

# 2025 Succession Plan

**Psychiatric Security Review Board  
January 1, 2025**

503-229-5596

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[Agency Website](#)

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## Executive Summary

January 1, 2025

Dear Valued Members of the PSRB Community and Beyond,

On January 1, 2024, the Psychiatric Security Review Board (PSRB) introduced its inaugural Succession Plan. This plan is a tool for ensuring the PSRB's resilience, adaptability, and long-term effectiveness, especially during times of inevitable transition such as retirements, promotions, or staff turnover. The plan goes beyond identifying potential leaders; it requires proactive leadership, retention of institutional knowledge, a plan for competency identification and development, and the cultivation and sustainability of a trained and engaged workforce. These elements are key to enabling the PSRB to seamlessly fulfill its mission and uphold its values, ensuring we remain strong and effective through periods of change.

At its core, the PSRB's Succession Plan identifies critical positions, outlines recruitment and onboarding strategies, and emphasizes the development of key competencies necessary to ensure the continued success of those roles. Board members and the Executive Director, in particular, have been identified as the agency's highly critical positions. As such, the competencies required for these positions have been established within this plan, along with the recruitment and onboarding strategies to fill these roles. Additionally, as a small agency, operational effectiveness relies heavily on all of our highly valued staff members, necessitating continuous efforts to review and amend position descriptions and maintain position-specific desk manuals. These components are foundational to PSRB's long-term sustainability.

In addition to these foundational components, the PSRB also sets specific, measurable objectives, focusing on key activities that align with the agency's evolving needs and strategic goals. These annual priorities further drive the agency's commitment to continuous growth, customer service, and operational excellence. In 2024, the PSRB made progress in implementing four key activities: enhancing Board member recruitment, developing a comprehensive Executive Director Desk Manual, updating key position descriptions, and launching a Staff Empowerment Program. Each of these objectives has advanced the agency's succession goals in meaningful ways.

Board member recruitment saw significant strides with the establishment of a formal recruitment protocol designed to streamline the vetting process and enhance consistency and effectiveness in recommendations to the Governor. While challenges, such as bandwidth constraints and the inability to host a recruitment event, presented obstacles to expanding recruitment efforts, the PSRB made use of new tools and strategic partnerships to mitigate these challenges. A notable collaboration with the state's contracted Partners in Diversity platform expanded outreach efforts, improved tracking of engagement, and increased visibility of open Board positions. Despite high levels of viewing the position descriptions of the

agency's upcoming psychiatrist and attorney member vacancies, the recruitment efforts for these positions appear to have been impeded by compensation disparities, resulting in a significant gap between the number of views and the actual applications submitted. On a positive note, recruitment for the probation/parole position surpassed expectations, with the agency successfully identifying a competitive candidate anticipated to be confirmed by the Senate in February 2025, thus ensuring a smooth transition in this critical area.

The development of the Executive Director Desk Manual made notable progress throughout 2024. The agency successfully identified core responsibilities of the Executive Director (ED) role and began organizing them into a centralized OneNote document. However, the initial structure of the manual faced challenges, as it did not align with the original categories set out at the outset. This required a shift toward a more dynamic and interconnected framework for the manual that better reflects the complexity and evolving nature of the ED role. Additionally, competing agency priorities slowed the progress in fully detailing each area of responsibility. Nonetheless, the process benefited greatly from the insights gained through the Director's participation in the Leadership Oregon cohort, which not only contributed to progress related to writing the desk manual, but moreover introduced new tools, lessons learned, and enhanced networking to strengthen the ED's overall leadership competencies.

The review of key position descriptions also progressed throughout 2024, with the Administrative Support Specialist 2 (AS-2) role undergoing a complete review and update. Meanwhile, the reviews of the Paralegal and Executive Support Specialist positions are ongoing, with the intention of aligning position descriptions more closely with the agency's evolving needs. These updates ensure clarity in job responsibilities and provide a clearer framework for staff development and succession planning within the organization, particularly given anticipated changes in position planned for 2025.

The Staff Empowerment Program faced delays due to the competing priorities of onboarding a new Deputy Director. However, significant progress was made in other areas that helped promote a positive and engaged work environment. The successful launch of the Gallup Employee Engagement Survey revealed strong staff engagement scores, demonstrating a highly motivated workforce. In addition, the agency hosted a staff retreat in May 2024, which promoted team-building and identified training needs, contributing to a stronger sense of collaboration and professional growth among staff. As part of the effort to recognize staff contributions, an achievement vision board was created, highlighting weekly staff successes and empowering employees to take greater ownership of their professional development.

As PSRB transitions into 2025, the insights gained from 2024 have been integrated into an updated, forward-looking Succession Plan designed to strengthen the agency's leadership and operational capacity. The new objectives for 2025 emphasize a shift toward more distributed leadership and decision-making, aimed at alleviating the administrative burdens on senior leadership while empowering staff at all levels to take on greater responsibility. This strategic shift is in direct response to the reduction in administrative work, notably through the successful implementation of a paperless filing system, as well as the recognition of a hierarchical structure that has sometimes hindered senior leadership's ability to focus on strategic priorities and make timely decisions in day-to-day operations.

The 2025 Succession Plan outlines six new or refined objectives that will build on the achievements of 2024 while addressing the agency's evolving needs. These objectives are designed to refine the leadership structure, enhance Board member recruitment, and expand staff development opportunities to support a sustainable workforce known for customer-service excellence. A key update in the 2025 plan is an agency reorganization that establishes the creation of two new Operations and Policy Analyst 2 (OPA-2) positions. These roles have been identified as necessary for distributing responsibilities across the organization, relieving senior leadership of sole responsibility for system improvements, decision-making, and daily operations. This will facilitate a flatter organizational hierarchy, allowing senior leadership to focus on strategic planning and higher-level priorities while developing a larger array of competencies and autonomy across all positions.

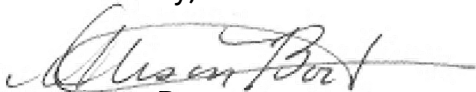
The completion and finalization of the Executive Director Desk Manual is another important goal for 2025. This manual will be fully developed to reflect the interconnected and dynamic nature of the Executive Director role, ensuring it supports leadership continuity and enhances succession planning. Board recruitment efforts will be significantly strengthened by partnering with a professional recruitment strategist, enhancing outreach and increasing the effectiveness of the recruitment process.

Further, the 2025 plan includes completing a comprehensive review of key positions within the agency. This will ensure that job roles remain aligned with the organization's strategic goals and provide meaningful career development opportunities for staff. The agency will continue to build on its Staff Empowerment Program by leveraging insights from the Gallup Employee Engagement Survey as well as stakeholder feedback to design a training program that strengthens staff competencies. Additionally, the introduction of customer satisfaction surveys for Paralegals, a position that has the largest interaction with our stakeholders, will help assess service delivery and identify areas for continuous improvement.

As PSRB looks ahead to 2025, the agency is committed to building on the progress made in 2024 while continuing to evolve its leadership and strategies to sustain long-term operations. To learn more about PSRB's ongoing initiatives, progress, and the strategic objectives shaping the future of the agency, we invite you to explore the full details of our 2025 Succession Plan.

I am honored to lead the PSRB and remain committed to guiding the agency with integrity and stability. Thank you for your trust as we continue to advance our mission and shape the future together. For further information or inquiries, please feel free to contact me at [psrb@psrb.oregon.gov](mailto:psrb@psrb.oregon.gov).

Sincerely,



Alison Bort  
PSRB Executive Director

## PSRB Mission and Vision

### Mission

The Psychiatric Security Review Board's (PSRB) **mission** is to protect the public by working with partnering agencies to ensure persons under its jurisdiction receive the necessary services and support to reduce the risk of future dangerous behavior using recognized principles of risk assessment, victims' interest, and person-centered care.

### Vision<sup>1</sup>

The PSRB envisions itself as a reliable judicial pillar committed to promoting the recovery of justice-involved individuals with severe mental illness. This involves the primary functions of conducting contested hearings and overseeing the monitoring and supervision of individuals under its jurisdiction. Guided by our core values and principles of diversity, equity, and inclusion, the PSRB's vision prioritizes strategic partnerships, resource investments, and technological modernization to improve program effectiveness, transparency, and accountability. Emphasis is also placed on succession planning to foster a positive workplace culture, operational efficiency, and long-term sustainability.

