



Board of Retirement Regular Meeting

Sacramento County Employees' Retirement System

Agenda Item 21

MEETING DATE: August 19, 2026

SUBJECT: Technology Report—Second Quarter 2026

SUBMITTED FOR: ____ Action X Information

RECOMMENDATION

Receive and file the Technology Report for the quarter ended June 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.

ATTACHMENT

- Board Order
- Technology Report—Second Quarter 2026
- Technology Report—Second Quarter 2026 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
August 19, 2026**

AGENDA ITEM:

Technology Report—Second Quarter 2026

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

I HEREBY CERTIFY that the above order was passed and adopted on August 19, 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—Second 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	Planning			
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			
3.3	Gartner Independent Advisory Review	2026-09	In Progress	\$ 110,000	\$ -	
3.4	Banking & Accounting Transition Project	2027	In Progress	\$ 400,000	\$ -	
3.5	M365 Tenant and Azure Hosting	2026	In Progress	\$ 57,500	\$ -	\$ 39,000
Year 3 Sub Total				\$ 1,467,500	\$ -	\$ 39,000

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	Completed	\$ 46,000	\$ 46,236	
2.0	Digital Transformation Initiatives	--	--	\$ 280,000		
	Azure Hosting Costs (Current)			\$ 36,000	\$ 30,000	
	M365 Tenant/Azure Hosting					
	SCERS Developer Support				\$ 7,830	
0.9	ORA Additional Functionality	2025 - 06	Completed	\$ 80,000	\$ 80,000	
0.9.3	ORA /Beneverse Reporting Enhancements	2026	Completed	\$ 5,000	\$ 4,320	
2.1	Online Service Purchase Calculator	2026	Completed	\$ 70,000	\$ 96,300	
2.2	Back Office Transformation: Retirement Pipeline	2026	In Progress	\$ -	\$ -	
2.3	Employer Portal	2026	Withdrawn			
2.4	Retirement Calculation Engine Refactoring (RAP)	2026	On Hold			
2.5	LRS Pre-Engagement	2026-05	In Progress	\$ 685,000	\$ 685,000	
2.6	A/V & Hybrid Meeting Tech Refresh	2026	Planning			
Year 2 Sub Total				\$ 1,202,000	\$ 949,686	\$ -

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
0.9.2	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

Technology Report—Second Quarter 2026

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



Technology Report

Second Quarter 2026

August 19, 2026

Digital Transformation – 2026 Q2 Update

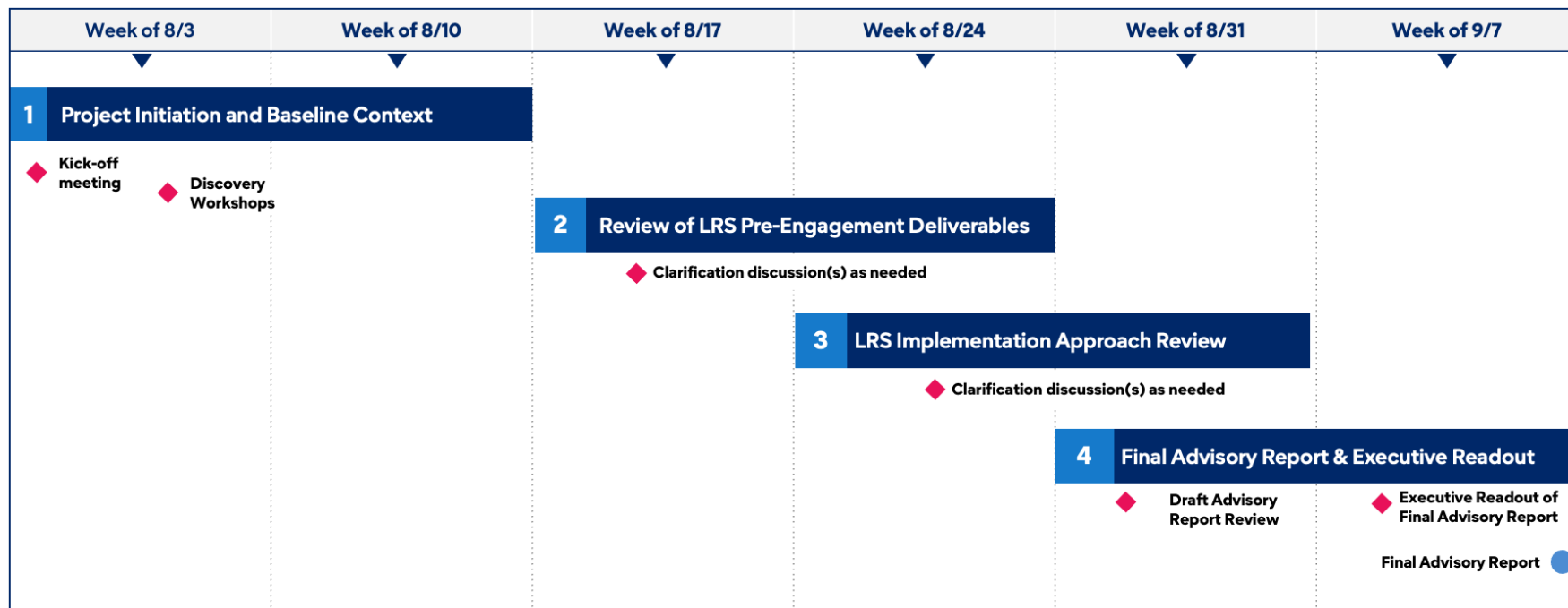
- Initiatives Completed
 - LRS Pre-Engagement
 - Secure Board Site Re-platforming
- Initiatives In Progress
 - Gartner Independent Advisory Review
 - Banking & Accounting Transition Project
 - Beneficiary Management via MySCERS
 - 1099R Forms and Retiree Pay Advices
 - Back Office Transformation: Retirement Pipeline

