



Board of Retirement Regular Meeting

Sacramento County Employees' Retirement System

Agenda Item 19

MEETING DATE: October 18, 2023

SUBJECT: SCERS Technology Roadmap

SUBMITTED FOR: Consent Deliberation and Action Receive and File

RECOMMENDATION

Receive and file the SCERS Technology Roadmap presentation.

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

SCERS is currently operating with a mix of legacy and aging application systems and processes. The current state of our application ecosystem presents both immediate challenges and opportunities. The objective of the presentation is to equip the Board with a clear understanding of the current landscape and provide a roadmap for the future, ensuring our application infrastructure is robust, efficient, and ready to meet the future needs of both members and staff.

ATTACHMENTS

- Board Order
- SCERS Technology Roadmap presentation

Prepared by:

Reviewed by:

Timothy Taylor
Chief Technology Officer

Eric Stern
Chief Executive Officer



Retirement Board Order

Sacramento County Employees' Retirement System

Before the Board of Retirement
October 18, 2023

AGENDA ITEM:

SCERS Technology Roadmap

THE BOARD OF RETIREMENT hereby approves Staff's recommendation to receive and file the SCERS Technology Roadmap presentation.

I HEREBY CERTIFY that the above order was passed and adopted on October 18, 2023 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



SCERS Technology Roadmap

October 18, 2023

Introduction

- State of the Pension Administration Ecosystem
- Existing and imminent challenges
- Proposed framework for transformation
- Plans for the near and longer term future

Current State of the Ecosystem

- **MBASE**
 - System of record for active members
- **COMPASS**
 - Financials and retiree system of record
- **FileNet**
 - Electronic Document Management System
- **Back Office Tools & Processes**
 - Assorted workflows and processes

Current State Workflow Example

Service Retirement Workflow

- Comprised of ~30 distinct steps
- All four “systems” involved at various points
- Includes numerous *manual* processes:
 - Scanning
 - Data Entry
 - Forms/Documentation generation
 - Emails to ensure work progresses

Current Challenges

- No Centralized Single System of Record
- Lack of Integration = Operational Inefficiencies
- Aging Technology Stack
- Limited Self-Service Offerings
- Paper-Based Interactions

Iterative Digital Transformation Strategy

“A gradual, feedback-driven approach to adopting digital technologies and processes, emphasizing continuous improvement & phased implementation.”

- Prioritize “lighthouse” initiatives
- Think “Outside-In”
- Centralize Data
- Modularize functions
- Replace workbooks with applications
- Utilize COTS where beneficial

Iterative Digital Transformation Strategy

An iterative approach fosters...

- Risk Management
- Enhanced Quality
- Stakeholder Satisfaction and Engagement
- Resource Efficiency
- Enhanced Visibility & Predictability
- User-Centric Development

Our Approach

A systematic rebuild of the legacy system.

- Phased & Component-Based Approach
- Quick Wins/High Dividends Early
- Increase Self-Service Capabilities
- Centralize Data
- Streamline & Automate Back-Office Operations

Existing Momentum

- “My SCERS” Member Portal
- Secure File Upload
- Online Self-Scheduling
- Member Engagement/Communication Platform
- Workflow management tool analysis
- Data centralization has begun

High Level Roadmap

Increase Portal Functionality

Implement Tactical Solutions

Implement Workflow Solution

Modularize Workbook Functionality

Implement Aggregate Data Source

Systematic Rewrite of System

Next Steps

- Continue to employ iterative approach
- Leverage 2024 planning to guide next targets
- Develop a more detailed plan, budget, and timeline
- Regular Board reporting to monitor progress
- Various initiatives will require funding