



Board of Retirement Regular Meeting

Sacramento County Employees' Retirement System

Agenda Item 17

MEETING DATE: December 10, 2025

SUBJECT: Education: Business Resumption

SUBMITTED FOR: Action Information

RECOMMENDATION

Receive and file report on SCERS' business resumption and disaster preparedness efforts.

PURPOSE

This item supports the Strategic Management Plan objective to ensure the continuity and security of benefit payments and service delivery. At the July 2025 strategic planning meetings, Board members requested additional information from Staff about SCERS' efforts to support operations during a natural disaster or emergency situation.

DISCUSSION

SCERS maintains a proactive and comprehensive approach to disaster preparedness and business resumption. While planning and testing efforts have long been utilized, this effort was heavily shaped by the experience during the COVID-19 lockdown and other recent office closures, such as a substation fire in December 2021 that led to a multi-day blackout on the downtown grid where SCERS' office is located.

Following the pandemic, "disaster planning" activities have evolved rapidly from earlier abstract exercises. In recent years, SCERS' management has devoted time and resources to build a mature and well documented business resumption program. The key features of this strategy include:

- Planning
- Testing
- Mobility
- Redundancy
- Governance
- Continuous Improvement

Planning

SCERS management utilizes robust business resumption software, Preparis, to document contingency plans and ensure that critical operations are restored quickly and effectively following a disruption, minimizing impacts on members, staff, and organizational objectives.

Preparis is a cloud-based continuity and incident-management platform designed to support business continuity planning, incident response, IT disaster recovery, and reporting and alert/notification workflows. SCERS has utilized Preparis since 2023 to operationalize a multi-functional approach to business continuity and to assist staff with managing critical situations through disaster preparedness, crisis management, and emergency response.

Within Preparis, SCERS identifies mission-critical functions, assigns recovery responsibilities, and establishes priorities for restoring services. This structured approach enables the organization to minimize operational downtime, safeguard essential data, and maintain continuity of member services during emergency events.

Testing

SCERS conducts a series of ongoing preparedness and testing efforts designed to strengthen organizational resilience and ensure operational readiness. Through preparedness initiatives and systematic testing activities, SCERS continues to advance its state of readiness for emergency situations and disasters. Key components of current efforts include:

- **Mass Communication Alerts (Preparis Alerts):** SCERS utilizes Preparis to issue timely notifications and instructions during emergency events, ensuring effective communication with all employees through multiple channels, including personal and work phones and email.
- **Tabletop Exercises:** SCERS can conduct scenario-based crisis management exercises through Preparis to evaluate decision-making processes, identify procedural improvements, and test the effectiveness of response strategies.
- **Annual Alarm Testing:** Conducted in coordination with building management to verify proper alarm system function and support staff familiarity with evacuation routes and procedures.
- **Pager Testing (Office Phones):** Routine testing ensures that internal paging and notification systems remain reliable and effective for emergency communications.
- **Quarterly Safety Briefings and Guidebook:** Regular communication and training sessions provide staff with updated information on emergency response procedures, building safety, and business continuity planning. Safety guidebooks are placed at each desk and in common areas to support staff during emergency situations.

Mobility

SCERS completed its migration in December 2024 to a single device for home and office use, utilizing laptops and docking stations. Staff are required to take their laptops home every day, which ensures they can immediately transition to remote work during unexpected closures, which also reduces dependency on office-based hardware and supports seamless mobility between home and office environments.

In mid-2023, the County migrated its email and Microsoft platform to Microsoft 365, a cloud-based service that does not rely on on-site servers. This cloud-first architecture enhances SCERS's resilience during power outages or building closures, and supports long-term hybrid or emergency operations by allowing staff to securely access email, documents, and collaboration tools from any location.

Redundancy

SCERS's business resumption capabilities are heavily dependent on network and system support provided by the Sacramento County Department of Technology (DTech). Accordingly, SCERS recognizes that simultaneous countywide system or network failures could delay achievement of established Recovery Times Objectives (RTOs). DTech has provided 24-hour RTO commitments for its network infrastructure and for core systems including SAP (the County's COMPASS payroll system that supports pension payments), MBASE (SCERS' contribution and service credit database), and M365.

DTech has further acknowledged a 4-hour RTO for M365 (with expected 99.9% uptime), and 24-hour RTOs for network, SAP/COMPASS, phones, and MBASE (each with 99.9% or higher uptime targets). Full-service outages affecting multiple systems may require a tiered, multi-day restoration under the County's disaster recovery plan.

DTech maintains server redundancy that provides immediate backup of network functionality. Together, the recovery time frames guide informed planning decisions that support timely and effective business resumption.

