

Paid Leave Oregon Advisory Committee

August 2, 2023

1:00pm – 3:00pm

ZoomGov - <https://www.zoomgov.com/j/1603758108>

Agenda

Members
 Karen Humelbaugh
 David Gerstenfeld
 Jeannine Beatrice
 Amanda Dalton
 Jenny Dresler
 Linda Herrera
 Eric Hunter
 Eva Rippeteau
 Catie Theisen
 JaJetta Dumdi
 Courtney Veronneau

Docket #	Topic	Purpose	Presenter
1.0	Welcome	Inform	Karen Madden Humelbaugh & David Gerstenfeld
1.1	Member Roundtable		
1.2	Agency Updates		
1.3	Approval of April-July Meeting Notes		
2.0	Introduction of Paid Leave Leadership	Inform	Karen Madden Humelbaugh
3.0	Benefits Updates	Inform	Danielle Willey
4.0	Policy & Program Support Updates Legislative Updates	Inform	Kelley Ofoni & Shannon Ball
5.0	Customer Care, Outreach & Communication Updates	Inform	Andrew Warren & Angela Yeager
6.0	Additional Program Updates	Inform	Karen Madden Humelbaugh

Paid Leave Oregon Advisory Committee Docket

Docket Item:

1.3 – Approval of April, May, June & July Meeting Notes

Docket Summary:

Karen Madden Humelbaugh asks committee members if they have any edits to the notes from the previous meeting. After feedback is addressed, the committee will vote on whether to approve the notes. Quorum was not met at the April, May or June meeting and therefore April, May, June and July need to be reviewed and approved.

Docket Materials:

PDF – Paid Leave Oregon Advisory Committee Notes 04-2023

PDF – Paid Leave Oregon Advisory Committee Notes 05-2023

PDF – Paid Leave Oregon Advisory Committee Notes 06-2023

PDF – Paid Leave Oregon Advisory Committee Notes 07-2023

Staff Recommendation:

Approve notes.

Meeting:	Paid Leave Oregon Advisory Committee				
Date/time:	July 5, 2023				
Location:	Microsoft Teams				
Attendees:	P (Present) A (Absent) S (sent sub)				
	Facilitator: Karen Madden Humelbaugh Scribe: Mackenzie Jones				
Members		Staff		Guest	
P	Karen Madden Humelbaugh	P	Mackenzie Jones	P	Vince Porter
P	David Gerstenfeld	P	Shannon Ball		
P	Jeannine Beatrice	P	Juan Serratos		
A	Amanda Dalton (employers)	A	Danielle Willey		
P	Jenny Dresler (employers)	A	Michele Schwartz		
P	Eric Hunter (employers)	P	Angela Yeager		
P	JaJetta Dumdi (employers)	A	Kelley Ofoni		
A	Eva Rippeteau (employees)	P	Andrew Warren		
A	Linda Herrera (employees)				
P	Catie Theisen (employees)				
P	Courtney Veronneau (employees)				

Agenda

Docket #	Topic	Purpose	Presenter
1.0	Welcome	Inform	Karen Madden Humelbaugh &
1.1	Welcome New Member		David Gerstenfeld
1.2	Member Roundtable		
1.3	Agency Updates		
1.4	Approval of April & May Meeting Notes		

The Oregon Employment Department experienced temporary agency-wide technical challenges related to Zoom licensing agreements that required some last minute changes to the meeting invite as well as a shorted meeting time. The Paid Leave team apologizes for the technical difficulties and have since resolved those issues and should return to normal processes again next meeting.

