



Board of Retirement Regular Meeting

Sacramento County Employees' Retirement System

Agenda Item 15

MEETING DATE: October 21, 2026

SUBJECT: Technology Report—Third Quarter 2026

SUBMITTED FOR: ____ Action X Information

RECOMMENDATION

Receive and file Technology Report for the quarter ended September 30, 2026.

PURPOSE/STRATEGIC PRIORITY

This item supports the Strategic Management Plan objective to modernize SCERS' technology infrastructure and tools in alignment with SCERS' strategy.

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 2026 performance.

ATTACHMENTS

- Board Order
- Technology Report—Third Quarter 2026
- Technology Report—Third Quarter 2026 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
October 21, 2026**

AGENDA ITEM:

Technology Report—Third Quarter 2026

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

I HEREBY CERTIFY that the above order was passed and adopted on October 21, 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

Technology Report—Third Quarter 2026

Digital Transformation - Year 3					FY 26/27 Budgeted Amount - \$1,500,000	
ID	Initiative Name	Target Date	Status	Estimated	Expended	Annual Cost
2.6	A/V & Hybrid Meeting Tech Refresh	2026 - 11	Planning	\$ 18,000		
3.0	Digital Transformation Initiatives	--	--	\$ 900,000		
2.2	Back Office Transformation: Retirement Pipeline	2026	In Progress			
3.1	Beneficiary Management	2027	Planning			
3.2	1099R Forms and Retiree Pay Advices	2027	In Progress	\$ 50,000		
3.3	Gartner Independent Advisory Review	2026-09	Completed	\$ 110,000	\$ 25,000	
3.4	Banking & Accounting Transition Project	2027	In Progress	\$ 400,000	\$ 179,122	
3.5	M365 Tenant and Azure Hosting	2026	In Progress	\$ 57,500	\$ 15,670	\$ 39,000
3.6	Retirement Workbook Re-Platforming	2027 - 03	In Progress	\$ 150,000	\$ -	TBD
Year 3 Sub Total				\$ 785,500	\$ 219,792	\$ 39,000

Digital Transformation - Year 2					FY 25/26 Budgeted Amount - \$1,500,000	
				Estimated	Expended	Annual Cost
Year 2 Sub Total				\$ 1,202,000	\$ 949,686	\$ -

Digital Transformation - Year 1					FY 24/25 Budgeted Amount - \$1,750,000	
				Estimated	Expended	Annual Cost
Year 1 Sub Total				\$ 324,045	\$ 293,983	\$ 160,200

Digital Transformation - Year 0					FY 23/24 Budgeted Amount - \$1,000,000	
				Estimated	Expended	Annual Cost
Year 0 Sub Total				\$ 911,310	\$ 636,251	\$ 116,010



Technology Report

Third Quarter 2026

October 21, 2026

Digital Transformation – 2026 Q3 Update

Initiatives Completed

- Gartner Independent Advisory Review

Initiatives In Progress

- Banking & Accounting Transition Project
- Beneficiary Management via MySCERS
- 1099R Forms and Retiree Pay Advices
- Back Office Transformation: Retirement Pipeline
- Retirement Workbook Re-Platforming
- A/V & Hybrid Meeting Tech Refresh Phase I

PensionGold – Implementation Readiness

Governance & Oversight

- Utilize the ERP Steering Committee for executive oversight, decisions, and risk management.
- Define project roles, responsibilities, escalation paths, and reporting expectations.

Project Organization & Staffing

- Develop FLEX team structure with functional leads and subject matter experts (SMEs).
- Assess resource availability and backfill needs for ~3.0 FTE of combined SME effort.

Project Management

- Pursue external owner-side project management for coordination, vendor oversight, scheduling, and reporting.

PensionGold – Implementation Readiness

Data Conversion & Quality

- Coordinate with DTech to secure complete access to COMPASS and FileNet data.
- Establish data ownership, remediation priorities, and conversion validation criteria.

Requirements & Quality Assurance

- Establish a centralized register to track outstanding requirements, business decisions, and responsibilities.
- Define shared testing responsibilities, acceptance criteria, quality gates, and readiness measures.

Organizational & Employer Readiness

- Develop staff and employer communication, training, and onboarding plans.
- Plan coordination and testing with external partners and system interfaces.