### Values

The PSRB's values are rooted in our legislative mandate to protect the public. We achieve maximum levels of public safety through:

<b>Due Process:</b>	Observing individuals' legal rights and adhering to principles of procedural fairness.
<b>Research:</b>	Decision-making and organizational practices driven and influenced by the best available data.
<b>Recovery:</b>	Clients understand and receive treatment for the psychiatric and comorbid conditions that contributed to their past criminal offenses and have opportunities to achieve health, home, purpose, and community.
<b>Partnership:</b>	Promoting active communication and collaboration within and between the systems serving PSRB clients and the community at large.

### Future Workforce

The Psychiatric Security Review Board is rigorously recruiting future Board Members. Applications remain on file for up to two years. Serious candidates may contact the agency at 503-229-5596 or [psrb@psrb.oregon.gov](mailto:psrb@psrb.oregon.gov) to request an information interview with the Board's Executive Director.

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<sup>1</sup> This excerpt provides a condensed version of the PSRB's three-year vision. For a comprehensive view, please consult our complete strategic plan.

## Identification | Critical/Highly Critical Positions

This section delineates the highly critical personnel within the Psychiatric Security Review Board, emphasizing their essential competencies and outlining the specific consequences that would ensue in their absence.

### Highly Critical

#### 1. Adult Panel Board Member Positions

Psychiatric Security Review Board (PSRB) members play a crucial role in the Oregon justice system, making an array of risk decisions such as whether individual should reside in the community, have the gun rights restored, or be relieved from sex offender registration requirements. Each of the five, highly critical Board positions—psychiatrist, psychologist, attorney, parole/probation officer, and public member—is prescribed by the Oregon Revised Statutes. Board members are appointed by the Governor and confirmed by the Senate for up to two, 4-year terms. In addition to their specialized knowledge, the Board members must demonstrate competencies in legal expertise, impartial decision-making, analytical thinking, effective communication, procedural fairness, conflict management, case management efficiency, adaptability, and continuous learning. These competencies are pivotal for the PSRB members as they preside over hearings, review extensive case files, and formulate insightful questions for witnesses, all contributing to administration of justice and the protection of the public as the law requires.

A vacancy on the PSRB has the potential to significantly disrupt the continuity of operations. Board members, who work on a part-time basis with additional professional and personal responsibilities, play a crucial role in the functioning of the PSRB. With a minimum of three members required for hearings, a vacancy could result in a lack of quorum, causing delayed justice and threats to individual liberties. The high level of competence expected from Board members is paramount, as a deficiency in any of the specified areas could lead to adverse consequences. Inaccurate decisions, flawed legal interpretations, and unsupported findings may result in inconsistencies in rulings and contribute to delayed justice. Such decisions are susceptible to appeals and reversals, demanding additional agency resources for judicial review. The potential erosion of public trust in the PSRB is a consequential concern, as individuals may question the integrity and fairness of administrative proceedings. Incorrect decisions could set problematic legal precedents, affecting future cases and potentially leading to the misapplication of legal principles. Moreover, decisions to discharge, conditionally release, restore gun rights, or relieve individuals of sex offender reporting requirements that are influenced by factors other than legal mandates pose a risk to public safety and the agency at large.

<b>NOT A CRITICAL POSITION</b>	<ul style="list-style-type: none"> <li>• Vacancy would cause limited impact</li> <li>• Limited specialized knowledge or skills required</li> <li>• Strong recruitment potential</li> <li>• Competitive compensation package</li> <li>• Limited direct promotional opportunities</li> </ul>
<b>CRITICAL POSITION</b>	<ul style="list-style-type: none"> <li>• Vacancy would cause an impact</li> <li>• Some specialized knowledge or skills required</li> <li>• Challenging recruitment</li> <li>• Moderately competitive compensation package</li> <li>• Skill set in demand</li> <li>• Promotional opportunities</li> <li>• Anticipate vacancy within the next 1 to 5 years</li> </ul>
<b>HIGHLY CRITICAL POSITION</b>	<ul style="list-style-type: none"> <li>• Vacancy would cause a significant impact</li> <li>• Specialized knowledge or skills required</li> <li>• Very challenging recruitment</li> <li>• No competitive compensation package/compression issues</li> <li>• Skill set in high demand</li> <li>• Promotional opportunities</li> <li>• Anticipate vacancy within the next year</li> </ul>

Ensuring a competent and complete Board is vital for maintaining the integrity and effectiveness of the PSRB's adjudicative processes.

## **2. Executive Director (ED)**

The ED is a highly critical position for the PSRB, entrusted with a multifaceted set of responsibilities, requiring adeptness in **State Manager Competencies**, keen adherence to **Governor Expectations**, and a nuanced understanding of **Agency-Specific Expertise**. The ED's influence permeates across various domains, contributing to the agency's resilience and adaptability. As we embark on succession planning, it becomes evident that the ED is not merely a leader; they are a catalyst for the agency's vitality, underscoring the significance of identifying and cultivating a successor who can seamlessly navigate and uphold the critical functions integral to our organizational fabric. The following sections outline the most critical competencies possessed by the ED, explains why they are critical, and communicates the immediate and future business impact in the absence of this skilled position.

### **State Manager Competencies**

The identification of critical competencies starts with the expectation that the PSRB's leadership team, comprised of the Executive and Deputy Directors, possess an advanced to expert proficiency in the competencies established for all managers in state service including business acumen, communication, innovation, intentional engagement, mentoring and developing people, and stewardship.<sup>2</sup> These competencies transcend the enterprise's leadership workforce and represent the combination of the knowledge, skills, and abilities required for state leaders to be successful. A lack of competency in any of these areas could have significant and widespread, negative consequences for the agency in the short and long-term.

### **Business Impact/Consequences in the Absence of ED with State Manager Competencies**

This sections explains the business implications arising from either the absence of an Executive Director (ED) or the lack of the aforementioned State Manager Competencies within the ED.

#### ***Lack of Business Acumen:***

Insufficient business acumen in a leadership role can result in strategic misalignment, where PSRB's objectives deviate from public interests, leading to policies that may not effectively serve the broader community. Ineffective oversight of agency operations can lead to operational inefficiencies, resource mismanagement, and a failure to meet agency goals. Collaboration challenges with external partners may hinder the leveraging of collective expertise and resources, resulting in a lack of innovation and missed opportunities for improvement. The consequences include public dissatisfaction, reduced agency effectiveness, and the potential for missed opportunities that could enhance overall service delivery.

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<sup>2</sup> [See Enterprise Values and Competencies: Competency Guide for Managers](#)



### ***Lack of Communication Skills:***

A deficiency in communication skills may manifest in ineffective communication at various organizational levels, causing misunderstandings and a lack of clarity. Challenges in casting a compelling vision for the PSRB can result in a lack of buy-in and enthusiasm from stakeholders. Difficulties in communicating complex information to diverse audiences may lead to confusion and hinder decision-making processes. These issues can culminate in stakeholder dissatisfaction, decreased agency cohesion, and ineffective implementation of strategic initiatives.

### ***Lack of Innovation Skills:***

A leader's limited encouragement of diverse thinking and innovation can stifle creativity within the PSRB. Inability to motivate and empower others to translate innovative ideas into tangible performance improvements may lead to stagnation and resistance to change. Challenges in evaluating and implementing innovative concepts can result in a stagnant agency culture, with missed opportunities for improvement.

### ***Lack of Intentional Engagement Skills:***

A lack of intentional engagement skills may result in failure to treat employees and partners with respect, fostering a negative agency culture. Inability to create an inclusive work environment can lead to a lack of diversity and collaboration. Challenges in recognizing and utilizing diverse abilities may result in the underutilization of talent. The consequences include lower employee morale and job satisfaction, strained relationships with partners, and difficulty in building effective working relationships within the PSRB.

### ***Lack of Mentoring and Developing Others Skills:***

Issues in mentoring and developing others may stem from inadequate strategies, hindering the professional growth of employees. Challenges in providing clear, behaviorally specific performance feedback can result in a lack of direction for employees. Integration challenges with statewide mentoring initiatives may lead to a lack of consistency. Consequences may include limited employee growth, decreased satisfaction, and challenges in attracting and retaining top talent.

### ***Lack of Stewardship Skills:***

A lack of direction in protecting taxpayers' interests may lead to ineffective strategies, potentially resulting in public dissatisfaction and ethical challenges. Difficulty in setting effective policies can hinder the achievement of PSRB's goals, while challenges in evaluating impacts may lead to poor decision-making. Consequences may include an increased risk of misusing public funds, legal challenges, and decreased agency effectiveness and reputation.

