

Program Leadership	Program Overview
<p>Executive Sponsor: David Gerstenfeld, Acting Agency Director Program Sponsor: Karen Madden Humelbaugh Program Manager: Juan Serratos</p>	<p>The PFMLI Implementation Program will deliver the services set forth in ORS chapter 657B. This entirely new statewide program requires the creation of policies and rules, operational processes and infrastructure, outreach and education efforts, and the program management and governance structures needed to support the implementation. Technology and business processes to support PFMLI will be delivered through the agency's Modernization Program.</p>

Program Headlines
<ul style="list-style-type: none"> • Karen Madden Humelbaugh provided testimony to the Senate Labor and Business Committee, introducing herself as the new PFMLI director and providing program status updates. • Brink Communications completed two deliverables in January, Developed and Implemented Employee Survey and delivered the final draft of the Marketing and Outreach Plan. These deliverables ended the Research and Planning Phase and moved their contract into the Outreach Phase. • Finalized recruitments for leadership positions. Kelley Ofoni, Policy Manager will start on February 1. Danielle Willey, Operations Manager on February 7. Michelle Roland-Shwartz, Outreach Manager on March 7. Additional recruitments ongoing include a Diversity, Equity and Inclusion Coordinator, Outreach Coordinator and several policy and operations positions as Operations and Policy Analyst 2. • Proposed that the PFMLI team should manage operations for Equivalent Plans and not the Contributions Team. A final decision is expected next month.

Program Status by Delivery Work Stream

Status:	Education and Outreach		Policy, Legislation, and Rules		Operations	
	Previous	Current	Previous	Current	Previous	Current
Key:	On Target		In Mitigation		High Risk	

Summary: Program status is currently High Risk for Education and Outreach; while the communications contract and associated deliverables with Brink Communications are on target, this work stream is still at a High Risk status due to current staffing resources and current needs to establish a detailed action plan for the education and outreach to employers and employees following the stakeholder engagement that has occurred to date. Policy Legislation and Rules, Operations, and Program Management milestones are all on target schedule wise, but are maintaining the High Risk status reflecting the high degree of complexity and level of risks and issues to the implementation program for all workstreams. More detailed information can be found in the Risk and Issue report on pages 3-4.

Program Status by Delivery Work Stream

	Education and Outreach	Policy, Legislation, and Rules	Operations
This Month Highlights	<ul style="list-style-type: none"> • Continued Development of Q&A and FAQ documents • Provided PFMLI updates to agency educational documents and training materials • Prepared for public hearings & RAC meeting preparations 	<ul style="list-style-type: none"> • Analyzed and incorporated suggestions received on Batch 1 rules during the formal rulemaking process • Finalized Batch 1 administrative rules with the Secretary of State • Analyzed and incorporated suggestions received on Batch 2 rules during the RAC meetings 	<ul style="list-style-type: none"> • Drafted letters for the technology system • Continued recruit to fill PFMLI implementation team vacancies • Continued development of operational processes for the combined contributions unit • Completed initial preparations for system testing and validation

	<ul style="list-style-type: none"> • Brink Communications Contract moved into the Outreach Phase 	<ul style="list-style-type: none"> • Filed proposed Batch 2 rules Secretary of State for the Oregon Bulletin • Continued development of potential 2023 legislative concepts 	<ul style="list-style-type: none"> • Began Self-employed rules and process review • Began Equivalent Plans rules and process review
	Education and Outreach	Policy, Legislation, and Rules	Operations
Next Month	<ul style="list-style-type: none"> • Formalize Outreach team and start recruitments of additional staff • Identify critical Outreach deliverables for the next three and six months • Collaborate and define an approach with Brink on PFMLI branding efforts • Update stakeholder database. Assess for gaps and make sure that underrepresented communities are identified • Collaborate with the Operations team to define an approach to survey Oregon employers on equivalent plans 	<ul style="list-style-type: none"> • Hold formal rulemaking hearings on Batch 2 rules • Draft 2023 Legislative Concept one-pagers for discussion with Advisory Committee • Monitor PFMLI-related legislation and SB 1515 during the 2022 legislative session • Draft Batch 3 rules related to PFMLI benefits • Begin drafting Batch 4 rules related to appeals, benefits, and equivalent plans • Start recruitments of new policy staff 	<ul style="list-style-type: none"> • Identify phone options to handle Equivalent Plan phone calls • Draft an onboarding plan, PFMLI culture and other new hire collateral documents • Develop an Equivalent Plan operations timeline • Draft a staffing proposal to manage Equivalent Plan phone calls and application processing • Start implementation planning of Equivalent Plans if approved • Define an approach to survey Oregon employers' preference for an Equivalent Plan or contributions

