

# OREGON PERS

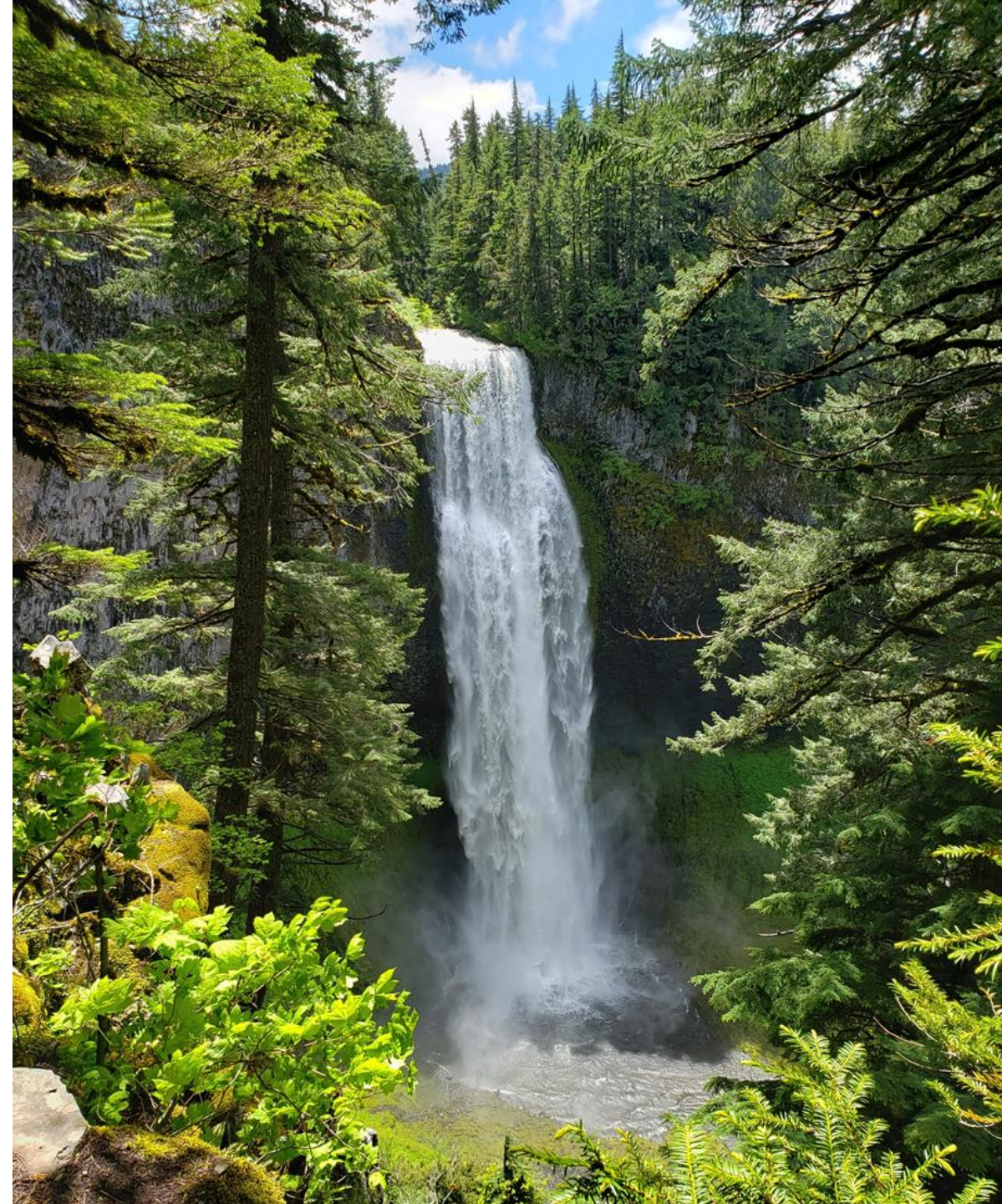
PUBLIC EMPLOYEES RETIREMENT SYSTEM



## **2023-25 Phase II Budget Presentation**

**Ways and Means  
General Government  
Subcommittee  
April 6, 2023**

**Kevin Olineck  
Director  
Richard Horsford  
Chief Financial Officer**



# Agenda

State Data Center Migration and Backup Data Center Updates

Policy Option Packages:

101 – SB 1049 Implementation

102 – SB 1049 Permanent FTE

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105 – IT Hardware and Subscriptions

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# PERS Program and Project Prioritization

# PERS Program and Project Priorities 2023-25

## SB 1049 Program

- Member Redirect
- Close Out

## Backup Data Center

- Configuration
- Deployment

## Modernization Program

- Planning & Design Efforts
- Preliminary Implementation Efforts

# State Data Center Backup Data Center

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# Historical Background

During the 2015 legislative session within HB 5034, PERS submitted policy option package (POP) #105 to support its disaster recovery (DR) strategy for core business applications. The response was the LFO 2015-2017 Legislative Recommendations Memo, recommending that PERS perform a series of tasks to focus on providing critical DR services since the agency does not have an established backup data center to support business operations in the event of a localized disaster.

