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Recession Preparation – A Plan for Oregon’s Economic Cycle

Recommendations and tips for economic downturns

Overview

Since the 1940s, a new national recession has begun every six years on average. Some national recessions were especially damaging to Oregon's economy, while others were relatively mild. Historically, the Oregon Employment Department has used a reactionary tactic to combat the effects of any given recession. As the ever-increasing number of unemployed are added into the department's workflow an inevitable backlog occurs. This backlog triggers the hiring of more staff. While these staff are trained, the backlog continues to increase and service levels begin to decline.

During the Great Recession of 2007-2009 which resulted in the loss of 147,000 Oregon jobs by February 2010 and unemployment rates that reached 11.9 percent in mid-2009, the department could have reacted more quickly to the sudden and severe effects. The Unemployment Insurance (UI) Division, for example, did not hit its high staffing mark until approximately May 2010, well into the recession and after the incoming workload had begun to decline. Although staff did their best to quickly and accurately work through the deluge of incoming work, wait times for filing claims were drastically higher with some customers waiting as long as three and a half hours to speak with UI staff.

This slow reaction to the effects of the Great Recession was also seen in the Workforce Operations (WO) Division of the department. The lack of adjustment to the department's strategies left staff at WorkSource Oregon Centers trying to find employment for a large volume of jobseekers when there were 12.9 unemployed individuals for every available job in the spring of 2009 compared to the spring of 2007 when there were 2.2 unemployed individuals for every available job.

Although the Oregon Employment Department cannot predict when the next recession will take place, or how severe it will be, we do know that there will be more recessions in our future and that there is a better approach to incorporating the changes resulting from the economic cycle into our daily workflow than our recessionary tactics of the past. We also know that how the public is best served by the department is not necessarily the same during periods of economic downturn as it is during times of economic stability or growth and we need a more effective, logical, and proactive way to adjust department operations to provide a better and more valued service to the public.

Purpose of the Plan

The *Economic Cycle Plan* is designed to allow the Oregon Employment Department to more effectively integrate economic cycle changes in to the way that we do business. The goal is to be proactive and be more focused on what is needed at the onset and conclusion of an economic downturn.

By having this document readily available to individuals at all levels and in all areas of the department, we will be able to align our priorities faster than we have in the past. Through in-depth research and open discussions, this plan was designed to provide a high level guide to assist the department prepare for the demand of the higher workload that comes from an economic downturn. In addition, preplanning will allow staff and management to head in the same shared positive direction, reduce staff confusion and frustration and build trust in

leadership. The faster and more coordinated response will allow the department to deliver the services that are in greater demand during economic downturns.

This plan is a living document that is designed to be modified and updated by the Economic Task Force so that it remains relevant and functional over time. As the department makes changes to processes, procedures, policies and/or overall structure, the plan will be modified to reflect the relevant changes.

Agency Mission and Guiding Principles

Mission: Support Business - Promote Employment

- Support economic stability for Oregonians and communities during times of unemployment through the payment of unemployment benefits.
- Serve businesses by recruiting and referring the best qualified applicants to jobs, and provide resources to diverse jobseekers in support of their employment needs.
- Develop and distribute quality workforce and economic information to promote informed decision making.

Guiding Principles

How the Oregon Employment Department behaves and conducts business is crucial to the success of the department and the entire workforce system. Working with customers, partners, stakeholders and advisors, the Oregon Employment Department commits to the following guiding principles:

Openness, trust and integrity

Set high ethical and professional standards at all times. Build and maintain relationships based on honesty, respect, fairness and a commitment to open dialogue and transparency.

Quality with agility

Be passionate about delivering quality information and service. Strive to replicate success, learn from mistakes and actively pursue creative approaches that lead to continuous improvement and innovation. Be flexible and nimble, responding quickly to changing economic needs.

Delighting the customer

Identify the needs of Oregonians and provide uncompromising service with efficiency, accountability and a helpful attitude. Find what we can do to overcome barriers and help our customers, rather than focusing on what cannot be done. Remember that our coworkers are customers too.

Teamwork with responsibility

Encourage individual ownership and effort, but work as a team, valuing the expertise, insights, individuality and contribution of all colleagues. Understand that we are funded by taxpayers and have a relentless responsibility to provide value to Oregonians every day.

Humor, fulfillment and inclusion

Cultivate a safe, healthy, family-friendly work environment that encourages personal growth and provides opportunities for everyone to succeed. Embrace humor as a vital part of workplace culture, and honor the desire to do meaningful and satisfying work. Allow the diversity of our staff, customers and stakeholders to enhance the service we provide to the people of Oregon.

Approvals and Version Control

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Approval Signatures

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The Oregon Employment Department's Economic Task Force

Section Updated July 17, 2017

The Oregon Employment Department's Economic Task Force

Task Force Purpose

The purpose of the Oregon Employment Department's Economic Task Force is to contribute to the monitoring of economic conditions by the department and the implementation of initiatives identified within the *Economic Cycle Plan*. (For more information refer to the draft charter in the appendix section of this document.)

Goals for the Task Force

The goals of the Economic Task Force include involvement and coordination between all sections of the department; having an emphasis placed not only on cohesive teamwork but also individual ownership and responsibility of the results of task force activities and recommendations; updating the *Economic Cycle Plan* as applicable to keep the document relevant and functional over time; providing communication as directed in the *Economic Cycle Communications Plan*; assisting in the successful implementation of *Economic Cycle Plan* initiatives prior to, at the onset of, and during the next economic downturn or recession as appropriate; and evaluation of the effectiveness and update of the *Economic Cycle Plan* at the conclusion of the next economic downturn or recession.

Task Force Structure

The Economic Task Force will meet on a quarterly basis unless more frequent meetings are needed. The committee will be comprised of a Recession Single Point of Contact (RSPOC), a task force chair, and team members for various areas of representation as defined by the department's Executive Team. Depending on need, the task force may have involvement from non-voting members other than the RSPOC. The task force will implement *Economic Cycle Plan* initiatives in partnership with program area management and oversight from the Executive Team.

The Recession Single Point of Contact

The RSPOC (Vär- späk) is a non-voting member of the Economic Task Force. The RSPOC will serve as the "project manager" for activities associated with an economic downturn. During stable periods in the economic cycle the RSPOC will attend task force meetings, contribute to the work that is being done by the task force, and will partner with the task force chair on related communication. Task force activities will be open and transparent; all members can receive and share information both across sections and within their areas of representation.

When appropriate, determined by the Economic Task Force and/or the Executive Team, the RSPOC will become the department's primary liaison for all activities related to the recession. S/he will answer inquiries, provide communication in partnership with the Legislative Affairs and Communications section, help remove information and workflow bottlenecks or barriers as appropriate, and manage recession related activities as determined by program management and/or the Executive Team. During periods of recession, task force activities will remain open and transparent; however it's the RSPOC's role to ensure that messaging is consistent and up-to-date to reduce confusion, and that all areas of the department are working together towards the same shared focus and not unintentionally duplicating work efforts or initiatives.



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Five Things to Think About

A quick checklist to be used in times of economic downturn and recession

Section Updated July 17, 2017

Five Things to Think About

The items listed below are key points and questions that need to be considered prior to, at the onset of, and during an economic downturn. We explore five main topics: Funding, Communication, Processes, Technology and Staffing. This document should be reviewed and updated annually, after any major change to any of the following items is implemented, and after an economic downturn. Before implementing the items within this document please review the *Great Recession Lessons Learned Report*.

1. Funding

- a. Determine how much money is needed, and when we need it.
 - 1) Where is the money coming from?
 - 2) Is there funding readily available? If not, how quickly can we obtain the funding?
- b. Are there any Supplemental Budget Requests (SBR) or Grant opportunities to help bridge the funding gap?
- c. Has Unemployment Insurance (UI), Workforce Operations (WO), the Office of Workforce Investments (OWI), the Office of Administrative Hearings (OAH), the Employment Appeals Board (EAB), Workforce and Economic Research, and Administrative Business Support (ABS) met to discuss funding options and opportunities?
- d. Is the agency communicating with the Department of Administrative Services Chief Financial Office and the State of Oregon Legislative Fiscal Office regarding funding and limitation so that resources can be available quickly?

2. Communication

- a. What information needs to be communicated, when and to whom?
 - 1) Review the *Economic Cycle Communications Plan*.
 - 2) When was the *Economic Cycle Communications Plan* last updated? Have conditions changed enough that the plan should be revised?
- b. Determine if we need to add any additional lines of communication. For example:
 - 1) Dedicated inquiry phone line(s).
 - 2) Additional email boxes.
 - 3) Are we leveraging social media successfully? (Twitter, Facebook, YouTube, etc.)
- c. Should UI extend hours of operation?
 - 1) Have we communicated the extended hours to the general public?
 - 2) Do we know how to extend phone system hours or are staff performing non-phone work only during this time?
 - 3) Have we considered flexible shifts and other options instead of offering overtime/compensatory time?
 - 4) Have we coordinated with Information Technology Systems (IT) to ensure that there is HelpDesk coverage during the extended hours?

- 5) Have we checked with Facilities on the financial impact/contractual obligations of extended hours such as increased rate for running lights and HVAC after regular business hours?
 - 6) Have we communicated with the union and HR about staffing, coverage and workload needs?
- d. Should WO extend hours of operation?
- 1) Have we communicated the extended hours to the general public?
 - 2) Have we coordinated with IT to ensure that there is HelpDesk coverage during the extended hours?
 - 3) Have we checked with Facilities on the financial impact/contractual obligations of extended hours such as increased rate for running lights and HVAC after regular business hours?
 - 4) Have we communicated with the union and HR about staffing, coverage and workload needs?
- e. Have we communicated with the State Data Center (SDC/ETS) regarding our anticipated increase in workload so that they can be prepared for the additional traffic? (This includes anticipated hiring and the addition of phone lines.)
- f. Have we communicated with the Print Plant regarding our anticipated increase in workload so that they can be prepared for the increased quantity of letters, forms and other mailers?
- g. Have we communicated with other state agencies that might be impacted or with whom we could collaborate in communicating our recession-related services?

