.   **At each review, you may be required to make changes to the proposal.** The PIB Advisory Committee, PIB, or full Commission may recommend or require revisions to the project.

√ 9.   **Commission staff is always available to answer questions.** Please call (213) 974-1361 or (213) 974-1390 if you have any questions.

V. WHAT HAPPENS AFTER FUNDING IS APPROVED?

Award Letter, Agreement for Acceptance of Funds, and Schedule
The Commission e-mails an award letter, approved Schedule of Withdrawals and Payments, and Agreement for Acceptance of Funds to the department showing Commission approval of the loan/grant and the terms and conditions. The Schedule of Withdrawals and Payment is based on information in the application.

Ensure all involved parties know of the Agreement and Schedule. The Department Head, Productivity Manager, Project Manager, and Finance or Budget Officer are required to sign the forms. As soon as all your department representatives sign, please send the signed original copy to the Commission Office. Your project will then be activated and withdrawals can take place as scheduled.

Key Players
Every project has several key players that must oversee the progress of the project until it is completed: the Project Manager, the Productivity Manager, and the departmental finance or budget person. If any of these key players transfers out of that role, it is that person's responsibility to train their replacement about the project and funding requirements.

Loan Interest Rates
The annual rate of interest is the County's treasury pool rate at the time of the loan, plus 50 basis points or 0.5 percent. It remains fixed for the life of the loan.

The projected outstanding loan balance on the Schedule of Withdrawals and Payments is the basis for interest charged by quarter. Quarterly interest amounts are calculated based on the outstanding scheduled loan balance on the Schedule of Withdrawals and Payments at the end of the previous quarter.

Interest due for the prior year is paid annually during the second quarter of the following year. However, the final payment on principal includes all interest scheduled and not yet paid.

Monitoring the Project

All projects, especially large loans or grants will be monitored to ensure that the money is spent for the project as approved. Commissioners may request to make site visits to track programs. If it does not appear the money is being used for the purpose as approved, the department may be asked to return the loan or grant. ***Money cannot be used to meet other department needs.***

Site visits may be scheduled at any given time. The PIB or the Commission may ask for a progress report or presentation at any time on any funded projects.

VI. HOW DO I WITHDRAW FUNDS OR MAKE PAYMENTS?

<u>Board Authorization for Budget Adjustments</u>
The 1992-93 Budget Resolution adopted by the Board authorizes the Auditor-Controller, on approval of the CEO, to make an appropriation budget adjustment (BA) to all departmental budgets for projects approved by the Commission. Therefore, departments are to incur costs for approved projects out of their operating budget, offset by a BA, either before or after spending the funds, at the discretion of the department. However, any appropriation adjustment funds received must be spent or committed by fiscal year-end.

<u>Work with your Budget Officer and CEO Budget Analyst</u>
To eliminate the need for a BA each fiscal year, your department's budget officer should include any scheduled PIF withdrawals or payments in its Budget Request each fiscal year.

- Scheduled withdrawals are budgeted as **"Operating Transfers In" Account #9911.**
- Scheduled PIF payments as **"Operating Transfers Out" Account #6100, Object Code 6102.**

The CEO budget analyst for your Department should also be notified and kept informed about any PIF loans and grants and their status so your PIF needs are included in the budget request.

Before the end of each fiscal year, the project and financial staff should confer to compare the planned versus actual expenditures for the fiscal year. If you have withdrawn funding and will not be spending the entire amount during the same fiscal year, you must encumber the funds and carry them over as a commitment to the next fiscal year. Ask your Department fiscal staff for the best way to carry out what is needed.

<u>Withdrawals</u>
1. The department prepares a BA according to the Schedule of Withdrawals and Payments and submits it to the Auditor-Controller.

2. Once the BA has cleared the Auditor-Controller, the department sends an e-mail request for funds to the Executive Office of the Board, Fiscal Services Division, Accounting Section (BOS Accounting). The request should include:
   - Confirmation the BA has cleared the Auditor-Controller
   - The amount to be withdrawn
   - The department's unit number
   - The account number which will receive the funds

3. BOS Accounting corroborates the project for budget monitoring purposes with Commission staff.

4. BOS Accounting creates a journal voucher (JV) in eCAPS to complete the transaction.

   The contact number at BOS Accounting Services is (213) 974-3174.

