



Board of Retirement Regular Meeting

Sacramento County Employees' Retirement System

Agenda Item 17

MEETING DATE: January 21, 2026

SUBJECT: Technology Report—Fourth Quarter 2025

SUBMITTED FOR: Action Information

RECOMMENDATION

Receive and file the Technology Report for the quarter ended December 31, 2025.

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 2025 performance.

ATTACHMENT

- Board Order
- Technology Report—Fourth Quarter 2025
- Technology Report—Fourth Quarter 2025 Presentation

Prepared by:

/S/

Timothy Taylor
Chief Technology Officer

Reviewed by:

/S/

Eric Stern
Chief Executive Office



Retirement Board Order

Sacramento County Employees' Retirement System

Before the Board of Retirement
January 21, 2026

AGENDA ITEM:

Technology Report—Fourth Quarter 2025

THE BOARD OF RETIREMENT hereby approves the Staff recommendation to receive and file the Technology Report for the quarter ended December 31, 2025.

I HEREBY CERTIFY that the above order was passed and adopted on January 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—Fourth Quarter 2025

| Digital Transformation - Year 0 | | | | FY 23/24 Budgeted Amount - \$1,000,000 | | |
|---------------------------------|--|-------------|-----------|--|------------|-------------|
| ID | Initiative Name | Target Date | Status | Estimated | 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 | Completed | \$ - | \$ - | \$ - |
| 0.5 | Member Portal - Phase I | 2024 - Q2 | 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 | Completed | \$ - | \$ - | \$ - |
| 0.8 | Workflow Management: Retirement Pipeline | 2024 - Q2 | Completed | \$ - | \$ - | \$ - |
| 0.9 | Online Retirement Application | 2024 - Q3 | Completed | \$ 197,000 | \$ - | \$ - |
| 0.9.1 | Secure File Upload | 2024 - Q3 | Completed | \$ - | \$ - | \$ - |
| 0.10 | Business Continuity/Single Device Strategy | 2024 - Q4 | Completed | \$ 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 | Estimated | Expended | Annual Cost |
| 0.4 | Direct Deposit Member Notification | 2024 - 12 | Completed | \$ - | \$ - | \$ - |
| 0.5 | Member Portal - Phase I | 2024 - 10 | Completed | \$ 15,228 | \$ 18,550 | \$ 110,200 |
| 0.7 | Online Death Reporting | 2024 - 12 | Completed | \$ 8,000 | \$ - | \$ - |
| 0.9 | Online Retirement Application (ORA) | 2024 - 12 | Completed | \$ 147,000 | \$ 147,000 | \$ 50,000 |
| | ORA Additional Functionality | 2025 - 06 | Completed | \$ - | | |
| 0.9.1 | Secure File Upload | 2024 - 12 | Completed | \$ 15,000 | \$ - | \$ - |
| 0.10 | Business Continuity/Single Device Strategy | 2024 - 12 | Completed | \$ 72,375 | \$ 70,963 | \$ - |
| 1.1 | Member Statements | 2025 - 03 | Completed | \$ 51,042 | \$ 42,070 | \$ - |
| 1.5 | Website Refresh | 2026 - 03 | Testing | \$ 15,400 | \$ 15,400 | \$ - |
| Year 1 Sub Total | | | | \$ 324,045 | \$ 293,983 | \$ 160,200 |

| Digital Transformation - Year 2 | | | | FY 25/26 Budgeted Amount - \$1,500,000 | | |
|---------------------------------|---|-------------|-----------|--|------------|-------------|
| ID | Initiative Name | Target Date | Status | Estimated | Expended | Annual Cost |
| 1.5 | Website Refresh | 2026 - 03 | Testing | \$ 46,000 | \$ 30,824 | \$ - |
| 2.0 | Digital Transformation Initiatives | -- | -- | \$ 280,000 | | |
| 0.9 | ORA Additional Functionality | 2025 - 06 | Completed | \$ 80,000 | \$ 80,000 | \$ - |
| 2.1 | Online Service Purchase Calculator | 2026 | Testing | \$ 70,000 | \$ - | \$ - |
| 2.2 | Back Office Transformation: Retirement Pipeline | 2026 | Planning | \$ - | \$ - | \$ - |
| 2.3 | Employer Portal | 2026 | Planning | \$ - | \$ - | \$ - |
| 2.4 | Retirement Calculation Engine Refactoring (RAP) | 2026 | Planning | \$ - | \$ - | \$ - |
| 2.5 | LRS Pre-Engagement | 2026-05 | | \$ 685,000 | \$ 137,000 | \$ - |
| Year 2 Sub Total | | | | \$ 1,161,000 | \$ 247,824 | \$ - |



Technology Report










Fourth Quarter 2025

January 21, 2026

Digital Transformation – 2025 Q4 Update

- Initiatives In Progress
 - LRS Pre-Engagement
 - Online Service Purchase Calculator
 - Back Office Transformation: Retirement Pipeline
 - Retirement Calculation Engine (RAP) Refactoring
 - Website (scers.gov) Refresh
 - Secure Board Site Replatforming
- On Hold
 - Employer Portal

