



Board of Retirement Regular Meeting

Sacramento County Employees' Retirement System

Agenda Item 15

MEETING DATE: May 20, 2026

SUBJECT: Technology Advisory Support

SUBMITTED FOR: X Action Information

RECOMMENDATION

Authorize Chief Executive Officer to execute a contract with Gartner, Inc. (Gartner) for independent technology advisory support through December 31, 2026, in an amount not to exceed \$110,000.

PURPOSE/STRATEGIC PRIORITY

This item supports the Strategic Management Plan objective to evolve SCERS' operational model by strategically aligning responsibilities to balance shared services and independent functions in a way that best serves members and beneficiaries.

DISCUSSION

SCERS is engaged in a pre-implementation review with Levi, Ray & Shoup, Inc. (LRS) to evaluate the feasibility, scope, and potential implementation approach for the PensionGold pension administration system. This effort is part of SCERS' broader initiative to modernize its pension administration environment, reduce reliance on aging legacy systems, and improve long-term operational resilience.

SCERS previously undertook a pension administration system replacement effort that did not proceed to a successful production deployment. As a result, SCERS has taken a more deliberate and risk-conscious approach before making any future implementation commitment. The current LRS pre-engagement is structured as a due diligence and readiness exercise to assess business requirements, current processes, technical dependencies, system interfaces, employer reporting, and data conversion considerations.

At the conclusion of the pre-engagement, LRS is expected to provide implementation findings and a proposed path forward, including scope, cost, timeline, methodology, resource needs, and key assumptions. Given the size, complexity, and long-term significance of a pension administration system replacement, Staff recommends engaging Gartner to provide independent advisory support to evaluate the completeness, reasonableness, and overall

credibility of the proposed implementation approach prior to any future implementation recommendation.

Gartner has proposed a six-week independent advisory engagement focused on reviewing LRS pre-engagement deliverables and the proposed implementation strategy. This includes development of a customized evaluation framework, review of requirements documentation and technical analyses, and assessment of key implementation considerations such as data conversion, system interfaces, governance, resource assumptions, and risk management. The review will also evaluate the extent to which the proposed solution can be delivered through configuration rather than customization, an important factor in reducing implementation complexity and long-term cost of ownership.

Gartner will also assess the proposed implementation approach, including timeline, scope, release strategy, governance structure, and accountability mechanisms, to determine whether the plan is realistic given SCERS' operational constraints and capacity. The engagement will conclude with a Final Independent Advisory Report and executive presentation identifying strengths, gaps, risks, and actionable recommendations to support executive and Board decision-making.

Gartner is a global information technology research and advisory firm with extensive experience providing independent, objective guidance on complex technology initiatives. The firm maintains a dedicated public sector and pension advisory practice and has supported retirement systems such as CalSTRS, CalPERS, NYCERS, and Oregon PERS on system modernization, procurement, and implementation oversight efforts. Its independence from system vendors and implementers, combined with its experience reviewing large-scale pension administration initiatives, positions Gartner to provide objective, risk-focused advisory support tailored to SCERS' current effort.

Gartner proposed a fixed fee of \$110,000, inclusive of travel and expenses. Board approval is requested given the importance of this engagement in supporting a major technology modernization decision and strengthening risk management prior to any implementation commitment. Funding for this initiative is included in the proposed 2026-27 budget.

ATTACHMENTS

- Board Order

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
May 20, 2026

AGENDA ITEM:

Technology Advisory Support

THE BOARD OF RETIREMENT hereby approves the Staff recommendation to authorize Chief Executive Officer to execute a contract with Gartner, Inc. for independent, technology advisory support through December 31, 2026, not to exceed \$110,000.

I HEREBY CERTIFY that the above order was passed and adopted on May 20, 2026 by the following vote of the Board of Retirement, to wit:

AYES:

NOES:

ABSENT:

ABSTAIN:

ALTERNATES (Present but not voting):

Chris Giboney
Board President

Eric Stern
Chief Executive Officer and
Board Secretary