

PERS EMPLOYER ADVISORY GROUP MEETING

Date: 04/24/2026

Time: 10:00 a.m. – 12:00 p.m.

Location: Microsoft Teams

TYPE OF MEETING	Employer Advisory Group (EAG) meeting
FACILITATOR	Sam Paris
NOTE TAKER	Chloe Harris
CALL-IN NUMBER	+1 971-300-4342 Phone conference ID: 881 244 608#
ATTENDEES	<p>EAG members: Audrey Roberson, Oregon State University; Diana Herb, Tualatin Valley Fire & Rescue; Fabiola Flores, Department of Administrative Services; Gina Turner, Portland State University; Jeff Rasmussen, Jefferson County; Jeff White, Marion County; Matt Warner, City of Tualatin; Michelle Morrison, Portland Public Schools; Robert Tintle, Deschutes County; Shauna Tobiasson, Department of Administrative Services; Tod Case, Blue Mountain Community College</p> <p>PERS staff: Brandon Armatas, El Rossman, Elli Probasco, Ethan Erickson, Heather Case, Jake Winship, Kai Turner, Kevin Olineck, Kristi Ivers, Laurel Galego, Matthew Graves, Rachel Schizas, Richard Horsford, Sam Paris, Shawn Harper, Theresa Bechtol, Troy Phillips</p> <p>Guests: Amber Schonbrod, Brendan Watkins, Bryce Bumgardner, Carol Samuels, Cody Trafton, Donna Chastain, Ian Peterson, Jennifer Jones, Jon Grover, Maurizio Bottalico, Rhonda Miller</p>

Public Employees Retirement System (PERS) Employer Advisory Group (EAG) Meeting

NOTES

TOPIC	Welcome	Sam Paris
TIME: 10:00–10:02		
Sam Paris, PERS Chief Operating Officer, welcomed the Employer Advisory Group (EAG) and reviewed the meeting agenda and shared the meeting presentation .		

TOPIC	Director's Office update	Kevin Olineck
TIME: 10:02–10:07		
<p>Kevin Olineck, PERS Director, gave an overview of highlights from the April 2026 PERS Board meeting and provided a preview of the May 2026 PERS Board meeting. The board meeting packet is available on the PERS website.</p> <p>December board recap</p> <p>The April 3, 2026, PERS Board meeting (PDF) topics included the OPERF performance review, Oregon Savings Growth Plan (OSGP) annual report, an agency budget-development update, 2025 final earnings crediting and reserving, and an overview from Milliman about the School District rate collar.</p> <p>Rate collar: In the 2025 legislative session, there was bill that applied the School District Unfunded Liability Fund (SDULF) against school district rates for 2025-27.</p> <p>May 2026 PERS Board meeting preview</p> <ul style="list-style-type: none"> • PERS Health Insurance Program (PHIP) annual review. • PHIP renewal and rates. • Agency budget development . <ul style="list-style-type: none"> ○ Preliminary submitted to Legislative Financial Office (LFO). The final will be submitted in July. • School District Pool rate collar. <p><i>Q: Carol Samuels – Do you know what the March rate of return was?</i></p> <p><i>A: Kevin Olineck – We do not have the values for March yet. As soon as we have the March numbers, we will publish those. (Post-meeting note: March OPERF returns were published on the Treasury website in April.)</i></p> <p style="margin-left: 40px;">March – 1.81%</p> <p style="margin-left: 40px;">YTD – 0.61%</p>		

TOPIC	Legislative update	Heather Case
TIME: 10:07 - 10:12		
<p>Heather Case, PERS Senior Policy Advisor, presented legislative updates.</p> <p>February 2026 legislative session</p> <p>The February 2026 legislative “short session” was held from February 2 to March 6.</p> <ul style="list-style-type: none"> • No policy bills passed that involved PERS, the system, in terms of benefit increases or changes. • Bills passed that do not require implementation activity: <ul style="list-style-type: none"> ○ Senate Bill 1507 – federal reconnect bill. Only PERS change was updating dates. ○ House Bill 5204 – modernization budget adjustment bill. Did receive approval. • Multiple bills passed dealing with PERS’s operations as a state agency. 		

