Board of Retirement Regular Meeting
Sacramento County Employees' Retirement System

Agenda Item 18

MEETING DATE: January 15, 2025

SUBJECT: Technology Report—Fourth Quarter 2024

SUBMITTED FOR: ___ Action   _X_ Information

RECOMMENDATION

Receive and file the Technology Report for the quarter ended December 31, 2024.

PURPOSE

This item supports the Strategic Management Plan to leverage technology to continuously improve performance, productivity, and efficiency in fulfillment of the SCERS' mission.

DISCUSSION

The Technology Report is provided to ensure oversight of the organization's technological progress, ensuring it aligns with strategic objectives. This report offers a snapshot of technological advancements, system implementations, and digital transformation updates. It serves to inform decisions on current and future technology initiatives.

This quarterly report reflects a 3-month review of 2024 performance.

ATTACHMENT

- Board Order
- Technology Report—Fourth Quarter 2024
- Technology Report— Fourth Quarter 2024 Presentation

Prepared by: Reviewed by:

/S/   /S/

_____   _____
Timothy Taylor   Eric Stern
Chief Technology Officer   Chief Executive Officer

Retirement Board Order
Sacramento County Employees' Retirement System

Before the Board of Retirement
January 15, 2025

AGENDA ITEM:

Technology Report—Fourth Quarter 2024

THE BOARD OF RETIREMENT hereby accepts the recommendation of staff to receive and file the Technology Report for the quarter ended December 31, 2024.

I HEREBY CERTIFY that the above order was passed and adopted on January 15, 2025 by the following vote of the Board of Retirement, to wit:

AYES:

NOES:

ABSENT:

ABSTAIN:

ALTERNATES:
(Present but not voting)

_____
James Diepenbrock
Board President

_____
Eric Stern
Chief Executive Officer and
Board Secretary

Technology Report—Fourth Quarter 2024

Digital Transformation - Year 0							FY 23/24 Budgeted Amount - $1,000,000	
ID	Initiative Name	Target Date	Status	Estimated		Expended		Annual Cost
0.1	Enterprise Resource Planning Committee	2023 - Q4	Completed	$ -	$	-	$	-
0.2	SCERS.gov Transition	2024 - Q2	Completed	$ -	$	-	$	-
0.3	Online Appointment Scheduling	2024 - Q1	Completed	$ 230	$	230	$	230
0.4	Direct Deposit Member Notification	2024 - Q2	Development	$ -	$	-	$	-
0.5	Member Portal - Phase I	2024 - Q2	Initial Launch Complete	$ 603,500	$	597,816	$	110,200
0.6	Member Engagement Platform	2024 - Q2	Completed	$ 5,580	$	5,580	$	5,580
0.7	Online Death Reporting	2024 - Q3	Design	$ -	$	-	$	-
0.8	Workflow Management: Retirement Pipeline	2024 - Q2	Development	$ -	$	-	$	-
0.9	Online Retirement Application	2024 - Q3	Development	$ 197,000	$	-	$	-
0.9.1	Secure File Upload	2024 - Q3	Development	$ -	$	-	$	-
0.10	Business Continuity/Single Device Strategy	2024 - Q4	In Progress	$ 105,000	$	32,625	$	-
Year 0 Sub Total				$ 911,310	$	636,251	$	116,010

Digital Transformation - Year 1							FY 24/25 Budgeted Amount - $1,750,000	
ID	Initiative Name	Target Date	Status	Estimated		Expended		Annual Cost
0.4	Direct Deposit Member notification	2024 - Q4	Implementation	$ -	$	-	$	-
0.5	Member Portal - Phase I (Continued)	2024 - Q3	Completed	$ 15,228	$	18,550	$	110,200
0.7	Online Death Reporting	2024 - Q4	Implementation	$ 8,000	$	-	$	-
0.9	Online Retirement Application	2024 - Q4	Development	$ 147,000	$	147,000	$	50,000
	Online Retirement Application Additional Functionality			$ 40,000				
0.91	Secure File Upload	2024 - Q4	Implementation	$ 15,000	$	-	$	-
0.10	Business Continuity/Single Device Strategy	2024 - Q4	In Progress	$ 72,375	$	70,963	$	-
1.0	Digital Transformation Initiatives	2025		$ 350,000				
1.1	Member Portal - Phase 2			$ -	$	-	$	-
1.2	Online Service Purchase Calculator			$ -	$	-	$	-
1.3	Back Office Transformation: Retirement Pipeline			$ -	$	-	$	-
1.4	Workflow Management/Transformation: Service Purchase			$ -	$	-	$	-
Year 1 Sub Total				$ 647,603	$	236,513	$	160,200

Technology Report
Fourth Quarter 2024

January 15, 2025

Digital Transformation – 2024 Q4 Update

- MySCERS Portal Fully Launched

- Implementing/Operationalizing:
  - Secure File Upload
  - Online Death Reporting
  - Direct Deposit Member Notification

- Online Retirement Application (ORA) in Development

- Single Device Strategy Rollout wrapping up

MySCERS Registration Highlights

3,206
Registrations

2,213
Fully Activated

39 of 50
States

Top 3

TX (31)

TN (29)

NV (25)

	Retired	Active	Deferred
	9%	12%	5%
■ Registered	1,343	1,640	223
■ Not Registered	12,942	12,050	4,712