SBCERS

Santa Barbara County Employees' Retirement System

DATE: August 23, 2023

TO: SBCERS Board of Retirement

FROM: Greg Levin, CEO

RE: **Online Docketing System Conversion**

Recommended Action:
That the Board of Retirement receive and file the presentation.

Summary:
Over the summer, staff researched alternative software solutions for online agenda management to evaluate the cost efficiency and user-friendly features of other options on the market. OnBoard provides document storage similar to BoardDocs, with added features such as Task Management, Directory of Users, Resources, and Meeting Calendar. OnBoard also offers an easy-to-use app available to download on smartphones and tablets. Switching to OnBoard would save SBCERS $4,000 annually.

This presentation will demonstrate what accounts will look like for trustees and the public, as well as a new agenda and minutes format. Staff plan on transitioning to OnBoard for the September 27, 2023 Regular Board Meeting. Members of the staff will be reaching out to individual trustees to setup their OnBoard accounts and offer a walk-through if requested.

This item has no attachments.