3. Processes

- a. Take into consideration how the economic downturn is affecting the regions of Oregon differently. Think about:
- 1) What do the agency Economic Indicators show? What does our Workforce and Economic Research Division report? What are others outside the agency saying?
 - 2) If the downturn is a regional crisis, how far do the impacts go?
 - 3) Has the agency talked to the Local Workforce Development Board (LWDB) to discuss needed shifts in staffing or business focus?
- b. Have UI and WO discussed plans for the influx of UI claimants in the WorkSource Centers?
- 1) Should there be a UI presence in the field offices (e.g. UI navigators)? If so, when?
 - 2) What happens to this presence after the economy improves?
 - 3) If a UI presence isn't necessary, should WO staff provide more UI services or assistance than is typically provided during non-recessionary times?
 - What type of work should they perform?
 - What training, support, or controls are needed to make this work?
 - How do we scale back on these services or assistance after the economy improves?
- c. Identify how we will implement and track extensions to Unemployment Insurance benefits.

- 1) Have UI, IT and ABS met to discuss options?
- 2) Do we have/need guidance from the US Department of Labor?
- d. Prioritize all of the active projects within the agency that may be impacted by the economic downturn.
 - 1) Do the projects need to be completed now, or can they wait? If so, how long?
 - 2) What is our current methodology for prioritizing projects? How will extensions and other urgent projects fit into that methodology?
 - 3) What projects need to be completed prior to the next recession?
 - 4) Update the list of skills and talents available from our staff to call upon to help with work needed to deal with the recession.
- e. Develop a list of processes and projects that have either started, changed or been set aside as a result of the economic downturn.
 - 1) Note: Not everything needs to be documented, but this list should include items that should be reviewed after the economic downturn is concluded.
 - 2) For example: if a monthly list is turned off due to workload priorities in other areas it should be added to the process/project list to ensure that when the economy improves the monthly list will be turned back on.
- f. Determine whether the Economic Task Force needs to meet more frequently. Should other groups be formed to deal with specific issues related to the recession?
- g. Determine whether the Recession Single Point of Contact (RSPOC) is ready to initiate implementation of the tactics identified in *Recession Preparation – A Plan for Oregon's Economic Cycle*.
 - 1) What additional information does s/he need to get started?
 - 2) Have we determined who to shift her/his regular workload to so that s/he can concentrate on the plan items?
- h. Has each section determined their plan for the possible backlog of work?

4. Technology

- a. Look at phone system routing options for the UI Contact Center and UI Central Office sections. For example:
 - 1) Direct easy questions, such as Personal Identification Number (PIN) resets, to a "quick service line" or allow claimants to reset their PIN using the phone system.
 - 2) Provide common information upfront before speaking to a representative such as "has my payment been processed?" or "what is my current claim balance?" etc.
- b. Determine if we need additional T1 lines or Voice Over Internet Protocol (VOIP) circuits to handle the increased number of inbound and outbound calls for all divisions.
 - 1) Additional T1 lines take approximately 8-16 weeks to install.
 - 2) More VOIP circuits take approximately 6-8 weeks to install.
- c. Are there ways that we can help our customers self-serve to avoid long wait times to speak with agency staff?

- d. Determine if our technology is ready for extensions.
 - 1) Can the Online Claim System (OCS) handle the increased traffic?
 - Is there ground work that can be done ahead of time?
 - Are there short-term workarounds that we need to identify?
 - Has UI, IT and ABS met to discuss options?
 - 2) Have we identified projects that can temporarily be put on hold to free up IT staff to work on extension implementation?
 - If so, has this information been communicated to the stakeholders on those projects?
- e. Do we have a current inventory of agency equipment?
 - 1) Determine if we should start and/or continue leasing equipment?
 - 2) Should we move some equipment from one location to another to help with immediate needs while longer term solutions are implemented?
 - 3) Do we have enough equipment and licenses to support anticipated increased staffing levels?
 - If additional licenses are needed, take into consideration the anticipated length of the positions. (For example: Should we order standard 3 year software licenses to cover staff in limited duration positions expected to last 6-12 months?)
- f. The agency is undergoing a Modernization effort; are there items resulting from this project that need to be taken into consideration? For example:
 - 1) Have letters been moved to Planet Press?
 - 2) Have the UI forms 196 and 197 been updated for clarity and moved to an electronic format instead of 100% paper?
 - 3) What impact, if any, will current modernization work have on our ability to appropriately respond to the recession? What impact will dealing with the recession have on our modernization plans?

5. Staffing

- 1) Look at current job duties/classifications and ensure the right staff are doing the right work.
 - 1) If not, how do we shift that work?
- 2) Are current staff ready to take on more complex work (e.g. extensions) and/or the increased volume of work?
- 3) Identify a backup system for a sudden influx of work. For example:
 - 1) UI Operations and Program Support (UI OPS) can back up the UI Contact Center, but should they?
- 4) How are we using existing seasonal and part-time staff?
 - 1) Are we using these positions correctly?
 - 2) Can they be leveraged to better fill the need and how?
- 5) Instead of hiring new staff, should we temporarily alter the work duties of current staff?
 - 1) Look at leveraging job rotations, work out of class opportunities and temporary changes to job duties.
 - 2) What system access do they need?

- 3) If a Network User Request Form (NURF) is submitted, will they lose their old access? Is this an issue? (e.g. UI Tax staff helping with UI Benefits work.)
- 6) Are existing staff cross-trained? Can they be?
 - 1) Determine which positions are good candidates for this training. (Don't just limit within each section. For example: WO BES and UI BES or business support staff deployed to assist ABS and/or HR with data entry; talk with partners such as OWI to see if they can assist.)
 - 2) How do we ensure that the training is up to date? (e.g. one week each quarter cross-trained staff are deployed to the other units they were cross-trained in.) Do we need to modify normal training procedures to more quickly get people able to help with particular urgent needs?
 - 3) Are current processes and procedures documented and easily accessible?
- 7) Can we temporarily move staff to alternate workstations?
 - 1) Is there physical space for the staff?
 - 2) Does the selected location have the technology that they will need?
- 8) Determine at what point we need to hire new staff.
 - 1) How many staff are needed?
 - 2) Where are they needed?
 - 3) What work do they need to perform?
 - 4) What classifications can perform this type of work?
 - 5) What training is needed?
- 9) How quickly can we hire staff?
 - 1) Does there need to be a Letter of Agreement (LOA) in place to allow quicker hiring practices during times of economic downturn?
 - 2) Do we have a plan for what will happen to these positions after the economy improves?
 - 3) Consider who else is hiring. Can sections work together to maximize recruitment for the same classification even if the responsibilities or offices are different?
 - 4) Have we reached out to agencies that may be having staff reductions, to retirees and others who may be able to more quickly help the department serve the public?
- 10) Create a new hire equipment checklist that can be consistently followed.
- 11) Determine where the new staff are going to be located.
 - 1) Are there vacant workstations available in your building?
 - 2) If not, have you checked with Facilities to see if there is availability in other buildings owned or leased by the agency?
 - 3) If there isn't space, check with Facilities to see if there are temporary desks or surplus cubicle parts that can be put into place within your building or another building.
 - Set up of these items will take approximately 2-3 weeks, but could take longer depending on demand for services. See notes below about IT equipment.
 - For new workstation pieces such as walls, desktops and connectors, it takes 8 weeks to deliver after order.
 - 4) Do the workstations have computers?
 - If not, check with IT to see if there are spare computers in lockup or at other workstations that can be used.

- It takes approximately 8-12 weeks to deliver and set up a new computer after order.
- 5) Do the workstations have phones?
- If not, check with IT to see if there are spare phones in lockup or at other workstations that can be used.
 - It takes 3 weeks for desktop phone service to be installed.
 - If additional VOIP circuits are needed, they take approximately 6-8 weeks to install.
 - Have you checked with IT to make sure that we have enough software licenses for the phone system available? Timing for ordering of new licenses varies depending on the software.
- 6) If there is not a current location available, keep in mind that it takes approximately 2-3 months to prepare a new office for network cabling and phone lines after the worksite has been selected.
- 7) Have we looked at other location options such as telecommute from home or workstations in another agency's buildings, etc.?
- Are there other individuals performing this work from alternate worksites?
 - Do we have the equipment to allow this type of work?
 - Have you looked at the security, confidentiality, and system access impacts?
 - Are there policies in place that allow/do not allow this type of work? Should the policy(s) be modified?
- 8) When new staff are hired there will be an increased need for training. Are there trainers available to train new staff?
- Do we need to hire trainers to train the new staff?
 - Can we shift staff start dates to train more individuals at one time?
 - What format do we need the training to be in? (e.g. classroom, iLearn, etc.)
 - How quickly can the staff be trained?
 - i. What is the business need?
 - ii. What topics can staff learn well within a condensed timeframe?
 - iii. Do we have a system to keep track of who has received certain training so that we can make sure to get staff additional training at a later date?



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Economic Cycle Communications Plan

To be used in times of economic downturn and recession

Section Updated July 17, 2017

Economic Cycle Communications Plan

1. Overview

Summary Statement

Since the 1940s, a new national recession has begun every six years on average. Some national recessions were especially damaging to Oregon's economy, while others were relatively mild. Historically, the Oregon Employment Department has used a reactionary tactic to combat the effects of any given recession. As the ever-increasing number of unemployed are added into the department's workflow an inevitable backlog occurs. This backlog triggers the hiring of more staff. While these staff are trained, the backlog continues to increase and service levels begin to decline.

During the Great Recession of 2007-2009 which resulted in the loss of 147,000 Oregon jobs by February 2010 and unemployment rates that reached 11.9 percent in mid-2009, the department could have reacted more quickly to the sudden and severe effects. The Unemployment Insurance (UI) Division, for example, did not hit its high staffing mark until approximately May 2010, well into the recession and after the incoming workload had begun to decline. Although staff did their best to quickly and accurately work through the deluge of incoming work, wait times for filing claims were drastically higher with some customers waiting as long as three and a half hours to speak with UI staff.

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Although the Oregon Employment Department cannot predict when the next recession will take place, or how severe it will be, we do know that there will be more recessions in our future and that there is a better approach to incorporating the changes resulting from the economic cycle into our daily workflow than our recessionary tactics of the past. We also know that how the public is best served by the department is not necessarily the same during periods of economic downturn as it is during times of economic stability or growth and we need a more effective, logical, and proactive way to adjust department operations to provide a better and more valued service to the public.

