PERS EMPLOYER ADVISORY GROUP MEETING

NOTES   DATE: 07/15/2016   TIME: 10:00AM-11:30AM   **PERS HEADQUARTERS**

TYPE OF MEETING	PERS EMPLOYER ADVISORY GROUP MEETING
FACILITATOR	Yvette Elledge-Rhodes
NOTE TAKER	Katie Brogan
CALL IN NUMBER	(877)411-9748; participant code: 510922
ATTENDEES	**Present:** Debra Grabler, Tualatin Valley Fire & Rescue; Ralph Wyatt, Linn County; Jeff White, Marion County; Donna Chastain, Oregon State University; Nancy Brewer, City of Corvallis; Jim Langstraat, Portland Community College; Michelle Morrison, Hillsboro School District; **PERS:** Yvette Elledge-Rhodes, PERS; Brian Harrington, PERS; Marjorie Taylor, PERS; Laurel Galego, PERS; Debra Steiner, PERS; Katie Brogan, PERS; Roger Smith, PERS; Elaine King, PERS **Guests:** Rhonda Miller, City of Salem; Alison Chan, City of Medford; Jennifer Cooperman, City of Portland; Cheryl Anselone, Portland Public Schools; Dave Hauser, City of Salem; Wendy Santucci, Oregon State University **Phone:** Rob Bovett; Association of Oregon Counties; Elizabeth McCann, City of Gresham; Scott Morgan, City of Lincoln City

TIME: 10:00 – 10:10   TOPIC: WELCOME   YVETTE ELLEDGE-RHODES

PURPOSE/GOAL	Roundtable Introductions.

Yvette Elledge-Rhodes welcomed everyone to the PERS Employer Advisory Group meeting on July 15, 2016.

TIME: 10:10 – 10:35   OUTREACH PLAN   ROGER SMITH

PURPOSE/GOAL	To keep employers informed of outreach plan and receive feedback.

Roger Smith, Oregon Savings Growth Plan (OSGP) Manager shared information about PERS and OSGP's outreach plan.   The plan includes developing ways to reach members earlier in their career by leveraging tools and resources to help educate members as part of the PERS 2015-2020 Strategic Plan. As an agency they want to continue to educate members about retirement during their entire career. A Human Resources/Benefit Manager's guide book is being developed and it will answer most of the general questions and outline the different retirement plans. The EAG members will have an opportunity to review it. In addition to the guidebook, they want to implement a help line for HR and benefit managers to use to answer more specific questions and issues.

There was discussion about enhancing the Online Member Services benefit estimator to calculate the member's other retirement sources. A one page handout for new hires with OPSRP information would be useful and an OSGP opt in/opt out form with LifePath information. Auto-enrolling practices were

also discussed.

Discussions included online learning for employees with a more inclusive calculator and more education for new members. Creating separate handbooks for general service and police/fire members was also brought up.

The PERS website is being redesigned using the Oregon Department of Administrative Services templates and plan to have it finished near the end of the year. PERS would like to get EAG and focus group feedback on it. Another part of the Strategic Plan is data reliability, PERS staff is working on this breakthrough and they will be requesting employer feedback.

Roger announced a National Retirement Security Week event at the Salem Convention Center on October 17, 2016.

ACTION ITEMS	PERSON RESPONSIBLE	DEADLINE
Verify that garnishment rules as they pertain to auto-enrollment have or have not changed.	Marjorie Taylor	8/31/2016

TIME: 10:35 – 11:00 **TOPIC: OPSRP CONTRIBUTION START DATE STATUS** **YVETTE ELLEDGE-RHODES**

PURPOSE/GOAL	Share with you where we are at with the data and how you go forward.

Yvette Elledge-Rhodes, Chief Operations Officer provided handout with the OPSRP IAP Contribution Start Date Status Update and query progress. There are some accounts that can be fixed via .dat files and others that will require more extensive fixes. PERS can calculate the financial impact for each of the EAG members. PERS staff will send out the data to the other employers, so they can review their data and develop a request to present to the Board for consideration.

ACTION ITEMS	PERSON RESPONSIBLE	DEADLINE
Financial analysis for EAG members.	Yvette Elledge-Rhodes	July 22, 2016

TIME: 11:00 – 11:15 **TOPIC: UNUSED SICK LEAVE AND SICK TIME** **YVETTE ELLEDGE-RHODES**

PURPOSE/GOAL	Is for BOLI and PERS to resolve how sick time should be reinstated.

Yvette asked members if there were any additional questions. A member brought up that their sick time (ST) and sick leave (SL) are combined, which exceeds the state's requirement of ST. There is confusion as to whether these are interpreted the same or if they need to fraction out the state mandatory sick time from the additional leave policy. Members question if they need to reinstate both ST and SL. Some employers have settled on reinstating 40 hours while others are reinstating the entire amount.

Sick Leave (SL) vs. Sick Time (ST) (SB 454)
In May, PERS had a meeting with BOLI to discuss the confusion that is occurring between SL and ST. BOLI will either redirect employers to PERS on sick leave questions or inform employers that new time given pursuant to SB 454 is not SL for PERS purposes and the ST doesn't need to be reported to PERS.

PERS determined that employers should not reinstate sick leave when a member returns to work after retirement. At retirement, the unused sick leave is reported to PERS and if they are eligible used in their pension benefit. The employee returning to work as retiree will not be accruing additional SL, they will be accruing ST.

ACTION ITEMS	PERSON RESPONSIBLE	DEADLINE

TIME: 11:15 – 11:25   ADDITIONAL ITEMS   YVETTE ELLEDGE-RHODES

PURPOSE/GOAL	General discussion.

GASB: PERS will improve conversations and get feedback from employers in a collaborative manner when there are updates.

Other Employers also discussed an automated EDX fix for biweekly OPSRP employees as part of the data reliability project. They would like to see real time batch processing for making simple corrections. Employers are looking for ways to make the process quicker for employees.

ACTION ITEMS	PERSON RESPONSIBLE	DEADLINE

Next Meeting Facilitator: Sam Paris
Next Meeting Date/ Time: October 21, 2016 10:00 AM – 12:00 PM