



Board of Retirement Regular Meeting

Sacramento County Employees' Retirement System

Agenda Item 14

MEETING DATE: June 17, 2026

SUBJECT: Technology Services

SUBMITTED FOR: X Action Information

RECOMMENDATION

Authorize the Chief Executive Officer to extend the contract with QualApps for technology development and advisory services through June 30, 2028, in an amount not to exceed \$1.8 million.

PURPOSE/STRATEGIC PRIORITY

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

DISCUSSION

Over the past several years, SCERS has pursued a measured and iterative approach to technology and digital transformation focused on delivering targeted business value while reducing organizational risk. Through a combination of internal leadership and specialized external expertise, SCERS has successfully delivered a growing portfolio of digital capabilities that support members, employers, and staff while establishing a scalable foundation for future innovation.

The Board previously authorized a Proof-of-Concept engagement that validated SCERS' modular and agile development strategy. Subsequent engagements have continued to build upon that foundation through the development and enhancement of solutions such as the MySCERS portal, Secure File Upload capabilities, Online Death Reporting, Service Purchase Calculator functionality, and the Online Retirement Application. Collectively, these initiatives have improved service delivery, enhanced security, reduced manual effort, and demonstrated the value of incremental, high-impact technology investments.

SCERS partnered with QualApps, a Sacramento-based technology firm, to help implement those projects over the prior two years. Across multiple engagements, SCERS will have invested approximately \$430,000 with QualApps by June 30, 2026.

These efforts have also helped SCERS better identify opportunities where technology can deliver meaningful operational and member-service benefits. As the digital transformation roadmap has matured, SCERS has gained greater visibility into more complex process modernization opportunities, including areas that were not fully understood or practical to pursue during earlier phases of the program. This increased understanding enables SCERS to evaluate and sequence initiatives more effectively while preserving the flexibility needed to adapt to changing priorities and future enterprise technology decisions.

As SCERS looks ahead, technology planning must balance two complementary objectives. First, SCERS seeks to continue delivering meaningful improvements to members and staff through targeted digital transformation initiatives. Second, SCERS must remain mindful of the anticipated future Pension Administration System (PAS), ensuring that investments made today complement and support the long-term technology direction of the organization while minimizing potential work that may be replaced in a few years.

Additionally, while SCERS remains focused on long-term enterprise transformation, certain business-critical capabilities require attention in the near term. Some operational processes continue to rely on aging technologies, legacy workflows, and platform dependencies that are becoming increasingly difficult to support, enhance, or sustain over time. Accordingly, SCERS must balance future-state planning with targeted investments that maintain operational resiliency, reduce support risk, and position the organization for a smoother transition to future enterprise platforms.

Under this engagement, SCERS anticipates continuing to pursue a range of technology initiatives that may include:

- Modernization of legacy spreadsheet- and workbook-based business processes through secure web-based applications and workflow automation.
- Expansion of member self-service capabilities through online transactions, smart forms, calculators, and digital service offerings.
- Development of additional business process automation tools designed to improve operational efficiency and reduce manual processing.
- Continued enhancement of SCERS' cloud-based application portfolio and supporting technology infrastructure.
- Technical analysis, planning, integration, and architectural support associated with future enterprise technology initiatives, including cloud adoption efforts, Business Central implementation activities, and preparation for a future Pension Administration System.

As with previous engagements, the specific sequencing and scope of individual initiatives will continue to evolve through ongoing business analysis, roadmap refinement, and organizational prioritization. This flexible approach enables SCERS to remain responsive to changing operational needs, emerging opportunities, and lessons learned while maximizing the value of technology investments.

In addition to development services, QualApps provides specialized technical expertise that supplements SCERS' internal technology resources. As a relatively small technology

organization supporting an expanding digital portfolio, SCERS benefits from access to experienced professionals who provide guidance on solution design, cloud adoption, systems integration, technology modernization, and future enterprise platform planning. The engagement therefore supports both the delivery of individual initiatives and the continued maturation of SCERS' technology ecosystem.

To ensure transparency and Board oversight, progress updates, major accomplishments, budget utilization, and roadmap adjustments will continue to be reported through SCERS' Quarterly IT Reports.

This engagement will be funded through approved Digital Transformation budget allocations. The proposed contract establishes a not-to-exceed authorization of \$1.8 million over a two-year period and does not obligate SCERS to expend the full amount. Services will be utilized on an as-needed basis and prioritized according to business value, available funding, and organizational priorities.

ATTACHMENTS

- Board Order

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
June 17, 2026

AGENDA ITEM:

Technology Services

THE BOARD OF RETIREMENT hereby approves the Staff recommendation to authorize the Chief Executive Officer to extend the contract with QualApps for technology development and advisory services through June 30, 2028, in an amount not to exceed \$1.8 million.

I HEREBY CERTIFY that the above order was passed and adopted on June 17, 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