



Board of Retirement Regular Meeting

Sacramento County Employees' Retirement System

Agenda Item 18

MEETING DATE: April 17, 2024

SUBJECT: Quarterly Technology Report—First Quarter 2024

SUBMITTED FOR: Consent Deliberation and Action Receive and File

RECOMMENDATION

Receive and file the Quarterly Technology Report for the quarter ended March 31, 2024.

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

The Quarterly 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 2024 performance.

ATTACHMENT

- Board Order
- Quarterly Technology Report—First Quarter 2024
- Quarterly Technology Report—First Quarter 2024 Presentation

Prepared by:

/s/

Timothy Taylor
Chief Technology Officer

Reviewed by:

/s/

Margo Allen
Chief Operations Officer

/s/

Eric Stern
Chief Executive Officer



Retirement Board Order

Sacramento County Employees' Retirement System

Before the Board of Retirement
April 17, 2024

AGENDA ITEM:

Quarterly Technology Report—First Quarter 2024

THE BOARD OF RETIREMENT hereby approves Staff's recommendation to receive and file the Quarterly Technology Report for the quarter ended March 31, 2024.

I HEREBY CERTIFY that the above order was passed and adopted on April 17, 2024 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

Quarterly Technology Report - Initiative Status

Digital Transformation - Year 0				FY 23/24 Budgeted Amount - \$1,000,000		
ID	Initiative Name	Target Date	Status	Budget	Expended	Annual Cost
0.1	Enterprise Resource Planning Committee	2023 - Q4	Completed	\$ -	\$ -	\$ -
0.2	SCERS.gov Transition	2024 - Q2	In Progress	\$ -	\$ -	\$ -
0.3	Online Appointment Scheduling	2024 - Q1	Completed	\$ 230	\$ 230	\$ 230
0.4	Direct Deposit Member Notification	2024 - Q2	Development	\$ -	\$ -	\$ -
0.5	Member Portal - Phase I	2024 - Q2	Development	\$ 603,500	\$ 576,999	\$ 110,200
0.6	Member Engagement Platform	2024 - Q2	In Progress	\$ 5,580	\$ 5,580	\$ 5,580
0.7	Online Death Reporting	2024 - Q3	Not Started			
0.8	Workflow Management: Retirement Pipeline	2024 - Q2	Development			
0.9	Online Retirement Application	2024 - Q3	Design	\$ 197,000		\$ 50,000
0.9.1	Secure File Upload	2024 - Q3	Design			
Year 0 Sub Total				\$ 806,310	\$ 582,809	\$ 166,010

Digital Transformation - Year 1				FY 24/25 Budgeted Amount - \$1,750,000		
ID	Initiative Name	Target Date	Status	Budget	Expended	Annual Cost
1.1	Member Portal - Phase 2					
1.2	Online Service Purchase Calculator					
1.3	Back Office Transformation: Retirement Pipeline					
1.4	Workflow Management/Transformation: Service Purchase					
Year 1 Sub Total						



Quarterly Technology Report

First Quarter 2024

April 17, 2024

Iterative Digital Transformation Strategy

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

High Level Roadmap

Increase Portal Functionality

Implement Tactical Solutions

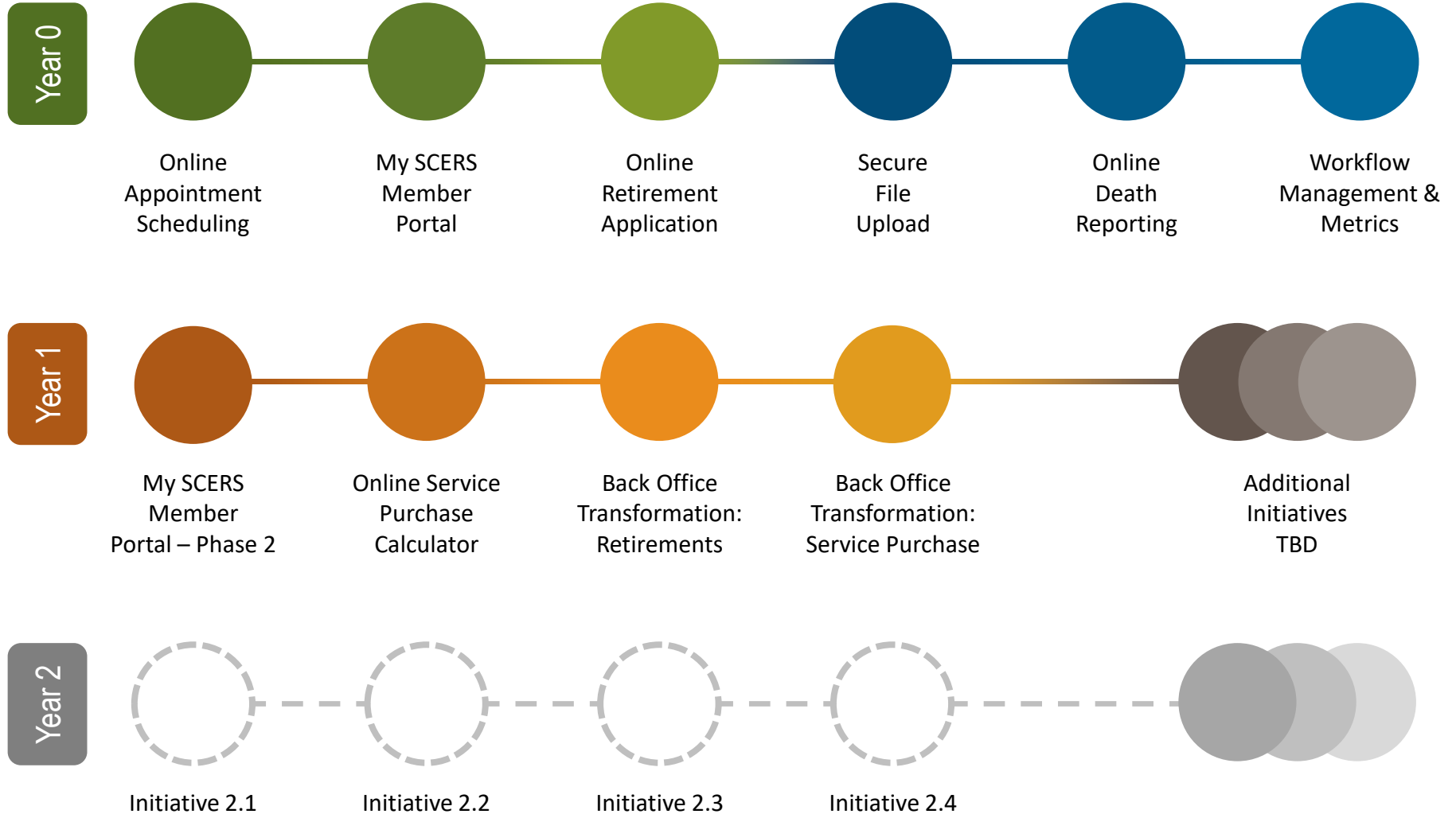
Implement Workflow Solution

Modularize Workbook Functionality

Implement Aggregate Data Source

Systematic Rewrite of System

High Level Roadmap Refined



Digital Transformation – 2024 Q1 Update

- Implemented Enterprise Resource Planning (ERP) Steering Committee
- Initiated SCERS.gov domain name migration
- Implemented Online Appointment Scheduling functionality
- Engaged vendor to develop Online Retirement Application and Secure File Upload