Meeting:	Modernization Oversight Forum				
Date/time:	Sept. 5, 2023 | 1-2:30 p.m.				
Attendees:	P (Present)　　　A (Absent)				
Forum Members		**Guests**			
A	Representative Paul Holvey	P	Renee Royston	P	Lynn Kneeland
P	Representative Nancy Nathanson	P	David Gerstenfeld	P	Maggie Gleason
A	Senator Tim Knopp	P	Alex Kasner	P	Bill Truex
P	Terrence Woods	P	Drew Sutter	P	David Genz
P	Sean McSpaden	P	Jayne Martin		

AGENDA

	Topic	Time	Presenter
1.	Welcome and introductions	5 min	Sean McSpaden
2.	Review and approval of meeting minutes Minutes from 1/27/23 were adopted.	5 min	Sean McSpaden
3.	OED | Modernization Program David shared an agency update including information related to the Paid Leave Oregon implementation, an update on overall volume, and the work that is being done to prevent fraud. He also briefly shared other agency transformation work, including a new Office of Strategy, Innovation, and Performance, Equity and Inclusion Office, and ongoing work building our Contributions and Recovery unit. Additionally, David reported the Unemployment Insurance (UI) call wait times are higher than normal following a reduction in staff and hiring delays. The agency hopes to offset an anticipated spike in winter claims by hiring additional staff soon. Finally, David stated the overall agency priorities were focused on our ongoing modernization work, continued efforts to improve customer service, and working towards a sustainable pace of work. Comments and discussion: Representative Nathanson emphasized the importance of data driven decision-making and asked if we could, in the not-too-distant future, share how many Paid Leave Oregon claims are being approved vs. how many are denied, and something of the reasons? Sean acknowledged the value of the regular reports the agency provides to Department of Labor, and as example of transparency, the data available on the Oregon transparency website is helping members focus on the most important facts, figures, and metrics.	30 min	David Gerstenfeld & Renee Royston

He suggested that as we work with interested parties, we reinforce what is available, and invite feedback and input on what kinds of data is important to them.

David agreed and acknowledged that while call wait times are not a federal measure, but it is something we think people care about.

Program Highlights
Renee shared progress on the implementation of the Frances system for our UI and Paid Leave programs, information about how we are supporting our staff, partners, and customers, and an update on the progress we have been making with our Workforce Modernization Project.

She also informed the group the Modernization Program would be providing a written report to Joint Committee on Information Management and Technology during September 2023 legislative days.

Frances successfully went live the weekend of Aug. 14 with functionality to support our state's new Paid Leave Oregon benefits. On Aug. 14, people working in Oregon were able to start applying for Paid Leave Oregon benefits for leave beginning Sept. 3, and small businesses were able to begin applications for assistance grants.

Currently we have the portal active for Paid Leave Oregon, and beginning next March 2024, Unemployment Insurance (UI) will be added when we rollout Frances for UI benefits.

Customers can use Frances Online to apply for benefits, communicate directly with program staff, upload and update documentation, manage and update their account, check on the status of their claim, easily change a forgotten password.

The claimant portal and the interactive assistant, also known as a chat bot, is also available in English and Spanish.

We are continuing to implement ways of supporting our staff, our agency partners and external users, and the Oregon employer community.

Our team is focused on providing ongoing education and training, working with the OED business areas to respond to and prioritize requests for changes and enhancements both internally and from customers.

Our modernization organizational change management team are dedicated to help lead OED staff through the changes that occur because of this new system implementation, and for this rollout specifically, a brand-new benefits program.

We conducted our Go-Live Readiness Assessment Survey and hosted six virtual staff information sessions allowing impacted staff to share their

perspectives about the upcoming Rollout and help our staff focus their efforts immediately before the benefits system went live.

We also hosted six virtual focus groups in English, and two in-person focus groups in Spanish. The feedback about the Frances Online claimant portal is continuing to help us think about how to improve our customer's experience.

We added helpful tools and resources to our francesinfo.oregon.gov page, including things like "how to get started checklist" and video, and FAQs.

We are also helping employers understand what they will see and what they need to do when their employees apply for benefits. This includes how to see and respond to questionnaires, and in some cases how to create new logons or update access for new roles in the system. We have added additional FAQs to the agency's employer help pages, we are in the process of creating a how-to video, including information in our agency internal and external communications, and plan to host employer workshop to support employers with these changes.

We are continuing our quarterly workshops for employers and have started a new series focused on the unique needs of third-party administrators.

We are using what we have learned from the first two rollouts of this project to fine-tune our plans to bring UI claimant voice into our UI benefits rollout.

Workforce Modernization Project
We are moving forward with the Workforce Modernization Project with as much concurrency as reasonable, considering the timing of existing project needs and agency resource availability.

