

| Meeting:      |                                | Modernization Oversight Forum |                   |   |                |
|---------------|--------------------------------|-------------------------------|-------------------|---|----------------|
| Date/time:    |                                | May 23, 2024   1-2:30 p.m.    |                   |   |                |
| Attendees:    |                                | P (Present) A (Absent)        |                   |   |                |
| Forum Members |                                | Guests                        |                   |   |                |
| P             | Representative Paul Holvey     | P                             | Renee Royston     | P | Lynn Kneeland  |
| P             | Representative Nancy Nathanson | P                             | David Gerstenfeld | P | Maggie Gleason |
| A             | Senator Tim Knopp              | A                             | Drew Sutter       | A | Bill Truex     |
| A             | Terrence Woods                 | P                             | Terri Grenda      | P | David Genz     |
| P             | Sean McSpaden                  |                               |                   | P | Rebecca Craven |

### AGENDA

|    | Topic  | Time   | Presenter         |
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| 1. | Welcome and introductions  | 5 min  | Sean McSpaden     |
| 2. | Review and approval of meeting minutes<br>Minutes from 9/5/23 were adopted.  | 5 min  | Sean McSpaden     |
| 3. | <p>Agency updates</p> <p>David started his update by sharing Renee Royston has accepted a new position with the Department of Administrative Services. Her replacement, Rebecca Jensen Craven, is starting as the new Modernization director on Tuesday, May 28.</p> <p>David brought an update on the agency’s new system, Frances Online, and what we’re doing to improve customer service at the agency.</p> <p>He shared improvements in access and communication for customers and flexibility and enhancements available for agency staff to improve customer service.</p> <p>He also informed the forum of progress the agency has made hiring new positions made available through House Bill 4035 (2024), and anticipated gains from shifting the focus of work to resolving pending claims applications, including upcoming changes to the phone hours.</p> <p>Finally, David informed the group the agency would be bringing testimony to the Interim Senate Labor and Business Committee on Wednesday, May 29, and to the Interim House Labor and Workplace Standards Committee on Friday, May 31.</p> <p><b>Discussion</b></p> <p>Rep. Holvey acknowledged the work the agency has been doing, and observed the changes to the phone lines, for example, are likely to frustrate the claimants he is already hearing from.</p> <p>David agreed that the level of customer service is not where we would like it to be, and we will be evaluating the effectiveness of this adjustment and others to determine the path forward.</p> <p>Sean reinforced the importance of OED providing data in dashboards and metrics over time to support the most thoughtful conversation about what needs to happen in the future, including providing comparison between previous systems and the new system.</p> | 15 min | David Gerstenfeld |

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| 4. | <p>Frances implementation update</p> <p>Renee shared an update on the Modernization Program implementation, including how we have been supporting our staff, partners, and customers.</p> <p>The project has entered the warranty, maintenance, and support phase. The project close is scheduled for March of 2025. Ongoing maintenance and support for operations will continue.</p> <p>Renee observed that from the beginning, the UI Modernization Project became an even more significant endeavor than we could have ever imagined.</p> <p>In 2021, the project became more complex when the agency restructured to stand up the new Paid Leave Oregon Division for Paid Leave benefits and create a new division to support both unemployment insurance (UI) and Paid Leave tax programs.</p> <p>Considering the timing of COVID and the resulting recession, adding Paid Leave Oregon contributions and benefits to the project, supporting the creation of a combined new division for tax contributions, we are proud that each of the three rollouts were delivered as planned (on time, in scope, and under budget) in less than three years.</p> <p>Renee shared some of what goes into three back-to-back rollouts, including statistics reflecting the size of our team, training, converted data, and other activities.</p> <p>She explained the project’s production support team continues to work in close partnership with the program areas, adjusting Frances’s functionality for our employers and Paid Leave and UI benefits customers, and supporting our staff and partners with additional resources and training.</p> <p>Adjustments include how people identify their employer in the system; the timing of when some letters are sent to claimants; making it easier to amend already filed claims; and shortening the timeframe employers must respond, when appropriate, to speed up claim processing.</p> <p>We are also improving and expanding language in Frances Online to give customers additional detail about their claim.</p> <p>Finally, our team has partnered with agency communications to create a comprehensive set of resource materials so customers who need help with Frances Online can find walk-through guides, videos, and answers to many frequently asked questions (FAQs).</p> | 15 min | Renee Royston  |
| 5. | <p>Frances Online demo</p> <p>Maggie shared a demonstration of the Frances Online system, highlighting the interactive assistant called “the Owl,” the live chat feature, and an overview of the expanded information available to customers in the portals.</p> <p><b>Discussion</b></p> <p>During the demonstration Sean asked and Maggie confirmed that several of the interactions being shown had to be completed through the mail in the previous system. He also asked and Maggie demonstrated, the system’s mobile responsive design.</p>   | 10 min | Maggie Gleason |
| 6. | <p>iQMS report – Frances implementation – CSG</p>   | 10 min | Terri Grenda   |