These recommendations gave rise to two separate projects to address these efforts: The Backup Data Center (BDC) Project and the Production Data Center Migration (PDCM) Project.

Migrating from the PERS Tigard Headquarters data center to the State Data Center (SDC) in Salem is a move towards technical readiness that aligns with the enterprise IT strategy. This move achieves compliance with Legislative direction, Enterprise Information Services (EIS) & Legislative Fiscal Office (LFO) directive and establishes a footprint at the SDC.

# State Data Center Co-Location vs Managed Services

The decision to migrate the PERS data center to the State Data Center (SDC) using a Co-Location model was mainly based on cost and effort.

Cost: Based on initial cost analysis of the necessary SQL Server Licenses and infrastructure for Hosted Services, PERS determined that managed services was not cost beneficial.

Effort: Of all Production applications, only four (Attendance Reporting System, file servers, ClearQuest, and PERS intranet) could be decoupled from ORION and hosted by Data Center Services (DCS).

PERS made the decision, in conjunction with DAS EIS' recommendations, after project reactivation in August 2020, to not proceed with DCS Hosted Services.

# SDC Co-Location Costs

## Managed Service quoted costs:

- Initial per biennium managed service quoted costs for ARS, file servers, intranet include: Application server, application storage, backup of storage:
  - \$2400/month = \$57,600 per biennium.
- Per Biennium costs for ClearQuest include: Application server, application storage, backup of storage, SQL server, SQL backup:
  - \$1200/month = \$28,800 per biennium.
- SQL Enterprise licensing costs:
  - \$100,000 per biennium
- Initial biennium cost = \$186,400 for four applications-only.
  
- The cost equation **has not** changed since the initial analysis:
  - Managed services with backup data center \$151,267.74/month\*
  - Co-location with backup data center \$ 37,446.14/month

\* Plus server set up costs of \$190,000



# SDC Co-Location Effort to Migrate and Manage

“Although it is feasible to migrate the PERS production environment to SDC using standard managed hosting services this would represent a substantial project effort that would directly conflict with the focus on addressing the DR risk in addition to other project priorities related to the PERS Information Security Program.” (PERS SDC Use Analysis – November 2017).

“The involvedness of managing and running ORION makes outsourcing a non-viable solution, due to the complexity of the systems and software (jClarety.) DCS does not have enough resources to manage PERS’ system factoring in that complexity.” (PDCM Q&A Response to LFO – February 2021).

# Successful migration to State Data Center

The Production Data Center Migration Project was put on hold in 2019, as per DAS instructions, in order for PERS to concentrate on initial SB 1049 implementation efforts and requisite infrastructure needs.

Project further delayed in 2020 and early 2021 as a result of agency-related IT efforts related to COVID (remote work infrastructure) and ensuing chip shortages.

Project re-initiated in August 2021.

Cutover to SDC was fully achieved in June 2022 using a Co-Location model and project was officially closed out in August 2022.

# Backup Data Center Project Overview

The Backup Data Center (BDC) project includes planning and implementation of a backup data center/disaster recovery capability for PERS to support continuity of critical IT services in the case of a disaster impacting the ability to operate the current data center.

Progress for this effort was well underway during the 2019-21 biennium, when a replication issue became evident and was a roadblock to further implementation. This replication issue essentially meant that the network “pipeline” was not large enough to fully replicate the necessary backup environment quickly enough to provide PERS continuity of critical IT services.

The project was paused in January 2021, while resources were diverted to the Production Data Center Migration project.

In collaboration with DAS, research for the remediation of the technical replications issues took place. Initial testing of the proposed solution showed that replication issues persisted.

PERS performed solution analysis on three different options to find a path forward on building a new backup data center.

In December 2022, a path forward to resolve the replication issue and complete this effort became available and is actively being pursued.

In February 2023, PERS transferred banking functionality to KeyBank and is engaged with them to ensure PERS can run a duplicate payroll run in the event of a significant business continuity event.

# Backup Data Center Project Next Steps

In March 2023, the BDC business case was revised in collaboration with DAS EIS Oversight to reflect the history of the project as well as the solution analysis and has now been approved.

The Special Procurement Request for the purchase of the solution was developed in collaboration with DAS Procurement Services and will be delivered to the Special Procurement office in April 2023.

PERS was recently able to fill the role of a full-time disaster recovery senior system administrator who will be responsible for maintaining the solution long-term.