- Implementation activities have begun on some of these bills.

2027 Legislative Concepts

Development of legislative concepts for 2027 is underway.

- Government affairs interested-parties meeting was held in February.
- Changes to PERS Health Insurance Program (PHIP) subsidy will not be proposed by PERS in 2027.
 - May be brought forward by outside advocacy groups.
- At the April 2026 PERS Board meeting, PERS Board voted to approve concepts.
 - Concept requests were sent for approval to DAS and Governor’s office on April 10, 2026.
 - Requests have not been approved by Governor’s office yet, but we do not anticipate disapproval.
- PERS Board will review drafted bills at the December 4, 2026, meeting.
 - Must go through legislative drafting before going to the board.

TOPIC	Modernization update	Kristi Ivers
TIME: 10:12 - 10:20		
<p>Kristi Ivers, PERS Modernization Program Director, presented an update on modernization efforts.</p>		
<p>Telephony Modernization Project</p>		
<ul style="list-style-type: none"> • Project completed phase 2 on February 23, 2026: <ul style="list-style-type: none"> ○ Natural language processing. ○ One-way text messaging. ○ Post-call survey. ○ Automated messaging during pre-scheduled closures. • Scheduled call-back functionality postponed to phase 2b. <ul style="list-style-type: none"> ○ Phase 2b estimated to run 4/6 – 6/19/2026. <ul style="list-style-type: none"> ▪ Eli Probasco shared that analysis and proofs of concepts have been completed. Will be moving into construction and testing phase. Hoping for deployment by 6/19/26. ▪ Currently we can keep caller’s place in line, but this will allow for scheduled callbacks up to three days out. • Analysis and requirement gathering for phase 3 are in process. 		
<p>Employer Experience</p>		
<p>Kristi shared the Employer Experience journey map and highlighted the top three findings:</p>		
<ol style="list-style-type: none"> 1. Detail record sequencing and validation gaps. 		

- 2. Employer guidance and compliance issues.
- 3. Employer visibility and notification gaps.

Efforts are ongoing to address these issues before the fully updated PAS.

Pension Administration System (PAS) Modernization Project

Seeking a specialized consultant. Consultant will help write the request for proposal (RFP) for the PAS.

- o Proposals received 3/10/2026.
- o Evaluation team reviewed proposals and completed reviews 3/30/2026.
- o Evaluation team is scoring and working toward next steps.
- o Hoping to have update at next EAG meeting.

TOPIC	Actuarial update	Troy Phillips
TIME: 10:20–10:45		
<p>Troy Phillips, PERS Actuarial Business Specialist, presented an update on actuarial activities.</p> <p>Employer Incentive Fund (EIF) update First phase ran April 1 – June 30, 2025.</p> <ul style="list-style-type: none"> • Eight applications received. • All were from independent employers: <ul style="list-style-type: none"> o Five from local governments. o Three from special districts. <p>Second phase ran July 1 – September 30, 2025.</p> <ul style="list-style-type: none"> • Thirty-four applications received (six waitlisted because of volume of requests): <ul style="list-style-type: none"> o Fourteen from school districts o Seven from local governments. o Six from special districts. o Five from independent employers. o Two from colleges. <p>Final numbers: 18 counties received matching funds. \$136,254,873 in employer deposits. \$33,655,335 in EIF match rewards.</p> <p>More details are posted on the EIF webpage.</p>		

Expiring Side Accounts Project

52% of employer side accounts are due to expire in 2027: 182 accounts.

Timeline of project: February 2026 – December 2028.

