Board of Retirement Regular Meeting

Sacramento County Employees' Retirement System

Agenda Item 11

MEETING DATE: **September 16, 2026**

SUBJECT: **Chief Benefits Officer's Report**

SUBMITTED FOR: **____ Action** **__X__ Information**

RECOMMENDATION

Receive and file the CBO Report for the quarter ended June 30, 2026.

PURPOSE/STRATEGIC PRIORITY

This item supports the Strategic Management Plan objective to gather data on member and employer needs and preferences to inform improvements to the overall member and employer experience.

DISCUSSION

The quarterly CBO Report presentation will cover multiple lines of benefit administration and customer satisfaction relative to targets and provide team updates and upcoming activities.

ATTACHMENTS

- Board Order
- Quarterly CBO Report presentation

Prepared by:

/S/

Keith Riddle
Chief Benefits Officer

Reviewed by:

/S/

Eric Stern
Chief Executive Officer

Retirement Board Order

Sacramento County Employees' Retirement System

Before the Board of Retirement
September 16, 2026

AGENDA ITEM:

Chief Benefits Officer's Report

THE BOARD OF RETIREMENT hereby approves the Staff recommendation to receive and file the CBO Report for the quarter ended June 30, 2026.

I HEREBY CERTIFY that the above order was passed and adopted on September 16, 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

SCERS

Chief Benefits Officer Report

2026 – Second Quarter

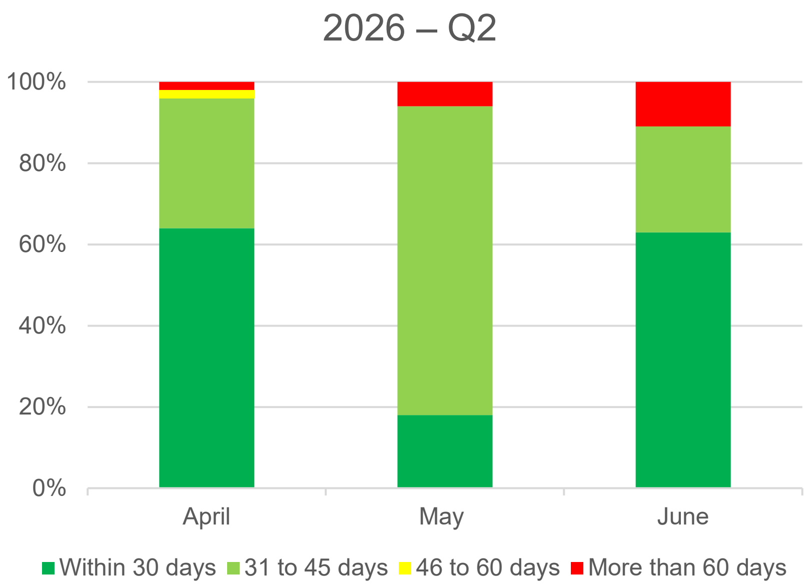
September, 2026

Performance Summary

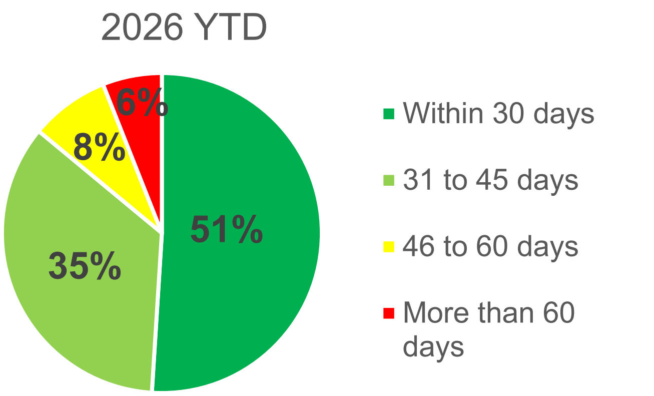
- Increase in retirement applications processed within 30 days compared to 2025
- Decrease in buyback calculations turnaround time
- Disability retirement application inventory continues to shrink
- Consistently meet or exceed customer satisfaction targets

Service Retirement Application Processing

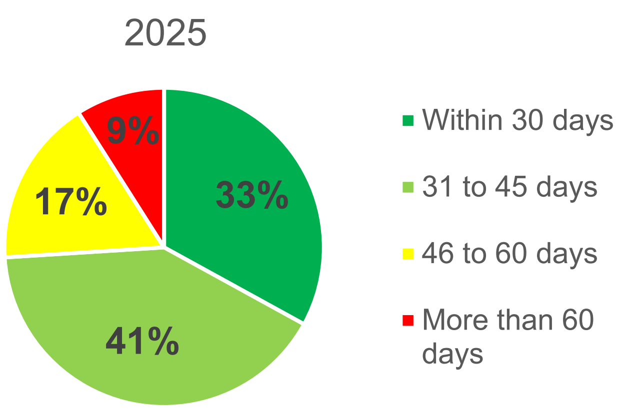
Target:
Retirees paid –
- >50% within 30 days
- >75% within 45 days
- >90% within 60 days