Additionally, the SCERS.gov website is a cloud-based application hosted by a third-party, which provides SCERS' web administrators the ability to update the website remotely if other communication methods (i.e. the County's phone and email network) are impacted during an outage.

Governance

These efforts are guided by the Safety Charter and overseen by the SCERS Crisis Management Team, which is responsible for developing, implementing, and evaluating the organization's emergency response and recovery protocols.

SCERS established a Crisis Management Team and Safety Charter in 2025 that provides a strong governance framework to ensure that SCERS can respond effectively to business

disruptions and resume operations within established RTOs. The Crisis Management Team is led by the Chief Operations Officer and includes the executive team and staff from the across all business units of SCERS.

Continuous Improvement

These efforts continue to evolve based on practical experience, technological improvements, and ongoing evaluation of SCERS' operational needs. SCERS remains committed to strengthening its preparedness posture and refining its continuity strategies to ensure the organization can adapt to emerging risks and maintain reliable service delivery. As part of this ongoing evolution, SCERS is expanding its use of cloud-based technologies to further reduce operational risk. New online services—including the Secure File Upload portal, Online Retirement Application, Death Notification utility, and the Service Purchase Calculator—have been developed or are in development as cloud-hosted (Azure) solutions. The planned replacement of the Pension Administration System will also utilize a modern, cloud-based platform, further mitigating the risk of business impacts caused by unexpected events or infrastructure outages. Collectively, these efforts reflect the organization's ongoing commitment to operational resilience, employee safety, and the uninterrupted delivery of services to its members.

ATTACHMENTS

- Board Order
- Presentation on SCERS Business Resumption

Prepared by:

/S/

Margo Allen
Chief Operations Officer

Reviewed by:

/S/

Eric Stern
Chief Executive Officer



Retirement Board Order

Sacramento County Employees' Retirement System

**Before the Board of Retirement
December 10, 2025**

AGENDA ITEM:

Education: Business Resumption

THE BOARD OF RETIREMENT hereby approves the Staff recommendation to receive and file report on SCERS' business resumption and disaster preparedness efforts.

I HEREBY CERTIFY that the above order was passed and adopted on December 10, 2025 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



Education: Business Resumption

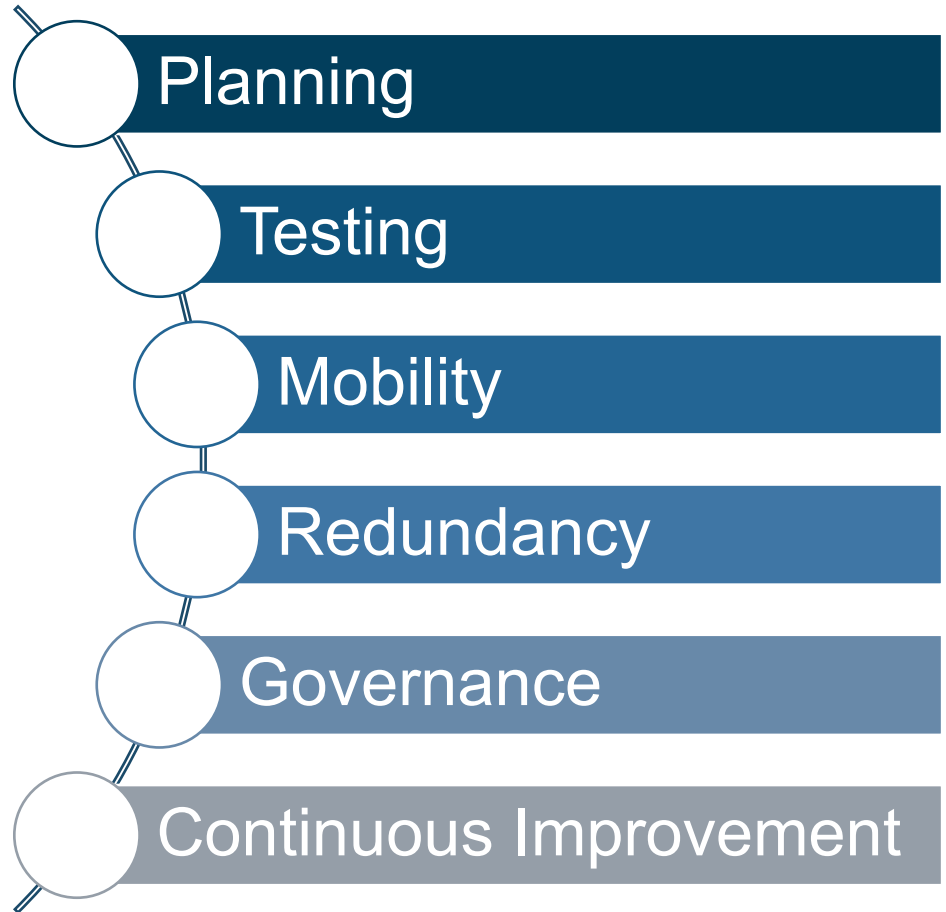
Ensuring Continuity and Security of Benefit Payments

