



# Board of Retirement Regular Meeting

## Sacramento County Employees' Retirement System

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### Agenda Item 21

**MEETING DATE:** January 21, 2026

**SUBJECT:** Position Requests

**SUBMITTED FOR:**   X   Action           Information

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#### **RECOMMENDATION**

Approve the following position changes for the 2026-27 fiscal year: Reallocate 1.0 FTE Sr. Office Specialist (c) to 1.0 FTE Executive Secretary and add 1.0 FTE Information Technology System Support Specialist Level I/II and 1.0 FTE Accountant.

#### **PURPOSE/STRATEGIC PRIORITY**

This item supports the Strategic Management Plan objective to equip SCERS staff with the knowledge, skills, tools, and facilities needed to perform effectively today and in the future.

#### **DISCUSSION**

These position changes are being requested in advance of the 2026-27 budget proposal to accommodate County budget planning and position approval processes.

**Sr. Office Specialist to Executive Secretary:** The Senior Office Specialist (Confidential) position was utilized to provide broad administrative and clerical support across SCERS, including assistance with executive leadership, operations, and benefits functions. SCERS previously utilized the Executive Secretary classification and changed to Senior Office Specialist to broaden the recruitment pool. While this structure initially offered flexibility, the role has evolved significantly due to increasing governance, compliance, and executive coordination needs of the organization.

In practice, the position now functions primarily as direct executive-level support for the Chief Executive Officer. Core responsibilities include managing confidential and highly sensitive information; coordinating executive calendars, meetings, and travel; preparing complex correspondence, reports, and Board materials; and serving as a central point of coordination for Board of Retirement meetings, agendas, packets, and related governance documentation. These duties require a high level of discretion, independent judgment, and familiarity with executive decision-making processes.

As SCERS's operational complexity and regulatory environment have expanded, the need for consistent, dedicated executive support has become more pronounced. Approximately two-thirds of the position's workload is now devoted to executive and Board-related functions, with the remaining time providing limited operational or programmatic assistance. This allocation more closely aligns with the Executive Secretary classification, which is specifically designed to support executive leadership and governance functions, rather than the broader, more generalist scope of the Senior Office Specialist (Confidential) classification.

Reclassifying the position back to Executive Secretary more accurately reflects the nature, complexity, and confidentiality of the work being performed. It also strengthens organizational effectiveness by ensuring that executive and Board support responsibilities are assigned to a classification intended to manage sensitive information, support high-level decision-making, and maintain continuity in governance processes. This alignment supports SCERS's strategic priorities, enhances accountability, and reinforces appropriate staffing structures as the organization continues to evolve.

**Information Technology System Support Specialist:** In recent years, SCERS has continued to modernize its technological environment, including system upgrades, cloud-based platforms, cybersecurity controls, and preparation for a future pension administration system. As these initiatives have advanced, the organization has reassessed not only its technology strategy, but also the balance of IT staffing needed to sustain day-to-day operations while supporting long-term modernization efforts.

At one time, SCERS maintained dedicated staff capacity to perform core technology systems support functions, including end-user support, device and access management, routine system administration, and operational technology troubleshooting. When that capacity was reallocated to support higher-level infrastructure and analytical responsibilities, essential systems support functions were left without a dedicated role and have since been absorbed informally across other IT staff and business units. This has created operational gaps, competing priorities, and inefficiencies that are not sustainable as SCERS's technology footprint continues to expand.

Restoring dedicated systems support capacity is critical to maintaining operational stability and service continuity. These functions provide the foundation upon which more complex infrastructure, security, and system initiatives depend. A focused systems support role through an ITSSS ensures timely resolution of user issues, consistent configuration and access controls, reliable device and application support, and proactive maintenance of core technology services. Without this foundational layer, higher-level IT staff are routinely diverted from strategic work to address routine operational needs, slowing progress on modernization initiatives.

Adding the ITSSS position allows SCERS to clearly separate operational systems support from infrastructure design, security architecture, and strategic technology planning. This staffing structure promotes efficiency, strengthens internal controls, improves responsiveness to staff needs, and reduces organizational risk. It also supports continuity during system transitions by ensuring that daily technology operations remain stable while major projects move forward.

Reestablishing this capacity aligns IT resources with SCERS's current and future operational demands, supports a sustainable technology staffing model, and reinforces the organization's ability to deliver secure, reliable, and efficient services to staff and members.

Since 2017, SCERS' Information Technology function has expanded from a single IT support position to a fully staffed team of six (6) consisting of a Chief Technology Officer, one (1) Supervising IT Analyst, two (2) IT Applications Analysts, one (1) IT Infrastructure Analyst, and one (1) IT Business Systems Analyst. In addition to permanent staff, SCERS has utilized temporary IT resources as needed to support operational demands. Currently, SCERS employs one (1) temporary IT Systems Support Specialist.

**Accountant:** As SCERS prepares to implement a new pension administration system, the organization will assume responsibility for all core payment and accounting functions that are currently performed by the Sacramento County Department of Finance. This transition represents a significant operational shift and requires additional internal accounting capacity to ensure continuity, accuracy, and compliance once these functions move in-house.