Median: 30 days
Retirements Processed: 145
On-line Applications Received: 83 (81%)



Median: 30 days
Retirements Processed: 345

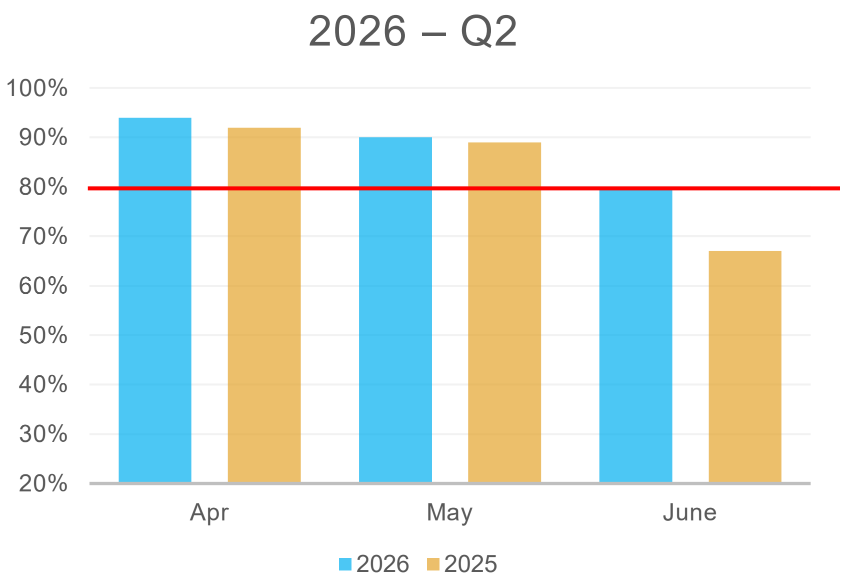


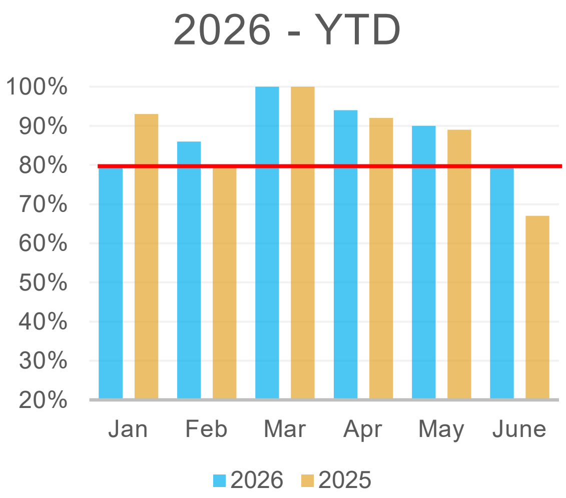
Median: 34 days
Retirements Processed: 616