Banking & Accounting Transition Project

- Regular SCERS leadership and project status meetings
- Board approved BMO 5-year Banking Agreement – 9/16/26
 - Transition work in progress
- Business Central Accounting System (Sikich) – Contract signed 8/3/26
 - Migration underway
- ERP Data Extraction – Submitted 9/10/26; rated high risk

MySCERS Registration Highlights

▲ 829
14,540
Registrations

 **12,050**
Fully Activated

 **49 of 50**
States

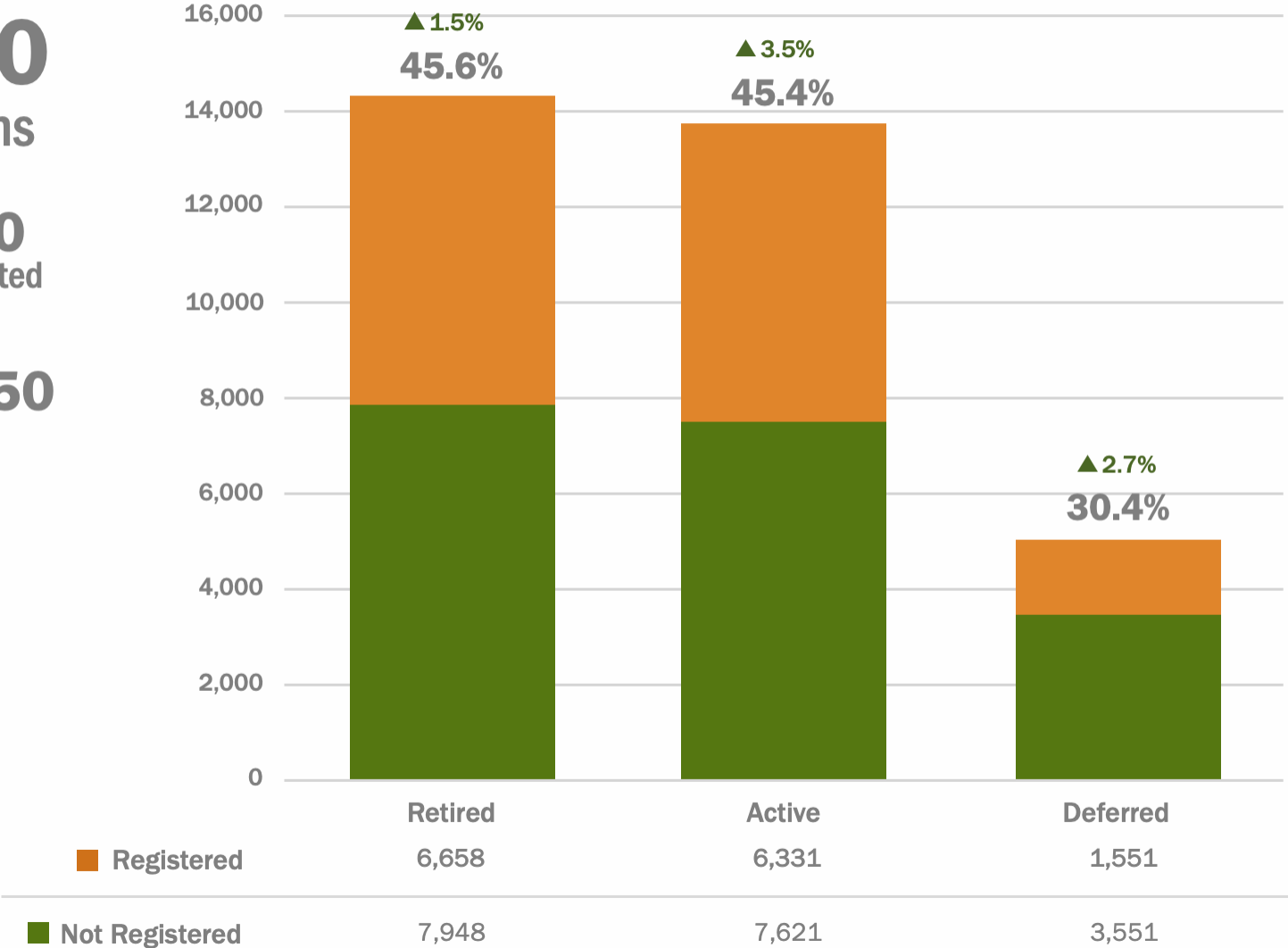
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 **TX (141)**

 **NV (136)**

 **ID (118)**

As of 09/30/2026



2025 Q3	2025 Q4	2026 Q1	2026 Q2	2026 Q3
9,935 / 30.2%	10,857 / 32.25%	12,854 / 38.25%	13,711 / 40.80%	14,540 / 43.20%
R 31%	R 29%	R 41%	R 44%	R 45.6%
A 33%	A 41%	A 40%	A 42%	A 45.4%
D 19%	D 20%	D 24%	D 28%	D 30.4%