Communications Plan Purpose

The purpose of this communications plan is to provide a road map to communicate changes that the Oregon Employment Department will be making due to shifts in Oregon's economic cycle. The intent is to educate and inform affected individuals and groups of updates to process, procedures, policies, and best practices.

2. Communication Responsibilities

Communications Plan Owners

The individuals listed below are responsible for keeping this plan current. The *Economic Cycle Communications Plan* owners will work in partnership to make any needed updates to the document and to ensure the updated version is provided to the Economic Task Force. When appropriate the plan owners will implement the *Economic Cycle Communications Plan*.

Owner	Role	Duration of Ownership
TBD	Oregon Employment Department Economic Task Force Chair	Ongoing
Andrea Fogue	Legislative Affairs and Communications Manager	Ongoing

Communication Roles

Each of the areas listed below must have an identified representative responsible for providing messaging, reviewing messaging, approving messaging, or a combination of the three roles. The identified representative from each area does not need to hold a specific title (e.g. Division Director) but does need to have the authority to fully represent the area of representation as the Provider, Reviewer and/or Approver.

The Provider's role is to create needed messaging regarding their area of representation and should use the talking points in Section 3. The Providers listed below are not required to create messaging; however, they are the only approved individuals who can create messaging as it relates to their area of representation.

The Reviewer's role is to review the messaging created by the Provider and give feedback.

The Approver's role is to review the messaging and approve or reject the message. Approved messages will be delivered to the communication audience(s) using the delivery methods identified within the Communications Matrix in Section 4.

Area of Representation	Provider	Reviewer	Approver
Recession Single Point of Contact (RSPOC)	TBD	TBD	TBD
Economic Task Force Chair	TBD	TBD	TBD
Director's Office	Kay Erickson	Kay Erickson	Kay Erickson
Director's Office	Graham Slater	Graham Slater	Graham Slater
Legislative Affairs and Communications	Andrea Fogue	Andrea Fogue	Andrea Fogue
Unemployment Insurance	David Gerstenfeld	David Gerstenfeld	David Gerstenfeld
Unemployment Insurance Benefits	Dee Anna Hassanpour	Dee Anna Hassanpour	
Unemployment Insurance Tax	Isabel Joslen	Isabel Joslen	
Unemployment Insurance Operations and Program Support	Jason Barbee	Jason Barbee	

Workforce Operations	Jim Pfarrer	Jim Pfarrer	Jim Pfarrer
Workforce Operations	Kristin Kahler Jones	Kristin Kahler Jones	
Workforce and Economic Research	Bob Uhlenkott	Bob Uhlenkott	Bob Uhlenkott
Information Technology Services	Bill Truex	Bill Truex	Bill Truex
Information Technology Services	Annalise Famiglietti	Annalise Famiglietti	
Administrative Business Services	Mike Smith	Mike Smith	Mike Smith
Modernization Initiative	Renee Royston	Renee Royston	Renee Royston
Modernization Initiative	Jennifer Hannan	Jennifer Hannan	
Office of Administrative Hearings	John Mann	John Mann	John Mann
Office of Workforce Investments	Karen Humelbaugh	Karen Humelbaugh	Karen Humelbaugh
Employment Appeals Board	Sara Cromwell	Sara Cromwell	Sara Cromwell
State Employment Economist	Nick Beleiciks	Nick Beleiciks	
Public Information Officer	Craig Spivey	Craig Spivey	
Public Affairs Specialist	TBD	TBD	
Economic Task Force Members	TBD	TBD	

3. Communication Tactics

The communication tactics within this section may need to be updated over time to ensure that they are relevant to the communication goals, the specific parameters of the economic downturn, and that they are up to date with current communication channels.

Communication Goals

- Timely and effective communication to stakeholders and interested parties regarding what the department is doing to combat the effects of the economic downturn.
- Set clear expectations regarding what the department can do to help our customers.
- Leverage technology to communicate to our customers including social media, predictive dialer, and encrypted email along with traditional methods such as press releases, interviews and letters.
- Work with partner agencies, when appropriate, to communicate information jointly to reduce customer confusion and unnecessary redundant messaging.
- Inform the public about self-serve options and encourage their use to help reduce overall wait times and speed processing times.
- Be clear, consistent, and proactive in our communication to build trust with external and internal customers.
- Ensure the department uses the applicable portions of the *Economic Cycle Plan* to help work through an economic downturn.

- Communicate any changes in the economy that the Economic Task Force is seeing to the Executive Team.
- Keep department staff informed and prepare affected staff for change.
- Give all staff the opportunity to provide input and feedback.
- Provide a methodology for communicating processes and projects that will be put on hold due to the higher workload demands.
- Keep morale high by ensuring staff are aware of the department's plan to combat the economic downturn.
- Mitigate stress levels by openly discussing changes that are occurring and addressing issues that need swift resolution head on.
- Open and maintain lines of communication upwards, downwards and across the Oregon Employment Department.
- Ensure connectivity within and between sections of the department.
- Work in partnership with the Service Employees International Union.

Talking Points

Point#	Talking Point
1	Since the 1940s, a new national recession has begun every six years on average. Although the Oregon Employment Department cannot predict when the next recession will take place, or how severe it will be, we do know that there will be more recessions in our future and that there is a better approach to incorporating the changes resulting from the economic cycle into our daily workflow than our recessionary tactics of the past.
2	The Great Recession of 2007-2009 resulted in the loss of 147,000 Oregon jobs by February 2010 and unemployment rates that reached 11.9 percent in mid-2009.
3	The Employment Department undertook a project to develop a plan that would allow the department to be more proactive in the way we incorporate the effects of the changing economic cycle into the way we do business. The core project team was comprised of staff for multiple areas of the Employment Department. The inclusive mentality of the project team allowed for a broader perspective which was crucial as one section may see nothing that they would consider as an indicator while another might predict imminent economic changes. Staff participation came from multiple levels and areas of the department so that institutional knowledge, unique viewpoints and individual talents could be capitalized on and a more comprehensive knowledge base was utilized.
4	The <i>Economic Cycle Plan</i> is a living document that will be modified and updated by the Economic Task Force so that it remains relevant over time. As the Employment Department makes changes to process, procedure, policy and/or structure, the plan will be modified to reflect the relevant changes.
5	The Economic Task Force will meet on a quarterly basis, unless otherwise directed, to discuss where Oregon's economic cycle is at, trends that they are seeing, any potential new economic indicators that emerge, any updates to the <i>Economic Cycle Plan</i> that are needed, and implementation of the <i>Economic Cycle Plan</i> when appropriate.

Point#	Talking Point
6	The Oregon Employment Department may work with Service Employees International Union leadership to develop temporary hiring strategies to help get qualified workers onboard more quickly to better serve the public's increased need for service.
7	There may be a need to hire temporary employees during an economic downturn. This would not be a change in standard business practice but a response to a crisis.
8	The Economic Task Force, the Recession Single Point of Contact and the Executive Team will work together to ensure that all areas of the Oregon Employment Department are working together and on the same track.
9	The Economic Task Force, Recession Single Point of Contact, Executive Team and/or the Legislative Affairs and Communications section will openly communicate information to staff and other interested parties regarding changes to processes, procedures, policy and best practices that the Oregon Employment Department undertakes in response to an economic downturn as it unfolds.
10	Cross training, modified training, refresher training, and other trainings will be developed to ensure that the department can be flexible in our response to an economic downturn in order to best serve the public and set our employees up to be successful in their job duties.
11	The department's economic downturn response strategies will be agile but remain in line with our vision, mission and core values.
12	The <i>Five Things to Think About</i> document is a quick checklist that should be used when the department is faced with an economic downturn.
13	The department has undertaken a proactive approach by having the Economic Task Force and the Executive Team review the Economic Indicator Dashboard in addition to usual economic indicators to look for clues that Oregon's economy is changing and might be headed towards an economic downturn.
14	During an economic downturn the department will strive to continue to provide the highest customer service. However, as service times increase due to the volume of customers we will encourage customers to try our online claims system to claim a week of benefits; repay an overpayment or delinquent employer tax account online using the E-Pay Portal; check out website for information, answer frequently asked questions and to view videos; complete an iMatch registration; and/or file quarterly reports using OTTER, SETRON, or OPRS.
15	The department will strive to communicate actively with other agencies to ensure they know what is happening, if our changes will impact them, and to see if we can work together on outreach strategies that might be mutually beneficial.
16	The Oregon Employment Department will strive to utilize all forms of communication to reach our customers including social media, predicative dialer, and encrypted email along with traditional methods such as press releases, interviews and letters.
17	Economic downturns can affect the regions of Oregon differently. The department will work to be as flexible as possible to provide support to locally affected communities.
18	Questions and comments for the Economic Task Force are welcome and strongly encouraged and can be sent through the Recession Preparation EDweb page.