Customer Service - Retirees

Target

Satisfaction of new retirees surveyed > 80%





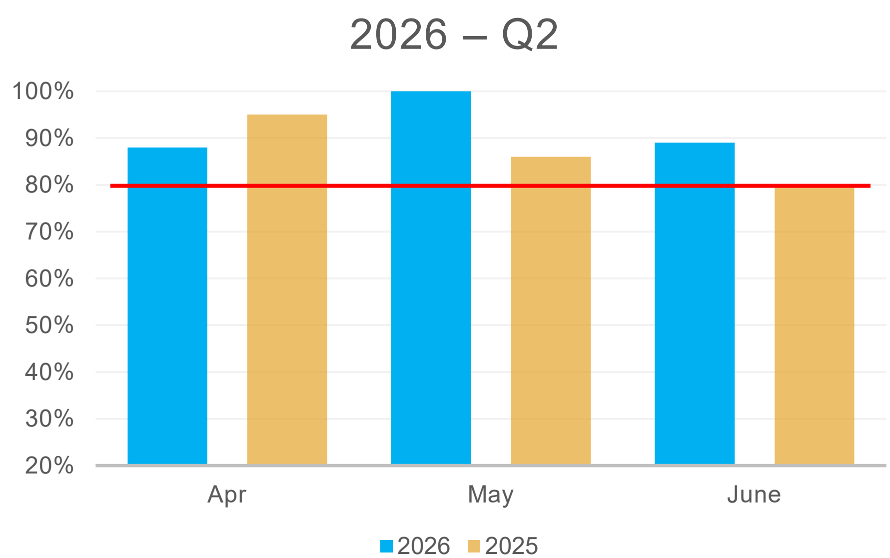
Response Rate

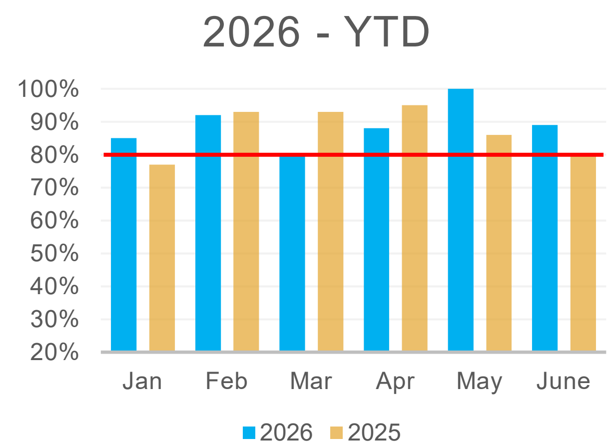
2026 (YTD)
31% (106)