Under the current operating model, the Department of Finance manages payment processing activities on SCERS's behalf, including cash and bank reconciliations, check issuance and voids, tax reporting, garnishments, and related control processes. In the future state, these responsibilities will be performed directly by SCERS and will need to be integrated with the new pension administration system and associated banking arrangements. This expanded scope materially increases the volume, complexity, and technical nature of accounting and payment processing work.

The additional Accountant position would provide dedicated support for payment operations, including reconciliation of cash and payroll accounts, review of bank transaction summaries, reconciliation of cleared check data, and maintenance of complete audit trails. The role would also support in-house banking activities by ensuring that accounting records align with bank activity and that all payment transactions are appropriately reviewed, documented, and recorded.

In addition, SCERS will become responsible for preparing and filing the Annual Return of Withheld Federal Income Tax (Form 945) for non-payroll payments, a function currently handled by the Department of Finance. The Accountant would support the preparation, review, and timely filing of this return, ensuring compliance with federal reporting requirements.

SCERS utilizes electronic payment methods, including ACH, the Accountant would assist with reviewing prenote file validations prior to initiating transactions to confirm accuracy and readiness. This role would support the establishment of sound controls around payment authorization and transmission as these functions are brought in-house.

The Accountant would also play a key role in supporting implementation of the new pension administration system by assisting with file development, initial testing, iterative feedback, and final approval for production use. Responsibilities would include reviewing technical documentation and specifications, validating test results, coordinating secure submission protocols for testing files, and ensuring test files are appropriately segregated from live production data. This support is essential to achieving a smooth transition and ensuring the system is fully operational and reliable upon go-live.

Adding this position provides SCERS with the accounting expertise necessary to support expanded payment processing responsibilities, maintain strong internal controls, and ensure a successful transition to the new pension administration system. The position strengthens operational resilience, supports regulatory compliance, and allows SCERS to internalize critical financial functions in a controlled and sustainable manner as part of its broader modernization efforts.

The Accounting and Finance Unit is fully staffed at eleven (11) positions consisting of one (1) Senior Accounting Manager, two (2) Accounting Managers, three (3) Senior Accountants, two (2) Accountants, and three (3) Accounting Technicians. Approval of this additional full-time equivalent (FTE) would increase the unit's total staffing to twelve (12) positions, aligning resources with expanding operational and regulatory responsibilities.

***Fiscal Impact***

<b>Deleted Position(s)</b>	<b>Salary</b>	<b>Benefits</b>	<b>Total</b>	<b>Net Cost</b>
1 FTE Sr Office Specialist Conf	\$71,973	\$37,227	\$109,200	\$109,200
<b>Grand Total</b>	<b>\$71,973</b>	<b>\$37,227</b>	<b>\$109,200</b>	<b>\$109,200</b>
<b>Added Position(s)</b>	<b>Salary</b>	<b>Benefits</b>	<b>Total</b>	<b>Net Cost</b>
1 FTE Executive Secretary	\$86,088	\$41,614	\$127,702	\$127,702
<b>Grand Total</b>	<b>\$86,088</b>	<b>\$41,614</b>	<b>\$127,702</b>	<b>\$127,702</b>
<b>Added Position(s)</b>	<b>Salary</b>	<b>Benefits</b>	<b>Total</b>	<b>Net Cost</b>
1 FTE Accountant	\$95,818	\$44,509	\$140,326	\$140,326
1 FTE Info Tech Systems Supp Spec Lv 2	\$101,289	\$46,339	\$147,628	\$147,628
<b>Grand Total</b>	<b>\$197,107</b>	<b>\$90,847</b>	<b>\$287,954</b>	<b>\$287,954</b>
<b>Total Increase/(Savings)</b>	<b>\$197,107</b>	<b>\$90,847</b>	<b>\$287,954</b>	<b>\$287,954</b>

**ATTACHMENTS**

- Board Order
- Proposed Organization Chart

Prepared by:

/S/

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Margo Allen  
Chief Operations Officer

Reviewed by:

/S/

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Eric Stern  
Chief Executive Officer



# Retirement Board Order

## Sacramento County Employees' Retirement System

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Before the Board of Retirement  
January 21, 2026

AGENDA ITEM:

### Position Requests

THE BOARD OF RETIREMENT hereby approves the Staff recommendation to approve the following position changes for the 2026-27 fiscal year: Reallocate 1.0 FTE Sr. Office Specialist (c) to 1.0 FTE Executive Secretary and add 1.0 FTE Information Technology System Support Specialist Level I/II and 1.0 FTE Accountant.

I HEREBY CERTIFY that the above order was passed and adopted on January 21, 2026 by the following vote of the Board of Retirement, to wit:

AYES:

NOES:

ABSENT:

ABSTAIN:

ALTERNATES (Present but not voting):

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Chris Giboney  
Board President

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Eric Stern  
Chief Executive Officer and  
Board Secretary

# Proposed