Next steps are to fulfill all required documentation for a Stage Gate 3 Endorsement Addendum Requirements (Project Charter, Project Management Plan, Project Schedule, Scope Statement, Budget).

After the Stage Gate 3 Endorsement Addendum Requirements are met, and the Special Procurement Request is completed for the solution, the contract can be drawn and PERS will start planning for design and implementation.

The funding and resources to continue this project will be provided through PERS ISD CSL Budget.

# Backup Data Center Project Next Steps

Tasks	Estimated Timeline
DAS Procurement	April – June 2023
Planning and Design	June – September 2023
System Configuration	September 2023 – January 2024
Set up Zerto (BDC software)	January – February 2024
Replication	February – March 2024
Testing	March – May 2024

# Policy Option Package 101

SB 1049 Implementation



# SB 1049 Implementation Program

## Background:

- PERS is requesting \$20.1 million to complete the SB 1049 Implementation Program.
- SB 1049 was approved by the 2019 Oregon Legislative Assembly on May 30 and signed by the Governor on June 11, 2019. SB 1049 is comprehensive legislation intended to address the increasing cost of funding PERS, reduce system Unfunded Actuarial Liability (UAL) obligations, and provide relief to escalating contribution rate increases for public employers.
- This funding is necessary to continue development of the Member Redirect and Technical Debt components of the SB 1049 legislation.
- PERS expects to complete implementation of this legislation in the 2023-25 biennium and will build upon the work already completed and enable the agency to fully realize the impact of this legislation.

# SB 1049 Implementation Program

## SB 1049 Component Projects and Status

- **Salary Limit:** This section of the bill limits the amount of subject salary for all program members to \$195,000 beginning in calendar year 2020. This amount will be indexed annually for inflation based on the CPI. The first adjustment for inflation occurred on January 1, 2021. This is not a salary cap, but a limit on salary for all Plan purposes, including contributions and final average salary.
  - This project was completed on 5/28/2021.
- **Employer Programs:** Sections of the bill related to Employer Programs clarify and expand the requirements for the Employer Incentive Fund:
  - Appropriate \$100 million from the General Fund to the Employer Incentive Fund.
  - Direct net proceeds from Oregon Lottery Sports betting to the Employer Incentive Fund.
  - Allow participating public employers who make larger than \$10 million deposits to side accounts to determine when they wish to have these funds included in their employer rate assessment, and
  - Require all public employers to participate in the Unfunded Actuarial Liability Resolution Program.
  - This project was completed on 7/16/2021.

# SB 1049 Implementation Program

## Component Projects and Status

- **Member Choice:** This section of the bill allows members to elect a Target Date Fund (TDF) other than the default TDF (which is based on their year of birth.) PERS is to provide members the opportunity to make elections once a year during a defined window.
  - This project was completed on 8/4/2021.
- **Work After Retirement:** This section of the bill lifts current restrictions on retiree allowable work hours. Retirees will be permitted to work unlimited hours for PERS participating employers in calendar years 2020-2024. SB 1049 legislation states that while this mandate is in effect, employers will pay contributions on retirees' salary. Employer contribution rates for retiree salaries will be the same as if the retiree were an active member.
  - This project was completed on 2/24/2022.

# SB 1049 Implementation Program

## Component Projects and Status

- **SB 1049 Technical Debt:** This new project was added to SB 1049 during the 2021-23 biennium to address unanticipated delays or issues that might be encountered related to existing or new technical debt in the jClarety system. This project addresses technical debt items:
  - that are created by SB 1049,
  - are exacerbated by SB 1049,
  - or inhibit PERS' ability to complete SB 1049 requirements.
  - This project is due to be completed in Feb 2024.
- **Member Redirect:** This section of the bill redirects a portion of member contributions to a new Employee Pension Stability Account (EPSA) when the funded status of the plan is below 90% and the member's monthly salary is more than \$3,570.
  - This project is due to be completed in May 2025.

# SB 1049 Implementation Program

## Member Redirect – Why has it taken this long?

- The scope and complexity of the changes required for Member Redirect have extended the program to May 2025.
  - Most of the required programming was new to the PERS system and had to be developed from the ground up. This effort has included:
    - The development of detailed business requirements,
    - determination of how these modifications might affect the base system (ORION),
    - development of a comprehensive architectural analysis, followed by intricate programming and detailed testing.

# SB 1049 Implementation Program

## Member Redirect – Why has it taken this long?

- In 2022 the Member Redirect Team discovered the remaining work is larger and more complex than originally understood and required replanning:
  - Later work packages are larger than previously delivered.
    - Some as much as 10-15 times the size of earlier work packages!
  - Functional requirements within work packages have grown in complexity.
    - More complex business rules and processes.
    - More complex technical design, development and testing.
  - High interdependency of remaining Member Redirect work packages.
    - New functionality layers on top of functionality provided by earlier work packages.
    - Some new functionality is being built upon other functionality that is still not complete.



