



Board of Retirement Regular Meeting

Sacramento County Employees' Retirement System

Agenda Item 14

MEETING DATE: April 16, 2025

SUBJECT: Technology Report—First Quarter 2025

SUBMITTED FOR: Action X Information

RECOMMENDATION

Receive and file the Technology Report for the quarter ended March 31, 2025.

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 2025 performance.

ATTACHMENT

- Board Order
- Technology Report—First Quarter 2025
- Technology Report— First Quarter 2025 Presentation

Prepared by:

/S/

Timothy Taylor
Chief Technology Officer

Reviewed by:

/S/

Eric Stern
Chief Executive Officer



Retirement Board Order

Sacramento County Employees' Retirement System

Before the Board of Retirement
April 16, 2025

AGENDA ITEM:

Technology Report—First Quarter 2025

THE BOARD OF RETIREMENT hereby approves Staff's recommendation to receive and file the Technology Report for the quarter ended March 31, 2025.

I HEREBY CERTIFY that the above order was passed and adopted on April 16, 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	Completed	\$ -	\$ -	\$ -
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	Completed	\$ -	\$ -	\$ -
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	Completed	\$ -	\$ -	\$ -
0.5	Member Portal - Phase I (Continued)	2024 - Q3	Completed	\$ 15,228	\$ 18,550	\$ 110,200
0.7	Online Death Reporting	2024 - Q4	Completed	\$ 8,000	\$ -	\$ -
0.9	Online Retirement Application	2024 - Q4	Testing	\$ 147,000	\$ 147,000	\$ 50,000
	Online Retirement Application Additional Functionality			\$ 40,000		
0.91	Secure File Upload	2024 - Q4	Completed	\$ 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					
1.1.1	Member Statements			\$ 51,042	\$ 30,450	\$ -
1.2	Online Service Purchase Calculator			\$ -	\$ -	\$ -
1.3	Back Office Transformation: Retirement Pipeline			\$ -	\$ -	\$ -
1.4	Workflow Management/Transformation: Service Purchase		In Progress	\$ -	\$ -	\$ -
1.5	Website Refresh	2025 - Q4		\$ 62,000	\$ -	\$ -
Year 1 Sub Total				\$ 760,645	\$ 266,963	\$ 160,200



Technology Report

First Quarter 2025

April 16, 2025

Digital Transformation – 2025 Q1 Update

- Initiatives Completed

- Direct Deposit Member Notification
- Online Death Reporting
- Secure File Upload
- Online Annual Statements

- Initiatives In Progress

- Online Retirement Application (ORA) in Test
- Website (scers.gov) Refresh
- ChatBot Analysis

MySCERS Registration Highlights

▲ 4,158
7,364
Registrations

6,043
Fully Activated

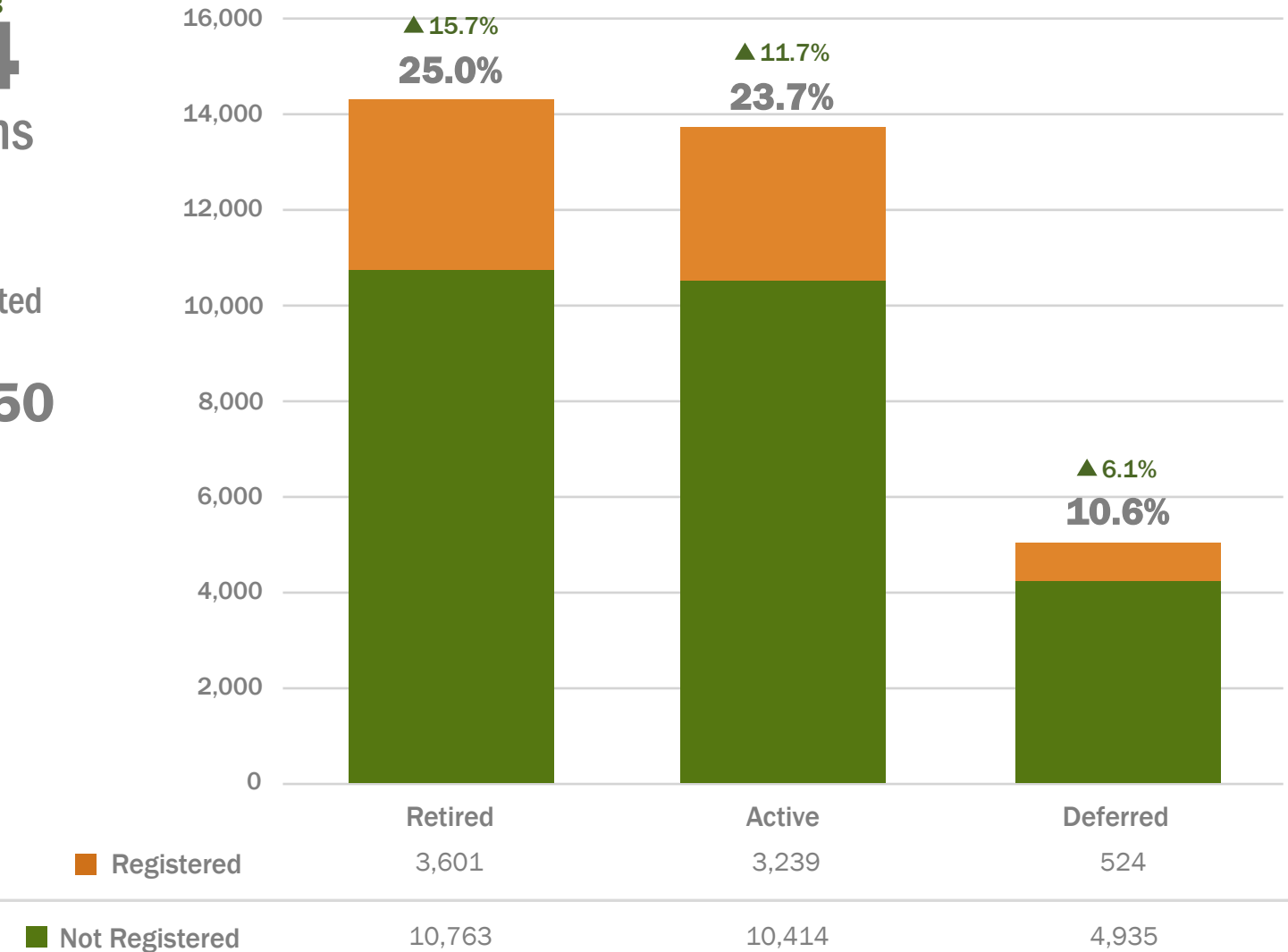
▲ 7
46 of 50
States

Top 3

NV (82)

ID (80)

TX (77)



As of 03/31/25