### **Governor Expectations**

In the capacity of an executive branch agency, the ED must competently translate and execute the expectations delineated by the governor. Beyond this, they must seamlessly integrate the administration's priorities and associated workload into the fabric of the PSRB's business practices. This isn't just about adherence; it's about embodying the strategic vision of state leadership. The ED's proficiency in aligning the PSRB with the nuanced expectations and priorities of any governor's administration is foundational to the PSRB's success. As we delve into succession planning, it becomes imperative to identify a successor who not only appreciates the importance of this alignment but can adeptly navigate the ever-evolving landscape of gubernatorial expectations, ensuring the sustained impact and relevance of our agency within the broader context of state leadership.

### **Business Impact/Consequences in the Absence of ED with Governor Expectation Competencies**

The absence of the Executive Director's competency in translating and executing the governor's expectations, coupled with seamlessly integrating administration priorities, poses severe consequences for the PSRB. This includes strategic misalignment, reduced agency effectiveness, limited impact, missed opportunities, potential friction with state leadership, inefficient resource allocation, negative stakeholder perception, and challenges in adapting to policy changes. Specific to the current administration, this may manifest in a breakdown of agency accountability, hindering progress in key areas like customer service, diversity, equity, and inclusion initiatives, and emergency preparedness. Strained relationships with stakeholders and missed opportunities for strategic planning, modernization, and performance improvements may impede addressing critical issues such as housing, homelessness, behavioral health, addiction care, and education. Non-compliance may also invite increased scrutiny from oversight bodies, potentially leading to negative consequences for agency leadership. Identifying a successor adept at navigating the evolving landscape of gubernatorial expectations becomes imperative for sustained impact and relevance within the broader state context.

### **Agency-Specific Competencies**

The following section summarizes the most critical competencies required specifically by the PSRB's ED and the corresponding impact in the absence of these competencies: Legal Expertise, High-Risk Decision Making, Board Governance and Meetings Management, Collaborative Relationships, Legislative Engagement and Advocacy, and Training Facilitation.

#### ***Legal Expertise:***

The role of the ED demands a profound mastery of legal and procedural intricacies linked to contested hearings, PSRB appeals, and overall agency operations. While the ED is not positioned as the agency's legal counsel, a cornerstone of their responsibilities involves the administration and strategic direction of the PSRB's five forensic programs. This requires an in-depth expertise encompassing the statutes governing each program area, nuanced familiarity with corresponding administrative rules, and a comprehensive understanding of relevant caselaw. In the realm of conducting hearings, the ED is required to exhibit a seasoned command of the Administrative Procedures Act. This proficiency extends to a thorough grasp of the complete spectrum of procedures entailed in conducting timely contested hearings,

including that findings of fact and conclusions of law in Board orders are legally sound. Collaborative engagement with the PSRB's legal counsel is pivotal, particularly in navigating complex issues impacting the agency, ranging from appeals to tort claims. The ED's legal expertise is integral to upholding the highest standards of procedural integrity and legal efficacy within the agency.

***Business Impact/Consequences in the Absence of ED with Legal Expertise Competency:***

In the absence of a robust legal expertise competency within the succession plan for the Executive Director (ED) role, the PSRB faces several potential consequences. First and foremost, the risk of legal challenges and compliance issues significantly increases, particularly in the context of contested hearings and appeals. This lack of expertise may result in procedural inefficiencies, potentially leading to delays and inadequate findings in the decision-making process. Moreover, the ED's ability to strategically administer the PSRB's forensic programs may be compromised, affecting the overall effectiveness of these critical state programs. Additionally, without a strong legal foundation, there might be an increased reliance on external legal counsel, potentially driving up legal costs and limiting the autonomy of internal decision-making.

***High-Risk Decision-Making:***

In the demanding role of the E), an unwavering commitment to high-risk decision-making is imperative. The ED stands ready 24/7 to adeptly respond to crises demanding swift and decisive action. Proficiency in this competency requires a multifaceted skill set encompassing risk assessment, collaborative communication, and crisis management. Additionally, the ED must possess a familiarity with the specific individuals involved, adding a layer of professional insight to the decision-making process. The ED excels not only in recognizing the severity of threats but also in orchestrating the development of strategic safety action plans in real-time. These decisions are navigated with a profound understanding of the applicable legal standards, ensuring that the chosen course of action aligns seamlessly with regulatory requirements while anticipating the potential repercussions of each decision. This competency is a dynamic fusion of agility, strategic insight, and a profound commitment to safeguarding the public through astute decision-making in high-stakes scenarios.

***Business Impact/Consequences in the Absence of ED with High-Risk Decision-Making Competency:***

The most significant impact of the lack of this vital competency is an increased risk to public safety and the welfare of the individuals under the Board's jurisdiction. An ED without adept decision-making skills may struggle to respond promptly to crises, potentially allowing situations to escalate before effective intervention occurs. This delay could result in increased harm or damage, impacting the safety and well-being of those involved. Likewise, inadequate proficiency in risk assessment may lead to inaccurate evaluations of threat severity. This could result in misguided decisions and the implementation of suboptimal safety measures, increasing the likelihood of harm. A lack of crisis management skills may lead to chaotic responses during high-stakes situations, hindering the Director's ability to navigate and control rapidly evolving crises. This could contribute to the escalation of crises and difficulty regaining

control. An insufficient understanding of legal standards and regulatory requirements may lead to decisions that inadvertently breach laws or standards. This poses the risk of legal consequences, regulatory penalties, and damage to the organization's reputation due to non-compliance. Limited collaborative communication skills may impede the Director's ability to convey critical information swiftly and clearly during crises. This could result in miscommunication or inadequate information sharing, hindering coordinated responses. Inconsistent or ineffective high-risk decision-making may erode public and stakeholder trust in the organization's ability to handle crises competently. This poses the risk of diminished credibility, potential legal actions, and strained relationships with stakeholders.

***Board Governance and Meetings Management:***

Within this competency, the ED demonstrates an exceptional ability to orchestrate and oversee board meetings in strict adherence to public meetings laws. This includes the meticulous preparation of comprehensive meeting agendas that address pertinent topics and align with legal requirements. The ED not only oversees the smooth execution of meetings but also assumes the responsibility of recording accurate and detailed minutes, ensuring a comprehensive record of discussions, decisions, and action items.

In addition, the ED excels at effective tracking and follow-up on action items arising from board meetings. This involves a proactive approach to monitor the progress of assigned tasks, engage with relevant stakeholders, and ensure timely completion. The competency in board governance extends beyond the actual meeting, emphasizing the executive's role in fostering a culture of accountability and transparency within the organization. Overall, this competency underscores the ED's proficiency in managing the intricate processes of board meetings, safeguarding legal compliance, and promoting effective decision-making and action.

***Business Impact/Consequences in the Absence of ED with Board Governance and Meetings Management Competency:***

In the scenario where the director lacks the critical competency in Board Governance and Meetings Management, the repercussions unfold across various dimensions. Non-compliance with public meetings laws introduces legal uncertainties, casting shadows on the legitimacy of board decisions and potentially tarnishing the PSRB's reputation. The deficiency in orchestrating efficient board meetings, from agenda preparation to facilitation, results in disorganization and inefficiency, hindering the PSRB's ability to address pivotal issues. Incomplete or inaccurate recording of meeting minutes exacerbates the challenge, fostering misunderstandings and disputes over decisions and introduces issues of non-compliance of public meetings law. The ED's inability to systematically track and follow up on action items contributes to a lack of accountability, impeding progress on essential initiatives and eroding stakeholder confidence. The PSRB faces missed opportunities for improvement, as critical issues remain unaddressed, and strategic goals languish unfulfilled. Strained relationships with board members may ensue, leading to dissatisfaction and diminished engagement, further compromising the PSRB's operational effectiveness. In essence, the absence of this competency jeopardizes legal compliance, agency efficiency, stakeholder relationships, and the overall effectiveness of the PSRB's governance structure.

### ***Collaborative Relationships:***

Cultivating collaborative relationships is a pivotal competency for the ED, demanding a nuanced skill set to navigate the intricate landscape of external stakeholders. This proficiency acknowledges the inevitability of conflicting perspectives within the diverse roles and objectives of key stakeholders associated with the PSRB's initiatives. The ED adeptly employs a diplomatic strategy, elevating communication and trust. This approach extends beyond mere acknowledgment of differences, emphasizing the promotion of cultural sensitivity and inclusivity. The ED's role is not only conflict resolution but a proactive engagement that seeks common ground, fostering an environment conducive to innovative solutions. This competency is foundational in steering through myriad challenges inherent in the PSRB's work, epitomizing the ED's ability to forge collaborative partnerships that transcend differing viewpoints.