Communication Audiences

1	Economic Task Force
2	Employment Department Executive Team
3	Employment Department Managers
4	Employment Department Staff
5	Customers such as Claimants, other Jobseekers, and Employers
6	Oregon Workforce Investment Board and Local Workforce Development Boards
7	The Department of Administrative Services, Department of Human Services, Department of Revenue, Department of Consumer and Business Services, Higher Education Coordinating Commission and other state agencies
8	The Media
9	Governor's Office, Oregon Legislature, and other elected officials
10	Other interested parties outside the department such as: <ul style="list-style-type: none"> • American Federation of Labor and Congress of Industrial Organizations (AFL-CIO) • Association of Oregon Industries (AOI) • Legal Aid Services of Oregon • National Association of State Workforce Agencies (NASWA) • Oregon Employment Department Advisory Council • Other states • Portland Business Alliance • Service Employees International Union (SEIU) • Small Business Association • Strategic Services on Unemployment and Worker's Compensation (UWC) • United States Department of Labor (US DOL)

4. Communication Matrix

Talking Point(s)	Delivery	Media	Primary Audience	Secondary Audience	Frequency	Start Date	End Date
1 - 18	Executive Team Meeting	Face to Face	2	None	As Needed	TBD (After Project Completion)	N/A

Talking Point(s)	Delivery	Media	Primary Audience	Secondary Audience	Frequency	Start Date	End Date
4 - 18	Internal Progress Article	Inner-View	2 - 4	1	As Needed	TBD (After Project Completion)	N/A
1 - 3, 13 - 17	External Progress Article	Social Media (e.g. Facebook and Twitter)	5 - 10	1 - 4	As Needed	TBD (After Project Completion)	N/A
1 - 18	Economic Task Force Meeting	Face to Face or via Phone	1	None	Quarterly or As Needed	TBD (After Project Completion)	N/A
4, 5, 8, 9, 12, 13, 18	Economic Task Force Meeting Minutes	Post to EDweb Page	1	2 - 4	Quarterly or As Needed	TBD (After Project Completion)	N/A
1 - 18	Manager Meeting	Face to Face or via Phone	3	1, 2, 4	As Needed	TBD (After Project Completion)	N/A
1 - 11, 13 - 18	Staff Meeting	Face to Face or via Phone	4	1 - 3	As Needed	TBD (After Project Completion)	N/A
1 - 4, 8, 9, 11 - 17	Internal Presentation	Face to Face or Virtual (e.g. WebEx)	1 - 4	5 - 10	As Needed	TBD (After Project Completion)	N/A
1 - 4, 8, 9, 11, 13 - 17	External Presentation	Face to Face or Virtual (e.g. WebEx and Gov Delivery Bulletin)	5 - 7, 9 - 10	1 - 4, 8	As Needed	TBD (After Project Completion)	N/A
8, 9, 14 - 18	Internal Announcement	Email, Face to Face	2 - 4	1	As Needed	TBD (After Project Completion)	N/A

Talking Point(s)	Delivery	Media	Primary Audience	Secondary Audience	Frequency	Start Date	End Date
9, 14 - 16	External Announcement	Press Release, Face to Face, Email, Letter, Social Media, Gov Delivery Bulletin	5 - 10	1 - 4	As Needed	TBD (After Project Completion)	N/A



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Process / Project Stop and Tracking Forms

To be used in times of economic downturn and recession

Section Updated July 17, 2017

Process / Project Stop Form

Email completed forms to: EMAIL ADDRESS

{Descriptive Title}

CURRENT PROCESS:

{Short description of the current process, procedure, or project to be stopped.}

REASON FOR STOPPING:

{One or two sentences describing why the process should be stopped.}

AREAS AFFECTED:

{Document any areas or sections that will be affected by the stop and how the area will be affected.}

RESOURCES NEEDED TO IMPLEMENT THE STOP:

{Identify what resources are needed to implement the stop.}

DATE OF STOP:

{Enter the date the stop will take effect.}

REVIEW OF STOPPED PROCESS:

{Provide the date for the first review and who needs to be included in the review to determine whether it is appropriate to restart the process, procedure, or project.}

Process / Project Stop Tracking Form

{Descriptive Title}

Program	Project/Process	Description	Areas Affected by Stop	Date Stopped	Date to be Reviewed	Last Review Date	Date Restarted	Comments from Reviews



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Quick Staffing Guide

To be used in times of economic downturn and recession

Section Updated July 17, 2017

Quick Staffing Guide

General recommendations for Quick Staffing: Listed in order of recommended use.

Always Refer to the current Collective Bargaining Agreement (CBA)

1. Cross-Train Current Staff

- a) **CBA/Policy guidelines:** 2017-2019 CBA Article 43 supports career development. New skills expand career path and promotional opportunities for Oregon Employment Department employees. New skills increase employee engagement and job satisfaction.
- b) **Recruitment:** None required. Potential Job Rotation. Article 121.1, Section 2 (b) states that Agencies have the discretion to create job rotation and/or developmental opportunities, including job shadowing, which are designed to meet the interest and/or needs of specific employees. Because they are specific, such opportunities are not appropriate for filling in a competitive manner.
- c) **Access:** All individuals have an Oregon state identification number, computer access, criminal recorded check, identification for building entry, and a designated work area.
- d) **Training:** Opportunities to cross-train and length of training will vary with position and skill-sets.
- e) **Action:** Implement before identified staffing need and/or during hiring freezes.
- f) **Other:** A current employee moved to another work area during a time of quick staffing need will leave a vacancy in their current position. Those positions in areas not affected by external factors such as a recession will have the most flexibility. Example: A support position in UI Tax Support or other area may be able to table that current work to move to a position assisting the UI Contact Center (Potential Job Rotations).

2. Return Unscheduled Seasonal Employees

- a) **CBA/Policy guidelines:** 2017-2019 CBA Article 71.1C and 71, section 9 (may apply).
 - 1) From Article 71.1C - Seasonal Positions (Used primarily by Employment Department)
 - Positions that are to respond to workload peaks are designated as seasonal positions.
 - Seasonal employees will complete trial service after having served 1,040 hours.
 - Persons appointed to these positions must be informed in writing that the position is seasonal.
 - Unscheduling a seasonal employee is not considered a layoff. "Whenever possible, a seasonal employee shall be given ten (10) calendar days' notice of scheduling and unscheduling of work." However, when not possible, the section says this can be done "without advance notice."
 - Seasonal employees will be scheduled or unscheduled for work by seniority in the work unit.
 - Seasonal employees have all the rights and benefits accrued by full-time and/or part-time permanent employees, "except as otherwise modified by this agreement."

- In the event a seasonal employee fails to meet eligibility for continued health insurance because of unscheduling, the employee shall be allowed to use available vacation or compensatory time to maintain eligibility.
 - Information to lending institutions for these employees will reflect duration of employment “rather than status of employment.”
- 2) From Article 71, section 9: Intermittent Appointments.
- Only certain seasonal, part-time or unfunded positions designated in the CBA may be designated as intermittent positions.
 - These employees may be scheduled to work “only when work is available”. They may be scheduled to work “without any penalty pay provision for short notice.”
 - Unscheduling this employee is not considered a layoff. These employees “may be unscheduled without advance notice.” Also, unscheduling will not be used “as a method of unofficially disciplining or discharging” an employee.
 - Intermittent employees will be scheduled or unscheduled for work in seniority order by work unit.
 - Except as modified in this section, “intermittent employees shall have all the rights and privileges of seasonal employees.”
- b) **Recruitment:** Call backs only.
- c) **Access:** All individuals retain an Oregon state identification number, computer access; criminal records check clearance, identification for building entry. They require a designated work area. [Be sure to confirm computer security clearance after passage of more than fourteen (14) calendar days.]
- d) **Training:** Minimal. Training occurs during initial recruitment as a seasonal employee.
- e) **Action:** Contact your Human Resources Analyst prior to scheduling or unscheduling seasonal staff.
- f) **Other:** Availability varies. The longer the employee has not returned to work, the less likely s/he will be the employee’s availability.

3. Recruit New Seasonal Employees

- a) **CBA/Policy guidelines:** 2017-2019 CBA Article 45, 71.C and 71.
- b) **Recruitment:** Required - follow normal procedures. When looking to hire new staff remember to use our WorkSource Oregon resources to help identify potential candidates when appropriate.
- 1) There are six types of recruitments.
- Open competitive,
 - Agency promotional,
 - Statewide promotional,
 - Job rotation,
 - Transfer list, and
 - Reemployment list.

- 2) Different types of recruitments have different recruiting times and advertising.
 - Open competitive – ten (10) calendar days for represented staff, seven (7) calendar days for management service positions,
 - Agency and statewide promotional – seven (7) calendar days,
 - Job rotations, transfer list and reemployment list should be announced for a minimum of five (5) days to allow staff the opportunity to apply.
- c) **Access:** NURF, an Oregon state identification number, computer access, criminal records check clearance, identification for building entry.
- d) **Training:** Varies depending on position type and individual skillset.
- e) **Action:** Determine the number of positions needed and type of recruitment.
- f) **Other:** Contact your Human Resource Analyst prior to scheduling or unscheduling seasonal staff.

4. Limited Duration Employees

- a) **CBA/Policy guidelines:** 2017-2019 CBA Article 51, 70 and LOA.
 - 1) From Article 51—Limited Duration Appointment
 - Section 1. Appointments for Specials Studies or Projects. Persons may be hired for special studies or projects of uncertain or limited duration which are subject to the continuation of a grant, contract, award, or legislative funding for a specific project.
 - (a) Limited duration appointments may be filled by hiring new employees to state service or hiring current employees.
 - (b) Such appointments shall not exceed two (2) years in duration, unless the Parties mutually agree to extend the limited duration appointments beyond two (2) years, and shall expire upon the earlier termination of the special study or project.
 - Section 2. Appointments for Workload Purposes. Persons may be hired as limited duration appointments, for workload purposes, when needed to fill short-term or transitional assignments, including, but not limited to, legislative directive, reorganizations, unanticipated workload needs or when the position reduction is anticipated.
 - (a) Limited duration appointments may be filled by hiring new employees to state service or hiring current employees.
 - (b) Such appointment shall not exceed two (2) years in duration, unless the Parties mutually agree to extend the limited duration appointment beyond two (2) years.
 - (c) These appointments will not be used in a manner that subverts or circumvents the filling of budgeted position pursuant to Article 45 and Article 45.1-45.5.
 - (d) The Agency, in collaboration with DAS, will monitor the utilization of limited duration appointments for workload reasons during the contract term and a summary report will be provided to

DAS, Budget and Management and the Union every six (6) months.

