

Oregon Department of Energy
Energy Siting Division
Operations and Policy Analyst Work Plan
July 2024 – July 2025

The Energy Siting Division uses annual work plans to focus current process improvement activities and report on completion of past activities. The work plan provides direction and priorities for staffs' efforts beyond day-to-day activities and other established responsibilities. Meeting all legal requirements and protecting the state's resources will continue to guide our day-to-day review of applications and amendments to site certificates.

Each fiscal year's prioritized list of tasks is established in the last quarter of the previous fiscal year. The prioritized tasks will be considered when developing biennial budgets and assigning day-to-day work activities. The work plan also provides a historical record of completed tasks and a location for a prioritized list of identified future tasks.

The five **Imperatives from ODOE's Strategic Plan** underpin the annual Work Plan and are used as high-level goals. The combination of projects chosen ensure that all the high-level goals are addressed on an annual basis:

1. Expand and improve stakeholder engagement

- Increase applicant/certificate holders' trust and perception of the value of the state energy siting process by decreasing unknowns.
- Increase and enhance the public's understanding, participation and trust in the state energy siting process.
- Increase the quality and quantity of the Siting Division's connections to local, state, federal and tribal agencies that participate in the siting process.

2. Build practices and processes to achieve more inclusive and equitable outcomes

- Increase the accessibility of the siting process to provide opportunities for all stakeholders to participate in a meaningful way.

3. Assess and enhance organizational data capabilities

- Measure and report key performance metrics.
- Be accountable to our stakeholders by publishing performance data and using it to improve.

4. Assess and modernize agency programs and activities

- Systematically evaluate underlying business processes to achieve highest possible efficiency.
- Increase the efficiency, effectiveness, transparency, accountability and predictability of the site certificate process.

5. Optimize organizational efficiency and impact

- Strengthen the ability of the Energy Facility Siting Council, and Siting Division's staff and processes, to adapt to changes in energy markets and environmental constraints.

Energy facility siting related stakeholders also influence which projects are chosen annually to ensure process improvement projects have value to all stakeholders who participate in the state siting process. These include:

- 1.** Applicants and site certificate holders
- 2.** The public
- 3.** Energy Facility Siting Council members
- 4.** Reviewing agencies – State agencies, local governments and tribal governments
- 5.** The Siting Division team

March 2024-July 2024 Plan Report:

Compliance:

Task Overview	Status	High-Level Goals & Stakeholders
<p>Assess compliance program: Conduct a review of current compliance processes and Compliance Program workload. Use data to discover what areas of the compliance program to focus future process improvement efforts.</p>	<p>OPA worked with compliance team from December 2024 through present to learn current processes for operational sites annual reporting, site inspection processes, and incident reporting processes as well as the overall compliance cycle. OPA is using that data and understanding to design and inform future process improvements to compliance processes.</p>	<p><i>High Level Goals: 3, 4, 5</i></p> <p><i>Stakeholders:</i> -EFSC members -Siting Team: Compliance -Certificate holders/operational sites</p>
<p>Metrics: Data mine to understand more of the unknowns within the Compliance Program and to understand the deeper challenges the compliance program faces.</p>	<p>OPA began data mining and is still in progress with this project.</p>	<p><i>High Level Goals: 3, 4, 5</i></p> <p><i>Stakeholders:</i> -EFSC members -Siting Team: Compliance -Certificate holders/operational sites</p>
<p>Program Structure: Improve current systems and structures for the compliance program with a focus on supporting the additional staff working on this program. Emphasis on clear delineation of roles and responsibilities, project ownership, and project tracking.</p>	<p>OPA streamlined the annual compliance reports from operational sites, coordinated assessment work with Haley & Aldrich, and supported the site inspection prep for in-person site inspections that started in May and go through August. OPA continues to work with Assistant Director for Siting, and Senior Policy Advisor to define roles and</p>	<p><i>High Level Goals: 3, 4, 5</i></p> <p><i>Stakeholders:</i> -EFSC members -Siting Division Team: Compliance -Certificate holders/operational sites</p>

	responsibilities within Compliance and assess correct solution for project tracking within the division.	
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Financial:

Task Overview	Status	High-Level Goals & Stakeholders
Assess financial program: With guidance of draft recommendations from the ongoing program assessment, work with the Division’s Fiscal Analyst to data mine timesheets, invoices, and general billable tasks. The focus will be on answering a variety of questions aimed at helping to create metrics to measure future process improvement efforts against.	OPA is still in progress with this task and does not have anything definitive to report currently.	<i>High Level Goals:</i> 3, 4, 5 <i>Stakeholders:</i> -EFSC members -Siting Division Team -Certificate holders/operational sites -Applicants

Additional Projects & Outcomes:

Task Overview	Status	High-Level Goals & Stakeholders
Contested Case Comment Portal: Work with IT and Division staff to develop a comment portal that will streamline stakeholders petitioning to be considered in contested case processes.	OPA has been working with IT and has run into some technical roadblocks. OPA will continue to work with IT and Siting Rule Making Coordinator to continue to move this project forward. These tech issues highlighted some other issues with the comment portal that OPA is working with IT to address.	<i>High Level Goals:</i> 1, 2, 5 <i>Stakeholders:</i> -EFSC members -Siting Division Team -The public
Cassette Tapes: Research and engage an appropriate company to transfer EFSC meeting recordings from cassette tape to digital recording.	OPA has worked with Assistant Director for Siting to identify an in-house solution and will be creating a process to convert tapes to digital files with ODOE staff.	<i>High Level Goals:</i> 1, 2, 4 <i>Stakeholders:</i> -EFSC members

		-Siting Division Team
<p>Continue On-Boarding for the Siting Division: Continue on-boarding/learning the systems, processes, and procedures of the Siting Division.</p>	<p>OPA continues to on-board to the Siting Division and the complex systems, processes, and procedures of the Siting Division. OPA has primarily focused on a holistic overview of Siting, with a deeper dive into the compliance department. In the next quarter OPA will be focused on a deeper understanding of Applications & Amendments and Department Financial processes.</p>	<p><i>High Level Goals:</i> 1, 2, 3, 4, 5</p> <p><i>Stakeholders:</i> EFSC members Siting Division Team</p>
<p>ORESAs: Learn ORESA platform</p>	<p>OPA spent time learning the ORESA tool and created a basic how to document of the ORESA tool.</p>	<p><i>High Level Goals:</i> 1, 2, 5</p> <p><i>Stakeholders:</i> -EFSC members -Siting Division Team -The public</p>

July 2024 – June 2025 OPA Annual Work-Plan:

The focuses of this work plan are largely influenced by the recommendations made by the consulting firm, Merina, that worked with the Siting Division to assess the Applications & Amendments process and suggest areas of improvement. The Merina team developed their methodology for assessing the Siting Applications and Amendments processes using best practices to establish clear evaluation criteria and to identify opportunities for improvement. Merina’s methodology started with information gathering to understand the applications and amendments processes, which included reviewing current Oregon Revised Statutes and Oregon Administrative Rules, internal policies, procedures and process documentation along with interviewing key stakeholders including the Siting Division Team, Energy Facility Siting Council members, applicants, site certificate holders, government agencies representatives, and interested members of the public. After their work to understand the current application and amendment processes, Merina developed recommendations for Division improvements. From those recommendations, the OPA worked with the ODOE Director and the Siting Team to assess which suggested areas of improvement were the priority and the foundational building blocks for future process improvements from year to year.

It should be noted that the Merina assessment was primarily focused on the applications and amendments processes and not compliance, rulemaking, or supporting the Energy Facility Siting Council. The OPA continues to work on assessing the Siting Division processes and procedures across the different areas of the Division and mapping out how these different areas interact, overlap, and support one another.

Merina Recommendations:

Oversight and Accountability

- Establish formal performance metrics and formal accountability and feedback channels,
- Enhance oversight of Siting Division fiscal management by establishing clear expectations for fiscal management,
- Establish executive-level sponsorship over implementation of Program Assessment recommendations and adopt a formal implementation plan and strategy, and
- Strengthen alignment of Siting Division operations with ODOE strategic planning imperatives and initiatives by establishing clear goals and performance expectations/objectives.

Program Management

- Clarify expectations for overall program management and optimize the distribution of project oversight responsibilities to maintain capacity for enhanced program management, and

- Clarify responsibilities for internal process improvement, performance reporting, and financial reporting.