LRS Pre-Engagement – 2025 Q4 Update

| Phase | Start | End | Status | |
|---------------------------------------|----------|----------|--------|---|
| Initiation & Planning | 08/25/25 | 10/06/25 | 100% |  |
| Employer Reporting Analysis | 09/23/25 | 11/25/25 | 100% |  |
| Payroll Banking Setup | 10/06/25 | 04/13/26 | 51% |  |
| Imaging System Analysis | 10/27/25 | 12/12/25 | 42% |  |
| Accounting System Analysis | 01/12/26 | 03/17/26 | 0% |  |
| Data Conversion Analysis | 10/10/25 | 04/29/26 | 2% |  |
| System Interfaces Analysis | 08/25/25 | 02/26/26 | 31% |  |
| Line of Business Requirement Analysis | 01/23/26 | 06/12/26 | 0% |  |
| Project Close | 07/30/26 | 07/31/26 | 0% |  |

MySCERS Registration Highlights

▲ 922
10,857
 Registrations

 **9,143**
 Fully Activated

 **46 of 50**
 States

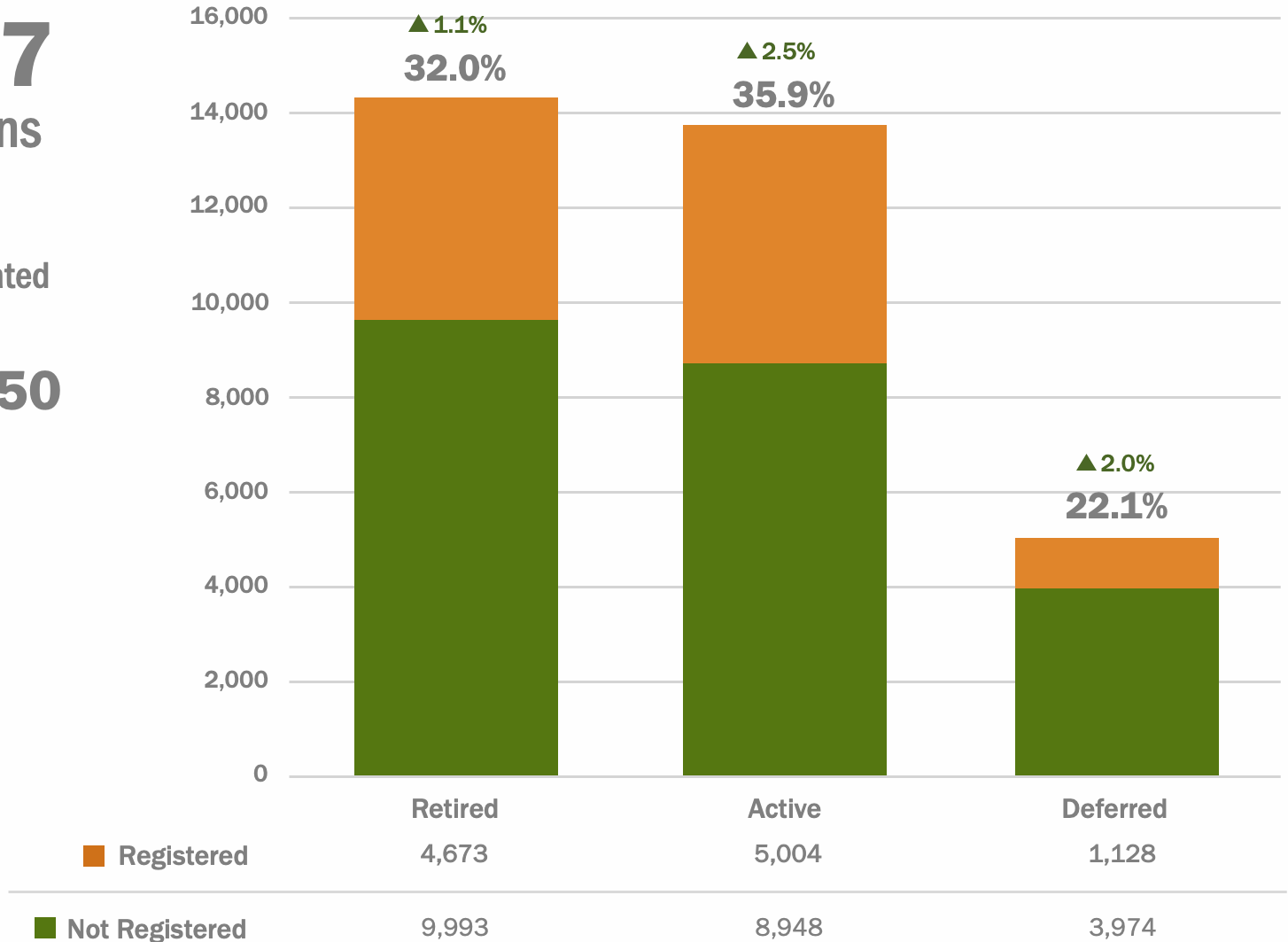
Top 3

 TX (103)

 NV (101)

 WA (89)

As of 12/31/25



2024 Q4

2,810 / 8.5%

R 7% A 12% D 4%

2025 Q1

7,325 / 22.3%

R 26% A 22% D 11%

2025 Q2

8,674 / 26.4%

R 28% A 28% D 15%

2025 Q3

9,935 / 30.2%

R 31% A 33% D 19%

2025 Q4

10,857 / 32.25%

R 28.8% A 40.5% D 20.0%