As a reminder, 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, we will transform business processes to take advantage of opportunities and benefits available through new system capabilities.
This year our focus is on initiating and planning the project, and engaging with staff, partners, and other impacted parties to identify, explore, and analyze current-state processes and systems.

We are also forming workgroups to further explore and document specific items, such as interfaces and data exchanges and system access. These activities will help us define the project requirements. We will also explore and envision the future state as we develop the procurement strategy later this year.

We are preparing to release a request for proposals in 2024 as we are wrapping up the UI Modernization project.

	Beginning in March of this year, members of our team visited 20 WorkSource Oregon Centers and we are continuing virtual conversations to gather feedback for project business requirements.		
	We are continuing to refresh, update, and create the required project plans and artifacts for the project Stage Gate 2 submission.		
	We were accepted to participate in the Aligned Case Management Institute, an initiative facilitated by the United States Department of Labor Employment and Training Administration's Office of Workforce Investment and NASWA's Workforce Information Technology Support Center (Workforce ITSC). This effort involves OED and some of our service delivery partners in a series of interactive sessions aimed at transforming and aligning case management systems.		
	The goal of this initiative is to improve how services are provided to customers in the workforce system. It uses a human-centered design approach to create a more holistic experience. The engagement helps state teams improve case management systems and processes through exploration, design, testing, implementation, and scaling.		
	Finally, several vendors have provided demonstrations of their workforce and case management systems, and other system capabilities.		
4.	Frances implementation		
	Maggie brought an implementation update covering the Definition, Base Configuration, Testing and Training, Partner Engagement, and Data Conversion phases of the project. Content available on related presentation.	15 min	Maggie Gleason
5.	iQMS report – Frances implementation - CSG		
	Overall Project Health		
	The overall health rating for the Unemployment Insurance Modernization Project is medium risk. Last meeting there was one health area reported as high risk: Resources. As of July 31, 2023, Resources and Quality health areas are at high risk.		
	The Quality area was changed from medium to high in March 2023, due to risk #1, missing or misunderstood requirements. Implementing a brand-new state-wide program is much different than modernizing a long-established program. There are more unknowns, and it takes more effort to ensure requirements are understood and there is agreement to their interpretation. There were a few instances where changes were made due to a misunderstanding, causing rework. The program has been developing policy and administrative rules at the same times the system is being developed, and changes are not uncommon, as you would expect with a new system. There is just a higher risk for missed requirements or needed changes. The project is mitigating this risk	15 min	Jayne Martin

through open communications and involvement of Paid Leave management and policy developers in project meetings to help ensure clear communications and understanding.

The Schedule and Organizational Readiness health areas remain medium. Budget, Scope, Leadership and Governance, Budget, Communication, and Project Management remain low.

Regarding the other high-risk area - Resources

Resources – regarding staffing shortages and over allocated resources. The project and business areas are dealing with high workloads, overallocated resources, and vacancies. The Agency leadership is working together to ensure priorities are clear and to address areas of high need as appropriate. Burnout is a concern they are monitoring as well.

The project is mitigating this risk, by adding resources when possible, reassigning resources to cover the highest priority areas, and reprioritizing project activities to ensure the focus remains on the highest priority activities.

The medium risk health areas are:

Schedule – The Modernization team continues to modify and update the schedule. The team is not always utilizing dependencies and variance in their schedule, though there have been no major delays or missed milestones.

Organizational Readiness – The project team scheduled periodic readiness assessments for the duration of the project. They recently completed the latest assessment. The results are being shared with management and the Modernization team is working with managers to address the concerns raised. There were areas with a high percentage of positive results, such as the Paid Leave program. Many Paid Leave staff were recently hired and appreciated the onboarding process. Other feedback Agency-wide was staff wanting more information on how Modernization will be impacting their unit. Staff also feel there is a need for written, step by step procedures. The Modernization team is working with Paid Leave to help develop these and UI Benefits is also working to ensure procedures are available for staff. They also developed workflows for many of the Paid Leave processes.

There have been some areas of resistance observed and the project team is working with management to address the concern.

Security Assessment

At our last meeting, we provided information regarding the black box external penetration test (pen test) of the Frances Online website. As a reminder, CSG's testing found that the Agency has implemented effective security controls to properly secure the Frances Online

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	website. With the release of the Paid Leave benefits portal, CSG conducted further testing. There was little change.		
6.	Next steps		
	The agency will be providing a Modernization program status report to the Joint Committee on Information Management and Technology by Sept. 21, 2023.		
	Lynn reaching out to the Senate president's office to request help identifying a replacement.		
	Suggest end of October for next meeting.	5 min	Sean McSpaden

SUPPORTING MATERIALS

UI Modernization Project Quarterly Status Report Qtr 2 2023_v1.0