Payments
1. The typical and preferred practice is to schedule payments on the principal during the second quarter of the fiscal year. However, payments may be made during any quarter.

2. During the second quarter of each fiscal year, the BOS Accounting will set up the JV for your annual scheduled payment. The scheduled payment includes the *prior year's interest* plus any *principal* that is due. Interest is due each year, even if you are not yet scheduled to start making payment on the principal.

3. A BA is required if you do not have the Operating Transfers Out appropriation budgeted.

4. Annual payments on principal may be proposed in any amount over the length of the loan, including the option of paying the entire amount during the last year of the loan.

   The contact number at BOS Accounting Services is (213) 974-3174.

VII. WHAT ARE THE ANNUAL AND FINAL REPORTS?

Annual Status Report
The Commission requires an annual project status report for each PIF project. <u>Reports are due by January 31</u>.   Future funding may be at risk if reports are not filed. (Electronic signatures for the annual report are accepted.)

Final Report
Departments must submit a Final Report after the funds have been completely withdrawn and loan paid, and/or your evaluation measures are complete. The report must include:
- Description of the program implementation
- Actual program cost
- Cost benefits and outcomes
- Wet signatures for Final Reports are required

All funds must be used only for the purposes stated in the application. All expenditures must be documented and retained in the department. The PIB requires immediate notification of any unspent funds and funds must be returned to the PIF. **Commissioners receive copies of annual and final reports.**

VIII. HOW DO I MAKE CHANGES TO THE WITHDRAWAL OR PAYMENT SCHEDULE?

Changes in the terms and conditions for your loan or grant are possible, but require a written request to the Commission. Some changes can be done administratively, while others need approval by the PIB. If you have any questions, call the Commission office at (213) 974-1361 or (213) 974-1390 for clarification.

Changes to the Schedule of Withdrawals and Payments

1. A department initiates a change in the timing or the amounts of withdrawals and payments by sending an e-mail to the Commission office, jalam@bos.lacounty.gov, including an explanation of the change. Also send a revised Implementation Plan which reflects the changes being requested. If further information is required, the department will be asked to appear before the PIB. Changes to the line item budget detail are possible, but require a written request to the PIB Chair.

2. A reduction in the total amount of the grant-loan is to be divided proportionately between the grant and loan amounts. Loan funds must be withdrawn in the same proportion to grant funds. The entire grant portion may not be withdrawn before the loan portion is withdrawn.

3. A Revised Schedule of Withdrawals and Payments may be submitted during any quarter. Changes to the Schedule of Withdrawals and Payments may not be made retroactively.

4. Excessive delay in withdrawals. Withdrawals of grants and loans must be made during the scheduled quarter or the department should request a delay in the schedule according to the rules set above. *If the department does not withdraw funds within four quarters from the date the original Schedule of Withdrawals and Payments agreement for the project was signed, nor communicates a reason for the delay with the Commission, the award may be cancelled and funding may automatically be returned to the PIF.*

Changes which may be handled administratively without PIB approval

Although the PIB has the right to disapprove a submitted revision to the Schedule of Withdrawals and Payments, a department may request and receive a revised schedule without prior PIB review for the changes noted below:

- A decrease in the previously approved amount to be withdrawn in any quarter, including a decrease in the total amount of the grant or loan;
- A decision to delay withdrawing an approved amount to a later quarter;
- A decision to make a payment that is greater or paid earlier than the previously approved schedule; and
- A slippage in the schedule whereby all withdrawals and payments are delayed equally from the original schedule.

Changes requiring PIB approval

The following changes need a revision to the Schedule of Withdrawals and Payments and approval by the PIB before being implemented:

- An increase in the amount to be withdrawn in any quarter over the previously approved amount or an earlier withdrawal than previously scheduled;
- A payment to be made later than scheduled or in a lesser amount than previously approved; and
- A change in the scope of the project.