Performance Management

- Define clear performance metrics for measuring, evaluating, and reporting on program performance,
- Formalize the approach to establishing the Division's annual work plan to define clear objectives and expected outcomes, and
- Establish clear expectations and accountability measures for individual performance.

Staffing and Qualifications

- Narrow the scope of responsibilities/expectations for Siting Analysts to prioritize project management, Siting Process expertise, communication and coordination,
- Conduct a detailed skills assessment to identify necessary skills/expertise and gaps within the Siting Division in order to establish and implement internal training and development plans, and identify opportunities to mitigate risks through outsourcing,
- Prioritize efforts to ensure employee engagement and retention and develop and implement strategies for succession planning.

Financial Transparency

- Implement a clear and transparent methodology for establishing and communicating billable rates and following established Fiscal Management policies,
- Implement program-level reporting of financial performance,
- Establish/revise internal policies and procedures for tracking, reviewing, and invoicing for siting application review time and expenses and consider leveraging software to address challenges related to timekeeping and billing, and
- Evaluate opportunities to streamline process for reviewing agency reimbursement.

Project Management

- Clarify project management responsibilities for Siting Division staff to ensure fulfillment of duties related to quality assurance, resource management, issue resolution/escalation and management of project scope, timelines, costs, quality, risks, and communications,
- Develop and implement standardized processes and systems to effectively manage and coordinate projects, and
- Leverage technology to enhance project management and coordination between applicants, reviewing agencies, and Siting Division staff.

Applicant and Reviewing Agency Coordination

- Enhance resources and guidance materials available to aid applicants in preparing applications that meet the expectations of the Siting Division,
- Standardize and streamline the coordination of Requests for Additional Information (RAIs),
- Clarify and communicate expectations for reviewing agencies, Tribes, and local governments with responsibilities for participating in the Siting process.

Public Engagement

- Improve communications and resources provided to the public to aid in navigating the complex and legalistic process,
- Standardize and communicate internal processes for responding to public comments and testimony,
- Leverage technology to enhance communication and transparency to the Siting process through a docket-style system, and
- Explore opportunities to allocate resources to an intervener fund to provide access to a third-party advocate to represent public interests in the evaluation of proposed facilities.

Rulemaking Opportunities

- Continuing efforts to streamline application requirements and standards to provide greater clarity on required information for application review,
- Evaluating opportunities to collaborate with key stakeholders on ways to streamline application requirements and review process for renewables, and
- Exploring opportunities to revise Council standards to reduce inconsistencies with local and statewide processes and standards.

Legislative Opportunities

- Evaluating alternative approaches to fill Council positions, with the goal of addressing various challenges such as the identification and retention of qualified members, managing heavy workloads, and ensuring applications receive fair consideration from individuals with diverse and relevant expertise,
- Continuing efforts to develop a statewide comprehensive plan for energy development and/or pursuing updates to land-use planning goals to incorporate renewable energy goals, and
- Conducting an assessment to evaluate the benefits and limitations of an impacts-based evaluation model as an alternative to the standards-based evaluation model.

Along with those recommendations the OPA assessed the Siting Division needs from a holistic viewpoint to ensure that work items will positively impact most stakeholders throughout the year and into the future.

Some areas of recommendation will be included and addressed by other Siting Division staff. Recommendations regarding Financial Transparency and Rulemaking Opportunities will be addressed by the Siting Financial Analyst and Siting Rulemaking Coordinator

Public Engagement and Information Projects:

Task Overview	Expected Outcome	High Level Goals, Stakeholders and Merina Recommendations
<p>Create Youtube video tutorials: Work with the ODOE communications team to create video tutorials on:</p> <ul style="list-style-type: none"> - ORESA Mapping Tool - Submitting comments via the Siting public comment portal - EFSC process and how to engage with the process as a member of the public - Rule making process and how to engage with that process or joining a RAC - Other videos as identified throughout the year 	<p>OPA expects that these videos will be a positive tool for the public to understand the EFSC process, how to engage with EFSC and meaningfully participate in the process, and how to use tools available for understanding project applications via ORESA. We expect that these videos will engage the public with the Siting Division and EFSC process. This project was initially kicked off on 06/20/2024, the first videos will be focused on the public comment portal and using the ORESA mapping tool.</p>	<p><i>High Level Goals: 1, 2, 4, 5</i></p> <p><i>Stakeholders:</i></p> <ul style="list-style-type: none"> -The public -EFSC members -Siting Division team -ODOE <p><i>Merina Recommendation Areas:</i></p> <ul style="list-style-type: none"> -Public Engagement
<p>Update printed handouts: Work with Siting team to create a schedule for yearly review and updates of printed materials available at EFSC meetings.</p>	<p>OPA expects that this task will allow for the Siting team to ensure handouts are up to date and relevant to the public.</p>	<p><i>High Level Goals: 1, 2, 3, 4, 5</i></p> <p><i>Stakeholders:</i></p> <ul style="list-style-type: none"> -EFSC members -Siting Division team -The public

