Board of Retirement Regular Meeting
Sacramento County Employees' Retirement System

Agenda Item 21

MEETING DATE: **August 20, 2025**

SUBJECT: **Technology Report—Second Quarter 2025**

SUBMITTED FOR: ___ Action   _X_ Information

RECOMMENDATION

Receive and file the Technology Report for the quarter ended June 30, 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—Second Quarter 2025
- Technology Report— Second Quarter 2025 Presentation

Prepared by: Reviewed by:

/S/   /S/

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

Before the Board of Retirement
August 20, 2025

AGENDA ITEM:

Technology Report—Second Quarter 2025

THE BOARD OF RETIREMENT hereby approves the Staff recommendation to receive and file the Technology Report for the quarter ended June 30, 2025.

I HEREBY CERTIFY that the above order was passed and adopted on August 20, 2025 by the following vote of the Board of Retirement, to wit:

AYES:

NOES:

ABSENT:

ABSTAIN:

ALTERNATES:
(Present but not voting)

_____
Board President

_____
Eric Stern
Chief Executive Officer and
Board Secretary

Technology Report—Second Quarter 2025

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	Completed	$ 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 - 12*	*Completed*	$ -	$ -	$ -
0.5	*Member Portal - Phase I*	*2024 - 10*	*Completed*	$ 15,228	$ 18,550	$ 110,200
0.7	*Online Death Reporting*	*2024 - 12*	*Completed*	$ 8,000	$ -	$ -
0.9	*Online Retirement Application (ORA)*	*2024 - 12*	*Completed*	$ 147,000	$ 147,000	$ 50,000
	ORA Additional Functionality	*2025 - 06*	*Completed*	$ -		
0.9.1	*Secure File Upload*	*2024 - 12*	*Completed*	$ 15,000	$ -	$ -
0.10	*Business Continuity/Single Device Strategy*	*2024 - 12*	*Completed*	$ 72,375	$ 70,963	$ -
1.1	Member Statements	2025 - 03	Completed	$ 51,042	$ 42,070	$ -
1.5	Website Refresh	2025 - 12	In Progress	$ 15,400	$ 15,400	$ -
Year 1 Sub Total				$ 324,045	$ 293,983	$ 160,200

Digital Transformation - Year 2 | | | | **FY 25/26 Budgeted Amount - $1,500,000**

ID	Initiative Name	Target Date	Status	Estimated	Expended	Annual Cost
1.5	*Website Refresh*	*2025 - 12*	*In Progress*	$ 46,000	$ -	$ -
2.0	Digital Transformation Initiatives	--	--	$ 280,000		
0.9	*ORA Additional Functionality*	*2025 - 06*	*Completed*	$ 80,000	$ 80,000	
2.1	Online Service Purchase Calculator	2026	Initiation	$ -	$ -	$ -
2.2	Back Office Transformation: Retirement Pipeline	2026	Initiation	$ -	$ -	$ -
2.3	Employer Portal	2026	Initiation	$ -	$ -	$ -
2.4	Retirement Calculation Engine Refactoring (RAP)	2026	Initiation	$ -	$ -	$ -
2.5	LRS Pre-Engagement	2026-05		$ 685,000		
Year 2 Sub Total				$ 1,045,000	$ 80,000	$ -

Technology Report—Second Quarter 2025

Digital Transformation - Year 0 · **FY 23/24 Budgeted Amount - $1,000,000**

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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	Completed	$ 603,500	$ 597,816	$ 110,200
0.6	Member Engagement Platform	2024 - Q2	Completed	$ 5,580	$ 5,580	$ 5,580
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0.8	Workflow Management: Retirement Pipeline	2024 - Q2	Development	$ -	$ -	$ -
0.9	Online Retirement Application	2024 - Q3	Development	$ 197,000	$ -	$ -
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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**

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0.10	Business Continuity/Single Device Strategy	2024 - 12	Completed	$ 72,375	$ 70,963	$ -
1.1	Member Statements	2025 - 03	Completed	$ 51,042	$ 42,070	$ -
1.5	Website Refresh	2025 - 12	In Progress	$ 15,400	$ 15,400	$ -
Year 1 Sub Total				$ 324,045	$ 293,983	$ 160,200

Digital Transformation - Year 2 · **FY 25/26 Budgeted Amount - $1,500,000**

ID	Initiative Name	Target Date	Status	Estimated	Expended	Annual Cost
1.5	Website Refresh	2025 - 12	In Progress	$ 46,000	$ -	$ -
2.0	Digital Transformation Initiatives	--	--	$ 280,000		
0.9	ORA Additional Functionality	2025 - 06	Completed	$ 80,000	$ 80,000	
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2.4	Retirement Calculation Engine Refactoring (RAP)	2026	Initiation	$ -	$ -	$ -
2.5	LRS Pre-Engagement	2026-05		$ 685,000		
Year 2 Sub Total				$ 1,045,000	$ 80,000	$ -