Customer Service – Benefits Counseling

Target

Satisfaction of members receiving benefits counseling > 80%

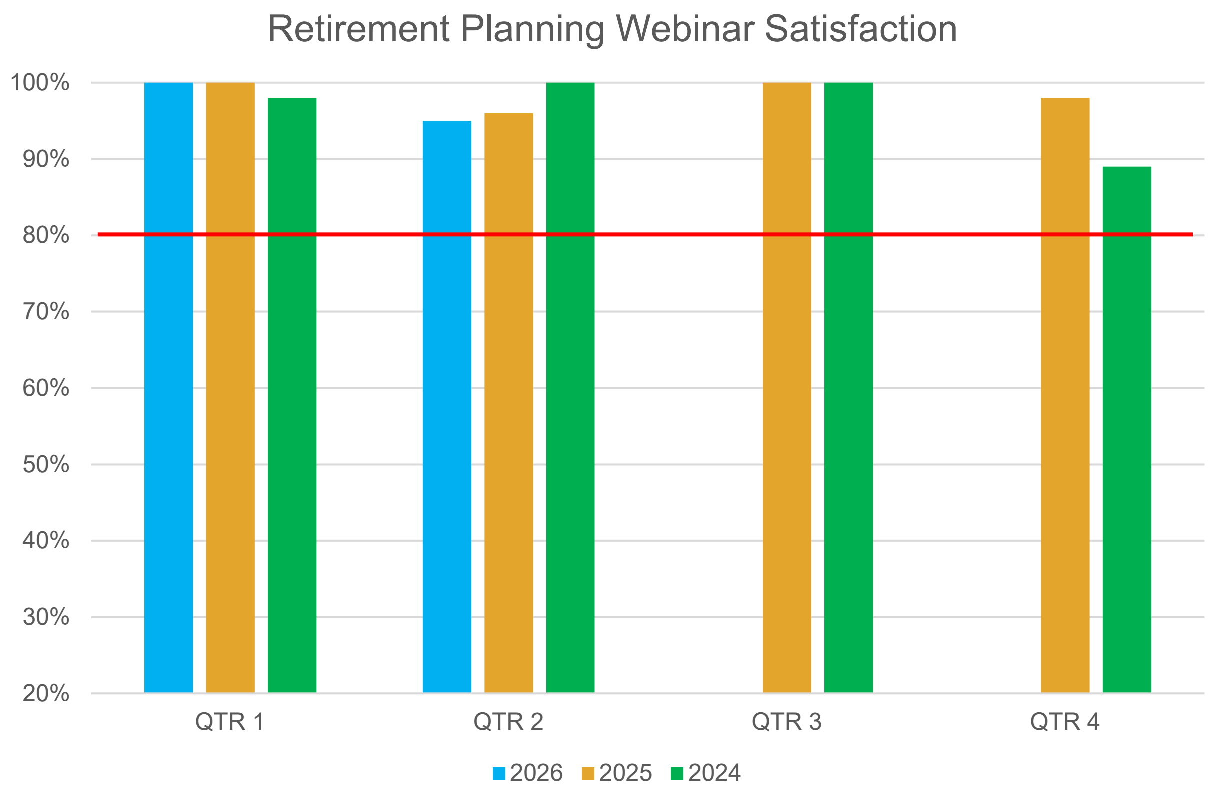




Responses Received

2026 (YTD)
71

Customer Service – Retirement Planning Webinars



Target

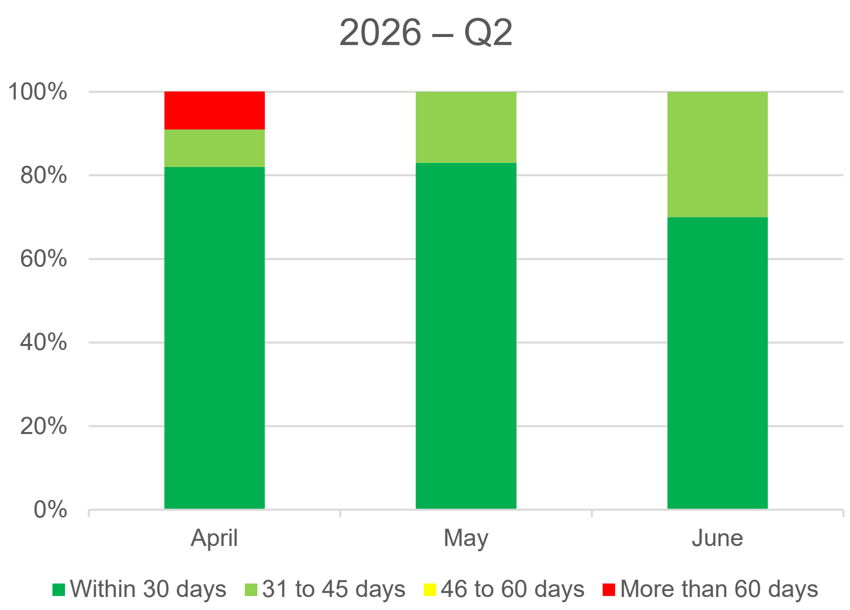
Satisfaction of webinar attendees surveyed > 80%

Responses Received

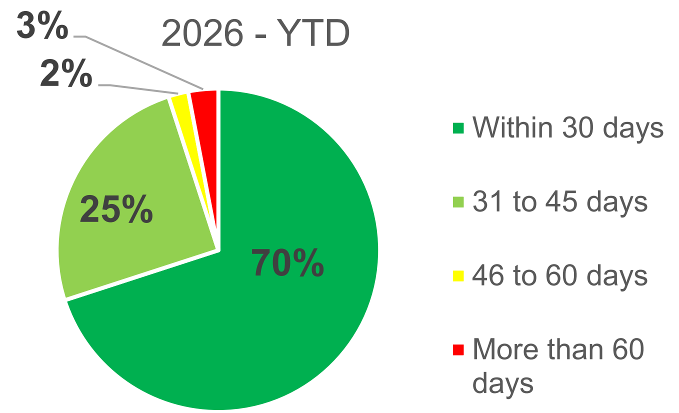
2026 (YTD)
65

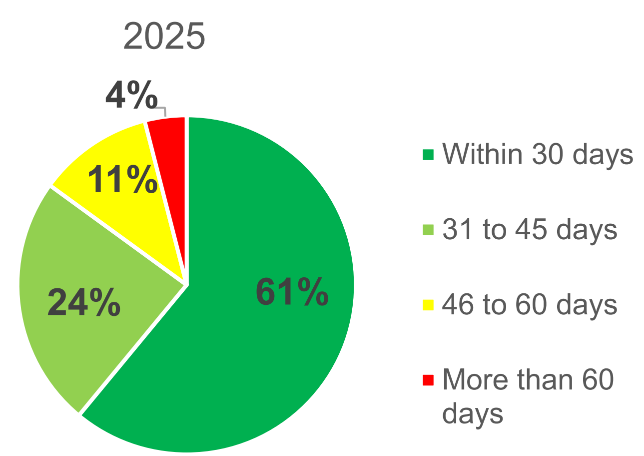
Continuance Processing – documents received>payment

Target:
Survivors paid –
- >50% within 30 days
- >75% within 45 days
- >90% within 60 days