### ***Business Impact/Consequences in the Absence of ED with Collaborative Relationships Competency:***

The absence of the competency of cultivating collaborative relationships yields an array of challenges that reverberate throughout the organization. As the ED engages with external stakeholders, the lack of collaborative relationship-building skills becomes evident. Struggling to establish positive partnerships, the ED faces difficulties in fully understanding diverse perspectives. This limitation hampers the ED's ability to make informed decisions that consider a broad range of stakeholder interests. Communication nuances become a focal point, with the ED grappling to navigate diplomatic communication effectively. Challenges arise, leading to occasional misunderstandings among stakeholders and impacting coordinated efforts for successful initiatives. Additionally, the ED's challenge in elevating communication and trust results in lower levels of trust and credibility with external partners. While garnering support becomes more challenging, it may impact the organization's reputation in the external community. The need for emphasizing cultural sensitivity and inclusivity becomes apparent to avoid potential morale issues and legal concerns. In the external landscape, the ED faces difficulties proactively engaging and resolving disputes, leading to prolonged disagreements. This may slow down decision-making processes but also highlights opportunities for enhancing conflict resolution strategies. Transcending differing viewpoints proves challenging for the ED, affecting the ability to forge collaborative partnerships. Missed opportunities for joint initiatives limit the organization's potential for collective achievements. Internally, the absence of collaborative relationship-building extends to organizational teams, impacting cohesion and teamwork.

### ***Legislative Engagement and Advocacy:***

Within this competency, the ED demonstrates multifaceted abilities crucial for effective legislative engagement and advocacy. The ED not only comprehends the legislative process intricately but also excels in analyzing and crafting policies and impact statements in response to proposed and enacted legislation. Establishing and nurturing positive relationships with legislators is a hallmark of this competency, further amplified by the ED's adept representation of the agency in diverse legislative workgroups. The ED's proficiency extends to skillful testimony before the legislature, a pivotal aspect of advocating for the agency's interests.

Recognizing the agency's modest role within a vast mental health system, the ED plays a pivotal role in vigilant monitoring for bills that could inadvertently impact the PSRB. This proactive stance reflects the ED's commitment to safeguarding the PSRB's interests within the larger legislative landscape.

Integral to this competency are skills encompassing the preparation and presentation of the agency's budget. The ED not only navigates the intricacies of budgetary processes but also engages in strategic advocacy for additional funding. This advocacy aligns meticulously with enhancing the agency's strategic initiatives and overall improvement, showcasing the ED's dedication to securing resources that propel the agency forward in a fiscally responsible manner.

***Business Impact/Consequences in the Absence of ED with Legislative Engagement and Advocacy Competency:***

In the absence of this competency, the agency contends with a series of consequential challenges. Without the ED's nuanced understanding of legislative processes, the organization operates with limited insight into the intricacies of proposed and enacted legislation. Reactive rather than proactive policy responses become the norm, potentially leading to ineffective policies that fail to address the agency's evolving needs. The hallmark positive relationships with legislators, typically fostered by the ED, face strain, compromising the agency's ability to effectively advocate for its interests and collaborate on legislative matters. Diminished representation in legislative workgroups further weakens the agency's voice in critical discussions and decisions. The absence of skillful legislative testimony hampers the agency's capacity to communicate its needs persuasively. Vigilant monitoring for bills that could inadvertently impact the PSRB becomes compromised, exposing the agency to potential adverse consequences. Inadequate skills in budget preparation and strategic advocacy for additional funding leave the agency vulnerable to budgetary challenges, hindering its ability to align resources with strategic initiatives and overall improvement. The overall result is a compromised ability to thrive within the broader legislative and funding landscape, impacting the agency's effectiveness and strategic advancement.

***Training Facilitation:***

In the realm of training facilitation, the ED assumes a pivotal position as the agency's subject-matter expert. This role demands not only a profound understanding of the unique intricacies of the PSRB but also the capacity to design, deliver, and facilitate training sessions that resonate with diverse audiences. Notably, the scarcity of directly applicable resource materials adds an additional layer of complexity. The training initiatives encompass a variety of formats, spanning webinars, consultations, written handbooks, and website resources. What distinguishes the ED's proficiency is the adept adaptation of these sessions to a wide spectrum of audiences. This requires not only the ability to distill complex information into accessible and informative formats but also a nuanced understanding of the diverse needs and backgrounds of training recipients. The ED's role in training goes beyond imparting knowledge; it involves creating an engaging and effective learning experience tailored to the specific challenges and contexts of the PSRB.

***Business Impact/Consequences in the Absence of ED with Training Facilitation Competency:***

The absence of this competency yields significant negative consequences for the agency. Without the ED's adept understanding of the PSRB's intricacies and the capacity to design tailored training sessions, the dissemination of crucial knowledge becomes compromised. The scarcity of directly applicable resource materials exacerbates the challenge, limiting the availability of comprehensive training materials. The ED's proficiency in adapting sessions to diverse audiences is pivotal; without it, the training may fail to resonate with individuals of varying backgrounds and needs. Ultimately, the negative impact extends beyond the mere transmission of information; it compromises the agency's ability to create engaging and effective learning experiences tailored to the specific challenges and contexts of the PSRB, potentially impeding organizational growth and adaptability.

**Highly Critical**

1. **Board Members:** The following developmental plan addresses how the PSRB plans to build the bench strength for this position, focusing on recruitment, retention and skill development challenges and recommendations.

**Recruitment Strategies**

- ✓ **Targeted Outreach:** Implement targeted outreach campaigns to reach potential candidates within the mental health, legal, and law enforcement communities. Utilize professional associations, academic institutions, and relevant conferences to identify and engage qualified individuals.
- ✓ **Competency-Centric Recommendations:** Align recommendations to the governor with the competencies highlighted in the succession plan. Conduct informational interviews with questions tailored to assess candidates' proficiency in key areas crucial for a Board member.
- ✓ **Inclusive Stakeholder Involvement:** Enhance the recruitment process by involving key stakeholders who can contribute to participating in informational interviews. This collaborative approach ensures a comprehensive evaluation from diverse perspectives, incorporating insights from those directly impacted by the PSRB's operations.
- ✓ **Public Information Campaigns:** Conduct public information campaigns to raise awareness about the PSRB and the importance of its work. This can attract individuals with a sense of civic duty and a commitment to contributing to public safety and mental health recovery.
- ✓ **Strategic Job Announcement Distribution:** Develop a targeted distribution list for the Board member vacancies. Identify specific individuals, organizations, and platforms that can maximize the reach of the announcement within relevant networks. This strategic approach ensures that potential candidates with the right qualifications are reached effectively.
- ✓ **Engage Professional Networks:** Leverage professional networks and affiliations related to mental health, public safety, and governance. Engaging with these networks can help identify candidates with specialized knowledge and experience relevant to the PSRB's mission. This targeted outreach increases the likelihood of attracting candidates with a strong alignment to the agency's goals.
- ✓ **Diversity and Inclusion Focus:** Prioritize diversity and inclusion in the recruitment process. Actively seek candidates from diverse backgrounds to ensure a broad range of perspectives and experiences. This approach contributes to a more inclusive Board, fostering innovation and effective decision-making.



## Onboarding Strategies (coordinated by Board Chair and Executive Director)

- ✓ **Onboarding Plan:** Develop a customized onboarding plan tailored to the unique needs and background of the Board member. This plan should include a comprehensive orientation program that introduces new Board members to the PSRB's mission, values, strategic goals and hearings procedures as well as an overview of relevant statutes, administrative rules, and key legal precedents.
- ✓ **Mentorship Program:** Implement a mentorship program pairing new members with experienced colleagues. This provides a supportive environment for knowledge transfer, guidance, and insights into the nuances of administrative law and contested hearings.
- ✓ **Knowledge Transfer Sessions:** To the extent possible, facilitate structured knowledge transfer sessions between the outgoing and incoming Board member. These sessions should focus on sharing insights, experiences, and best practices related to preparing for and conducting hearings.<sup>3</sup>
- ✓ **Hearing Observations:** Facilitate new Board members' exposure to diverse hearing scenarios by providing opportunities for observation. Develop a comprehensive catalog featuring various hearing types, offering insights and training on both routine and complex hearing issues.
- ✓ **Public Hearing History:** Facilitate new Board members' onboarding by providing them access to the comprehensive archive of meeting minutes from past administrative meetings. This initiative not only familiarizes new members with the dynamics of public meetings but also offers an in-depth account of the agency's historical discussions and key issues.

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<sup>3</sup> It is imperative that Board members refrain from exchanging or discussing specific case details outside the formal deliberation process.

2. **Executive Director:** The following developmental plan addresses how the PSRB plans to build the bench strength for this position, focusing on recruitment, retention and skill development challenges and recommendations.