Program Management Report

Program Management approach was restructured to only three work areas (work streams); Policy, Outreach and Operations. The goal is to maximize operational efficiencies by building the institutional knowledge within three main areas of work and to facilitate communication and collaboration. Additionally, the project management approach was redefined from strictly Scrum to a hybrid model to improve accountability, simplify staff reporting and easily identify progress or delays. Additional work relating to updating the project management tools, program reporting forms, and processes to improve accountability will remain in a state of continuous improvement.

As the three work streams were defined this month, it was also identified the staffing levels needed and classifications. The leadership team priority is to complete recruitments to ensure that all work streams are staffed appropriately.

Risk and issue management process improvements continue. Updates continue to the program charter, program plans, and work stream milestones to reflect current program state and build out the both Education and Outreach and Operations Work streams.

Technology Report

During January the Modernization Project entered into the Development phase of the project and continues on schedule for a September Rollout date. In March, a second PFMLI Checkpoint will be held to verify that the PFMLI contributions implementation continues to be directionally correct.

Technology and business processes to support PFML continue to be delivered through the agency's Modernization Program. Updates to modernization milestones can be found here: [Modernization Milestones](#).

Schedule Report

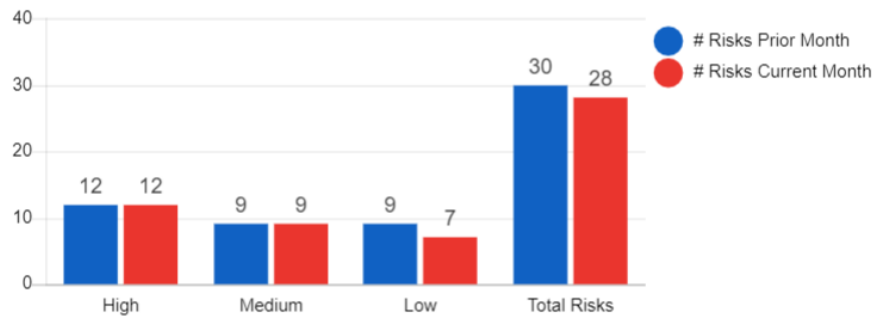
Rules and policy work continues to remain on schedule. In formal rulemaking, the first batch of 35 administrative rules comprised of Contributions, Self Employed, Small Employers and Assistance Grants, and our Outreach rule. The 35 Batch 1 administrative rules became permanent with the Secretary of State on January 31, 2021. The second batch of administrative rules comprised of will be posted in the February *Oregon Bulletin* and the public comment period closes on March 1, 2022 at 5pm and the target for the permanent rules to become effective is April 2022..

The operations work stream is on schedule. Recruitment is ongoing to recruit and onboard staff for operational needs. The operational process development for the combined contributions unit within the Employment Department has begun and will continue through the fourth quarter of 2022.

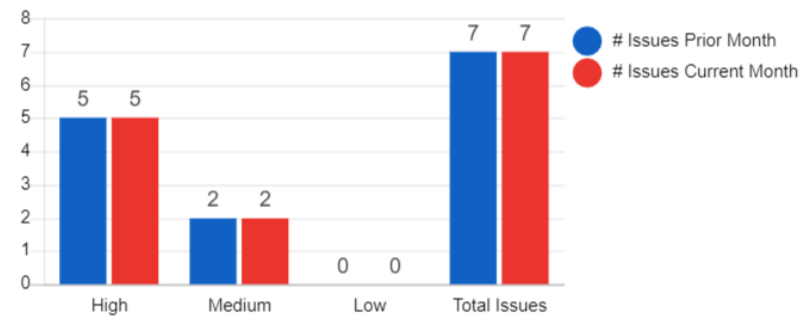
Education and Outreach work is currently at risk of becoming behind schedule. The Brink Communications contract deliverables are on schedule, program resource adjustments are needed to insure timely and robust employer and employee engagement occur in conjunction with the completed outreach plan.

Risk and Issue Report

Risks



Issues



Risks: There are **28 total risks** being monitored at this time: **12 High Priority**, **9 Medium Priority**, and **7 Low Priority**.

Issues: There are **7 total issues** being monitored at this time: **5 High Priority** and **2 Medium Priority**.

PFMLI Implementation Team	PFMLI State Partners Team		
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