LRS Pre-Engagement – 2026 Q2 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	100% 
Imaging System Analysis	10/27/25	12/12/25	100% 
Accounting System Analysis	01/12/26	03/17/26	100% 
Data Conversion Analysis	10/10/25	04/29/26	100% 
System Interfaces Analysis	08/25/25	02/26/26	100% 
Line of Business Requirement Analysis Project	01/23/26	06/12/26	100% 
Close	07/30/26	07/31/26	100% 

Gartner Independent Advisory Review

- Provide an independent assessment of the LRS proposal and implementation approach
- Validate project readiness while identifying gaps, risks, and mitigation opportunities
- Support executive and Board decision-making



Banking & Accounting Transition Project

- Board approved strategy – 6/17/26
- Project Management Contract (Sorello) – Signed 7/21/26
- Project Kickoff Meeting – 7/27/2026
- SCERS & DOF Transition Kickoff Meeting – 7/31/26
- Banking RFP Closed – 7/31/26
 - Segal-Marco assisting with evaluations – Board approved 1/21/26
- Business Central Accounting System Contract (Sikich) – Signed 7/31/26
 - System Requires Hosting Environment

MySCERS Registration Highlights

▲ 857
13,711
Registrations

 **11,366**
Fully Activated

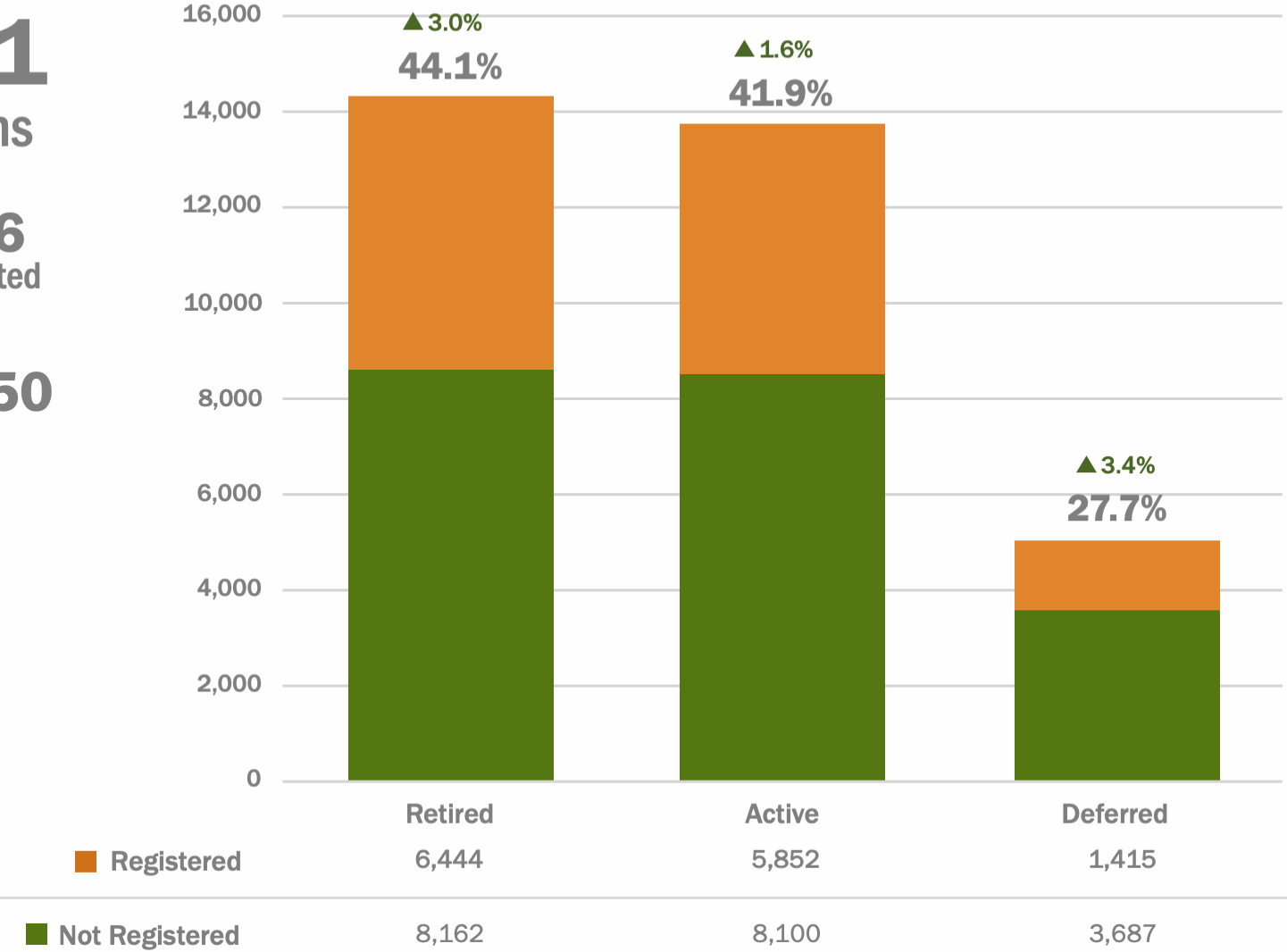
 **49 of 50**
States

Top 3

 NV (130)

 TX (126)

 ID (112)



As of 06/30/2026

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

29%

A

41%

D

20%

2026 Q1

12,854 / 38.25%

R

41%

A

40%

D

24%

2026 Q2

13,711 / 40.80%

R

44.1%

A

41.9%

D

27.7%