December 10, 2025

Program Overview

Purpose & Approach

- A proactive, mature, and documented business resumption program
- Supports the SMP to ensure continuity of benefit payments and service delivery
- Strategy heavily shaped by recent experiences



Planning Strategy



Identifies mission-critical functions and assigns specific recovery responsibilities.

Minimizes operational downtime and safeguards essential data.

Establishes priorities for restoring services quickly.

Maintains continuity of member services during emergency events.

Operational Readiness & Testing



Communications

Mass alerts via PreparaIS ensure timely notifications through multiple channels (phone, email).



Exercises

Scenario-based tabletop exercises evaluate decision-making and identify procedural improvements.



Safety Drills

Annual alarm testing, routine pager tests, and quarterly safety briefings ensure staff familiarity.

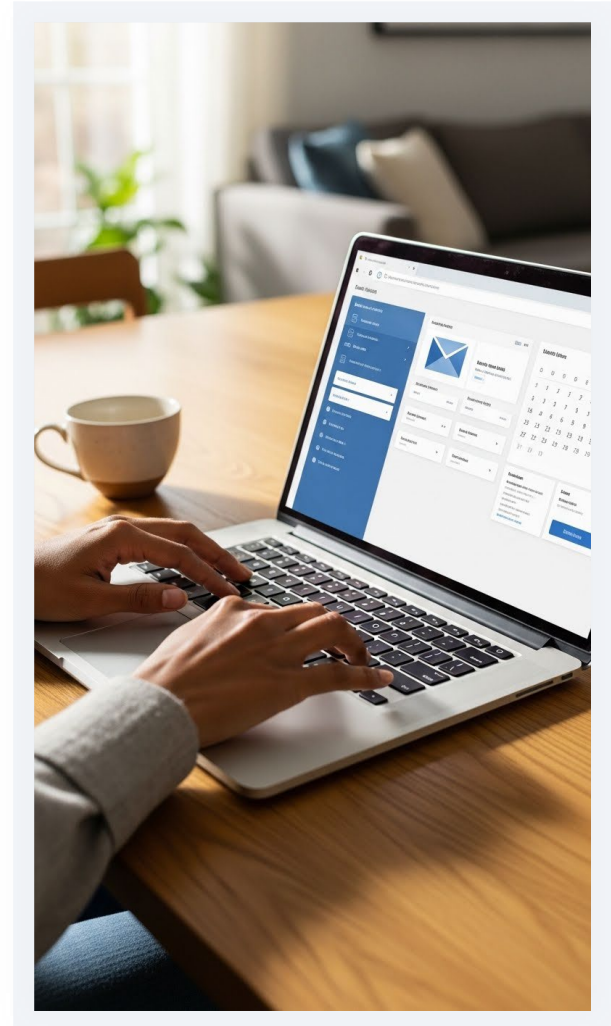
Mobility & Remote Work

Seamless Transition

Device Migration: All staff utilize laptops with docking stations. A mandatory "take home" policy ensures immediate readiness for unexpected closures.

Cloud-First Architecture: Migration to Microsoft 365 reduces reliance on on-site servers, enhancing resilience during power outages.

Result: Staff can securely access email, documents, and collaboration tools from any location.



System Redundancy & Recovery



Core Infrastructure

Robust recovery protocols for mission-critical systems (Payroll, Database) with a 24-Hour RTO.



Server Redundancy

Immediate server backup capabilities ensuring network functionality and data integrity during hardware failures.



Public Failover

SCERS.gov hosted externally to guarantee member communication during internal network outages.

Governance Framework

Crisis Management Team

- Established in 2025, overseen by the Safety Charter.
- Led by the COO with cross-organizational representation.
- Develops, implements, and evaluates emergency response protocols.
- Ensures SCERS resumes operations within established RTOs.



Continuous Improvement

Cloud Expansion

Expanding use of Azure-hosted solutions to reduce operational risk and infrastructure dependency.

Deployment of *Secure File Upload, Online Retirement Application, and Service Purchase Calculator*.

Planned replacement of the Pension Administration System with a modern, cloud-based platform.