		<i>Merina Recommendation Areas:</i> -Public Engagement
Comment Portal updates: Work with IT to continue to improve the usability of the public comment portal. Work with IT to create a comment portal specific to submitting interest in being considered for a contested case.	This project will positively impact the user experience of the public comment portal and should address some minor bugs in the system that currently exist. This project will also create a clearer way for the public to engage with the contested case process. The initial part of this project has been ongoing with IT and began in March 2024, OPA expects that the bug fixes will take an additional 6 months to address and then 3-4 months to create the contested case section of the comment portal.	<i>High Level Goals: 1, 2, 4, 5</i> <i>Stakeholders:</i> -The public -Siting Division team -EFSC members -Applicants and site certificate holders <i>Merina Recommendation Areas:</i> -Public Engagement

Rulemaking:

Task Overview	Expected Outcome	High Level Goals, Stakeholders and Merina Recommendations
Update Siting Rulemaking webpages: Work with Rulemaking coordinator and ODOE Communications team to update the rule making webpages with a focus on user experience, and visually presenting information in a user-friendly format.	This project will result in increased navigability of the rule making website and make the information about rule making more accessible.	<i>High Level Goals: 1, 2, 4, 5</i> <i>Stakeholders:</i> -EFSC members -Siting Division Team -ODOE -Applicants and site certificate holders -The public -Reviewing agencies

		<p><i>Merina Recommendation Areas:</i></p> <ul style="list-style-type: none"> -Public Engagement -Rulemaking Opportunities
<p>Create handouts for rule making: Work with Rulemaking coordinator to create handouts to be publicly available that explain the contested case rules.</p>	<p>That the public has more information available to them in regard to contested cases, how they work within EFSC rules, and how to navigate the process of being considered for a contested case.</p>	<p><i>High Level Goals: 1, 2, 4, 5</i></p> <p><i>Stakeholders:</i></p> <ul style="list-style-type: none"> -EFSC members -Siting Division Team -Applicants and site certificate holders -The public <p><i>Merina Recommendation Areas:</i></p> <ul style="list-style-type: none"> -Public Engagement -Rulemaking Opportunities

Compliance:

Task Overview	Expected Outcome	High Level Goals, Stakeholders and Merina Recommendations
<p>Refine annual compliance processes: Work with compliance team to refine the annual compliance reporting process. This will include creating and communicating to certificate holders’ standards for the following:</p> <ul style="list-style-type: none"> - how sites submit their reports and additional supporting evidence - further refinement of the existing condition spreadsheets - creating a consistent tracking method for issues found at sites from year to year 	<p>OPA expects that this effort will create clearer expectations for certificate holders, allow for easier and more efficient processing of annual compliance reports, and allow for the compliance team to be able to track ongoing issues at sites from year to year.</p>	<p><i>High Level Goals:</i> 1, 2, 3, 4, 5</p> <p><i>Stakeholders:</i></p> <ul style="list-style-type: none"> -Site certificate holders -Siting Division team -EFSC members <p><i>Merina Recommendation Areas:</i></p> <ul style="list-style-type: none"> -NA
<p>Refine tracking systems: OPA will focus on refining compliance tracking systems for year-to-year continuity and will work with the compliance team to strengthen the ties between annual reports, site inspections, and issues tracking systems.</p>	<p>OPA expects that this will simplify some aspects of the compliance processes, leading to an increase in efficiency and overall effectiveness of the compliance program.</p>	<p><i>High Level Goals:</i> 1, 2, 3, 4, 5</p> <p><i>Stakeholders:</i></p> <ul style="list-style-type: none"> -Siting Division team -EFSC members -Site certificate holders Reviewing agencies <p><i>Merina Recommendation Areas:</i></p> <ul style="list-style-type: none"> -NA
<p>Data mining: Continue to work on the data gathering process with the goal of defining how many hours are dedicated to each facility, where process efficiency can lessen time needed per-facility, and discover any</p>	<p>Understanding the time commitments and needs for the annual reporting, site inspections, site inspection reports, and incident review and follow up will help</p>	<p><i>High Level Goals:</i> 3, 4, 5</p> <p><i>Stakeholders:</i></p> <ul style="list-style-type: none"> -Site certificate holders -Siting Division team