A revised schedule will be sent to the Department

When the above requirements have been met, Commission staff will send the revised schedule to the department with the new withdrawal and payment dates.

Failure to send a request for a revised schedule

1. Interest is based on the scheduled balance at the end of the quarter. Failure to send a new Schedule of Withdrawals and Payments for the changes noted above will not result in a reduction of the interest charged.

2. Failure to make a scheduled payment fully or partially, without a PIB-approved revision to the Schedule of Withdrawals and Payments, will cause the unpaid scheduled amount to be added immediately to the final payment due and interest to be increased accordingly. In this situation, the Department will provide an explanation at a PIB meeting.

These forms can be found online at:
http://qpc.lacounty.gov/Commission-Programs/Productivity-Investment-Fund

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County of Los Angeles Quality and Productivity Commission
PRODUCTIVITY INVESTMENT FUND PROPOSAL
(Please submit the proposal with a cover letter signed by the department head)

Last Updated: 1/25/2024

Department:	Date:

Project Name:

PURPOSE OF FUNDING (50 words). Describe how the PIF funding will be used.

SUMMARY OF PROJECT, INCLUDING BENEFITS (300 words). Describe benefits and potential multi-departmental or countywide adaptation.

EVALUATION/PERFORMANCE MEASURES. (300 words) Describe what specific outcomes are to be achieved and how the project will enhance quality and/or productivity.

County of Los Angeles Quality and Productivity Commission
PRODUCTIVITY INVESTMENT FUND PROPOSAL
(Please submit the proposal with a cover letter signed by the department head)
Last Updated: 1/25/2024

Is this an Information Technology (IT) project?

☐ Yes   ☐ No   ☐ N/A

If you answered yes, please obtain endorsement and sign off from your department's CIO/IT manager and answer question 5 on page 3 below. In addition, you must apply for Information Technology Funds (ITF) with the Chief Executive Office (CEO), Chief Information Office (CIO) first before applying for Productivity Investment Funding (PIF). If your IT project was not approved by the CEO-CIO, please indicate the reason it was not approved and/or the status of your project below:

Amount Requested: Loan _____   Grant _____   Total _____

Cost Analysis Summary. Attach detail for A and B, including staff, equipment, supplies, etc.

	Implementation Period	Project Year 1	Project Year 2	Project Year 3
A. Annual Cost of Current Process:				
B. Estimated Annual Cost of Proposal:				
C. Savings (B minus A)		$0.00	$0.00	$0.00

Funds Flow Summary: Indicate the amount of funds needed during implementation by period (fiscal year and quarter)

Quality and Productivity Manager (Print and Sign)	Project Manager (Print and Sign)
Telephone Number	Telephone Number
E-mail	E-mail
Department CIO/IT Manager (Print and Sign)	Budget/Finance Manager (Print and Sign)
Telephone Number	Telephone Number
E-mail	E-mail
Department Head (Print and Sign)	Telephone Number
E-mail	

QUESTIONS

1. Has this proposal been submitted before for a Productivity Investment Fund loan or grant? Yes_____   No_____

   If so, when (date)?

2. Was this proposal included in the department's current budget request?

   Yes_____   No_____   If no, why not?

3. How many years will it take for the loan to be paid back (3 years maximum without special approval)? Where will the funds come from to repay the loan?

   Hard Dollar Savings   Cost Avoidance

   Revenue Generation   Other (please explain)

4. Discuss potential for revenue increase, service enhancement, future cost avoidance and/or cost savings. Does it reduce net County cost?

5. (300 words)   How does this proposal extend, amplify, or complement existing cross-County best and shared practices (including, if applicable, technology or sustainability practices, and equity impact – whom does this benefit and/or burden); describe the proposed solution in terms of its innovative use of technologies to achieve desired business outcomes, and/or Department strategic goals and objectives?

6. (150 words) Is the proposal a pilot project? If so, what are the conditions for further expansion or development?