### Recruitment Strategies

- ✓ **Competency-Centric Interviewing:** Align the recruitment process with the competencies highlighted in the succession plan. Tailor interview questions to assess candidates' proficiency in key areas crucial for the Executive Director role. This ensures a focused evaluation of candidates against the specific requirements of the position.
- ✓ **Leadership Oregon Participation:** Nominate potential successors to participate in Leadership Oregon. This program offers invaluable insights into the intricacies of state-level leadership, providing candidates with a foundational understanding of state government management competencies and also exposes participants to opportunities to develop an extensive network of colleagues across the enterprise.
- ✓ **Inclusive Stakeholder Involvement:** Enhance the interview process by involving key stakeholders who can contribute question drafting and participate in interviews. This collaborative approach ensures a comprehensive evaluation from diverse perspectives, incorporating insights from those directly impacted by the PSRB's operations.
- ✓ **Strategic Job Announcement Distribution:** Develop a targeted distribution list for the job announcement. Identify specific individuals, organizations, and platforms that can maximize the reach of the announcement within relevant networks. This strategic approach ensures that potential candidates with the right qualifications are reached effectively.
- ✓ **Engage Professional Networks:** Leverage professional networks and affiliations related to mental health, legal/justice, public safety, and governance. Engaging with these networks can help identify candidates with specialized knowledge and experience relevant to the PSRB's mission. This targeted outreach increases the likelihood of attracting candidates with a strong alignment to the PSRB's goals.
- ✓ **Utilize Online Platforms:** Explore online platforms and job portals that cater to executive-level positions in the public sector. This includes reputable websites and forums where experienced leaders often seek new opportunities. Maximizing the visibility of the job announcement on these platforms broadens the pool of qualified candidates.
- ✓ **Diversity and Inclusion Focus:** Prioritize diversity and inclusion in the recruitment process. Actively seek candidates from diverse backgrounds to ensure a broad range of perspectives and experiences. This approach contributes to a more inclusive leadership team, fostering innovation and effective decision-making.

## Onboarding Strategies (coordinated by Chair, Deputy, and Exec. Support)

- ✓ **Onboarding Plan:** Develop a customized onboarding plan tailored to the unique needs and background of the incoming ED. This plan should include a detailed schedule, key introductions, and specific learning objectives aligned with the competencies outlined in the succession plan.
- ✓ **In-Depth Organizational Overview:** Provide an extensive overview of the organization's history, mission, values, and strategic goals. Ensure the incoming ED gains a profound understanding of the agency's context within the mental health system, its role, and the impact it seeks to achieve.
- ✓ **Structured Introduction to Key Stakeholders:** Facilitate introductions to key internal and external stakeholders, including staff, board members, government officials, and interstate agency and community partners. These introductions should go beyond formalities, aiming to foster meaningful connections and an understanding of the diverse roles within the organization.
- ✓ **Thorough Review of Agency Operations:** Conduct a thorough review of agency operations, focusing on critical processes, programs, and ongoing initiatives. This includes an exploration of the PSRB's programs, strategic plan, affirmative action plan, legal and procedural policies, key partnerships, fiscal/budget matters, vendors/contractors, and the competencies crucial for the ED role.
- ✓ **Mentorship and Shadowing Opportunities:** Facilitate shadowing opportunities between the incoming and outgoing ED. This provides unparalleled insights into the intricacies of the role and fosters direct exposure to critical decision-making scenarios, operational challenges, and organizational nuances. Through this immersive experience, the successor gains a profound understanding of the organizational culture, strategic initiatives, and the rationale behind key decisions, ensuring a seamless and informed leadership transition. The real-time interaction between the outgoing and incoming EDs establishes a foundation for open communication, encourages the exchange of institutional knowledge, and nurtures a collaborative relationship, empowering the new Executive Director to confidently navigate the demands of their pivotal role. If not achievable during the transition, organize knowledge transfer sessions post-successor initiation to accomplish the same objectives.
- ✓ **Preparedness for Legal Issues:** Ensure access to legal resources and consultation for the successor. This includes establishing a mechanism for seeking guidance on complex legal matters related to board governance, public meetings, and other legal considerations.

## Creation of an Executive Director Desk Manual

- ✓ Develop and customize the Executive Director's Desk Manual for the PSRB, ensuring alignment with the agency's mission, values, vision and strategic goals. Organize the manual with clear sections covering the vast competencies and job duties outlined in the position description. Integrate stakeholder mapping strategies to identify key stakeholders and their roles, and include a comprehensive accounting of pressing issues that may need to be addressed during the transition. Establish a systematic plan for continuous updates and maintenance of the Desk Manual to ensure ongoing accuracy and relevance.

## Develop a Training Facilitation Guide

- ✓ Develop a Training Facilitation Guide outlining the various types of trainings administered by the ED. This section should serve as a comprehensive guide, providing insights into the planning, execution, and evaluation of different training programs within the PSRB.
- ✓ Provide a detailed overview of the types of training programs regularly administered by the ED. This should encompass both internal staff development sessions and external training initiatives conducted by the PSRB.
- ✓ Clearly articulate the objectives and goals of each training program. Define the intended outcomes and competencies that participants are expected to acquire, aligning these goals with the broader mission and strategic objectives of the PSRB.
- ✓ Specify the target audience for each training program. Identify whether the training is designed for internal staff, external stakeholders, or specific groups within the community. This information ensures that training initiatives are tailored to the needs of diverse participants.
- ✓ Outline the methodologies employed during training sessions. This could include workshops, webinars, consultations, written materials, and any other innovative approaches used to deliver content effectively. Highlight the adaptability of the ED in catering to diverse learning styles.
- ✓ Describe the mechanisms in place for evaluating the effectiveness of training programs. Include details on post-training assessments, feedback collection, and continuous improvement strategies. Emphasize the commitment to refining training initiatives based on participant feedback.
- ✓ Provide insights into the allocation of resources for training programs. This may include budgetary considerations, staffing requirements, and any external collaborations essential for successful training execution.

## Development | Agency-Wide Competency Development Plan

The PSRB places immense value on its dedicated staff, recognizing their indispensable roles in ensuring the agency's seamless operations. While most positions have experienced turnover, the recruitment and onboarding of successors have efficiently maintained business continuity. Consequently, the agency refrains from currently designating any additional positions as "highly critical" or "critical."

Nevertheless, the agency is proactive in implementing a comprehensive evaluation plan for all positions, prioritizing competency development and sustained operations during periods of transition. The below plan integrates an annual review of position descriptions with the creation and upkeep of desk manuals and opportunities for professional development. The organization is committed to fostering clarity, consistency, and a seamless transition for employees in diverse roles. This strategic approach guarantees that incoming staff members are well-equipped, comprehend their roles, and can effortlessly contribute to the overarching success of the organization.

### Annual Position Description Review

- ✓ Conduct a yearly review of all position descriptions across various roles within the organization.
- ✓ Engage employees to gather insights on the evolving responsibilities and expectations associated with their positions.
- ✓ Incorporate feedback from outgoing employees to refine and enhance the accuracy of position descriptions.
- ✓ Evaluate the alignment of position descriptions with legal requirements, competencies, and organizational objectives.

### Desk Manuals

- ✓ Develop comprehensive desk manuals for each role, outlining key responsibilities, procedures, and performance expectations.
- ✓ Include detailed guidelines on essential tasks, interactions with colleagues and stakeholders, and adherence to legal and ethical standards.
- ✓ Collaborate with experienced employees to capture institutional knowledge and best practices in the manuals.
- ✓ Regularly update desk manuals to reflect changes in policies, procedures, and industry standards.
- ✓ Provide ongoing training sessions to ensure employees are familiar with and effectively utilize the desk manuals.

## Professional Development

- ✓ Utilize the Performance Appraisal Feedback (PAF) model to periodically assess and develop employees' skills, competencies, and career goals.
- ✓ Identify training needs and opportunities for skill enhancement.
- ✓ Implement targeted training to address identified skill gaps.
- ✓ Develop a cross-training plan to ensure that employees possess a diverse skill set.
- ✓ Facilitate job shadowing, mentorship programs, and collaborative projects across departments.
- ✓ Utilize Microsoft TEAMS to facilitate easy access to shared information.

What are the agency's plans to evaluate and revisit this plan to ensure the agency is on track in the following areas:

### **Evaluation of Succession Plan Components:**

#### **1. Highly Critical/Critical Positions:**

**Approach:** The agency will conduct regular reviews of organizational needs, workload, and strategic objectives to determine if positions should be recategorized as highly critical or critical. We anticipate this determination will be more revealing as staff make progress with the completion of their desk manuals and anticipate the challenges inherent in their job duties.