- Section 3. Conditions of Limited Duration Appointments. A person accepting such appointment shall be notified of the conditions of the appointment and acknowledge in writing that they accept the appointment under the conditions outlined in Article 51 of the CBA.
 - (a) That the appointment is of limited duration.
 - (b) That the appointment may cease at any time.
 - (c) That the persons who accept a limited duration appointment who were not formerly classified state employees shall have no layoff rights except as provided in Section 4(b).
 - *Section 4(b) states: "A newly-hired person to state employment for a workload limited duration appointment shall be entitled to layoff rights after seventeen (17) months of continuous employment."*
 - (d) That in all other respects, limited duration appointees have all rights and privileges of other classified employees including but not limited to wages, benefits, and Union representation under this Agreement.
- b) **Recruitment:** Required - follow normal procedures. When looking to hire new staff remember to use our WorkSource Oregon resources to help identify potential candidates when appropriate.
 - 1) **Types of recruitment:**
 - Open competitive,
 - Agency promotional,
 - Statewide promotional,
 - Job rotation,
 - Transfer list, and
 - Reemployment list.
 - 2) Different types of recruitments have different recruiting times and advertising.
 - Open competitive – ten (10) calendar days for representative staff, seven (7) calendar days for management service positions.
 - Agency and statewide promotional – seven (7) calendar days,
 - Job rotations, transfer list and reemployment list should be announced for a minimum of five (5) days to allow staff the opportunity to apply.
- c) **Access:** Varies depending on whether we are hiring new employees to state service or hiring current employees into new positions. Possibility of needing a NURF, an Oregon state identification number, computer access, criminal records check clearance, identification for building entry. The employee may require a designed work area.
- d) **Training:** Varies depending on position type and individual skill-set.
- g) **Action:** Determine the number of positions needed and type of recruitment needed.
- e) **Other:** A limited duration appointment is appropriate as opposed to hiring a temporary employee when it meets the criteria set forth in OAR 105-40-040 Types of Appointments and the applicable collective bargaining agreement. Generally, limited duration

appointments are a study, a project or when position reduction is anticipated. The emergency, nonrecurring and short-term workload criteria which apply to temporary appointments do not pertain to a limited duration appointments. With DAS Budget and Management Division, an agency may establish a limited duration position and fill it with more than one part-time employee if necessary. Always contact your Human Resource Analyst prior to ending a limited duration appointment.

5. Recruit OED Temporary Employees

a) **CBA/Policy guidelines:** 2017-2019 CBA Article 2, Section 5 and ORS 240.309

1) Article 2, section 5.

- Refers to compliance with ORS 249.309
- Enumerates the many articles in the 2017-2019 CBA which apply for temporary employees, such as Article 21 Grievance and Arbitration Procedure, or Article 58T Holidays, etc.
- They receive the same base pay appropriate for the classification for an employee in regular status.

2) ORS 240.309 - There are eleven sections in the ORS. Key information is below.

- Temporary employment shall be used for the purpose of meeting emergency, nonrecurring or short-term workload needs for the state.
- The position may be filled “without open competition...” However, these appointments “shall not be used to defeat the open competition and consideration system.”
- A temporary employee may not be employed in a permanent, seasonal, intermittent, or limited duration position except to replace an employee during an approved leave period.”
- Employment may not exceed six (6) calendar months in a twelve (12) month period. There is an exception when approved by DAS “when there is no other reasonable means to meet the emergency.”
- These employees may not be denied permanent work. Temporary work “shall not be used as any portion of a required trial service.”
- The Department of Administrative Services must report agency use of temporary employees once every six (6) months to “interested parties, including employee organizations.”
- Different departments have specific guidelines. Example: the Department of Justice may use student law clerks for up to twenty-four (24) months. None of these apply to the Employment Department, except for the use of student interns in high school or General Education Development (GED) programs and under the age of 19. These appointments may not exceed forty-eight (48) months.

b) **Recruitment:** No formal posting is required. These may be retired employees or those recruited by word-of-mouth. When looking to hire new staff remember to use our WorkSource Oregon resources to help identify potential candidates when appropriate.

c) **Access:** A retired employee will retain her/his Oregon state employee number. All others would require the full screening of all new employees (see Section 4 - c).

- d) **Training:** Varies depending on position type and individual skillset. Retired employees will need little training. New temporary employees will need full training.
- e) **Action:** Hold until emergency exists and other options do not meet the urgent need (per ORS and contract guidelines - see above)
- f) **Other:** Some direct-hire temporary employees are represented by SEIU. The state's collective bargaining agreement with SEIU sets forth the terms and conditions of employment which apply to these employees. All direct-hire state temporary employees, including those represented by SEIU, are governed by ORS 240.309 and State Human Resource Policy 40.025.01 Temporary Appointments.

6. Hire Non-OED Temporary Employees (e.g. Galt)

- a) **Policy guidelines:** The state hiring process must be followed if an employer-employee relationship between the state and a temporary worker is expected. If no employer-employee relationship will be established, the agency may contract for this service in accordance with the rules for public contracting established by the procurement section of the Administrative and Business Services Section.
- b) **Access:** Temporary agencies complete required background checks.
- c) **Training:** Varies depending on the position and the individual skill set.
- d) **Action:** Managers should work closely with their Human Resource Analyst to determine appropriate options.
- e) **Other:** Other resources include the Chief Human Resource Office Policy Unit and, particularly on the employer-employee relationship issue, the Labor and Employment Section of the Department of Justice.

7. Quick Resource Tables

To be used at the onset of an economic downturn or recession.

Current Budgeted Positions and Locations as of March 2017

Divisions Section Numbers	Current Number of FTE	Vacant Positions	Location(s)	Range of Staffing Additions
<u>Workforce Operations</u> - 84, 85, 102, 103, 111, 150, 170, 180, 190, 210, 211, 212, 250, 253, 270, 274, 280, 281, 287, 310, 320, 410, 420, 510, 610, 614, 710, 720, 810, 811, 820, 910, 911, 920, and 921	405	19	Statewide	34 (some may already be existing LD's included in FTE column)
<u>Unemployment Insurance</u> - 30, 31, 32, 33, and 40 – 45	211	25	Various	0
<u>Unemployment Insurance Contact Center</u> - 200 and 700	190.5	34	Beaverton, Bend	0
<u>Workforce and Economic Research</u> –	48	4	Various	-1

24				
<u>Information Technology Systems</u> - 71, 72, 73, 74, 75, 76 and 77	65	8	Various	1
<u>Financial Services</u> - 25 and 26	27.5	6	Salem	0
<u>Legislative Affairs & Communications</u> - 60	5	0	Salem	0
<u>Office of Human Resources</u> - 23	12	1	Salem	1-2
<u>Office of Administrative Hearings</u> - 50	89.5	8	Various	0
<u>Employment Appeals Board</u> - 15	8	0	Salem	0
<u>Workforce Investments</u> - 86	2	0	Various	0
<u>Oregon Talent Council</u> - 87	1.5	0	Salem	0
<u>Executive</u> - 11	5	0	Salem	0
<u>Modernization Initiative</u> - 14	4	0	Salem	19

Position-Specific Quick Response Options

Position	Location	Time Required to Competency

Location-Specific Quick Response Options

Current Facility(ies)	Expansion Options Available



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Customer Service through Agility

To be used in times of economic downturn and recession

Section Updated July 17, 2017

Customer Service through Agility

1. Overview

A guiding principle of the Oregon Employment Department is the commitment to 'Quality with Agility.' The department commits to replicating success, learning from mistakes, and actively pursuing creative approaches that lead to continuous improvement and innovation. It also commits to being flexible and nimble, responding quickly to changing economic needs. This commitment to quality with agility will be essential to providing better customer services throughout the economic cycle.

2. Agility

An agile business has the ability to rapidly respond to change by adapting services to meet the changing needs of its customers. The Oregon Employment Department divisions serve a variety of customers whose needs change during different stages of the economic cycle.

For example: Workforce Operations will see an increase in the number of unemployed customers it serves during a downturn, while having a decrease in number of job postings to refer those workers to. It will take longer to match unemployed customers with jobs, which provides an opportunity to provide unemployed customers with other services. Other divisions will see the needs of their customers change in different ways.

Each division should strive to be agile in responding to the changing needs of customers during the economic cycle. This will involve anticipating, planning, and adjusting to changing customer needs.

3. Five Things Checklist

Division leaders should familiarize themselves with the *Five Things to Think About* quick checklist for economic downturns. The checklist is designed to include items relevant to each division that will help each division prepare for changes in customer needs during the economic cycle.

4. Division Economic Cycle Plans

Division leaders should consider creating a plan for the economic cycle that is specific to their division. The plan can serve as a roadmap for how to adapt business procedures to provide better customer service when economic conditions change. The plan should be flexible and keep with the guiding principle of 'Quality with Agility,' while remaining consistent with the Oregon Employment Department's mission, other guiding principles and goals and objectives provided in the agency strategic plan.

Division leaders should:

- Identify indicators that can help spot changes in the needs of their customers. These could be data-driven indicators, or based on input from staff that interact directly with customers.

- Consider the findings from the *Great Recession Lessons Learned Report*, and any additional situations specific to the division, including changes in business procedures made since the Great Recession.
- Assemble a group of division subject matter experts that meets regularly to determine if customer needs are being met during the current phase of the economic cycle. The subject matter experts can make recommendations for how to adapt business procedures to meet customer needs, and help implement the changes with the guidance of the recession single point of contact as needed.



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Budget and Funding Constraints and Recommendations

To be used in times of economic downturn and recession

Section Updated July 17, 2017

Budget and Funding Constraints and Recommendations

1. Budgetary Constraints

The identified budgetary constraints include having insufficient cash, limitation or limits on the allowable use of available cash.

- Limitation is the agency's authority to spend cash as granted by the State of Oregon Legislature.
- Having cash does not always mean that it can be spent. (For example: if the agency has more UI Administration funding than it needs to administer the UI program, the funding cannot be used on agency wide initiatives.)

2. Funding Opportunities

Possible funding opportunities are unknown at this point. However, carefully considering funding opportunities and, to the greatest extent possible, using all available funding opportunities to finance activities already planned would be beneficial to the agency.

Ongoing efforts to maximize revenue through the Resource Justification Model (RJM) for the UI division can address some of the funding needs.

- This would require collaboration between UI, ABS and other affected departments. Other funding sources may have such opportunities in the future.

3. Limitation and Mandated Caseload

The Oregon Employment Department does have an existing tool to address anticipated workload issues as the result of an economic downturn. The Department's Mandated Caseload process is used to request positions and limitation as part of the biennial budget process for the workload driven positions in UI.

- There are certain limitations in Oregon State Law on the positions that can be included in Mandated Caseload. However, the Department should look at the possibility of expanding it to other divisions including Workforce Operations.
- For particularly large Mandated Caseload requests (For example: The 2009-2011 Mandated Caseload ended up being over 200 positions), the impact on other divisions and sections such as HR, IT, and Payroll should be considered as the hiring of so many individuals at once will have a direct effect on some sections. While it may not be possible to include sections such as IT in the Mandated Caseload request, it might be possible through the budget process to include these types of positions.
- Outside of Mandated Caseload, the Oregon Employment Department is able to request additional limitation through the Legislative e-Boards.
- Another effort to consider is anticipating potential changes to IT systems and reporting requirements.
- Although Mandated Caseload is typically only used to request additional limitation, it is possible to use it to ask for additional cash from the State.

