

PERS EMPLOYER ADVISORY GROUP MEETING

Date: 07/17/2026

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	EAG members: Anne Willis, University of Oregon; Audrey Roberson, Oregon State University; Fabiola Flores, Department of Administrative Services; Gina Turner, Portland State University; Jeff Rasmussen, Jefferson County; Matt Warner, city of Tualatin; Robert Tintle, Deschutes County; Sandra LeHoullier, Linn-Benton Community College; Stacy Michaelson, Oregon School Board Association PERS staff: Elizabeth Rossman Weber, 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, Tamie Johnson, Theresa Bechtol, Troy Phillips Guests: Alison Nehl, Amber Schonbrod, Brendan Watkins, Bryce Bumgardner, Carol Samuels, Cheryl Carder, Donna Chastain, Ian Peterson, Jennifer Jones, Lori Sattenspiel, Morgan Allen

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: 10:02–10:06		
Kevin Olineck, PERS Director, gave an overview of highlights from the May 2026 PERS Board meeting and provided a preview of the July 24, 2026 PERS Board meeting. The board meeting packet is available on the PERS website .		
May board recap		
The May 29, 2026 PERS Board meeting (PDF) topics included Board Education Policy, PERS Health Insurance Program (PHIP) plan update and 2027 rate setting, an agency budget-development update, and an overview from Milliman about the School District rate collar.		

July 2026 PERS Board meeting preview

- CEM Benchmarking results
- Agency budget approval
 - Approval September board meeting
- System-wide valuation results
- PERS Health Insurance Plan (PHIP) rate-setting adjustment
 - Providence Health Plan is leaving the market
 - United Healthcare adjustments
- Audit and risk committee meeting will be held after the board meeting

TOPIC	Modernization update	Kristi Ivers
TIME: 10:06 - 10:20		
Kristi Ivers, PERS Modernization Program Director and Elli Probasco, Lead Product Owner, presented an update on modernization efforts. Telephony Modernization Project • Phase 2b began April 6, 2026, and was implemented June 29, 2026. ◦ Scheduled callbacks up to three days later ◦ SMS confirmations ◦ Fix implemented to help calls from accidentally being redirected to the reception desk • Phase 3 contract is in process and will include: ◦ 24/7 Interactive Voice Response (IVR) ◦ Streamlined call flows ◦ Improved queue management Pension Administration System (PAS) Modernization Project A request for proposal (RFP) is in process for a specialized consultant (Segal). • Evaluations concluded on May 6, 2026. • Issuance of Notice to Award posted on May 11, 2026. • Protest period ended on May 18, 2026. • Contract negotiations are in progress — working with Department of Administrative Services Procurement and Department of Justice. ◦ Hoping to be completed in early August, 2026 PAS requirement gathering: • Requirement gathering was completed April 1, 2026. • Survey for employer reports will be sent out on July 20, 2026, for additional requirements gathering. • Met with 39 internal teams and identified 477 high-level requirements so far. • Identified high-level requirements: ◦ Allow employers to always access portal, even during EDX maintenance, with more robust data available ◦ Provide employers and PERS staff with a secure method of communication for PII ◦ Provide secure chat feature for real-time assistance and document sharing ◦ Allow for virtual assistant (chatbot) ◦ Interactive online forms ◦ Alert employers when employee has applied for PERS benefit ◦ Allow suspended records to be corrected by member		

- Highlight required fields within portal for any data outstanding
- Real-time data submissions via portal

Q: Sandra LeHoullier — What type of records would a member be touching?

A: Elli — A member might be touching records after employer has submitted them and is no longer actively working on them. They would have their own portal where they could update their information such as address. Detail 1 is only available to employers through EDX.

TOPIC	Actuarial update	Troy Phillips
TIME: 10:20–10:26		
Troy Phillips, PERS Actuarial Business Specialist, presented an update on actuarial activities.		
School Districts Unfunded Liability Fund (SDULF)		
• \$149M in additional SDULF funding projected to be available to offset unfunded actuarial liability (UAL) rates for 2027–29. • Rate offset will be estimated with 2027–29 rates proposed for adoption at the September 25, 2026 board meeting. • Offset may be updated in early 2027 if additional funds above \$149M are received. • Milliman will assume SDULF offset at 1.25% of payroll for 2027–29. • No further SDULF offsets are currently expected after the 2027–29 biennium.		
Unfunded actuarial liability (UAL) and rate collar policy decision		
• Milliman proposed two policy options to the PERS Board on May 25, 2026: ○ Policy approach A — Set initial 27–29 UAL funding at 13.95% of pay. ▪ The higher rate pays down UAL at a faster pace. ○ Policy approach B — Set initial 27–29 UAL funding at 12.27% of pay. • Initial UAL funding will determine the rate collar for the 27–29 biennium. • The PERS Board decided on policy approach A after feedback from Coalition of Oregon School Administrators. They would prefer to pay down the UAL at a faster rate.		
Side Account Expiration Project		
• PERS Actuarial Services meets monthly to review side accounts. • PERS Actuarial Services is working with employers to help them through this process by: ○ Identification — Tracking side-account balances monthly ▪ Use estimated 2025 year-end balance before current year earnings. ▪ Subtract 2025 average monthly amortization plus 20%. ▪ Identify those with projected negative balance within six months. ○ Outreach — Inform employers if their accounts will run out of funds before the end date ▪ Email/call employers identified on the watchlist. ▪ Arrange meeting to discuss course of action. ▪ Notify employer again when account goes negative. ○ Maintenance — Stop side-account rate offset on the first day of the month after it reaches a negative balance ▪ PERS staff will turn off the side-account rate in EDX on the first day of month; contribution rates increase accordingly. ▪ Explanation note will be entered in EDX for employer and PERS staff. ▪ Employer account will be trued-up at year-end.		