Scope includes:

- Employer communications (with links to materials on [Side Accounts webpage](#)).
- Monitoring of side account balances.
- Creation of invoices and credits to bring side accounts to zero.
- Creation of new dashboard to enable employers to monitor their side account balances.
 - Launching early 2027.
- Three-step process to identify side accounts that are expiring sooner than anticipated.
- Watchlist identification:
 - Use estimated 2025 year-end balance before earnings.
 - Subtract 2025 average monthly amortization plus margin of 20%.
 - Identify those with projected negative balance within six months.
- Outreach:
 - Email/call employers with side accounts on watchlist.
 - Arrange meetings to discuss affected side accounts and plan for offsetting rate stops first of month following negative accrual so employer understands cost impact.
 - A second employer notification once account goes negative.
- Account maintenance:
 - Side-account offset rate to 0 in EDX on first day of month after balance becomes negative. Net contribution rates will increase.
 - Explanatory note entered into system for employer and PERS staff.
 - Employer accounts trued up at year-end:
 - Invoice or credit generated.
 - Amount of credit/invoice reflects earnings for calendar year.
 - April 2027.

Q: Sandra Lehoullier - Will there be a list of employer side accounts that will be expiring?

A: Shawn Harper – Yes, posted on [Side Accounts webpage](#).

Q: Carol Samuels - Thank you for working on this project. Is PERS still planning on going through and looking at balances of March 2027 and going back and setting aside 30%? Is this replacing the older plan?

A: Jake Winship - We have revised and superseded the concept of 30% because we have updated our documentation and are more confident in our process to look forward. It will be timelier to get account balance information and information about side account offset in dollar terms. The process that we outlined for the identification of side accounts expiring – we will continue forward in calendar year 2026 and into 2027. March/April 2027 we will identify all year-end 2026 balances and rate offsets. We will use that information to project a balance at end of fiscal year 2027 and will have a communication process based on what those year-

end balances and projected year-end fiscal balances will be. Will communicate with those employers.

Q: Amber Schonbrod - Will we know exactly what the credit will be December of 2026 or January 2027? I want to make sure we have enough time to budget appropriately for July credit application.

A: Jake Winship - Yes. However, there will be a reporting lag due to payroll information that comes in for the previous year. We don't have final earnings crediting until the March/April board meeting. We monitor this each month, but what we have as of 12/31/2026 may not be congruent with the final earnings crediting. If there are credits or invoices necessary to true up, those will be communicated to employers at that point. We will do forward projections in April 2027 to provide estimate of balance at end of fiscal year.

Q: Carol Samuels - If you are thinking that some side accounts may expire before the end of next year, wouldn't they need a warning before June 30 of this year so they can budget accordingly? Is there any way to get that kind of communication?

A: Jake Winship - I'm not certain about that. We're trying to go through these accounts thoroughly and verifying information we have. We have developed an early warning system. We're only comfortable looking out 3-4 months due to volatility. We're becoming more confident, but I don't think we'll have something 12 months forward-looking by June.

Q: Amber Schonbrod - Is there a backup plan if some district simply can't afford a large, unexpected payment at the end of next year? Those districts are likely planning for the payment, but is there a contingency plan if it's larger than they anticipated?

A: Jake Winship - We have sections that work directly with EDX and the invoicing. Laurel might be able to answer better.

A: Laurel Galego - At year end, our staff is working on cleaning up suspended accounts. One thing that's helpful for the most accurate amount is getting your reports submitted on time and accurately.

Q: Bryce Bumgardner - Will there be any assistance for districts to help get a "blended" contribution rate once the side account expires for budget purposes considering mid-year expiration?

A: Jake Winship - I want to clarify that we're scheduled, as reflected in 2024 advisory evaluation, as of July 2027, all side-accounts will have a 0 rate offset if they have a scheduled expiration of 12/2027. That's why we want to help employers manage this process. If you have specific questions as side accounts move toward expiration, we want to talk person-to-person on what their specific impact will be. Generally, the contribution rate will revert to the employer 3000, the default school contribution rates. But we will discuss the specific amounts with you when the time comes. Will discuss rate and actual dollar amounts.