Median: 17 days
Continuances Processed: 27

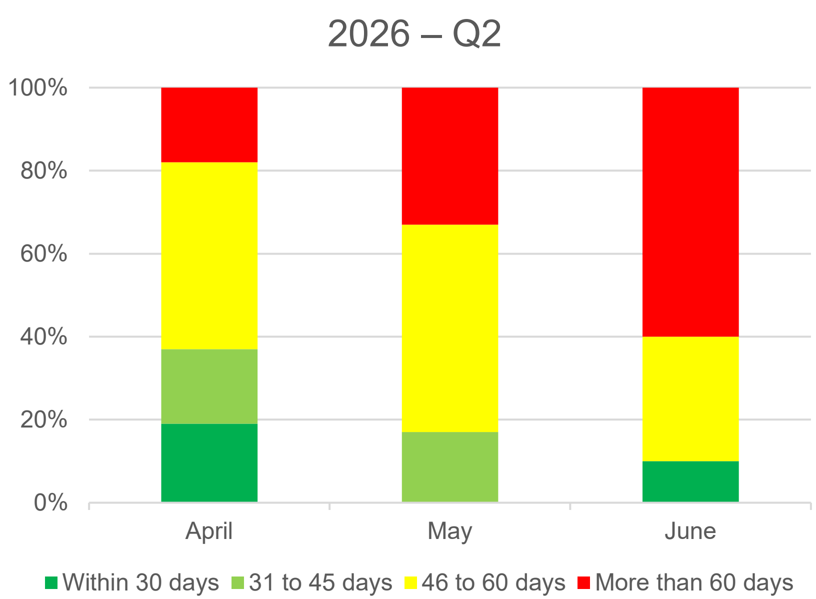




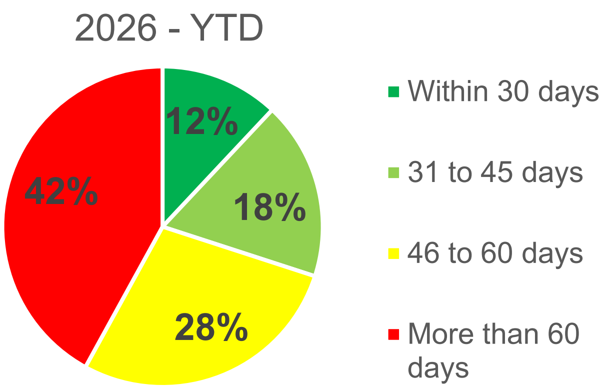
Median: 28 days
Continuances Processed: 114

Continuance Processing – death reported>payment

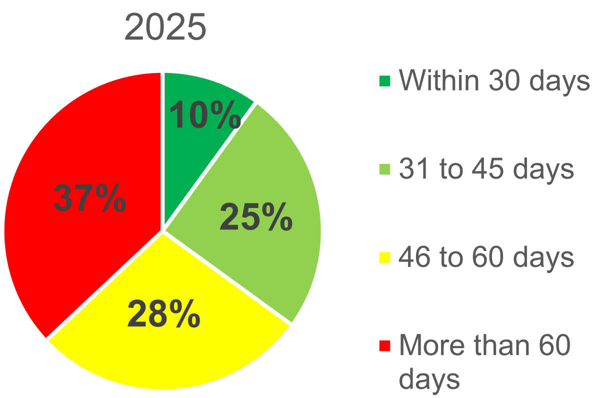
Target:
Survivors paid –
- >25% within 30 days
- >50% within 45 days
- >75% within 60 days



Median: 53 days
Continuances Processed: 27



Median: 56 days
Continuances Processed: 60

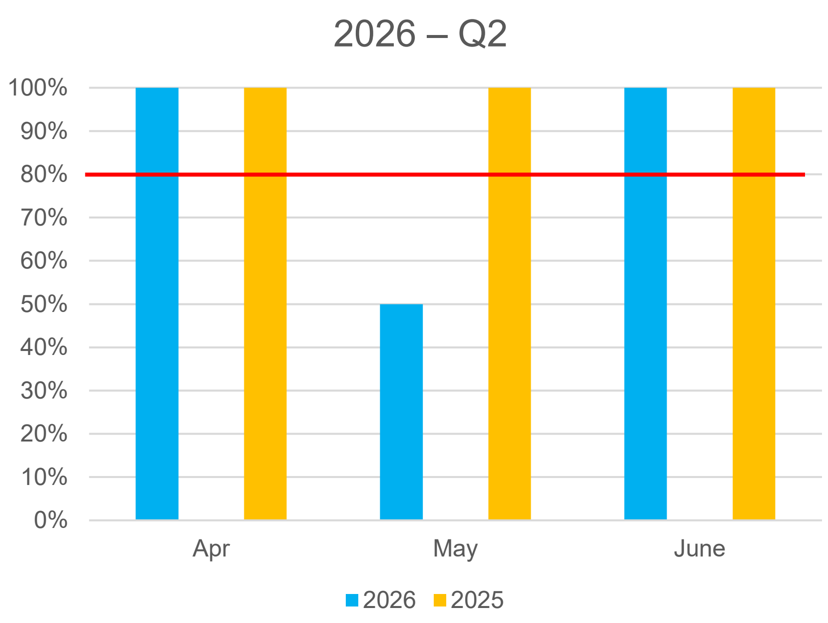


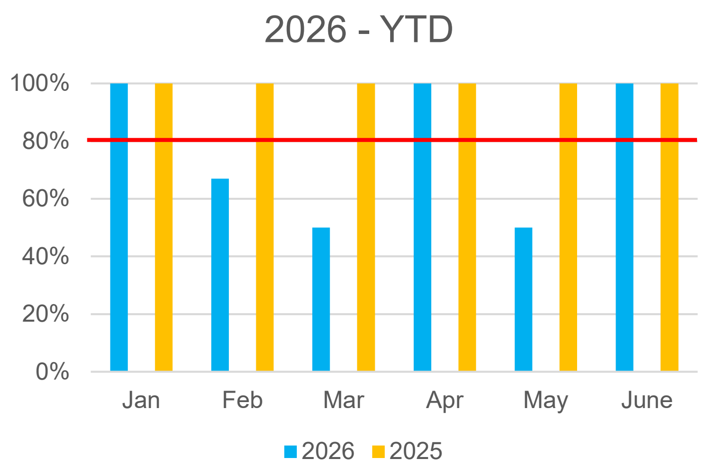
Median: 55 days
Continuances Processed: 114