# SB 1049 Implementation Program

## Member Redirect – Close out plan

- Remaining Member Redirect work:
  - Member Redirect has a total of 24 work packages. Of these:
    - 14 are complete
    - 7 are in process
    - 3 have not started
- Only 3 work packages remain where detailed requirements have not been gathered: Focusing to complete these requirements as soon as possible.
- Team prioritizing requirements to focus on most important functionality.
- Team analyzing if any remaining work can/should be removed from SB 1049.
- Team focused on achieving new baseline completion dates.
  - Proactively identifying risks to major schedule milestones and aggressively determining mitigation plans to avoid.
- PERS executive management is dedicated to SB 1049 completion in the 2023-25 biennium.

# SB 1049 Implementation Program

## iQMS Oversight

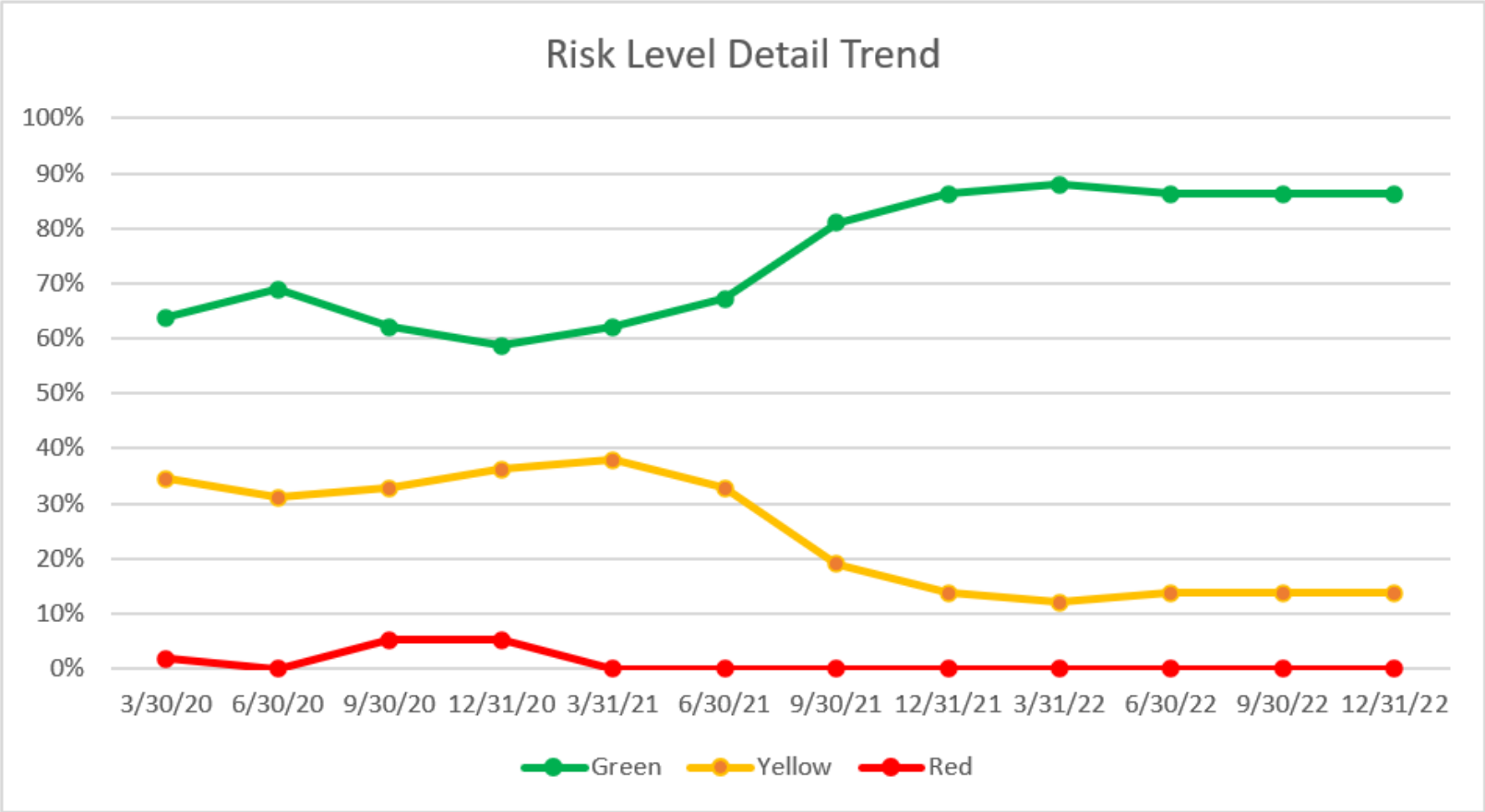
- Gartner has provided quarterly oversight to SB 1049 since March 2020.
- To generate a comprehensive and disciplined assessment, Gartner utilizes a standard risk assessment framework with defined and measurable risk ratings against 58 quality standards.
- The ratings are as follows:

Risk Levels	Risk Rating Definitions
Low	<b>Green</b> — Risk area is being managed according to applicable best practices and there is no material impact from this risk area on project success at this time.
Medium	<b>Yellow</b> — Risk area is being managed according to some of the applicable best practices, but others are missing, or the inherent risk can only be mitigated to a limited extent. There is a potential material impact from this risk area on project success that needs to be addressed proactively at this time.
High	<b>Red</b> — Risk area is in need of applicable best practices to avoid downstream ramifications, or there is significant inherent risk that cannot be reasonably mitigated. There is a definite material impact from this risk area on project success if this area is not addressed now.

# SB 1049 Implementation Program

## iQMS Oversight

- Below is a chart that shows how risk ratings have changed since Gartner began reporting in March 2020:



# SB 1049 Implementation Program

## Stakeholder Recommendations

- In addition to Gartner, PERS has received recommendations from other external agencies, including:
  - Enterprise Information Systems
  - Deloitte
- PERS has closed 611 recommendations since the inception of SB 1049:

Stakeholder	Recommendations Closed
Deloitte	120
EIS	57
Gartner	434
<b>Grand Total</b>	<b>611</b>

# SB 1049 Implementation Program

## 2023-25 Budget Request

- Original 2023-25 Budget Request:

2023-2025 Budget Request	
Category	Total Costs
Personal Services	\$ 3,638,372
Services and Supplies	\$ 16,200,400
Capital Outlay	\$ -
<b>Total</b>	<b>\$ 19,838,772</b>

- Updated Budget Request (December 2022):

Updated 2023-25 Budget Request (Dec 2022)	
Category	Total Costs
Personal Services	\$ 3,638,372
Services and Supplies	\$ 16,493,400
Capital Outlay	\$ -
<b>Total</b>	<b>\$ 20,131,772</b>

Difference \$ 293,000

# SB 1049 Implementation Program

## 2023-25 Budget Request

- 2023-25 Budget Details:

Category	Total Costs
<b>Personnal Services</b>	
Salaries & OPE	\$ 3,638,372
<b>Personnal Services Total</b>	<b>\$ 3,638,372</b>
<b>Services &amp; Supplies</b>	
iQMS	\$ 1,062,600
Other Contractors	\$ 15,299,800
Training and Office Expense	\$ 131,000
<b>Services &amp; Supplies Total</b>	<b>\$ 16,493,400</b>
<b>Capital Outlay</b>	\$ -
<b>Capital Outlay Total</b>	\$ -
<b>Total SB1049 Budget Request</b>	<b>\$ 20,131,772</b>



# SB 1049 Implementation Program

## 2023-25 Budget Request

- Additional Budget Comments
  - At the time of Governor’s Budget, EIS did not recommend the full policy package as requested by PERS.
    - EIS recommended \$18.1 million.
  - Reason:
    - Miscommunication regarding contingency amount:
      - PERS called a line item as “contingency” when it really was a “placeholder”.
      - This led EIS to determine the contingency amount was too high.
  - Resolution:
    - CFO, EIS and PERS have met to clarify the miscommunication and actual SB 1049 2023-25 budget need.
    - All now agree it will take the full \$20.1 million to complete SB 1049.

# Policy Option Package 102

SB 1049 Permanent FTE

# SB 1049 Permanent FTE

**Background:** PERS has determined that some of the SB 1049 limited duration positions need to be continued permanently due to sustained workloads, enhanced IT systems, increased complexity, and required support in the following specific areas:

- Two Electronic Publishing Design Specialist 3 positions:
  - External and internal website design and support.
- One Retirement Counselor 1:
  - Employer Reporting.
- One Information Systems Specialist 4:
  - Desktop Support.
- One Information Systems Specialist 7:
  - DevOps Engineering for System Development Life Cycle.
- One Information Systems Specialist 7:
  - jClarety Development.
- Two Information Systems Specialist 4's, One Operations & Policy Analyst 2:
  - Central Data Management report development.

# Policy Option Package 103

## PERS Modernization

# PERS Modernization Program

**Background:** PERS will engage in significant planning and design work in our initial phases of our Modernization efforts. Efforts will focus on modernizing our core pension administration system, business process and supporting technologies. This planning and design work will consume a significant portion of the biennium with initial implementation efforts focused on non-core pension administration system technologies and processes.

