MEETING MINUTES

OTDA PEF Labor Management Meeting

Date: September 24, 2026

Location: OTDA, 40 North Pearl Street, 3rd Floor, Albany, NY 12243

Time: 9:30 a.m. – 12:00 p.m.

Introductions:

Agenda Items:

1. Agenda Item – Confidentiality of files at DDD Processing Centers

☐ New Business ☒ Old Business

Description: On January 14, 2026, this specific confidentiality concern was elevated to OTDA Statewide per Division of Disability Determinations (DDD) Management. We were concerned about members' confidentiality being breeched by certain processing centers storing additional documentation in file cabinets that are not Personally Identifiable Information (PII) compliant.

In March 2026, DDD Management completed an internal review to investigate and subsequentially reported out the following month that there were no issues found. During that time, we asked additional questions that resulted in an agreement to conduct a full audit.

It was reported at DDD Labor Management on July 26, 2026, that the fieldwork was completed for the audit. At that time, Management was unable to share the final report with PEF. As of today, Labor has not received any results and would like to again request the audit findings.

Response: DDD conducted an internal review and directed that the files be destroyed. As of September 24, 2026, DDD concluded that all personnel files were destroyed. Going forward, the only document being held is the most recent performance/probation evaluation, all other files will be destroyed.

Action Item: Management will ensure that the process is being followed annually, at Labor's request.

FINAL

2. Agenda Item – Difficulty of the Reasonable Accommodation (RA) Process

☐ New Business ☒ Old Business

Description: The RA process has become more streamlined with the addition of the Frequently Asked Questions (FAQ) section. Changes in staff and processing times have changed the Reasonable Accommodation process. Specifically, members have expressed frustration mostly with 2 areas; the current backlog/wait time for a decision, and with the portion of the process of "interaction with the Division". Members are not given timely updates about this process and are following up many weeks after the response to only be informed that the request is still pending with the Division, mostly for 100% remote requests, which are often seen as the most urgent of requests due to a person's disabilities within office work. No specific feedback for the reason for the delay is provided.

- How can Labor and Management work to streamline this part of the process?
- How long would someone expect this process to take?
- Does the Division have to respond to a request within a specific period?
- Is there an opportunity to involve the person requesting an accommodation within the Division discussion process?
- Is there an opportunity to request a reduction to the in-office hour requirement while an accommodation is being negotiated?
- Are all State required notices and requirements posted at the RA page or FAQ section?

Response:

- Management currently processes RA requests based on date submitted and is looking to streamline short term requests and a new process to turn them around more quickly, outside the RA process. Staffing has increased and new staff are currently being trained.
- As already mentioned in the FAQ document, the processing time varies on a case-by-case basis.
- The Designee for Reasonable Accommodations (DRA) asks the Division to respond within 5 business days; however the Divisional conversation may have multiple back and forth conversations.
- No, it is the responsibility of the DRA to consult with the requestor's supervisor to determine if the proposed accommodation is feasible and will allow the requestor to fully perform the essential functions of the position.
- Management will review this request.
- Management said that all State required notices and requirements are located on the RA page or FAQ section.

Action Item:

FINAL

3. Agenda Item – Bullying in the Workplace

☒ New Business ☐ Old Business

Description: The Workplace Violence Prevention Program does not currently include bullying as an action considered workplace violence. OTDA defines workplace violence as "…any intentional physical and/or aggressive act that causes another individual to reasonably perceive and/or fear legitimate harm to his/her health and/or safety. Labor feels that actions that can be described as bullying should be considered part of workplace violence. At the Agency Health and Safety meeting, Management stated that they were unwilling to make changes to the Workplace Violence program through the health and safety process and would need to be addressed through the Labor Management process.

Understanding how/where bullying occurs in the workplace is imperative to prevent it from occurring in the future. Reporting by employees is an essential tool for both labor and management to become aware of unacceptable behavior in the workplace. Reports by employees may uncover patterns of unacceptable behavior so such behaviors can be addressed timely. It would also help employees to feel safer and more confident that their concerns are being heard and recorded.