Customer Service - Survivors

Target

Satisfaction of new beneficiaries surveyed > 80%



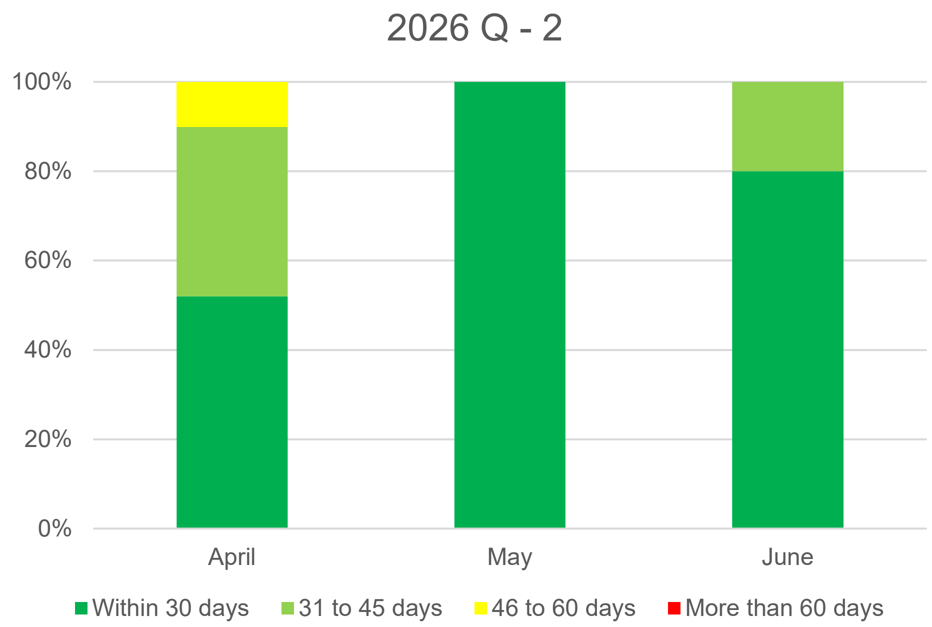


Response Rate

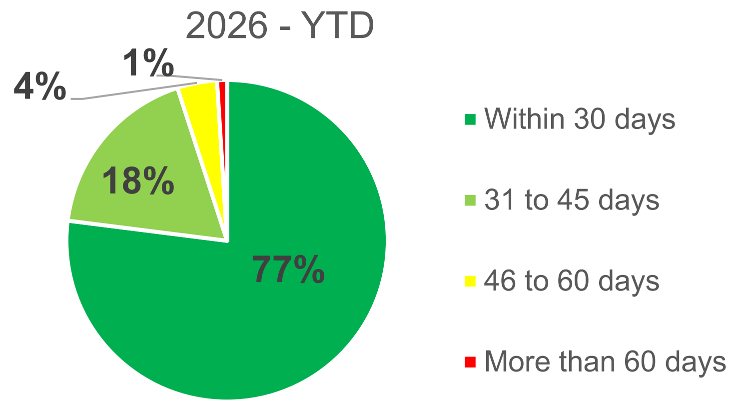
2026 YTD
26% (17)

Buyback Processing – Calculations

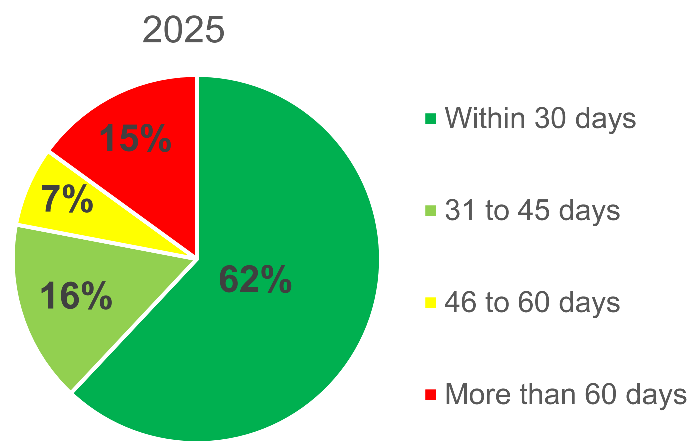
Target:
Calculations processed–
- >90% within 30 days