#### **2. Competency Adjustment:**

**Approach:** The agency has established a commitment to annually reviewing position descriptions, which will include an assessment of the required competencies. Leadership will utilize PAF sessions to gather feedback from employees to identify emerging competencies and skill gaps.

#### **3. Employee Goals:**

**Approach:** Use the PAF model to implement regular performance appraisal processes and discuss employee goals, interests, and identify opportunities for cross-training or career progression. Facilitate open communication between employees and supervisors to align individual goals with organizational objectives. The agency anticipates administering employee satisfaction surveys in the coming year to provide another modality to provide feedback to leadership.

#### **4. Recruitment Strategies:**

**Approach:** The agency will actively work with its HR Business partners to measure the effectiveness of recruitment and retention strategies. The agency will utilize metrics such as time-to-fill, turnover rates, and employee satisfaction. The agency will regularly solicit feedback from HR, hiring managers, and employees to identify areas for improvement.

The following provides an overview of the agency's 2024 objectives and progress made on each of them. To the extent these objectives were not completed, further objectives are established in the Action Plan section for 2025.

### **ACTIVITY #1: PROGRESS UPDATE:**

**Original Objective:** Implement a public information campaign to raise awareness about upcoming Board member vacancies and improve recruitment efforts.

#### **Progress Summary:**

In 2024, the agency made significant progress toward enhancing recruitment efforts for Board member vacancies. One significant accomplishment was the establishment of a recruitment protocol to standardize and improve the vetting process for candidates the agency recommends for Governor appointments. The agency had the opportunity to use this protocol in action for the recruitment and recommendation of one prospective Board member during 2024.

Other aspects of the recruitment process encountered challenges that required adjustments and led to a shift in strategies. The agency was unable to plan and host a recruitment event due to bandwidth limitations and competing priorities faced by the agency's director.

While the recruitment event could not take place, the agency expanded its recruitment efforts by identifying additional methods to spread the word. A notable success in this area was taking advantage of the newly established state contract with Partnership in Diversity. The agency took advantage of services, using its Career Center to post recruitments for its next psychiatrist and attorney Board members. This particular tool provided the added benefit of measurable metrics, tracking the views and engagement on posted vacancies, which helped assess the effectiveness of our outreach.

Recruitment efforts for the psychiatrist position included utilizing the Partnership in Diversity platform, which helped extend the job posting's reach. Over the course of two months, the position received over 90 views. However, despite this visibility, only one completed application has been received. In addition to the online platform, the distribution list for the position was expanded with the help of the Governor's office. Despite these efforts, the low response rate highlights a recurring challenge—the compensation package for this position is not competitive with the earning potential in the field, which is likely a major barrier to attracting qualified candidates.

Similarly, recruitment for the attorney member position resulted in around 50 views over two months on the Partnership in Diversity platform, but, as of now, no applications have been



received. This outcome reinforces the agency's concern that compensation issues are hindering recruitment for these highly critical roles.

On the other hand, this appears to be less of an issue affecting the recruitment of the probation/parole member for the Board. These efforts took place prior to the Partners in Diversity contract and resources being made available. Even without this tool, the agency was able to attract multiple applicants, surpassing the initial goal of three. This outcome was expected, as historically, the probation/parole role typically garners more interest compared to other vacancies like the psychiatrist, psychologist, or attorney roles. Ultimately, the Board identified a competitive applicant for the position, and that individual was appointed by the Governor and is due to be confirmed by the Senate in February 2025.

## **ACTIVITY #2: PROGRESS UPDATE**

**Original Objective:** Develop a comprehensive Executive Director Desk Manual for the Psychiatric Security Review Board (PSRB) that covers essential aspects of the role.

The original objective of developing a comprehensive Executive Director Desk Manual for the Psychiatric Security Review Board (PSRB) was established with the intention of covering essential aspects of the Executive Director (ED) role. This manual is a tool to ensure continuity, facilitate smooth transitions, and help both the current and future EDs navigate their responsibilities.

### **Progress Summary:**

In 2024, substantial progress was made in identifying the core duties of the Executive Director (ED) and organizing them into OneNote. This effort established a solid foundation for the development of the desk manual. While the key responsibilities of the ED have been cataloged, the next step is to delve deeper into each duty and specify the full scope of tasks. The goal is to ensure that each duty is not only identified but also broken down into clear, actionable steps that can guide a future ED in their role. This process will involve a thorough examination of the day-to-day activities, aiming for clarity and precision in documenting what each responsibility entails.

One other challenge that emerged was with the original planned structure of the manual. The approach of categorizing the ED's duties into distinct sections—such as governance, legal compliance, and strategic planning—proved to be too simplistic and the categories themselves were ill-defined. The ED's role is far more dynamic and interconnected than this rigid framework could accommodate. As a result, the duties did not fit neatly into predefined categories, underscoring the need for a more flexible and well-defined approach. Given the interconnected and evolving nature of the ED's responsibilities, the desk manual will be organized to reflect a more fluid structure. This revised approach will allow for greater adaptability and will better capture the complexity of the ED's role, ensuring that tasks and responsibilities are presented in a way that reflects their interdependencies and evolving nature.

A separate, but related area of progress relates to the agency director's participation and graduation in the Leadership Oregon 2024 cohort. This experience has been valuable in supporting the agency's succession planning efforts. The program has provided the director with new insights on leadership, strategic thinking, and organizational development, which will help refine the ED role and strengthen leadership within the agency. The director's participation has also highlighted best practices for talent development, team collaboration, and leading through change. These insights will be applied to further improve the ED desk manual and help better prepare the agency for future leadership transitions. Additionally, the director's growth through this program will strengthen their ability to mentor future leaders and enhance the agency's succession pipeline.

### **ACTIVITY #3: PROGRESS UPDATE**

**Original Objective:** Review and update position descriptions to ensure accuracy in reflecting current job duties and competencies. Develop more concrete competencies as needed and determine whether additional training or other resources are necessary.

The original goal was to review and update position descriptions across several key roles within the agency, focusing on ensuring they accurately reflect current duties and responsibilities. The key activities included gathering employee feedback on missing or uncompleted duties, discussing job competencies, updating position descriptions, and refining them to align with shifting responsibilities.

#### **Progress Summary:**

##### **1. AS-2 Positions Review:**

- The review of the **Administrative Support Specialist 2 (AS-2)** positions has been completed. After carefully assessing the current duties, it became clear that with the reduction in administrative responsibilities and a shift in agency priorities, one of the four AS-2 positions will be eliminated. This decision is part of a broader plan to establish two Operations and Policy Analyst 2 (OPA-2) positions, which will help redistribute decision-making duties more evenly across the organization.

##### **2. Paralegal Positions Review:**

- Agency management started, but was unable to complete a full review of the **Paralegal** positions by the end of 2024. This is primarily related to the onboarding of a new Deputy Director at the end of 2023 and need for establishing those roles and responsibilities vis a vis the paralegal positions. A deeper dive is still necessary to evaluate how their duties align with the shifting agency needs and to ensure their positions reflect any changes required due to plans for the agency to redistribute operational tasks and decision-making.

##### **3. Executive Support Specialist Review:**

- The review of the **Executive Support Specialist** position is still in progress, and we plan to complete this next, alongside the Paralegal review.

#### **ACTIVITY #4:**

**Objective: Staff Empowerment Program:** Develop and implement a structured staff empowerment program with the primary objective of providing employees continual opportunities for growth, enabling them to realize their full potential. This initiative aims to cultivate a collaborative workplace environment conducive to the formation of high-performing teams, thereby contributing to the overall improvement and success of the organization.

The initiative to develop and implement a structured staff empowerment program faced significant challenges during 2024. The original scope of the program was ambitious, requiring a considerable investment of time and resources. One of the major obstacles was the onboarding of a brand-new Deputy Director (at the end of 2023), who had to learn both their own responsibilities and the dynamics of the agency's staff. This was an inherent period of transition, and the Deputy Director's focus on this onboarding process, combined with other competing agency priorities, took up the majority of management's bandwidth. As a result, the full development and execution of the empowerment program did not progress as originally planned.

Notwithstanding this barrier, significant progress related to staff empowerment was made during 2024. The agency successfully launched its first Gallup Employee Engagement Survey, which yielded strong scores, reflecting high levels of staff engagement and satisfaction with their roles and professional relationships with each other and management. Additionally, a successful staff retreat was held in May 2024, providing a valuable opportunity for team-building, goal-setting, and identifying training needs. The retreat proved to be a positive experience, promoting connections among staff members and encouraging the sharing of ideas to create collaborative goals. One notable outcome of the retreat was the creation of an achievement vision board, which highlights individual staff accomplishments on a weekly basis. This initiative not only recognized staff successes that might have otherwise gone unnoticed but also provided a platform for staff to communicate the nuances of their roles. Furthermore, staff were empowered to take ownership of their professional development by seeking out their own training opportunities. This self-driven approach is expected to serve as a strong foundation for future training initiatives, contributing to ongoing personal and professional growth.