Topic	Employer Service Center update	Laurel Galego/Brandon Armatas
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Time: 10:45–10:55

Brandon Armatas has transitioned to the PERS Deputy Chief Operating Officer.

Laurel Galego, Employer Service Center (ESC) Business Operations Supervisor and Brandon Armatas, Deputy Chief Operating Officer, gave an ESC update.

Employer newsletter (*Laurel*)

- Newsletter has evolved over the years and has high engagement levels.
- Popular topics are money-related issues such as:
 - Salary limit.
 - Member redirect.
 - Actuarial valuation reports.
 - Contribution rates.
 - Payroll instructions.
 - Information on how to retire ([check out the April edition here!](#)).

Employer posting (*Laurel*)

In one week:

- 24,861 records posted.
- \$3,216,347 invoices paid.
- Thank you, employers, for all the work you’ve done.

Star Award recipients (*Laurel*)

The Superhero Superstar Award is given to employers who have all Regular reports submitted on time (within three business days) for the whole year.

- 483 employers received 2025 Superhero Superstar Awards in February.
 - 23 more awards granted than last year!

Employer reporting webinars (*Laurel*)

- May: Hiring PERS Retirees – best practices for success.
 - 15 minutes of training.
 - 45 minutes of time for questions and answers.
- June: There will be no webinar because of PERS-Treasury Invested for You webinar.
- July: Reporting for Local Governments – special reporting considerations for local government agencies.
 - Will highlight their specific reporting needs.

Data Services update (*Brandon*)

- Tamie Johnson is the new PERS Data Services Section manager.
- Tamie is a strong leader with deep understanding of PERS operations.
- Congratulations, Tamie!

TOPIC	Communications update	Shawn Harper
TIME: 10:55–11:13		
<p>Shawn Harper, Employer Communications Specialist, gave an employer communications update.</p> <p>PERS-Treasury Invested for You Webinars</p> <ul style="list-style-type: none"> • There will be a second series of <i>Invested for You</i> webinars in June 2026. • Speakers: Oregon State Treasurer Elizabeth Steiner, Oregon State Treasury Chief Investment Officer Rex Kim, and Oregon PERS Director Kevin Olineck. • There will be one session for employers/partners on June 3. • There will be a second session for members and retirees on June 5. • We will email registration links in May. <p>Website updates</p> <ul style="list-style-type: none"> • We updated the Employers home page to: <ul style="list-style-type: none"> ○ Add subheads within pull-down sections to help people find items in a long list. ○ Rename two sections to improve navigation (PERS and Retirement Benefits, Resources for Finance and Leadership). ○ Update the Popular Links section to the actual most-clicked links on the Employers home page, listed in order of popularity. • Updated the Employer Manuals and Guides webpage to: <ul style="list-style-type: none"> ○ Provide additional resources as buttons instead of a bulleted list. ○ Provide descriptions of the resources under the buttons. • Updated the Reporting to PERS webpage to: <ul style="list-style-type: none"> ○ Make it into a New Employer-Reporter Toolkit. ○ Provide links to the most helpful resources that employer reporters need, linked as buttons with descriptions underneath. <p>Guide updates</p> <p>These guides have been updated recently:</p> <ul style="list-style-type: none"> • Employer reporting guide 8, <i>Hiring a PERS Retiree</i> Clarifies bona fide vs. non bona fide retirement and work-after-retirement rules for each. • Guide 15, <i>Reporting a Termination or Death</i> Clarifications of salary limit, last day of service, and contract number of months for school employees. • Guide 19, <i>Completing Work List Requests</i> Updated Employer Data Verification Work List instructions per SB 851 (2025). • Guide 22, <i>Changing Demographic Information</i> Includes link to a new form employers must use to tell ESC when their organization's address changes. 		

New guide:

- [Changing Employee Information for a Prior Year](#)
This companion guide to [employer announcement #106](#) explains how to change an employee's or former employee's information for a "closed" year, plus the required documentation you may need to submit to PERS.