Technology Report
Second Quarter 2025

August 20, 2025

Digital Transformation – 2025 Q2 Update

- Initiatives Completed

  - Online Retirement Application (ORA)

- Initiatives In Progress

  - Website (scers.gov) Refresh

  - Online Service Purchase Calculator

  - Back Office Transformation: Retirement Pipeline

  - Employer Portal

  - Retirement Calculation Engine (RAP) Refactoring

  - Secure Board Site Replatforming

MySCERS Registration Highlights

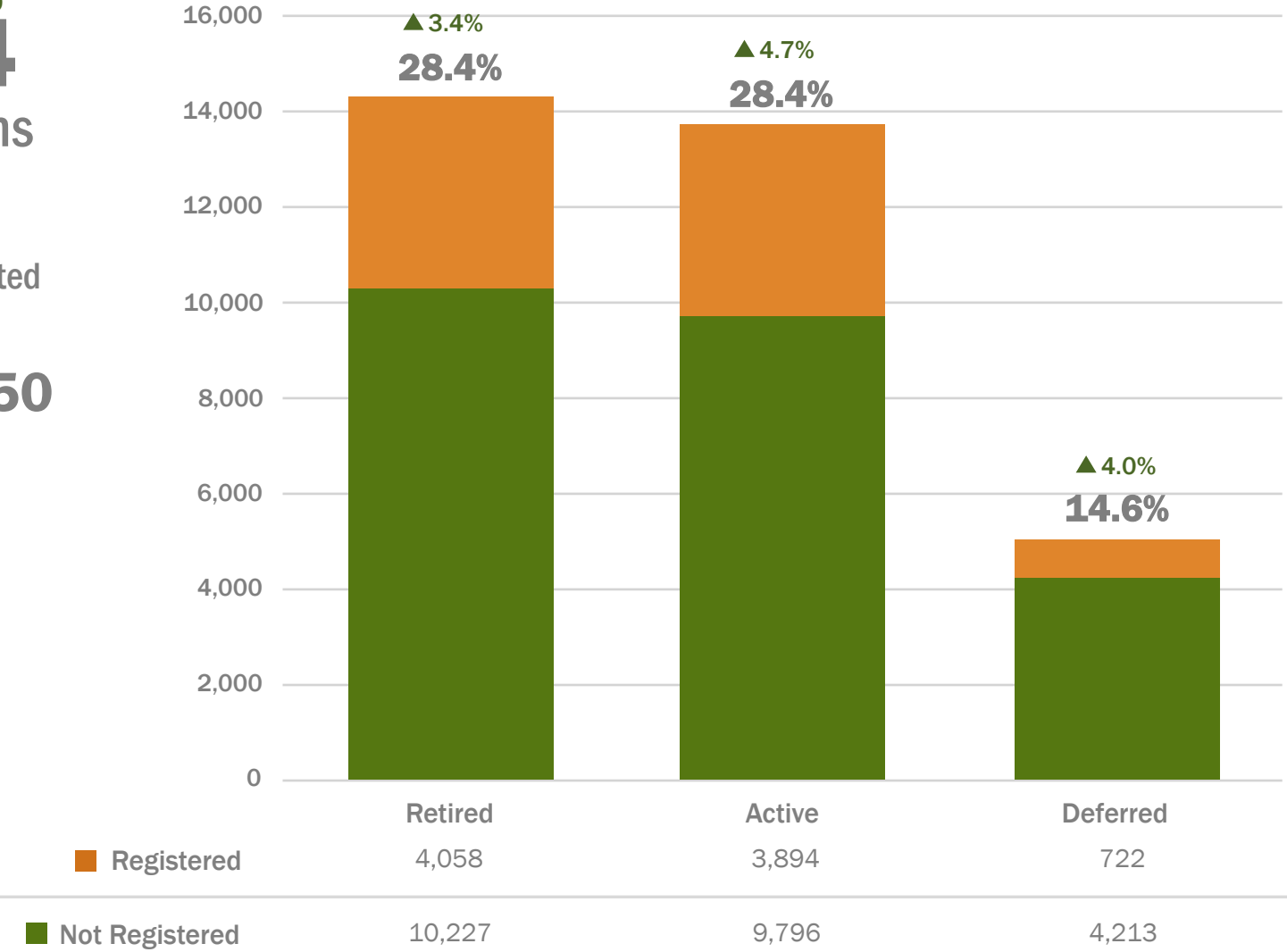▲1,310
8,674
Registrations

7,374
Fully Activated

▲7
46 of 50
States

Top 3

NV (94)

TX (90)

WA (83)

As of 06/30/25

	Retired	Active	Deferred
Registered	4,058	3,894	722
Not Registered	10,227	9,796	4,213