4. Funding Recommendation

Protecting existing funding sources is essential for the department's ability to manage the effects of a recession. If there are allowable costs, all of the department's funding sources may be able to be used in a recession. Therefore, as part of preparation for a recession, protecting the department's funding sources from sweeps is essential. Other funds sources (such as the Supplemental Employment Department Administrative Fund (SEDAF), Penalties and Interest (P&I), and Fraud Control) could be used during a recession if there are issues acquiring timely funding from the federal government.



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Incorporating Business Process Changes into Day-to-Day Workflow

To be used in times of economic downturn and recession

Section Updated July 17, 2017

Incorporating Business Process Changes into Day-to-Day Workflow

1. Commitment to Communication

A clear commitment to ongoing valuable communication is one of the most important factors in being able to successfully incorporate recessionary changes into the day-to-day workflow. We recommend following the guidelines within the *Economic Cycle Communications Plan* while keeping the following items in mind:

- System/process critical changes and changes with high impact should be announced to staff prior to their implementation. This communication should be high level and not overly technical but still include enough information for staff to understand what the change is and how it will affect not only themselves but our customers.
- Communication can come in many different formats including in-person meetings, EDweb articles, and emails. During the Great Recession email was heavily relied on as the main source of information which resulted in information overload for many staff. Emails continue to be a valuable form of communication, but should not be the sole-source of information regarding changes.
- There should be many layers of communication. This includes not only top-down but cross-sectional communication. Workgroups or committees should be leveraged to ensure that all sections know what the other sections and partners are doing to adapt to the increased workflow and to help identify possible impacts to their own section. The Economic Task Force should be kept in the loop regarding major changes.
- It is likely that extension programs would be revived in some capacity during the next recession. Once the US Department of Labor announces the availability of extensions, it is imperative that frontline staff are informed and kept in the loop regarding implementation so that they can be prepared and are able to adequately field customer questions.
 - IT can theoretically begin a build as soon as they know the specifics of the extension. IT should be immediately notified of incoming extension programs so that they can start working even before the effective date of the change.
 - If an extension follows the current law exactly, IT should be able to implement the extension quickly.
 - If an extension follows a similar form of extension previously implemented, IT has a higher likelihood of implementing the extension in a timely manner than for implementing a new or dissimilar program.
- Communication and partnership with the Project Management Office and UI Operations and Program Support will help ensure development and implementation of any change is carried out smoothly and prioritization of projects is aligned with business needs.

2. Changes in the IT Environment

When developing new processes or making changes to existing processes to better incorporate the workflow that results from an economic downturn or recession, new tools should be leveraged. In addition, consideration should be given to the impact of the new

tools both in how workflow will increase to these tools and that the number of users of these tools may also increase, possibly impacting functionality.

Many technology changes have occurred since the last recession some of which include the following:

- Business Intelligence Tool – Use of this tool could result in better analytical data to help determine workload flows.
- SIDES – Use of this tool will increase with the added volume of users. This tool is used nationally and a large scale recession may result in required or suggested changes. (Funding opportunities might also be available for update and/or expansion.)
- Changes to the Work Search requirement for all UI claimants and the changes made to the Online Claims System may need to be reviewed.

IT has few staff members currently working within the agency who were programming during the Great Recession. The following items should be noted:

- Changes, including the implementation of new extension programs, will likely take longer than they did in the past due to the lack of comprehensive system and connection knowledge.
- A more rigorous testing process has been put into place. This process has resulted in fewer issues arising out of system changes, however, testing requires more time.
- Changes had been implemented since the Great Recession to speed up batch processing. These changes will allow the increased volume of records to have less impact on the system than during the previous recession.

3. Commitment to Training

Having a robust training plan is one of the keys to being able to incorporate recessionary changes into the day-to-day workflow successfully. We recommend a strong commitment to ongoing training be pursued and training plans be developed by each program area and implemented now especially for system critical items.

- Cross-functional support training recommendation:
 - UI Claims (UI initial point of contact) should work with UI Adjudication to cross train staff to minimize support requests from other Central Office partners.
 - When workflow is unexpectedly high Central Office (Benefits, Tax, Special Programs Center, UI Operations and Program Support, Benefit Payment Control and other units) are already set up to assist the UI Contact Center to answer phone calls or process non-phone work.
 - This work should continue and be expanded where appropriate.
 - WorkSource Oregon Center groups should cross-train with UI groups and vice versa prior to the next recession for familiarity with systems and procedures.
 - Implementation now will minimize the need for last minutes updates and additional communications at the onset of the next recession.

- The WO/UI Connectivity work group could help coordinate day-to-day change communication and trainings with assistance from the program areas.



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Recommendations to Return to Baseline Staffing and Processes

To be used after the conclusion of an economic downturn or recession

Section Updated July 17, 2017

Recommendations to Return to Baseline Staffing and Processes

1. Background

The department expects that it will need to shift existing resources as well as add new resources to address the increased workload during an economic downturn. After the downturn ends and the economy levels out, the department should be able to effectively shift its focus from addressing the increased demands of higher workloads to regular staffing and processes more suitable to a baseline section of the economic cycle. This document offers general recommendations for how the department can return to baseline staffing and processes after the state is heading out of the lows of an economic downturn.

2. General Ongoing Baseline Staffing

Department wide – Managers should regularly monitor and review staffing levels with respect to current workloads. Managers should regularly monitor and review workloads for changes, spikes, dips, and any trends. They should share any notable trends with the Economic Task Force.

The Economic Task Force will meet on a quarterly, or as needed basis, to share perspectives and discuss Oregon's economic cycle, the economic indicators, and any trends, spikes, or dips in demands for our services. The representatives from each area within the Economic Task Force will share this information with their program areas to ensure that staffing levels are appropriate to meet the demand.

3. Recommendations for Return to Baseline Staffing and Processes

Division leaders should familiarize themselves with the *Quick Staffing Guide* for more in-depth information about how to quickly staff up to meet the demands of the increased workload. When the economy returns to baseline levels:

- Cross-Train Current Staff –
 - Staff who are cross-trained and/or trained in multiple program areas may be quickly allocated to different areas when needed. When the economic downturn has ended, the staff can easily be reallocated to their original program areas and job duties.
- Return Unscheduled Seasonal Employees –
 - Employees in these types of positions may be scheduled as needed when work is available, commonly to respond to regular workload peaks; consequently, individuals in these positions will be unscheduled when the demand no longer exists. During times of economic downturn seasonal employees may be scheduled for longer durations due to the increased demand.
- Limited Duration Employees –
 - Employees are generally hired into limited duration positions to address an immediate workload need. When the workload demand has ended, the

position(s) may end. Managers should be aware of the conditions of the limited duration appointments and when those positions should be reviewed to determine when the appointment(s) should end.

- Temporary Employees –
 - Job rotational and developmental opportunities present an avenue for employees to gain new skills and experiences. Specific opportunities might end when the economy is stable; other opportunities might be extended to allow employees to learn the “regular” job or to help with any clean-up efforts that might be needed when turning on stopped processes.
- Non-OED Temporary Employees –
 - Temporary employees are used to meet emergency, nonrecurring or short-term workload demand as such they will not be utilized when the workload demand does not exist.

4. Recommendation for Return to Baseline Processes

Division leaders should utilize the *Process / Project Stop and Tracking* forms within the *Economic Cycle Plan* to keep a detailed record of the processes and projects that are stopped so that the department can meet the demands of the increased workload. These forms allow managers to detail the reason for the stop, what areas are affected by the stop, how the stop was accomplished, when the stop occurred, and how often the stop will be reviewed for restart. The forms will allow the process/project to be cataloged and not forgotten so they can be easily evaluated for restart once the economy returns to baseline levels.

Appendix



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Economic Cycle Plan Scorecard

To be used after the conclusion of an economic downturn or recession

Section Updated July 17, 2017

Economic Cycle Plan Scorecard

Economic Cycle Plan statements are rated "N/A", "0", "1", or "2" using the following definitions	
Explanation	SCORE
Not applicable to the current economic downturn	N/A
Statement item was not completed or addressed	0
Statement is partially completed or correct - more information needed	1
Statement has been fully completed with no pending questions or concerns	2

Section 1 - Funding		SCORE
F1	Funding needs were determined quickly.	
F2	Funding availability was obtained in a timely manner.	
F3	Supplemental Budget Requests (SBR) and Grant opportunities were investigated.	
F4	Unemployment Insurance (UI), Workforce Operations (WO), the Office of Workforce Investments (OWI), the Office of Administrative Hearings (OAH), the Employment Appeals Board (EAB), Workforce and Economic Research, and Administrative Business Support (ABS) met to discuss funding options.	
F5	The department communicated with DAS CFO and Legislative Fiscal Office regarding funding and limitation.	

Section 2 - Communication		SCORE
C1	The Economic Task Force reviewed and followed the <i>Economic Cycle Communications Plan</i> .	
C2	<i>Economic Cycle Communications Plan</i> updates and revisions were considered.	
C3	Additional lines of communication (e.g. phone lines, email, social media) were determined and implemented.	
C4	UI/WO reviewed extending hours of operation.	
C5	Extended hours were communicated to the general public.	

C6	Flexible work shifts were considered in an attempt to lessen overtime and compensatory time accruals.	
C7	Coordination with IT was performed to extend hours of HelpDesk coverage.	
C8	UI/WO met with Facilities to check on financial impact and contractual obligations affected by extended hours.	
C9	The department communicated with the union regarding staff, coverage, and workload needs.	
C10	The department communicated with the State Data Center regarding anticipated increases in workload.	
C11	The department communicated with the Print Plant regarding anticipated increases in workload.	

