

| Meeting: | | Modernization Oversight Forum | | | |
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| Date/time: | | Jan. 27, 2023 2-3 p.m. | | | |
| Attendees: | | P (Present) A (Absent) | | | |
| Forum Members | | Guests | | | |
| P | Representative Paul Holvey | P | Renee Royston | P | Maggie Gleason |
| A | Representative Nancy Nathanson | P | David Gerstenfeld | P | Bill Truex |
| P | Senator Tim Knopp | P | Alex Kasner | P | David Genz |
| A | Senator Janeen Sollman | A | Drew Sutter | | |
| P | Terrance Woods | P | Jayne Martin | | |
| P | Sean McSpaden | P | Lynn Kneeland | | |

AGENDA

| | Topic | Time | Presenter |
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| 1. | Welcome and introductions | 5 min | Sean McSpaden |
| 2. | Review and approval of meeting minutes Minutes from 4/21/22 were adopted. | 5 min | Sean McSpaden |
| 3. | <p>OED Modernization Program</p> <p>David shared an agency update that included information related to the recent Secretary of State audit, the creation of Paid Leave Oregon, development of the 2023-25 budget, and ongoing agency transformation efforts.</p> <p>Renee shared a Modernization Program update including the Frances timeline to give context to where we are in our UI and Paid Leave Oregon project.</p> <ul style="list-style-type: none"> Frances successfully went live the weekend of Sept. 6 of last year with functionality to support our state’s unemployment insurance tax and Paid Leave Oregon contributions. Beginning this month, we added the statewide transit tax, previously a standalone reporting that was submitted to DOR, and the new Paid Leave contributions to the combined report for wages that are paid beginning 1Q 2023. Two weeks after the tax and contributions rollout, we started working on the second rollout for Frances, which includes the functionality supporting Paid Leave Oregon benefits and Unemployment Insurance benefits. Their respective go-live dates of Aug. 14 of 2023 and Mar. 4 of 2024. <p>Frances Support:</p> <ul style="list-style-type: none"> Frances Online is now available in Spanish. Through collaboration across several divisions within OED, Frances Online in Spanish went live in early January. In addition to increased access for native Spanish speakers, we have also seen employers taking advantage of other self-service features that make doing business with us faster and easier, including updating their account information, adding users and managing permissions for their staff, submitting documentation, or requesting a payment plan. They are able to do everything they used to do across multiple systems, plus so much more, securely all in one integrated system that uses multifactor authentication. | 15 min | David Gerstenfeld & Renee Royston |

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| | <ul style="list-style-type: none"> We are continuing to implement ways of supporting our staff, our agency partners and external users, and the Oregon employer community, including providing ongoing education and training, responding to tickets and requests for improvements and enhancements both internally and from customers. To date, over 1000 employers and third party administrators have participated in our virtual Frances Online Workshops, learning more about how to use the system and getting answers to their questions. We will be continuing the workshops quarterly. In mid-January we implemented our first set of core product updates, called a “sync pack” to Frances. This change impacted (and improved) pieces of the Frances most used by our staff. We are addressing the unique needs of Third Party Administrators by finding solutions that allow them more easily and safely access the resources they need to do business on behalf of their clients. <p>Workforce Modernization Project</p> <ul style="list-style-type: none"> Beginning this past December, we are moving forward with another planned project of the agency’s modernization work. We officially started the steps to obtain approval from our steering committee to move forward and charter the project. The Workforce Modernization Project will replace the computer systems supporting the delivery of employment services and administration of federal programs, including our labor exchange system, iMatchSkills, and our case management system. Additionally, similar to the UI project, we will transform business processes to take advantage of opportunities and benefits available through new system capabilities. Our first convening of the many state and community partners who are involved and invested in this project is scheduled for Jan. 31, 2023. | | |
| 4. | <p>Frances Implementation</p> <p>Maggie brought an implementation update covering the Defintion, Base Configuration, Testing and Training, Partner Engagement, and Data Conversion phases of the project. Content available on related presentation.</p> | 20 min | Maggie Gleason |
| 5. | <p>iQMS report – Frances implementation - CSG</p> <p>Overall Project Health</p> <p>The overall health rating for the UI Modernization Project is medium risk. Last meeting there were two health areas reported as high risk: Schedule and Resources. As of Jan. 31, 2023, the Resources area was the only high-risk category. Schedule, Quality, and Organizational Readiness are all medium. Scope and Leadership and Governance were moved from medium to low risk. The other remaining low risk areas are Budget, Communication, and Project Management.</p> <p>Regarding the high-risk area - Resources – regarding staffing shortages and over allocated resources. There has been little progress on alleviating the shortages, and it is not expected to be resolved any time soon. There has been little impact to the project. Business representatives are showing up to the meetings as needed. IT activities are still being defined. The concern is burnout and the demands on business increasing during training and testing. Mitigations to communicate, collaborate, and prioritize work continue.</p> <p>The medium risk areas are:</p> <ul style="list-style-type: none"> Schedule – The master schedule continues to be missing data, such as dependencies, task owners, and forecasted start and end dates. There are also a few errors remaining such as deliverables with wrong due dates. The Modernization team is reviewing the schedule and adding details and tasks as the planning continues. Quality – The Modernization team has developed mitigation strategies for Rollout 2 requirements, to ensure they are complete. The requirements will be validated during | 10 min | Jayne Martin |

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| | <p>the testing phase. A review of the requirements and ensuring traceability of the requirements will be conducted.</p> <ul style="list-style-type: none"> • There are areas of Paid Leave benefits business processes that are not completely developed, which makes development of Frances challenging. However, the experience of FAST appears to assist as they are able to provide options and help guide the decision-making process. • Organizational Readiness – The Modernization team is working on the readiness assessment for Rollout 2. The survey went out to all staff January. This will set a baseline for the rollout and help identify areas for organization change management efforts to prepare staff and address resistance to change being observed in a few meetings • There have been some areas of resistance observed and the project team is working with management to address the concern. <p>Project Evaluation and Lessons Learned Report</p> <p>CSG conducted a project evaluation and lessons learned in October and November. During this evaluation they reviewed various project plans and monthly status reports, conducted interview, and distributed a survey to various stakeholders.</p> <p>CSG submitted their report Nov. 11, 2023. A copy of the report was included in your materials. Generally, it appeared the project was on track to fully attain the business objectives and anticipated benefits. CSG will be conducting another evaluation later on in the project and at that time should have data available to do further analysis. In the report CSG also identified 14 lessons learned and included recommendations. The project had already made changes in several of the areas discussed.</p> <p>Security Assessment</p> <p>Last meeting, CSG reported they had completed a Security Assessment of Frances. They conducted further testing once the system was live, black box external penetration test (pen test) of the Frances Online website by methodically validating and verifying the effectiveness of its perimeter network and web application security controls. Overall, the assessment found that the Agency has implemented effective security controls to properly secure the Frances Online website. They observed that the Frances Online website has a limited external attack surface and sufficient controls in place to protect the website, user accounts, and sensitive data.</p> | | |
| 6. | Next steps | 5 min | Sean McSpaden |

SUPPORTING MATERIALS

UI Modernization Project Monthly Quality Status Report Nov_2022_v1.0