David Gerstenfeld who has been serving as the Acting Director of the Oregon Employment Department was officially appointed as Director. The agency received majority of what they'd asked for in the agency's requested budget, except for a few small adjustments. There were some alterations made due federal funding reductions as well as a change to one of the policy packages requested. The agency had hoped for a number of positions to help deal with some of the remaining pandemic-related unemployment insurance (UI) work and to fill in the gap of the cost for running the UI program and reduction of federal funding. The funding mechanism for this policy package was an adjustment to how much of the UI tax collected would be dispersed to the trust fund versus the administrative fund. While this had strong bipartisan support, the council realized near the end of session that they believed it required a 3/5ths vote to pass which created procedural barriers. Instead, they passed a temporary measure that allows the

agency to fund those employees through the end of March which allows for additional conversation with the legislators prior to session beginning again in February.

2.0	Benefits Updates	Inform	Danielle Willey
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Please see provided docket for updates. The Benefits team continues to hire and onboard new staff, and are working on creating desk manuals and operating procedures.

3.0	Policy & Program Support Updates Legislative Updates	Inform	Kelley Ofoni & Shannon Ball
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Please see provided docket for policy updates.

Shannon Ball shared legislative and administrative rule updates. The Rulemaking Advisory Committee is convening today to discuss the need for 8 temporary rules prior to go-live in August. These temporary rules would then follow up with permanent rules by January 2024. One of the Paid Leave legislative concepts, HB 2290 related to information sharing with the Department of Revenue (DOR) did not pass during legislative session. The program intends to bring this forward as a concept in a future legislative session and in the meantime will be working with DOR. SB 593 also did not pass. The team has been receiving a high volume of questions related to SB 999 and are working with the Bureau of Labor and Industries on a plan which will be posted on the website as soon as possible.

4.0	Customer Care, Outreach & Communication Updates	Inform	Andrew Warren & Angela Yeager
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Andrew Warren provided Customer Care and Outreach updates. The Customer Care team has welcomed two new supervisors: Tabitha Putnam and Amanda Parsons, as well as about 40 additional customer care specialists since May. They have been collaborating with the Paid Leave Learning and Development team to create "Core Skills" training which covers topics including trauma informed care, customer care principles, guidelines for customers experiencing a crisis, vicarious trauma, dynamics of violence and abuse, as well as scenario based role-play. The team has also been seeking out employees and employers to participate in a workgroup to define goals and performance metrics for the program. About 98 participated in the survey and 150 have started the survey. The workgroup will convene later this month.

Angela Yeager shared updates from the Communications team. The employee guidebook and self-employed guidebook have both been released and are on the website. The Communications team is also working on a new batch of frequently asked questions related to go-live, 35 new forms, an updated website, and a checklist and video to help walk customers through the application process. They are also creating a fact sheet to provide health care workers who can help answer their patients questions related to Paid Leave.

5.0	Quarterly Trust Fund Updates	Inform	Karen Madden Humelbaugh
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Through SB 31, the program has until August 11, 2023 to make the decision about whether or not they are solvent. They intend to make a decision and communication to the public much earlier and are aiming at delivering the news by the week of July 17.

Contributions are very close to what the team forecasted, only 5% under the estimate. That percentage will likely even shrink over time as employers who never submitted their equivalent plan after their declaration of intent back pay what they owe.

6.0	Additional Program Updates	Inform	Karen Madden Humelbaugh
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Paid Leave Oregon Advisory Committee Docket

Docket Item:

3.0 – Benefit Updates

Docket Summary:**Recruitment Update**

Paid Leave Oregon's Benefits section continues to grow as we welcomed another 20 staff in the month of July, including Customer Care Specialists, Benefits Eligibility Specialists, and Investigators. We will continue to recruit and hire staff over the coming months to fill the few remaining open positions.

Frances Development

End-to-end testing was extended for an additional two weeks to ensure all aspects of the system could be tested as fully as possible. Development on the system paused in July to ensure a smooth and stable start for the Paid Leave Benefits roll-out in August. Additional system enhancements or modifications that have been identified through end-to-end testing will be added to a list and prioritized after the system is live.