Median: 21 days
Calculations Processed: 164



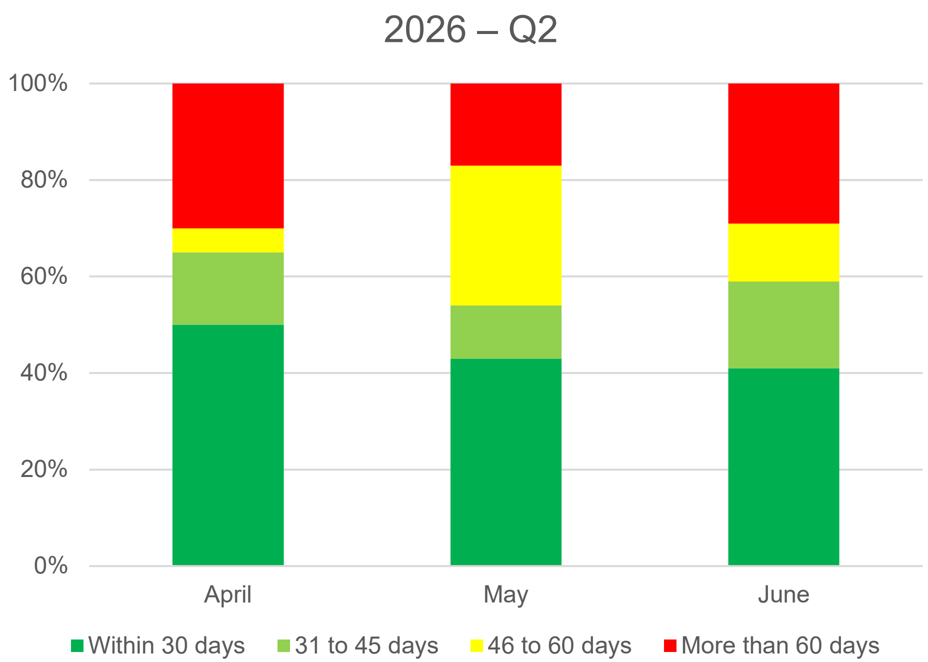
Median: 21 days
Calculations
Processed: 355



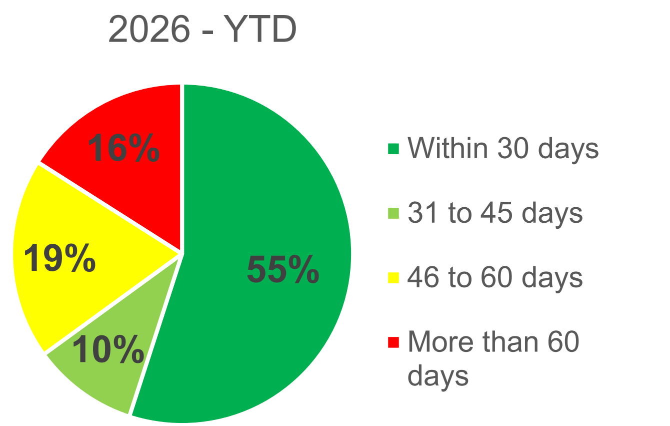
Median: 23 days
Calculations
Processed: 835

Buybback Processing – Elections

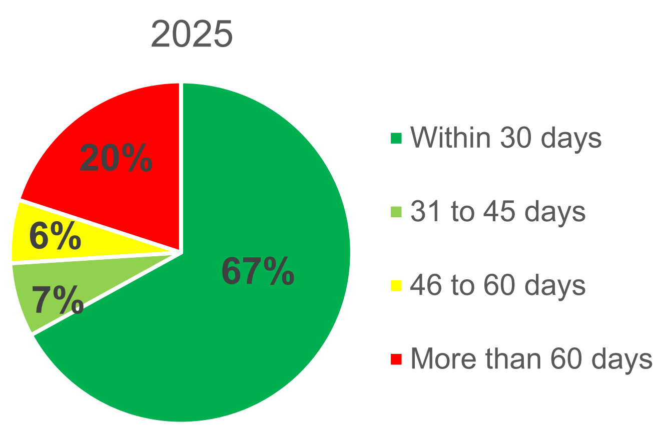
Target:
Elections processed–
- >90% within 30 days