further unknowns within the compliance processes and systems.	the Department to define future staffing needs.	-EFSC members <i>Merina Recommendation Areas:</i> -NA
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Applications & Amendments:

Task Overview	Expected Outcome	High Level Goals, Stakeholders and Merina Recommendations
<p>Update applicant guide: OPA will work with Siting Team and ODOE’s Communications section to update the applicant guide with the goal of making it more user friendly, easier to digest, and include a checklist and helpful tips for navigating the application process.</p>	<p>OPA expects that these efforts will result in more complete applications with fewer additional information requests from the analysts to the applicants.</p>	<p><i>High Level Goals:</i> 1, 2, 4, 5</p> <p><i>Stakeholders:</i> -Applicants -Siting Division team -EFSC members -Reviewing agencies</p> <p><i>Merina Recommendation Areas:</i> -Project Management -Applicant and Reviewing Agency Coordination</p>
<p>Create templates and style guides: Work with Siting team to create templates and style guides for the following:</p> <ul style="list-style-type: none"> - Orders on applications & amendments - Public notices 	<p>This effort should result in more consistent orders in terms of formatting and style on application and amendments. This will also increase consistency on public notices and</p>	<p><i>High Level Goals:</i> 1, 2, 3, 4, 5</p> <p><i>Stakeholders:</i> -EFSC members -Siting Division team</p>

<p>This task will also include:</p> <ul style="list-style-type: none"> - creating a schedule for yearly review and updates of those templates and revision of noticing procedures. - an audit on where are appropriate and needed spaces for public notice, considerations for this include many newspapers closing in Eastern Oregon and how to communicate effectively with the public in the digital age. - Proposals for the Rulemaking Coordinator to make changes to noticing requirements as information landscapes change. 	<p>increase the efficiency of the public noticing process.</p>	<ul style="list-style-type: none"> -Applicants & site certificate holders -The public -Reviewing agencies <p><i>Merina Recommendation Areas:</i></p> <ul style="list-style-type: none"> -Applicant and Reviewing Agency Coordination -Program Management -Project Management
<p>Update records checklist: Work with Siting Team to revise and update the checklist of what needs to go into a record, add additional details and turn the current checklist into a usable template with yearly revision.</p>	<p>This task will assist the Siting Analysts in being more efficient and ensuring complete records.</p>	<p><i>High Level Goals: 1, 2, 4, 5</i></p> <p><i>Stakeholders:</i></p> <ul style="list-style-type: none"> -Siting Division team -EFSC members -The public -Applicants & site certificate holders -Reviewing agencies <p><i>Merina Recommendation Areas:</i></p> <ul style="list-style-type: none"> -Applicant and Reviewing Agency Coordination -Program Management -Project Management

Financials:

Task Overview	Expected Outcome	High Level Goals, Stakeholders and Merina Recommendations
<p>Assess financial program: With guidance of draft recommendations from the program assessment, work with the Division’s Fiscal Analyst to data mine timesheets, invoices, and general billable tasks. The focus will be on answering a variety of questions aimed at helping to create metrics to measure future process improvement efforts against.</p>	<p>OPA will learn about the financial aspects of the Siting processes and work with Financial Analyst to refine and streamline processes where we are able to.</p>	<p><i>High Level Goals:</i> 1, 2, 3, 4, 5</p> <p><i>Stakeholders:</i></p> <ul style="list-style-type: none"> -Siting Division team -EFSC members -Applicants & site certificate holders -Reviewing agencies <p><i>Merina Recommendation Areas:</i></p> <ul style="list-style-type: none"> -Oversight & Accountability -Performance Management -Project Management
<p>Fiscal Analyst overlap projects: Work with the Siting Division’s Fiscal Analyst on her assigned projects as they overlap with the projects identified in this work plan. These include but are not limited to:</p> <ul style="list-style-type: none"> -Financial assurance updates -Evaluate time tracking data -Siting Division financial policies and procedures 	<p>OPA will support Financial Analyst on increasing clarity and efficiency to financial processes, data creation to identify key metrics for performance and measuring future process improvement efforts.</p>	<p><i>High Level Goals:</i> 1, 2, 3, 4, 5</p> <p><i>Stakeholders:</i></p> <ul style="list-style-type: none"> -Siting Division team -EFSC members -Applicants & site certificate holders -Reviewing agencies <p><i>Merina Recommendation Areas:</i></p> <ul style="list-style-type: none"> -Financial Transparency -Oversight & Accountability

		-Performance Management
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General:

Task Overview	Expected Outcome	High Level Goals, Stakeholders and Merina Recommendations
<p>Audit desk manuals: create a schedule to audit current desk manuals on a yearly cycle and ensure they are accurate and up to date</p>	<p>Increased clarity in processes for Siting Team</p>	<p><i>High Level Goals:</i> 3, 4, 5</p> <p><i>Stakeholders:</i> -Siting Division team -EFSC members</p> <p><i>Merina Recommendation Areas:</i> -Staffing & Qualifications -Program Management</p>
<p>Cassette tapes: Create a system for internal processing of cassette tapes to transfer them to a digital format.</p>	<p>Change Siting records to a modern, usable format</p>	<p><i>High Level Goals:</i> 4, 5</p> <p><i>Stakeholders:</i> -Siting Division team -EFSC members</p> <p><i>Merina Recommendation Areas:</i> -Public Engagement</p>
<p>Update EFSC Member onboarding guide: work with Assistant Director of Siting, DOJ counsel, and EFSC members to update the onboarding guide and create</p>	<p>Ensure an accurate and up to date guide for new EFSC council members leading to a smooth onboarding process</p>	<p><i>High Level Goals:</i> 1, 2, 4, 5</p> <p><i>Stakeholders:</i> -Siting Division team</p>

<p>a schedule for regular review and updating of the guide.</p>		<p>-EFSC members</p> <p><i>Merina Recommendation Areas:</i></p> <p>-Oversight & Accountability</p>
<p>Project management: Work with Siting Team and ODOE project managers to identify a project management tool and/or system that works to cohesively track workloads, project tasks and timelines, and allows for easier and more efficient task management throughout the Department.</p>	<p>The goal of this task is to allow for easier workload management and task tracking throughout the Department, with a focus on increasing the culture of accountability and adherence to agreed timelines.</p>	<p><i>High Level Goals:</i> 1, 2, 3, 4, 5</p> <p><i>Stakeholders:</i></p> <p>-Siting Division team</p> <p>-EFSC members</p> <p>-Applicants & site certificate holders</p> <p>-Reviewing agencies</p> <p>-The public</p> <p><i>Merina Recommendation Areas:</i></p> <p>-Program Management</p> <p>-Project Management</p> <p>-Oversight & Accountability</p> <p>-Staffing & Qualifications</p> <p>-Applicant & Reviewing Agency Coordination</p>
<p>Performance metrics & responsibility scopes: Work with Siting Division staff and ODOE project managers to assess staff's current workloads, skill sets, job descriptions, and ensure that the work assigned is appropriate to their roles. Create clarity within the Division of each staff member's role and responsibilities and ensure that workloads are</p>	<p>This task should result in an increase in clarity in staff responsibilities and will directly tie into tasks relating to creating performance metrics and increasing team accountability.</p>	<p><i>High Level Goals:</i> 2, 3, 4, 5</p> <p><i>Stakeholders:</i></p> <p>-Siting Division team</p> <p>-EFSC members</p>

<p>equitably distributed. Work with team to identify opportunities for skill building, internal training and to create plans around succession.</p>		<p><i>Merina Recommendation Areas:</i></p> <ul style="list-style-type: none">-Program Management-Project Management-Oversight & Accountability-Staffing & Qualifications
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Calendar of Work Plan Task Breakdown:

This calendar is an example of a larger calendar put together to track each project by step.