Q: Shauna Tobiasson - I have some concern about employer announcements #105 and #106 regarding the required documentation. Trying to submit documentation each time is a big workload – can we get some suggestions on how to carry those concerns forward and come up with a more streamlined process?

A: Brandon Armatas - We are still looking at this from an operations perspective. We're working toward being more proactive, but daily we're pulling in thousands of records. These announcements are regarding retroactive changes being requested. Can we connect offline to see if we can come up with a game plan?

A: Laurel Galego - This process is still in flux. If some folks from this group would be willing to meet as a group, we could brainstorm best practices.

Satisfaction surveys

- Annual PERS Employer Satisfaction Survey and Member Satisfaction Survey kick off 5/1/2026.
 - Conclude May 31.
- Goal of 600 responses on the employer survey (40 more than last year).
 - More feedback leads to more meaningful change.
 - Comments help significantly.
- This survey helps PERS learn about:
 - What is working for PERS employers and members.
 - What we need to improve.
 - What we need to keep doing.
 - What to increase or cut back on.

Topic	Additional items	Brandon Armatas
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Time: 11:13–11:27

Brandon Armatas, Deputy Chief Operating Officer, and Sam Paris, Chief Operating Officer, shared some additional items.

Member annual statements update (Brandon)

- 2026 statements will have minor cosmetic updates.
- Current project status:
 - Preparing for data extract and testing to ensure accuracy.
 - Working with PERS Publishing and Distribution for a mid-May mailing date.
 - These do get mailed out in phases.
 - Hoping first statements will go out by 5/18.
 - Efforts continue to update member addresses to cut down on returned statements.
 - Members can call PERS and we can print and mail statements as well.
- There are interactive sample statements on the [PERS website](#) – great for understanding information on the statements:
 - OPSRP.
 - Tier Two.
 - Tier One.

Q: Shauna Tobiasson - Has PERS ever considered moving toward electric statements?

A: Brandon Armatas - We are exploring process improvements for statements including reducing the amount of data to reduce confusion and digital options. In the past, access to accurate and appropriate email addresses has been a challenge. We are still exploring how we could make this happen.

Q: Jennifer Jones - Will communications go out via email and when is that slated?

A: Brandon Armatas – Yes, we work with our communications partners when we’re closer to delivery dates. These will go out via GovDelivery email. There will also be Workday headers and information posted on the [PERS website](#).

Online Member Services (OMS) benefit estimate (Sam)

- Service credit only uses qualified employment segments.
- Impacts part-time employees.
- Suggestion: make edit to open service-credit calculations.

Q: Sandra Lehoullier - Some employees were hired as non-qualified but then became qualified and couldn't process a request through OMS because of the inability to get an accurate estimate. This causes a lot of research into old data from outdated systems.

A: Brandon Armatas - Rather than having that conversation in this meeting, let's add this subject to the same group to brainstorm the documentation pain-points for retroactive change requests. We can explore pain-points on all sides and explore alternative options. If you want to be included in an offline discussion, email Laurel Galego at laurel.galego@pers.oregon.gov or the EAG at Employer_Advisory_Group@pers.oregon.gov.

TOPIC	Open discussion	Sam Paris
Time: 11:27–11:33		
<p><i>Sam Paris shared an announcement regarding EAG:</i></p> <p>We are still looking for an EAG member for the League of Oregon Cities. If you know someone who may be interested, please have them email Employer_Advisory_Group@pers.oregon.gov.</p> <p><i>Q: Polk County Payroll - Is the auto-enrollment for OSGP going to be discussed in this EAG?</i></p> <p><i>A: Heather Case - This is part of the 2027 Legislative Concepts. The concept hasn't been approved by government yet. If approved and the bill passes, it would be auto-enrollment in OSGP for state only. OSGP enrollment would remain optional for local governments and school districts.</i></p>		

Next meeting facilitator: Sam Paris
Next meeting date and time: Friday, 7/17/26, 10 a.m. to 12 p.m.
EAG information: Employer Advisory Group webpage