Process Documentation and Training

The Benefits section is working closely with Customer Care & Outreach and Policy & Program Support on refining and finalizing business processes, workflows, and standard operating procedures. Training on these processes, as well as Francis-specific training, will continue over the next several weeks to ensure staff are prepared to process applications for benefits and help support customer inquiries beginning in August.

Docket Materials:

None.

Staff Recommendation:

None, this is an informational item only.

Paid Leave Oregon Advisory Committee Docket

Docket Item:

4.0 – Policy & Program Support Updates

Docket Summary:*Administrative Rules:*

Paid Leave is working the latest batch (batch 8) of temporary administrative rules and will be filing them with the Secretary of State's Office (SOS) before Paid Leave Oregon goes live. The rules cover:

- *Benefits and assistance grants: what affinity means for family leave, what claimant designated representative means, how first year since a child's birth or placement is measured, what distance the employer must use for job protection rules, and what responsibilities the successor in interest has for assistance grants.*
- *Confidentiality: how Paid Leave Oregon will use confidential information, ways Paid Leave Oregon must safeguard confidential information, and when Paid Leave Oregon will disclose confidential information.*

Paid Leave is also working on the next batch (batch 9) of rules to make the temporary rules permanent and adding in rules that were not needed before go live. The timeline for the rulemaking processes for these batches is as follows:

- *Batch 8 temporary rules filed by August 9 with SOS*
- *Batch 9*
 - *RAC meetings will be held in late August or early September*
 - *File Notice of Proposed Rulemaking with SOS November 1, 2023*
 - *Public Hearings held during the month of November*
 - *Public Comment Period November 1-30, 2023*
 - *Permanent Rules filed with SOS by January 1, 2024*

Docket Materials:

None

Staff Recommendation:

None, this is an informational item only.



Paid Leave Oregon Advisory Committee Docket

Docket Item:

5.0 – Customer Care & Outreach, and Communications Updates

Docket Summary:

Customer Care & Outreach

Recruitments: We hired two new managers within Customer Care & Outreach, including Ashley Perley and Phillip Hudspeth. Onboarding for new hires is continuing as we prepare for Go Live on August 14.

Outreach and engagement began a new series titled, *Benefits Explained*, which is offered to the public from July 13-September 28th. The outreach and engagement team is collaborating with the *Department of Administrative Services* (DAS) for another series for state employees, beginning in August.

We finalized a non-competitive contract with the *Micronesian Islander Community* (MIC), a culturally specific non-profit organization based in Salem. We attended the first of four sessions in collaboration with MIC.

<https://www.microregon.org>

We estimate that approximately 304,969 union members may be eligible for Paid Leave. Through our partnership with AFL-CIO and others, we have contacted 50% and presented to 59% of the unions in the state. We are eager to join the *Labor Education Resource Center Summer School* hosted in Eugene this August.

We provided training for healthcare administrator and healthcare providers in partnership with the *Oregon Association of Hospitals & Health Systems*. Another session is scheduled for healthcare providers in September.

The outreach and engagement team is scheduled to table and/or present at the Oregon State Fair, Marion County Fun Friday Resources Fair, Summer Free For All – We Outside Health and Wellness Fair, and the Balanced Bend Mental Health Festival. The *Communications* team developed a one-pager for the Department of Agriculture to have available at the Oregon State Fair.

Communications

Communications is working hard for Go Live on August 14, completing forms, finishing the new website, and recording video tutorials for the website for Frances Online. We also worked with the Modernization team on the Frances Chatbot, as well as finishing new Frequently Asked Questions that will go on the website on Aug. 14. Finally, we completed review of all the advertising going out Aug. 14 statewide, and quality assurance work on new website features, such as the eligibility quiz.

We also had a successful press release go out on July 19, with media coverage in the Oregonian, KATU-TV, Univision, KTVZ-TV in Bend, KLCC Radio in Eugene and more than 20 other media outlets.

Docket Materials:

None

Staff Recommendation:

None