7. (300 words) What current County processes or functions will be eliminated or streamlined via this productivity enhancement(s) and/or quality improvement(s)?

8. (300 words) Does this proposal relate to a specific Countywide Strategic Plan goals and Board priorities? (To view the County's strategic plan, click here: https://ceo.lacounty.gov/strategic-plan-and-goals/. To view the Board's priorities, click here: (Chief Executive Office | County of Los Angeles (lacounty.gov). If yes, please explain.

9. (150 words) Does this proposal enhance the County image and/or improve relationships with the County's constituents? Please explain.

10. (150 words) How might this proposal promote interdepartmental cooperation including, if applicable, data sharing and program design?

11. (150 words) Where did the original idea for this project come from?

12. When will the funds be needed? Please indicate the amount needed by fiscal year and quarter:

2023-24
1st Quarter $_____
2nd Quarter $_____
3rd Quarter $_____
4th Quarter $_____

2024-25
1st Quarter $_____
2nd Quarter $_____
3rd Quarter $_____
4th Quarter $_____

2025-26
1st Quarter $_____
2nd Quarter $_____
3rd Quarter $_____
4th Quarter $_____

2026-27
1st Quarter $_____
2nd Quarter $_____
3rd Quarter $_____
4th Quarter $_____

IMPLEMENTATION PLAN

KEY MILESTONES	START DATE	FUNDS NEEDED	FUNDS REPAID
(Major steps in the project development)	(Estimated date for each project step)	(Amount and quarter funds will be needed)	(Amount and quarter funds will be repaid)
		$	$

LINE ITEM BUDGET DETAIL
(Work with your Budget Analyst)

Services and Supplies

List all services and supplies here

(a) Total services and supplies $

Other Charges

List all other charges here

(b) Total other charges $

Fixed Assets

List all equipments and other fixed assets here

(c) Total fixed assets $

TOTAL COSTS (a+b+c) $

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http://qpc.lacounty.gov/Commission-Programs/Productivity-Investment-Fund
The sections of the form are expandable

County of Los Angeles Quality and Productivity Commission **PRODUCTIVITY INVESTMENT FUND PROPOSAL**

ANNUAL STATUS REPORT

Date	Grant/Loan Number

Department

Project Name

Brief Description of Project   [   ] Revenue-Generating   [   ] Service Enhancement

Funding Status Total Grant Amount:_____	Total Loan Amount:_____	Total Withdrawn to Date:_____ Total Principal Repaid to Date:_____ Total Interest Repaid to Date:_____
Expenditures Total Estimated Expenditures:_____ Expenditures to Date:_____	Savings Total Estimated Savings:_____ Savings to Date:_____	Revenue Total Estimated Revenue:_____ Revenue to Date:_____

Brief description of project's status, major problems, significant accomplishments and other comments:

_____   _____
Productivity Manager   Date

_____   _____
Department Head   Date

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The sections of the form are expandable

County of Los Angeles Quality and Productivity Commission
PRODUCTIVITY INVESTMENT FUND PROPOSAL

FINAL REPORT
(To be submitted one year after the project is fully implemented)

Date	Grant/Loan Number
Department	
Project Name	
Date Started::	
Date Completed:	

DESCRIPTION OF ACTUAL PROGRAM IMPLEMENTATION:

RESULTS OF THE PROJECT (Programmatic and cost-savings/cost avoidance or revenue generated)

DESCRIPTION OF SERVICE ENHANCEMENT (How has this project improved core services)

ACCOUNTING OF FUND EXPENDITURES (Based upon the budget submitted when the project was approved)

Total Grant Amount:_____	Total Loan Amount:_____	Total Withdrawn to Date:_____ Total Principal Repaid to Date:_____ Total Interest Repaid to Date:_____
Program Cost (Salaries and benefits; Services and Supplies; Fixed Assets; Other Charges) Total Program Cost:_____	Cost Benefits: Total Estimated • Savings:_____ • Cost Avoidance:_____ • Revenue:_____	

_____   _____
Productivity Manager   Date

_____   _____
Department Head   Date