While the staff empowerment program did not fully materialize as envisioned in 2024, continuing to develop staff training and empowerment is a critical component of the succession plan. Management recognizes that a more gradual and focused approach will be necessary moving forward. Another factor the agency is considering in this progress update is the new requirement that each agency must develop customer service policy, which is to be completed by March 2025. With that in mind, efforts will be made to scale back and reframe this initiative for 2025, beginning with a smaller, more manageable scope and integrating this policy into our 2025 objectives.

The following activities outline the agency's anticipated goals over the course of 2025.

### **ACTIVITY #1:**

**Objective:** Strengthen the recruitment of qualified candidates for Board member vacancies by showcasing the significant public service impact these positions have on the citizens of Oregon. Despite compensation and workload challenges, recruitment efforts will focus on emphasizing how Board members contribute to improving outcomes for individuals with mental health challenges, enhancing community safety, and making a meaningful difference in the lives of vulnerable populations. To ensure a more robust and sustainable recruitment strategy, the agency will explore professional assistance from a recruitment strategist to develop innovative approaches, as all available internal resources have been exhausted.

**Targeted Completion Date:** December 31, 2025

### **Intermediate Milestones:**

- **April 2025:** Procure the services of a professional recruitment strategist who specializes in public sector roles or board recruitment to create a targeted and sustainable recruitment strategy.
- **June 2025:** Develop a comprehensive recruitment plan with the strategist's assistance. The plan will outline targeted strategies, key messaging, outreach channels, and partnerships to emphasize the public service impact of Board member positions.
- **August 2025:** Finalize and approve the recruitment plan, ensuring that all key strategies are aligned with the agency's strategic and DEI objectives for diversifying the applicant pool and engaging with underrepresented groups as well as other agency priorities.
- **September 2025:** Begin the implementation phase, utilizing the recruitment plan to increase outreach efforts, including consideration of leveraging professional networks, social media, and strategic partnerships.

### **Contingencies:**

- **Delays in Procuring a Recruitment Strategist:** If the recruitment strategist is not secured by April 2025, the agency may have to explore temporary partnerships with external organizations or rely on internal staff resources to draft a recruitment plan. This could delay strategy development and recruitment timeline.
- **Limited Impact of the Recruitment Plan:** If the initial plan does not generate sufficient interest or diverse applicants, the agency may need to refine the strategies and explore additional outreach avenues, such as partnerships with mental health organizations, community leaders, or leveraging state government networks.
- **Budget Constraints:** Financial limitations or procurements rules may affect the ability to procure a strategist or implement outreach activities. In this case, the agency will need to adjust the scope of the recruitment plan or prioritize strategies that are more cost-effective.

### **Metric Targets:**

- **Procurement of a Recruitment Strategist:** A recruitment strategist should be engaged by April 2025.
- **Completion of Recruitment Plan:** The recruitment plan, with clearly defined outreach strategies and target metrics, should be finalized and approved by August 2025.
- **Increase in Applicant Volume:** Achieve at least 5 qualified applicants for Board member vacancies. This metric will be measured post-launch of the recruitment plan.

### **Metric Definitions:**

- **Procurement of a Recruitment Strategist:** The engagement of a recruitment strategist will be considered complete when a signed contract is in place, and the strategist begins collaborating with the agency to develop the recruitment plan. The target is April 2025.
- **Completion of Recruitment Plan:** The recruitment plan will be considered finalized when it includes clearly defined outreach strategies, targeted messaging, specific channels (such as social media, professional networks, and partnerships), and measurable goals for increasing the applicant pool. The plan should be approved by August 2025.
- **Increase in Applicant Volume:** The increase in the number of qualified applicants will be measured by the receipt of at least five applications for Board member vacancies following the implementation of the new recruitment plan. It is anticipated that with the successful establishment of the recruitment plan in 2025, future recruitments may not be needed immediately, but the plan will provide a foundation for ongoing, targeted efforts to attract a strong pool of candidates when vacancies arise.

### **ACTIVITY #2:**

**Objective:** Refine and document the Executive Director's duties by specifying the full scope of responsibilities in enough detail to provide clear, actionable guidance for future EDs. Reorganize the desk manual to reflect a fluid and interconnected approach that accurately mirrors the dynamic nature of the ED's role.

**Targeted Completion Date:** December 31, 2025 (with additional objectives planned for 2026)

### **Intermediate Milestones:**

- **February 2025:** Complete identification of the ED's work duties. Approximately 60 areas of responsibility have been identified, some of which may be delegated upon the establishment of the OPA-2 positions.
- **March – November 2025:** Aim to clearly define at least two identified areas of responsibility per month, including associated specific duties. The process will involve thorough documentation of each responsibility, including sub-tasks, timelines, and necessary resources.
- **December 2025:** Organize and finalize the completed sections of the manual, ensuring that it is structured in a logical, accessible way that is easily navigable. Ensure that all areas of responsibility are fully detailed and cross-referenced to reflect the

interconnected nature of the ED's role, making it a living document adaptable for future leadership.

- **December 2025:** Review progress and establish objectives for 2026.

### **Contingencies:**

- **Delays in Role Clarification:** Delays in finalizing the ED's full scope of duties or the establishment of the OPA-2 positions may affect the timeline for completing the desk manual. Should this occur, the project timeline may need to be extended, or some tasks may need to be reallocated to other members of the leadership team.
- **Shifting Agency Priorities:** The evolving needs of the agency could require modifications to the ED's responsibilities and, therefore, the content of the desk manual. In the event of significant changes, the desk manual will be updated to reflect these shifts, which may affect the timeline for completion.
- **Workforce Bandwidth:** The workload of the ED may impact the ability to meet deadlines for developing the plan or completing the desk manual.

### **Metric Targets:**

- **Completion of Work Duties Identification:** By February 2025, 100% of the identified duties (approximately 60) should be documented, even if some duties are expected to be reassigned following the establishment of the OPA-2 positions.
- **Definition of Duties:** By November 2025, at least 50% (i.e. 30) of the identified areas of responsibility should be clearly defined, with the goal of completing at least two new sections per month between March and November.
- **Completion and Organization of Desk Manual:** By December 2025, the full desk manual should be organized, with clear sections, cross-referencing, and easily navigable content. Areas that have not yet been completed will include placeholders and new objectives will be established for 2026.

### **Metric Definitions:**

- **Completion of Work Duties Identification:** This metric is currently conceptualized as a list that outlines 100% of the ED's areas of responsibilities. It is anticipated that duties will be able to be categorized by not yet developed categories/sections of the manual.
- **Definition of Duties:** This metric will be evaluated based on the successful completion of documented duties in at least two areas of responsibility per month from March to November 2025. The level of specificity will depend on complexity of the area of responsibility and need for flexibility.
- **Desk Manual Organization and Finalization:** While the manual is considered a living document, this metric will be assessed by reviewing the desk manual's structure and accessibility. The manual should include 100% of the ED's responsibilities by the target date, organized into logical sections, cross-referenced, and easy to navigate, ensuring it is a complete and usable document for future executive leadership.

### **ACTIVITY #3:**

**Objective:** Develop and successfully fill two Operations and Policy Analyst 2 (OPA 2) positions within the next year to relieve senior leadership of routine operational duties, redistribute administrative responsibilities, and enhance overall operational efficiency across the agency. These roles will be pivotal in overseeing daily program operations, ensuring compliance, coordinating legislative updates, and enabling the Executive Director (ED) and Deputy Director (DD) to focus on strategic initiatives.

**Targeted Completion Date:** December 31, 2025

#### **Intermediate Milestones:**

- **January 2025:** Finalize draft position descriptions for the OPA 2 positions and prepare a justification memo for review by the Department of Administrative Services (DAS) HR Class and Compensation partner.
- **February 2025:** Submit a comprehensive finance plan detailing the establishment of the OPA 2 positions and outlining any necessary reclassification or elimination of existing positions to accommodate the new roles.
- **February 2025:** Post recruitment for the OPA 2 positions and initiate the hiring process.
- **April 2025:** Hire limited-duration OPA 2 positions pending legislative approval.
- **July 1, 2025:** Officially transition the OPA 2 positions from limited-duration to permanent status, following legislative approval.
- **December 2025:** Finalize and implement a working desk manual for both OPA 2 positions, outlining key responsibilities, workflows, and procedures.