Section 3 - Processes		SCORE
P1	Economic indicators correctly identified the economic downturn.	
P2	Workforce and Economic Research Division and outside agency reports were taken into consideration.	
P3	Downturn in the economy was recognized differently in different regions.	
P4	The department worked with Local Workforce Development Board to discuss shifts in staffing.	
P5	UI and WO discussed plans for influx of UI claimants in Oregon WorkSource Centers.	
P6	UI, IT and ABS met to discuss how to implement and track extensions.	
P7	Guidance was requested from the US Department of Labor re: extensions.	
P8	Active agency projects were prioritized based on the impact of the economic downturn.	
P9	A list of processes and projects set aside due to the economic downturn was created.	
P10	The Economic Task Force met with appropriate frequency given the issues related to the economic downturn.	
P11	The Recession Single Point of Contact initiated the implementation of the <i>Economic Cycle Plan</i> strategies.	
P12	Workload for the Recession Single Point of Contact was shifted so proper concentration could be placed on <i>Economic Cycle Plan</i> strategies and initiatives.	
P13	Each section created a plan for their backlog of work.	

Section 4 – Technology		SCORE
T1	Phone system routing options were investigated and implemented.	
T2	The department determined if there was a need for additional T1 lines and VOIP circuits.	
T3	Additional lines and circuits were installed timely.	
T4	Claimant and other jobseeker self-service options were considered.	
T5	Analysis was done to determine if department technology was ready for extensions.	
T6	UI, IT, and ABS met to determine if the Online Claim System could handle increased traffic.	
T7	An inventory of department equipment was current and up to date at the time of the economic downturn.	
T8	Equipment and license needs were met to support increased staffing.	
T9	The Modernization Initiative was taken into consideration when responding to the economic downturn.	

Section 5 – Staffing		SCORE
S1	Job duties and classifications were investigated to ensure staffing needs were correct.	
S2	Staff were trained to handle more complex and/or increased workloads.	
S3	Backup system for a sudden influx of work was identified.	
S4	Existing part-time and seasonal staff were leveraged to positions to better fill needs.	
S5	Job rotations, work out of class opportunities and temporary job duty changes were leveraged to better fill needs.	
S6	Existing staff were cross-trained in advance of the economic downturn.	
S7	Processes and procedures of job duties were documented and easily accessible.	
S8	Staff location needs and subsequent technology needs were investigated and considered.	

S9	New staff were hired in the needed positions timely.	
S10	New staff were trained for the work needed in a timely fashion.	
S11	Determination of needs (including a Letter of Agreement) were discussed with HR to allow quicker hiring practices.	
S12	Sections worked together to maximize recruiting for similar classification levels in order to fill immediate needs.	
S13	Other agencies were contacted re: staff reductions, retirees, or other employees that may have expertise to help fill quick needs for the department.	
S14	A new hire equipment checklist was created and followed.	
S15	Discussion was had with Facilities to determine availability of location for new staff.	
S16	Discussion was had with IT to determine availability of computers and phones for new staff.	
S17	New staff was trained quickly and efficiently.	
S18	Sections with new hire training needs communicated need for trainers with HR.	

Economic Cycle Plan statements are rated "N/A", "0", "1", or "2" using the following definitions	
Explanation	SCORE
Not applicable to the current economic downturn	N/A
Statement item was not completed or addressed	0
Statement is partially completed or correct - more information needed	1
Statement has been fully completed with no pending questions or concerns	2



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Economic Indicators

Section Updated July 17, 2017

Economic Indicators

Indicators Tracked on the Economic Planning Business Intelligence Dashboard	
Indicator Number	Indicator Description
1	Gross Wages Reported
2	Wages Reported by Temporary Agencies
3	UI Benefit Initial Claims Filed (Valid / Non-Valid)
4	UI Benefit Additional Claims Filed
5	Type of Separation Percentages (Discharge, Voluntary Quit, Layoff)
6	Total UI Benefit Weeks Claimed
16	UI Tax Blocked Claims

Indicators Tracked by the Workforce and Economic Research Division	
Indicator Number	Indicator Description
7	Unemployment Rate
8	Reason Behind Unemployment
9	Number of Unemployed
10	Private Sector Job Growth
11	Job Growth by Industry
12	Average Weekly Hours Worked
13	Online Advertisements for Job Openings
14	Local Business Closures / New Businesses
15	University of Oregon Economic Indicators

Indicators Tracked by Other Sources – Future Indicators

<i>Indicator Number</i>	<i>Indicator Description</i>	<i>Notes</i>
17	Trade Act Activity (Trade Adjustment Assistance - TAA and Trade Readjustment Allowance - TRA)	<p>This data is not currently in the Business Intelligence Tool (BI) but it is in the Data Warehouse. When the current project, BI for Workforce Operations, has concluded this data will be available to add to the Economic Planning BI Dashboard.</p> <p>The Central Trade Act Unit currently tracks this data through the US Department of Labor website, an in-house Excel file, and the Trade Adjustment Allowance Management Information System (TAAMIS).</p>
18	UI Benefit First & Final Pay	<p>This data is not currently in the Business Intelligence Tool (BI) but it is in the Data Warehouse. When the current project, BI for Workforce Operations, has concluded a new project would need to be undertaken to add this data into BI before it could be added to the Economic Planning BI Dashboard.</p> <p>In the meantime, UI Operations and Program Support tracks this data for the US Department of Labor on the 5159 monthly report. A copy of this report could be sent to the Economic Task Force for review.</p>
19	Incoming Call Volume to the UI Contact Center (Calls Offered / Calls Answered)	<p>This data is not currently in the Business Intelligence Tool (BI) or the Data Warehouse. This information is captured within the Cisco System. Reports are being built to accurately pull this data and once they are completed a monthly, or as needed, report could be created and sent to the Economic Task Force for review.</p>
20	Number of Jobseekers in the Workforce System	<p>This data is not currently in the Business Intelligence Tool (BI) but it is in the Data Warehouse. When the current project, BI for Workforce Operations, has concluded this data will be available to add to the Economic Planning BI Dashboard.</p>

<p>21</p>	<p>Rapid Response Services</p>	<p>This data is not currently in the Business Intelligence Tool (BI) but it is in the Data Warehouse. When the current project, BI for Workforce Operations, has concluded this data will be available to add to the Economic Planning BI Dashboard.</p> <p>The Central Trade Act Unit currently tracks this data through the US Department of Labor website, an in-house Excel file, and the Trade Adjustment Allowance Management Information System (TAAMIS).</p>
<p>22</p>	<p>WorkSource Oregon Office Traffic</p>	<p>This data is not currently in the Business Intelligence Tool (BI) but it is in the Data Warehouse. When the current project, BI for Workforce Operations, has concluded this data will be available to add to the Economic Planning BI Dashboard.</p>



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**DRAFT - The Oregon Employment Department's
Economic Task Force Charter**

Section Updated July 17, 2017

The Oregon Employment Department's Economic Task Force Charter (DRAFT)

Since the 1940s, a new national recession has begun every six years on average. Some national recessions were especially damaging to Oregon's economy, while others were relatively mild. Historically, the Oregon Employment Department has used a reactionary tactic to combat the effects of any given recession. As the ever-increasing number of unemployed are added into the department's workflow an inevitable backlog occurs. This backlog triggers the hiring of more staff. While these staff are trained, the backlog continues to increase and service levels begin to decline.

During the Great Recession of 2007-2009 which resulted in the loss of 147,000 Oregon jobs by February 2010 and unemployment rates that reached 11.9 percent in mid-2009, the department could have reacted more quickly to the sudden and severe effects. The Unemployment Insurance (UI) Division, for example, did not hit its high staffing mark until approximately May 2010, well into the recession and after the incoming workload had begun to decline. Although staff did their best to quickly and accurately work through the deluge of incoming work, wait times for filing claims were drastically higher with some customers waiting as long as three and a half hours to speak with UI staff.

This slow reaction to the effects of the Great Recession was also seen in the Workforce Operations (WO) Division of the department. The lack of adjustment to the department's strategies left staff at WorkSource Oregon Centers trying to find employment for a large volume of jobseekers when there were 12.9 unemployed individuals for every available job in the spring of 2009 compared to the spring of 2007 when there were 2.2 unemployed individuals for every available job.

Although the Oregon Employment Department cannot predict when the next recession will take place, or how severe it will be, we do know that there will be more recessions in our future and that there is a better approach to incorporating the changes resulting from the economic cycle into our daily workflow than our recessionary tactics of the past. We also know that how the public is best served by the department is not necessarily the same during periods of economic downturn as it is during times of economic stability or growth and we need a more effective, logical, and proactive way to adjust department operations to provide a better and more valued service to the public.

Task Force Overview

Task Force Charter Purpose

The purpose of the task force charter is to define the role of the Oregon Employment Department's Economic Task Force (hereafter known as 'the task force'). This document defines goals, scope, schedule, approval process, member roles and responsibilities. Changes to the charter will be reflected in updated versions of this document, approved by the task force as outlined in the "documentation and document approval process" section.

The Recession Single Point of Contact

The RSPOC (rə- spök) is a non-voting member of the Economic Task Force. The RSPOC will serve as the "project manager" for activities associated with an economic downturn. During stable periods in the economic cycle the RSPOC will attend task force meetings, contribute to the work that is being done by the task force, and will partner with the task force chair on related communication. Task force activities will be open and transparent; all members can receive and share information both across sections and within their areas of representation.

When appropriate, determined by the Economic Task Force and/or the Executive Team, the RSPOC will become the department's primary liaison for all activities related to the recession. S/he will answer inquiries, provide communication in partnership with the Legislative Affairs and Communications section, help remove information and workflow bottlenecks or barriers as appropriate, and manage recession related activities as determined by program management and/or the Executive Team. During periods of recession, task force activities will remain open and transparent; however it's the RSPOC's role to ensure that messaging is consistent and up-to-date to reduce confusion, and that all areas of the department are working together towards the same shared focus and not unintentionally duplicating work efforts or initiatives.

Goals for the Task Force

The goals of the task force are as follows:

1. Involvement and coordination between all sections of the Oregon Employment Department including UI (Tax and Benefits including the UI Contact Center), WO, OAH, EAB, Research, IT, Legislative Affairs and Communications, HR, ABS and workforce partner OWI.
 - The task force will benefit from the expertise and insightful contribution of varied viewpoints and institutional knowledge.
2. Have an emphasis placed not only on cohesive teamwork but also individual ownership and responsibility of the results of task force activities and recommendations.
 - Individual members may perform tasks or gather data within their area of representation. However, these activities will be directed by the chair and/or the recession single point of contact (RSPOC) and then reported back to the task force for analysis for action is taken.
3. Update the *Economic Cycle Plan* as applicable to keep the document relevant and functional over time.
 - As the department makes changes to process, procedures, policies and/or overall structure, the task force will modify the plan to reflect the relevant changes. (For example: when a new Collective Bargaining Agreement is finalized all sections will be reviewed to determine if/where changes need to be made.)