- Troy provided an overview of the project road map for 2027.
 - Please see the [Side Accounts webpage](#) for information about the expiration project, and [click here](#) for a full diagram of the project road map.
- There will be two live information sessions held online via Teams, with time for questions and answers:
 - Tuesday, August 25, 2026, 9–10 a.m.
 - Tuesday, September 29, 2026, 9–10 a.m.
 - Please ensure you're signed up for GovDelivery to receive information about registering.

Topic	Employer Service Center update	Laurel Galego/Tamie Johnson
Time: 10:26–10:30		
Laurel Galego, Employer Service Center (ESC) Supervisor, and Tamie Johnson, Data Services Section Manager, gave an ESC update.		
Employer reporting (<i>Laurel</i>) • For the first time in ESC history, all pre-2026 records are posted. ◦ Way to go employer reporters and PERS staff! • All reports have been submitted through January 1, 2026. • The ESC has implemented a report escalation process to help follow up with hard-to-reach reporters who have outstanding reports.		
Employer Satisfaction survey results (<i>Tamie</i>) • 357 responses received — 60% response rate. • 172 comments being reviewed. • Results are being analyzed and will be presented at the September 25, 2026 PERS Board meeting.		
Employer Town Hall update (<i>Tamie</i>) • PERS met with interested employers on 5/26/26. • Internal group discussions were held on 6/9, 6/11, and 7/14. • Next step: revisions are being considered. • Additional communications to come. • Thank you to all who contributed your perspectives!		

TOPIC	Communications update	Shawn Harper
TIME: 10:30–10:33		
Shawn Harper, Employer Communications Specialist, gave an employer communications update. New employer resource • PERS has created a published reference list to easily find an employee's contribution start date (CSD). • Printable PDF available here in two versions (numeric or word-based.). • The list is also available on the Employer manuals and guides webpage, along with other helpful employer resources. • The list will be updated yearly. 2026 PERS Expo • Expo is scheduled for October 7, 2026. • Employers can preregister here. • The event is completely virtual. • PERS will provide link in upcoming publications as well. • Please encourage employees to attend, as valuable information is shared to help members: ○ Understand their retirement benefits ○ Know when to check in with PERS during their career ○ Learn how to get an estimate of their future pension ○ Understand the retirement payout options available to them		

TOPIC	Open discussion	Sam Paris
Time: 10:33–10:40		
Sam Paris opened the meeting for discussion and questions: <i>Q: Sanda LeHoullier — Can you please verify the OAR in the chat?</i> <i>A: Jake Winship — OAR 459-459-009-0086 is related to the side account administrations. The processes we have been working on will be codified in the OAR and will be reviewed by the board. Shawn Harper shared a link to the OAR in the group chat.</i> <i>Q: Shawn Harper — Are there any PERS presentations coming up?</i> <i>A: Jake Winship — Matt Graves and I will have an hour-long presentation at the Oregon Association of School Business Officials (OASBO) summer conference on July 23. Anyone who can attend is encouraged to do so. As Troy mentioned earlier, we will also be hosting the actuarial online learning sessions on August 25 and September 29 from 9:00 a.m. to 10:00 a.m. There will be a small difference in information between the two sessions, as more will be known by the second session; attending both is encouraged, if possible.</i> <i>A: Rachel Schizas — The Employer Service Center (ESC) is hosting monthly webinars. The July webinar will focus on local governments. This next webinar will be hosted next Wednesday, July 22, and you can register here. We are also planning to do a specific school district webinar once schools are back in session.</i>		

Sam Paris closed the meeting with an announcement that we still have two Employer Advisory Group member vacancies for the **League of Oregon Cities**. We'd appreciate assistance in helping to get those vacancies filled!

Next meeting facilitator: Sam Paris

Next meeting date and time: Friday, 10/23/2026, 10 a.m. to 12 p.m.

EAG information: [Employer Advisory Group webpage](#)