Budget Breakdown	Total Costs
Hybrid Integration Platform	\$400,000
Client Relationship Management Software	\$1,255,000
DevOps	\$1,102,000
Telephony	\$210,000
iQMS	\$950,000
Architecture	\$950,000
Data and Analytics	\$1,300,000
Personal Services	\$3,228,103 (16 staff – 15 Perm, 1 LD)
Other Services and Supplies*	\$177,970

\* Staff set up costs, training, office expenses

# PERS Modernization

## Hybrid Integration Platform (HIP) - \$400,000

This cost reflects the current estimated total required for goods and services to complete the Hybrid Integration Platform (HIP) project, which is an important foundational technology element of PERS' modernized technology portfolio. The HIP will allow components within PERS to integrate with a central platform rather than requiring components to integrate with each other; in the end state PERS will be maintaining a single integration point with the platform for each component instead of multiple integrations directly with individual technologies/applications. Architectural planning and a proof of concept were completed for this project in the 2021-23 biennium. This requested amount will include the technology, licensing, and contracted services required to implement a HIP for PERS prior to the end of the 2023-25 biennium.

## Client Relationship Management (CRM) - \$1,255,000

This cost reflects the current estimated total required for initiation and early planning work to take place in the 2023-25 biennium for the Client Relationship Management solution(s) that will establish a modern CRM capability for PERS. Contracting in the 2023-25 biennium is required for services supporting the initiation and planning stages for the project(s) to deliver the CRM capability and are primarily related to conceptual and detailed enterprise architecture, business cases and solutions analyses, and high-level requirements gathering and future state visioning activities. At this time PERS expects that this will include the implementation of a CRM system and a solution for correspondence management capabilities, but neither the selection of technology solutions through appropriate procurement processes nor implementation of CRM solution is intended to begin before the 2025-27 biennium.

## DevOps - \$1,102,000

This cost reflects the current estimated total required for goods and services to enable PERS to make progress toward optimizing its DevOps performance in order to support modernization activities. As part of planning activities in the 2021-23 biennium, PERS received a roadmap of activities and process improvements that should take place over the next two biennia; this includes replacing or upgrading many of the current tools used in DevOps processes, providing training and upskilling PERS resources, and implementing new processes. PERS is still evaluating the feasibility of the items outlined in the roadmap for inclusion in the DevOps workstream during the 2023-25 biennium, but none of these items would include a major IT initiative as defined in statewide policy and/or statute.



# PERS Modernization

## **Telephony - \$210,000**

This cost reflects the current estimated total required for goods and services to complete the Telephony Upgrade project, which will replace PERS' current telephony hardware and software. PERS intends to initiate this project in April 2023 to prepare to select solutions/vendors and complete implementation in the 2023-25 biennium. This project is critical because the current telephony system is end-of-life and end-of-support and poses substantial risk to the agency unless replaced. This project is being included in the Modernization Program to ensure that this early opportunity to select telephony technologies aligned with modernization goals and intended future state architecture is not missed.

## **Independent Quality Management Services (IQMS) - \$950,000**

This cost reflects the continuing engagement of services from an iQMS vendor through the duration of the 2023-25 biennium. PERS is currently working with DAS Procurement Services to conclude an RFQ to select a vendor to provide iQMS services for the Modernization Program and its qualifying projects (RFQ #OPERS OPERS-0320-23, quotes are due on April 11, 2023). Expected deliverables during the 2023-25 biennium reflected in this cost are periodic and quarterly quality status reports, ongoing risk reporting, and quality reviews of program- and project-level artifacts. PERS expects to receive the Initial Risk Assessment deliverable from this vendor prior to June 30, 2023; if the RFQ is unsuccessful or the contract negotiation process is longer than expected, the Initial Risk Assessment will also be delivered in the 2023-25 biennium.