Median: 35 days
Elections Processed: 65

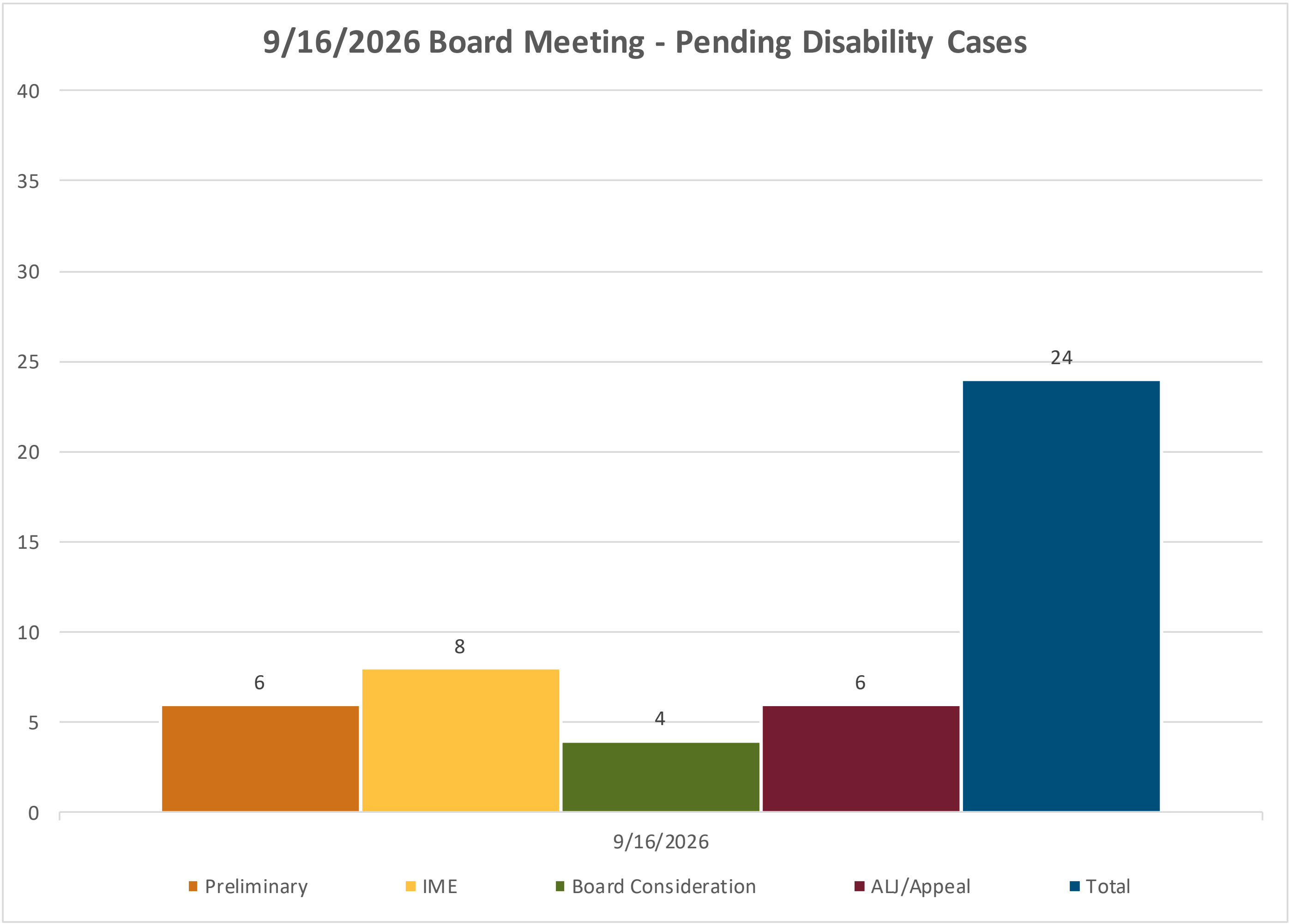


Median: 26 days
Elections Processed: 145



Median: 15 days
Elections Processed: 394

Disability Queue



Disability Retirement Re-evaluations

- Administered according to CERL provisions and the SCERS Disability Retirement Procedures
- § 31729 – Board authorization to reexamine a disability retiree under age 55
- § 31730 – If the disability retiree is deemed no longer substantially incapacitated AND the employer offers to reinstate:
    - The retirement allowance shall be canceled, and
    - The member shall be reinstated pursuant to the regulations of the employer
- § 31731 – Refusal to submit to an examination shall result in the discontinuance of the retiree's allowance
    - If refusal continues for more than one year, allowance shall be canceled
- Re-evaluation language included in recommendations and Board order
- 3-year cycle

Initiatives and Updates

Workload

- Benefit verification focusing on retirees residing in closed states

Outreach

- Sac Sewer
  - September 15 (South Yard), 23 (North Yard), 30 (Elk Grove)
- County Open Enrollment Fairs
  - 10/7-8; DPS, Tech Center Drive
  - 10/13, 16; Health Services, East Parkway
  - 10/22-23; Human Assistance, East Commerce Way
  - 10/27; County Administration, H Street
- Quarterly retirement planning webinar – September 10
- Mid-career retirement planning webinar – October 28