Task	2024						2025						
	July	August	September	October	November	December	January	February	March	April	May	June	July
Compliance:													
Refine and update annual reporting processes:													
Work with IT to create a digital submission system													
Update compliance matrix for annual reporting from each site													
Inform sites of new reporting processes													
Work with compliance to receive & process reports													
Assess reports and new reporting system													
Work with HA to review annual reports & refine systems of working with HA													
Create system of inspection reports to be completed in timely manor													
Analyze current system of reporting with Sarah and re-define how we are approaching compliance cycles where we can tie in the compliance annual reports, inspections, and incidents													
Refine Tracking Systems:													
Work with Ash to implement Survey 123													
Work with Ash and IT to ensure tablets work correctly and have all software on them													
Work with Sarah to design tracking system and SOP													
Change management for tracking system													
Revisiting tracking system to ensure it is being used correctly													
Rule Making													
Update rule making website with Erica and Tom - partially on hold until website update is rolled out													
Update contested case rules handouts													
Work with Tom on creating hand out													
Work with Patrick to ensure it is legaly correct													
Work with comms to ensure readability and correct wording													
Finalize with team and publish (ensure it is added to EFSC meeting handout bin)													
Public Engagement & Information Projects													
Create Youtube tutorials:													
ORESA Mapping tool:													
Create outline for Comms													
Comms creates script													
Script approval													
Filming													
Editing													
Approval & publishing													
Update printed handouts:													
Create calendar for handout review													
Meet with Siting team to review handout													
Edit based on review													
Review with siting team													
Finalize and publish													
Comment portal updates:													
Work with IT to fix current comment portal issues													
Learn more about MS Project Services & Click Dimensions													
Test IT fixes													
Update SOP on comment portal and present to team													
Remind team on SOP and continue to ensure it is followed													
Applications & Ammendments Projects													
Create Templates & Style Guides:													
Create a schedule for yearly review of templates and stlye guides													
Work with Sarah to edit current style guide/create style guide													
Edit style guide with team													
Finalize & Implement													
Check with each issuance that team is using the style guide													
Update template for orders on applications and ammendments													
Redline with team													
Incorporate redline edits													
Review with team for final edits													
Finalize and implement													
Implement template usage:													
Ensure everyone is clear on current template and where it lives													
Follow up with each project to ensure use of the template													
Update checklist for issuance and records													
Implement checklist													
Check with each issuance that team is using correct template and checklist													
Financials Program													
Assess financial program:													
Work with financial analyst to understand responsibilities and financial cycles:													
Use this information to create list of future process improvement efforts													
Datamine time sheets to create metrics for accountability:													
Work with Todd to define what information we want to know													
Define KPI metrics for analysts													
Present metrics to the team and discuss accountability efforts													
Implement accountability processes													
Datamine time sheets on a monthly basis to track metrics and ensure we are meeting KPIs													
General													
Audit Desk Manuals:													
Create a calendar for desk manual review and edits													
Update each desk manual													
Present changes to team													
Follow up with team to ensure changes are implemented													
Update EFSC Member Guide:													
Work with Todd and Patrick to update guide													
Interview Katie Ims about where the process for onboarding worked or needs improvement													
Update guide with input from recently onboarded members													
Present changes to team													
Finalize and publish													
Create sc hedule for annual review													
Project Management:													
Interview siting team to understand barriers to work systems and accountability													
Research options to meet team needs													
Obtain option that will meet the most needs													
Onboard team into the option													
Periodic review of how team is using the tool													

Future Work Plan Focuses:

The 2024-2025 OPA work plan is designed to lay the foundational steps for future process improvement efforts and to address process improvement in an iterative manner. The projects listed out for the 2024-2025 year are designed to create ongoing evaluation of Siting Division’s systems and processes from a holistic standpoint and are designed for the OPA to continue learning the complexities of the different areas within Siting and how they all work together. Future work plan focuses will use the frame work created in this years plan to further examine and refine the Siting Division’s efforts towards improving.

Primary areas of future work are currently projected to be closely tied into the recommendations for improvement by Merina, along with the holistic overview of the Siting Division conducted by the OPA. Future tasks will be designed to build upon current efforts and address needs from all stakeholder groups.