Labor is asking that bullying be explicitly stated and defined as a form of workplace violence within the Workplace Violence Policy and Prevention Program.

Labor is asking for a bullying checkbox to be added to the OTDA-4503 (Incident Report Form) to alert Management that an employee is alleging bullying is occurring and to assist in recognizing previous reports of such behaviors

Response: Management does not agree that bullying is workplace violence, but it is a serious matter that must be addressed.

Action Item: Management will send out an all-staff bulletin discussing appropriate and respectful workplace behavior. Employees are encouraged to address such matters with their supervisory chain and, if necessary, Human Resources.

FINAL

4. Agenda Item - Increasing Promotional Opportunities for OTDA Staff

☒ New Business ☐ Old Business

Description: When current and prospective staff determine if a role is right for them, they may review how the role fits with their career goals or the promotional opportunities available to staff in the role. Some Civil Service titles offer the ability to take promotional exams for several other titles, with positions available at many state agencies.

Several positions at OTDA, including but not limited to, Temporary Assistance Specialist, Housing Specialist, Management Specialist, Child Support Specialist, and Homeless Services Representative are specific to the agency. Staff in these titles, in most cases, are limited to promotional opportunities from the test given in their current title track. The promotional lists generated from these exams also provide a limited list of candidates; this is a result of the limited opportunity to take the exam, coming from the eligibility requirements of staff currently in the position.

The question sets for these exams are similar or in some cases the same. Additionally, staff are currently permitted to apply, and interview for these positions in a lateral transfer capacity being that the required skills and experience required for these roles often overlap.

Labor is requesting that Management allow staff in the listed titles to take OTDA promotional exams outside of title, creating a set of “B” qualifications. Creating a “B” list for these titles will allow Management to widen the pool of candidates for a position with Management’s discretion, while offering more opportunities for staff in OTDA specific positions.

Response:

Management supports the idea of increasing promotional opportunities for staff and will discuss this with Civil Service.

Action Item: Labor will follow up at next Labor Management meeting.

FINAL

Informational Items/Accomplishments

PEF is sharing highlights with Management about the new Collective Bargaining Agreement. Please see attached.

Public Employee Safety and Health (PESH) training was conducted in July, OTDA's Facilities and Operations staff as well as Labor Relations staff who sit on the health and safety committee participated. The training resulted in certification for OSHA 10-hour general industry safety and health training.

Since the DDD Statewide Labor Management meeting on October 7, 2025, there have been several discussions about Joint Labor Management training. Currently, DDD Labor Management has created a team to complete the training application with Management's shared interest and support to get this training live. PEF will continue to address this through proper channels, in a timely manner as needed.

The following individuals were present at the OTDA PEF Labor Management Meeting held on September 24, 2026.

PEF:		**Management:**	
Carl Anderson	Mathew Nirelli	Donnovan Beckford	Eric Schwenzfeier
Leslie Apacible	Jill Poeller	Sara DeWitt	Samuel Spitzberg
Pamela August	Justin Rising	Barbara C. Guinn	Jared Tallman
Germaine Greco	Joshua Routhier	Christian Mullin	Felicia Valle Job
Sarah Ketcham	Scott Staub	Matthew Rider	Bryce Winter
Omotayo Kuku	Ryan Stoliker	James P. Ryan	
Peter Maurer	Nathan Tucker		

Next Meeting/Date & Place

- PEF Headquarters on Thursday, December 10, 2026

The following representatives certify the minutes above to be an accurate representation of PEF OTDA Labor Management Meeting held on September 24, 2026.

X_____
Pamela August
PEF Labor Management Chair, OTDA

10/14/2026
Date

X James P. Ryan
James P. Ryan
Director of Human Resources, OTDA

10/14/2026
Date

FINAL