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| <p><b>Overall Project Health</b></p> | <p>As of April 30, 2024, the CSG iQMS team has two open and three closed risks. The UI Modernization project’s rollouts have been in production since March 4, 2024, and France is stable. There were known clean-up activities after the cutover, which are actively being worked on. The Executive Steering Committee approved the change request #137 Descoped Frances Cloud Migration on April 15, 2024. With this change, the Modernization team removed the cloud services migration from the UI Modernization project scope, which mitigates schedule and resource risks. Additionally, the system implementation vendor had previously delivered documentation to supplement the Business Continuity/Disaster Recovery to include Frances's activities. Oregon’s Business Continuity/Disaster Recovery is an internal operation that has been transitioned to Data Center Services. Other scheduled activities have transitioned to internal operations, such as the IT’s mainframe decommissioning tasks. CSG iQMS will continue to monitor knowledge transfer and training activities for state staff, as well as the continued business support as the Modernization team assists with mitigating the remaining SQRs as the remaining project transitions from project to program operations. The overall project’s health status has improved and is assessed at a low risk.</p> | <p>The low risks are:</p> | <ul style="list-style-type: none"> <li>✓ Risk #15, IT skills and resources. With the UI Benefits, Rollout 2a implemented in production, the Agency’s business and IT are working on the next steps to determine the number of resources required and the necessary skill set to support operations. The vendor is offering its own development training sessions to State staff in May and August for those who want to participate. The system’s vendor will support Frances and knowledge transfer activities as the Agency reviews future support plans. CSG iQMS will continue to monitor activities for training, knowledge transfer, and staffing needs.</li> <li>✓ Risk #22, regarding the schedule missing key elements. Some project operational activities lack information for knowledge transfer, training, and transitional planning and reporting. Although these tasks may not directly impact the project’s scope, there are remaining work efforts to complete for a successful transition. CSG iQMS will continue to monitor planning activities for training, knowledge transfer, and staffing needs.</li> </ul> | <p><b>CSG Deliverables – 3 deliverables in total</b></p> | <p>Reports:</p> | <ul style="list-style-type: none"> <li>• 4.1.18 - Quarterly Quality Assurance Status and Improvement Report – 1st Qtr. 2024 – v0.9 – 15-day review due May 28, 2024.</li> <li>• 3.3.39 – Monthly Quality Status Report – April 2024 V0.5, 15-day review due June 3, 2024</li> </ul> | <p>5.3.11.2 – Risk Assessment Report (UI Benefits) Black Box – testing is complete, and in the process of drafting the report due on May 31, 2024.</p> | <p>7.</p> | <p>Focus on the future and the Workforce Modernization Project<br/>Renee shared the Modernization team is now focused on the project close out in March 2025. We are continuing our commitment to equitable</p> | <p>10 min</p> | <p>Renee Royston</p> |
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|    | <p>access by expanding our language availability, partnering with the agency’s business areas to enhance our system functionality. We are working to reinforce transformed business processes and supporting the system long-term by ensuring necessary roles are in place and production support processes are integrated as we’re operationalizing the system.</p> <p>To close, Renee provided a brief update about the Workforce Modernization Project. The key project activities for this year are focused on releasing a request for proposal (RFP) towards the end of the year.</p> <p>Additionally, the team is working with EIS (Enterprise Information Services) partners to submit artifacts for Stage Gate 2 endorsement, and with Department of Administrative Services – Procurement Services, Enterprise Information Services (EIS) Quality Assurance, and EIS-P3 to create the statement of work for independent quality management services.</p> <p>The Modernization team are developing the 2025-27 policy option package for the project to ensure we have resources in the biennium.</p> |       |               |
| 8. | <p>Next steps</p> <p>Intention to schedule the next forum meeting during the first or second week of September 2024.</p>  | 5 min | Sean McSpaden |

SUPPORTING MATERIALS

UI Modernization Project Monthly Quality Status Report - February 2024