# PERS Modernization

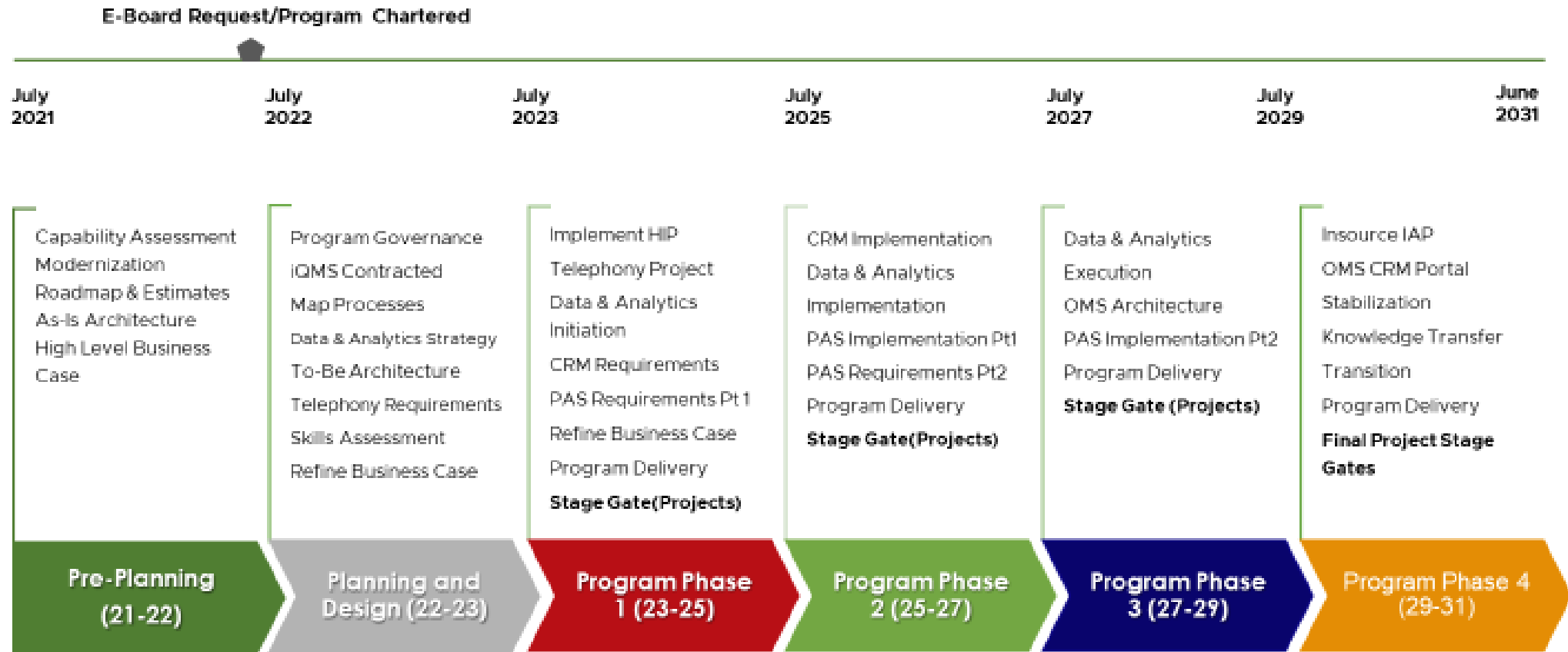
## **Architecture - \$950,000**

This cost reflects the continuing engagement of services to support enterprise architecture activities for the duration of the 2023-25 biennium. Enterprise architecture will be an ongoing need for the duration of the program. Conceptual future state architecture will need to be maintained as work begins to implement early foundational technologies, and development of transitional architectures will be required as projects are initiated and completed. This work will include updating PERS' future state architecture following the conclusion of the HIP and Telephony projects, as well as defining transition architectures for the 2025-27 biennium's implementation activities. This work also includes the support of PERS' enterprise architecture practice more generally to ensure that PERS is adhering to industry standards and best practices as well as producing quality artifacts and deliverables to support strategic decision making for modernization.

## **Data & Analytics (D&A) - \$1,300,000**

This cost reflects the current estimated total required for goods and services to enable PERS to make progress toward optimizing the use and care of data and analytics in agency performance and decision making. As part of planning activities in the 2021-23 biennium, PERS received a roadmap of activities and process improvements that should take place over the next three biennia; this includes replacing or upgrading many of the current tools for data storage, processing, and usage within the agency, providing training and upskilling PERS resources, and implementing new processes for data governance, sharing, and analytics capabilities. PERS is still evaluating the feasibility of the items outlined in the roadmap for inclusion in the Data & Analytics workstream during the 2023-25 biennium and would only include initiation and early planning activities for any major IT projects as defined in statewide policy and/or statute.

# PERS Modernization Timeline



# Policy Option Package 105

IT Hardware and Subscriptions

# IT Hardware and Subscriptions

## Background:

- PERS is requesting \$1,068,000 operating budget plus \$896,000 capital budget.
- PERS utilizes a series of networked systems at both the Tigard and Salem locations as well as cloud based systems.
- With increased system complexity and of cloud based systems, vendor support and maintenance costs have risen significantly.
- Network Hardware has reached end-of-life.
- Failure of end-of-life hardware could result in extended system down times.