#### **Contingencies:**

- **Budgetary Constraints:** Potential delays or challenges in securing the necessary budget to fund the OPA 2 positions.
- **Recruitment Delays:** Possible setbacks in the recruitment process due to a limited pool of qualified candidates.
- **Agency Priority Shifts:** Unexpected changes in agency priorities could require the redistribution of responsibilities within the OPA 2 positions, impacting timelines or job functions.

#### **Metric Target:**

- Successful recruitment and onboarding of two qualified OPA 2 positions by March 2025.
- A reduction in the number of operational tasks previously assigned to the ED/DD by the end of 2025.
- Completion and implementation of a working desk manual for the OPA 2 positions by December 2025.

#### **Metric Definition:**

- **Recruitment Success:** Both OPA 2 positions are filled with qualified candidates by March 2025, ensuring a timely transition and operational continuity.

- **Reduction in ED/DD Daily Involvement:** A 30% decrease in the number of tasks previously handled by the ED/DD as identified in their desk manual, now transferred to the OPA 2 positions. This will be tracked through a comparative review of tasks and their reassignment to the new roles.
- **Desk Manual Completion:** A fully functional desk manual for the OPA 2 positions by December 2025, demonstrating that both roles are well-established, with clear guidance on responsibilities and processes.

#### **ACTIVITY #4:**

**Objective:** Review and update the position descriptions for the AS-2, Paralegal, and ESS-2 roles to clarify responsibilities and ensure alignment with the evolving needs and priorities of the agency. This objective aims to refine these positions to provide a clearer understanding of each role's duties

**Targeted Completion Date:** December 31, 2025

#### **Intermediate Milestones:**

- **March 2025:** Finalize the elimination of one AS-2 position and ensure any gaps are redistributed or resolved.
- **June 2025:** Complete the review of Paralegal positions, refining their descriptions to ensure they are aligned with the agency's current needs and priorities.
- **June 2025:** Finalize the review of Executive Support Specialist positions, ensuring their role supports the agency's shift toward a more distributed operational structure.

#### **Contingencies:**

- **Delays in Position Review Completion:** Delays may occur if further adjustments are needed to position responsibilities, especially with the addition of the Deputy Director role or other evolving priorities.
- **Budget or Staffing Constraints:** Budget or staffing limitations could delay the reallocation of duties or the creation of new roles, particularly for the OPA-2 positions.
- **Shifting Agency Priorities:** Emerging agency priorities could impact timelines for completing position reviews and implementing the necessary changes.

#### **Metric Targets:**

- **Finalize the Elimination of One AS-2 Position:** Complete the elimination or transition of administrative duties left by the elimination of this position by July 1, 2025.
- **Complete Paralegal and Executive Support Specialist Position Reviews:** Ensure that 100% of Paralegal and ESS-2 position descriptions are reviewed, updated, and aligned with current agency priorities by June 2025.

#### **Metric Definitions:**

- **Elimination of AS-2:** This target is completed when the AS-2 is removed from the personal services section of the agency's financials spreadsheet.
- **Completion of Position Description Reviews:** The target is 100% completion of Paralegal and Executive Support Specialist position reviews by June 2025, measured by



the percentage of roles that have undergone thorough review and updates to position descriptions.

#### **ACTIVITY #5:**

**Objective:** Identify and develop specific competencies for the Paralegal positions to better align their roles with the agency's evolving priorities and enhance customer service. This objective aims to ensure that Paralegal roles are clearly defined with the necessary competencies to effectively support the agency's goals and meet customer expectations. The agency will assess customer and stakeholder expectations of Paralegal performance, incorporating their feedback to refine competencies and improve service delivery. The initiative will also evaluate the need for additional training or resources to develop these competencies, ultimately strengthening the Paralegals' capacity to meet their responsibilities.

**Targeted Completion Date:** December 31, 2025

#### **Intermediate Milestones:**

- **January - June 2025:** Survey key customers and stakeholders to understand their expectations of Paralegal performance and identify areas for improvement.
- **July - November 2025:** Utilize the newly established Paralegal position descriptions (see Activity #4) and feedback from surveys to develop a refined competency framework for Paralegals, clearly documenting the skills, knowledge, and abilities required for each role.
- **December 2025:** Develop a customer satisfaction survey based on identified Paralegal competencies to be distributed annually to stakeholders. Identify the stakeholders that will be requested to complete the survey. Prepare an implementation plan for distributing and analyzing survey results to guide continuous improvement.

#### **Contingencies:**

- **Customer/Stakeholder Engagement:** Delays or low response rates to surveys from customers and stakeholders may hinder the ability to gather sufficient feedback. To mitigate this, the agency will consider communication channels to encourage participation and ensure a diverse range of feedback is collected.
- **Budget or Staffing Constraints:** Budget or staffing limitations could delay or otherwise impact timelines for developing and distributing surveys and establishing competencies based on the feedback and position review.

#### **Metric Targets:**

- **Establish Stakeholder Feedback Survey:** Develop and implement a survey for stakeholders to provide feedback on Paralegal performance and expectations by June 2025.
- **Establish Paralegal Competency Framework:** Finalize and document the competency framework for all Paralegal positions by November 2025, including the necessary skills and customer service competencies.

- **Establish Annual Customer Service Survey:** Design and implement an annual customer satisfaction survey to assess Paralegal performance based on the identified competencies by December 2025.

#### **Metric Definitions:**

- **Stakeholder Feedback Survey:** Success will be measured by the development and implementation of a stakeholder survey that collects feedback on Paralegal performance and expectations. The survey should be completed and distributed by June 2025, with a goal of 50% response rate.
- **Paralegal Competency Framework:** Success will be measured by the finalization and documentation of a comprehensive competency framework for all Paralegal positions by November 2025. This framework will identify and define the required skills, knowledge, and customer service competencies for each role.
- **Annual Customer Service Survey:** Success will be measured by the creation and launch of an annual customer satisfaction survey by December 2025. This survey will assess Paralegal performance based on the established competencies and will be distributed to stakeholders to ensure ongoing feedback and improvement. The target is to achieve at least 50% stakeholder response rate.

#### **ACTIVITY #6:**

**Objective:** The agency will develop a structured training plan for a staff empowerment program that integrates its newly established customer service policy. This plan will serve as the foundation for promoting a culture of continuous professional growth while enhancing its commitment to exceptional customer service. By aligning staff development with customer service priorities, the plan will ensure that employees are equipped with the skills, knowledge, and confidence to provide excellent service. The goal is to create a strategic roadmap of training opportunities that will be rolled out in 2026.

**Targeted Completion Date:** December 31, 2025

#### **Intermediate Milestones:**

- **March 2025:** Complete and submit the agency's customer service policy. Begin staff training on the new policy to ensure understanding and integration into daily practices.
- **September 2025:** Develop the framework for the staff empowerment program, including identifying the format (e.g., in-person, virtual, hybrid), training resources (e.g., internal expertise, external trainers), scheduling options, as well as the topics that will be prioritized for implementation in 2026.
- **December 2025:** Present the 2026 program to staff, ensuring the first three months of training are planned for 2026.

#### **Contingencies:**

- **Budget Constraints:** Financial limitations may affect the ability to implement staff development opportunities or train staff on the new customer service policy. If budget constraints arise, the agency may need to adjust the scope or seek external funding or partnerships to ensure successful implementation of the training program.

- **Workforce Bandwidth:** The workload of key staff members, particularly management, may impact the ability to meet deadlines for developing the plan or completing the customer service policy. In such cases, timelines will be adjusted as necessary to accommodate staff availability.

#### **Metric Targets:**

- **Completion of Customer Service Policy:** Ensure that the customer service policy is finalized and communicated to all staff by March 2025.
- **Completion of Draft Staff Empowerment Program:** Management will establish an outline of the program by September 2025.
- **Introduction of Plan:** Management will present the overview of the program, with the first three months of trainings scheduled in 2026 by December 2025.

#### **Metric Definitions:**

- **Completion of Customer Service Policy:** Measured by the submission of the finalized customer service policy due March 2025.
- **Completion of Draft Staff Empowerment Program:** The program will be considered complete when a detailed outline, including training formats, resources, and topics, is drafted by September 2025.
- **Introduction of the Program to Staff:** Success will be measured by the communication of the 2026 program to staff, with the first three months scheduled and ready for rollout in January 2026, by December 2025.

## **Conclusion |**

The PSRB's 2025 Succession Plan is an integral to Initiative 3 of the PSRB's 2024-27 Strategic Plan. To ensure relevance and responsiveness, management aims to review the Succession Plan periodically and provide comprehensive updates at least annually.