



Board of Retirement Regular Meeting

Sacramento County Employees' Retirement System

Agenda Item 15

MEETING DATE: October 16, 2024

SUBJECT: Technology Report—Third Quarter 2024

SUBMITTED FOR: Consent Deliberation and Action Receive and File

RECOMMENDATION

Receive and file the Technology Report for the quarter ended September 30, 2024.

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 2024 performance.

ATTACHMENT

- Board Order
- Technology Report—Third Quarter 2024
- Technology Report— Third Quarter 2024 Presentation

Prepared by:

/s/

Timothy Taylor
Chief Technology Officer

Reviewed by:

/s/

Margo Allen
Chief Operations Officer

/s/

Eric Stern
Chief Executive Officer



Retirement Board Order

Sacramento County Employees' Retirement System

Before the Board of Retirement
October 16, 2024

AGENDA ITEM:

Technology Report—Third Quarter 2024

THE BOARD OF RETIREMENT hereby accepts the recommendation of staff to receive and file the Technology Report for the quarter ended September 30, 2024.

I HEREBY CERTIFY that the above order was passed and adopted on October 16, 2024 by the following vote of the Board of Retirement, to wit:

AYES:

NOES:

ABSENT:

ABSTAIN:

ALTERNATES:

(Present but not voting)

James Diepenbrock
Board President

Eric Stern
Chief Executive Officer and
Board Secretary

Technology Report—Third Quarter 2024

Digital Transformation - Year 0				FY 23/24 Budgeted Amount - \$1,000,000		
ID	Initiative Name	Target Date	Status	Budgeted	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	Development	\$ -	\$ -	\$ -
0.5	Member Portal - Phase I	2024 - Q2	Initial Launch 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	Design	\$ -	\$ -	\$ -
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	Budgeted	Expended	Annual Cost
0.4	Direct Deposit Member Notification	2024 - Q4	Development	\$ -	\$ -	\$ -
0.5	Member Portal - Phase I (Continued)	2024 - Q3	Initial Launch Completed	\$ 5,684	\$ 13,300	\$ 110,200
0.7	Online Death Reporting	2024 - Q4	Design	\$ -	\$ -	\$ -
0.9	Online Retirement Application	2024 - Q4	Development	\$ 197,000	\$ -	\$ 50,000
0.91	Secure File Upload	2024 - Q4	Testing	\$ -	\$ -	\$ -
0.10	Business Continuity/Single Device Strategy	2024 - Q4	In Progress	\$ 72,375	\$ 70,963	\$ -
1.1	Member Portal - Phase 2					
1.2	Online Service Purchase Calculator					
1.3	Back Office Transformation: Retirement Pipeline					
1.4	Workflow Management/Transformation: Service Purchase					
Year 1 Sub Total				\$ 275,059	\$ 84,263	\$ 160,200



Technology Report

Third Quarter 2024

October 16, 2024

Digital Transformation – 2024 Q3 Update

- MySCERS Portal (Soft) Launched
- Secure File Upload in System Test
- Online Retirement Application (ORA) in Development
- Single Device Strategy Rollout Continues
- Online Death Reporting in Design

High Level Roadmap Refined