# IT Hardware and Subscriptions

## Proposal:

- Increase IT operating budget by \$1,068,000 for network license & subscriptions:

Item	Cost
Backup Data Center Costs	\$ 528,000
Increased internet circuit size	24,000
Telephony Licensing	70,000
MS Support Plan	104,000
VMWare Licensing	80,000
Microsoft 365 Licensing	244,000
Articulate 360 Licensing	18,000
<b>Total</b>	<b>\$ 1,068,000</b>

- Increase one-time Capital outlay budget by \$896,000 for end-of-life hardware:

Item	Cost
Network Switches (22)	\$ 198,000
Firewall (2)	500,000
Servers (2)	40,000
Uninterruptible Power Supply (3)	110,000
Monitoring Appliance (5)	7,000
VOIP gateway	6,000
Professional Services	35,000
<b>Total</b>	<b>\$ 896,000</b>

# Policy Option Package 106

PERS Health Insurance Plan Administration

# PERS Health Insurance Plan (PHIP) Administration

## Background:

- PERS is requesting \$367,960 for increased consulting costs.
- PHIP is an Other Funds program funded by PERS Health insurance trusts.
- This program utilizes a health care industry consultant to assure proper program administration.
- PHIP has engaged a new consultant, updating from a ‘mom and pop’ consultant to a more sophisticated industry standard consultant.
- Total increase in consulting costs were \$867,960. PERS was able to identify \$500,000 of existing professional services budget for these costs, leaving \$367,960 additional funding needed.



# Policy Option Package 107

Maintain Service Levels

# Maintain Service Levels

## Background:

- PERS is requesting adding five full time IT positions to manage workload that is currently performed by contracted services at a net cost of \$90,585.
- Technological support needs have grown as technologies and PERS system complexity have grown over time.
- Reliance on contract IT services has grown to address these needs.
- Contract Services can be useful, but are also costly and less consistent than dedicated staff.
- Efficiencies gained by utilizing dedicated staff will allow PERS to manage the continually growing technological workload.

# Maintain Service Levels

## Positions Requested:

- Information Systems Specialist 7 – ORION Release manager:
  - Plans, coordinates and manages technology release milestones between multiple teams.
- Information Systems Specialist 6 – QA Systems Analyst:
  - Regression testing, production troubleshooting support, and user acceptance testing.
- Information Systems Specialist 7 – Technical Operations Release Manager:
  - Manage IT Operations technology releases, maintenance, and enhancements.
- Information Systems Specialist 6 – IT service Management Administrator:
  - Fulfill IT service change requests, incidents, and support.
- Information Systems Specialist 6 – IT System Administrator:
  - Assist in infrastructure support efforts due to increasing complexity.

# Policy Option Package 108

## Retirement Workload

# Retirement Workload

## Background:

- PERS is requesting one Retirement Counselor 2 position in the Member Information Center at a cost of \$161,205.
- As retirements have increased PERS has experienced an increased member call volume from 156,000 calls in 2015 to 180,000 calls in 2021.
- Complex issues are escalated to Team One Follow-Up for resolutions including:
  - Specialty Qualifications
  - Death
  - Divorce
  - Disability
  - Complaints/escalations
- This position is aimed at increasing the efficiency and expertise handling these complex issues, freeing up other resources to address standard member issues.

# Policy Option Package 109

Qualifying/Non-Qualifying

# Qualifying/Non-Qualifying

## Background:

- PERS is requesting \$523,653 to extend three limited duration Retirement Counselor positions to dedicated to the Qualifying/non-qualifying (Q/NQ) project.
- Q/NQ involves a manual review of member employment data to determine proper membership eligibility.
- As of 2019 the Impacted population included approximately 138,000 unique member accounts. By 2023 this number was below 54,000.
- Data challenges are caused by a combination of employer errors, employer reporting system limitations, and member eligibility changes over time.
- Process includes review of data, contact with employers, and adjustment of data where necessary.
- Current staff working on Q/NQ have made notable progress, but much work remains to be accomplished.

# Policy Option Package 110

## Reclassifications



# Reclassifications

## Background:

- PERS is requesting \$58,744 to address four position reclassifications.
- Detailed review of position descriptions, desk audits, and interview with staff & management determined that reclassification were likely appropriate.
- Oregon Department of Administrative Services Chief Human Resources Office completed an evaluation of these positions and requested these reclassification be implemented.

# Policy Option Package 111

## Agency Support Services

# Agency Support Services

## Background:

- PERS is requesting \$365,613 to fund one Human Resource Analyst 3 and one Office Specialist 2.

## Human Resources:

- PERS Human resources has experienced and increasing workload as they manage efforts around training, job classifications, succession planning, and Diversity, Equity, and Inclusion (DEI).
- Simultaneously, recruiting has become more challenging in a tight labor market with increased regulations and standards.
- Addition of a Human Resource Analyst 3 will allow staff to focus on meeting HR and recruiting goals while freeing HR management to focus on agency wide initiatives such as training, succession planning, and DEI.

# Agency Support Services

## Facilities Support:

- In 2021 the PERS mailroom handled 1.13 million letters along with managing central printing and paper process in the office.
- Workload is currently being managed through a combination of limited duration and temporary staff, as well as management coverage during periods of absence.
- Dedicated Office Specialist 2 will provide consistent, reliable coverage of these tasks supporting smoother operations throughout the agency.

# OREGON PERS

PUBLIC EMPLOYEES RETIREMENT SYSTEM



## Thank You