4. Provide communication as directed in the *Economic Cycle Communications Plan*.
 - Provide regular or as needed updates to program areas, agency management and the executive team.
 - Individual members will provide updates to the task force and RSPOC regarding activities within their area of representation that might affect *Economic Cycle Plan* strategies / initiatives or other program areas.
5. Assist in the successful implementation of *Economic Cycle Plan* initiatives prior to, at the onset of, and during the next economic downturn or recession as appropriate.
6. Evaluation of the effectiveness and update of the *Economic Cycle Plan* at the conclusion of the next economic downturn or recession.

Task Force Scope

The following items are in scope for the task force:

- Ongoing monitoring of the identified economic cycle indicators.
- Ongoing upkeep of the *Economic Cycle Plan*.
 - Needed modifications to the *Economic Cycle Plan* will be approved as outlined in the documentation and document approval process section of the *Oregon Employment Department's Economic Task Force Charter*.
- Implementation of *Economic Cycle Plan* initiatives.
 - The *Economic Cycle Plan* would be executed as needed by program management in partnership with the task force and the RSPOC.
 - Communication of task force activities and agency activities as indicated in the *Economic Cycle Communications Plan*.
 - Informational outreach to other agencies or states as needed as per the *Economic Cycle Communications Plan*.
- Recommendations and actions from the task force will keep in mind federal statutes and regulations, Oregon Revised Statutes, Oregon Administrative Rules, the applicable collective bargaining agreements, the Department of Administrative Services Labor Relations Unit, the State of Oregon Chief Human Resources Office policies, the 2014-2019 Oregon Employment Department Strategic Plan, and the 2012-2022 Oregon Workforce Investment Board Strategic Plan. The task force may determine that modifications to these constraints needs to be explored through actions such as:
 - Drafting legislative concepts that pertain to the goals of the task force as needed.
 - Financial analysis and recommendations for potential funding streams and strategies to cover the implementation costs of the *Economic Cycle Plan* prior to receiving anticipated federal funding.
 - Working with the Department of Administrative Service Labor Relations Unit on any Letters of Agreement as needed and approved by agency management.
- Exploration of potential supplemental funding sources to support ongoing task force operations including leveraging state and federal funding sources if they become available.

The following items are out of scope and specifically excluded from the authority of the task force, although some of these activities may be undertaken by the agency outside of, and in addition to, the work of the task force:

- Development of a set of Economic Cycle Indicators for entities other than the Oregon Employment Department.
- Recruitment and replacement of existing members of the task force. This work will be conducted by the program areas and/or the Executive Team.

Schedule and Structure

The task force will meet **at least** on a quarterly basis and be comprised of XX voting members and the RSPOC who is a non-voting member. The chair will, in the event of conflicting opinions, have the authority to make a final determination. During team meetings, a quorum is XX voting members including the chair.

In the event of a meeting where the task force lacks a quorum, the group will hear any updates that members may have for the task force but no new business will be conducted.

Funding

Funding for the task force will be derived from the existing budgets of the supporting sections. Participants will charge their time for meetings and other task force activities to their regular section maintenance charge code. Supplemental funding sources could be identified in the future to support ongoing task force operations including leveraging state and federal funding sources should they become available.

Strategic Statements

Strategic Alignment

The existence of the task force supports the Oregon Employment Department's 2014-2019 strategic plan's goals and guiding principles by:

- Having a commitment to open dialogue and transparency the *Economic Cycle Plan*, meeting minutes and any other documents that are created or updated by the task force will be openly communicated and shared. (*Guiding Principle: Openness, trust and integrity*)
- The *Economic Cycle Plan* has been developed to be flexible and nimble allowing the Oregon Employment Department to respond quickly to any upcoming downturn in Oregon's economy. (*Guiding Principle: Quality with agility*)
- Assembling a task force with representatives from multiple areas of the Oregon Employment Department the task force will benefit from the expertise and insightful contribution of varied viewpoints and institutional knowledge. One of the goals of the task force is to have an emphasis placed not only on cohesive teamwork but also individual ownership and responsibility of the results. (*Guiding Principle: Teamwork with responsibility*)
- Using the *Economic Cycle Plan* as a reference, the UI program will be able to more logically transition from regular workload levels to increased economic downturn workload levels and back again thus continuing to provide an effective UI system for workers, businesses and communities. (*Five Year Goal 1: Provide an effective unemployment insurance system for workers, businesses and communities*)

- The labor market and other economic data that will be used and analyzed to help forecast the next economic downturn and allow the task force to make informed decisions about the recommendations that will be made to stakeholders such as the Executive Team. *(Five Year Goal 4: Collect labor market data and provide analysis that informs the decisions of the workforce system in general, as well as the decisions of the Oregon Employment Department, local businesses, educators, jobseekers and families)*

Strategic Impacts

- Staff from all sections of the Oregon Employment Department including:
 - Unemployment Insurance: Benefits (including the Contact Center), Operations and Program Support, and Tax sections,
 - Workforce Operations,
 - Workforce and Economic Research,
 - Information Technology Systems,
 - Office of Human Resources,
 - Administrative Business Services,
 - Legislative Affairs and Communications,
 - The Office of Administrative Hearings, and
 - The Employment Appeals Board.
- Oregon Employment Department customers including:
 - Oregon businesses, and
 - Jobseekers including UI claimants.
- The Office of the Governor including:
 - Oregon Workforce Investment Board (OWIB), and
 - Oregon's Local Workforce Development Boards (LWDBs).
- Other Workforce Partners including:
 - Office of Workforce Investments (OWI),
 - Higher Education Coordinating Commission (HECC),
 - Department of Human Services (DHS),
 - Department of Revenue (DOR),
 - Department of Consumer and Business Service (DCBS), and
 - Bureau of Labor and Industries (BOLI).

Task Force Member Roles and Responsibilities

Task Force Member Roles

<i>Economic Task Force</i>			
Name	Title	Area of Representation	Role
TBD			Chair
TBD		Workforce and Economic Research	Member
TBD		Information Technology Systems	Member
TBD		Workforce Operations	Member
TBD		Office of Human Resources	Member
TBD		Unemployment Insurance Tax	Member
TBD		ABS - Accounting	Member
TBD		Office of Administrative Hearings	Member
TBD		ABS - Budget	Member
TBD		Unemployment Insurance Benefits (Contact Center)	Member
TBD		Office of Workforce Investments	Member
TBD		Unemployment Insurance Operations and Program Support	Member
TBD		Recession Single Point of Contact	RSPOC

Alternates and Voting

In the event a task force member, including the chair, is unable to attend a meeting, they may select an alternate to act in their stead with full voting authority. This alternate is to be named to the group in an email to the chair or designated member ahead of the meeting. If an alternate is not named ahead of an absence, the task force will only conduct new business if a quorum is met. If an alternate is not named ahead of an absence and the team lacks a quorum, the group will hear any project updates but no new business will be conducted.

In the event that no quorum is reached for two successive meetings, the task force will meet monthly thereafter until a quorum is reached and all necessary decisions unaddressed during the previous meetings are resolved.

Documentation and Document Approval Process

The following documents will be kept up-to-date by the task force:

1. Economic Task Force Charter,
2. Recession Preparation - A Plan for Oregon's Economic Cycle (i.e. the Economic Cycle Plan),
 - a. Agency Mission and Guiding Principles Section
 - b. Five Things to Think About
 - c. Economic Cycle Communications Plan
 - d. Process / Project Stop and Tracking Forms
 - e. Quick Staffing Guide
 - f. Customer Service through Agility
 - g. Budget and Funding Constraints and Recommendations
 - h. Incorporating Business Process Changes into Day-to Day Workflow
 - i. Recommendations to Return to Baseline Staffing and Processes
3. Economic Cycle Plan Scorecard,
4. Economic Indicators List,
5. Recession Preparation page on EDweb,
 - a. Economic Cycle Plan
 - b. Great Recession Lesson's Learned Report
 - c. Task Force Members List
 - d. Meeting Minutes
6. Economic Indicators Business Intelligence Tool Dashboard, and
7. Any formal communication to internal and/or external customers as indicated in the Economic Cycle Communications Plan.

Note: This list is non-exclusive and may expand or reduce based on decisions made by the task force or higher authority.

The team will be provided with documents to be reviewed and approved no later than one week prior to task force meetings. Any input or feedback that the members wish to provide must be sent to the chair or designated member by close of business the day before the meeting. Feedback from members will be provided electronically using "track changes" tools.

Requests for additional time for review will be sent to the chair or designated member for approval; the requesting member may receive an additional week for review when possible, extensions should only be requested when they are absolutely needed. Changes to documents made by members requesting additional time will be forwarded to the other task force members who will be given up to an additional week for review, schedule permitting. Members not providing feedback are assumed to agree with all contents of the document.

- Significant Changes:
 - Significant changes to documents representing substantive changes to requirements, scope, timeline, and budget will be sent by the chair or designated member to the task force for review and possible discussion in the meeting environment.

- Non-Substantive Changes:
 - Non-substantive changes to documents including minor edits or corrections for spelling or grammar will be made based on the chair or designated member's discretion.

- Change Conflicts:
 - If two or more task force members provide feedback to a document and the changes are significantly in conflict, the chair will be the deciding vote for the correct wording.

- Approvals:
 - Voting members will approve finalized documents in their entirety during task force meetings. A simple majority results in the document being approved for signature by the appropriate parties.

- E-Quorum:
 - Documents may be sent to the task force for review and approval electronically. If XX of the XX voting members approve the document via e-mail, then a quorum is considered to have been met electronically, and the document will be considered accepted. If fewer than XX members approve the document, then document review will occur at the next scheduled meeting as described above. Any member feedback or requested document changes would not be considered as a vote to approve the documents electronically.

