

# 2024 Succession Plan

**Psychiatric Security Review Board  
January 1, 2024**

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[Agency Website](#)

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## 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. Please visit our [website](#) for additional information about our vacancies and how to apply. 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, explain why they are critical, and communicate 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 section 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

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

improvement. The consequences include public dissatisfaction, reduced agency effectiveness, and the potential for missed opportunities that could enhance overall service delivery.

***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 ED, 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.

## Development | For Critical and Highly Critical Positions

### 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 plans for competency development

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.

## Evaluation | Competencies, Goals, and Recruitment Strategies

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.

## Action Plan |

The following activities outline the agencies anticipated goals over the next year.

### **ACTIVITY #1:**

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

**Targeted Completion Date:** *June 2024*

### **Intermediate Milestones:**

- ✓ Consult with HR Business partner for innovative ways to recruit by February 1, 2023.
- ✓ Host at least one recruitment event by March 1, 2023.

**Contingencies (if any):** No contingencies anticipated.

**Metric Target:** Attain at least three applicants for the probation/parole position for possible recommendation to the Governor's Office.

**Metric Definition:** The three applicants will have submitted their completed application through Workday.

### **ACTIVITY #2:**

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

**Targeted Completion Date:** *December 2024*

### **Intermediate Milestones:**

- ✓ Content Customization (Sections 1-5): Complete by June 1, 2024.
- ✓ Governance and Legal Compliance Section (Sections 6-8): Complete by July 1, 2024.
- ✓ Strategic Planning and Stakeholder Engagement (Sections 9-10): Complete by August 1, 2024.
- ✓ Communication Protocols, Risk Management, and Performance Metrics (Sections 11-14): Complete by September 1, 2024.

**Contingencies (if any):** Adjust the timeline for specific sections while maintaining the overall target completion date should unforeseen challenges arise.

**Metric Target:** Ensure that 95% of the Desk Manual content is completed by the targeted completion date.

**Metric Definition:** The percentage of completion will be determined by dividing the number of completed sections by the total number of sections outlined in the onboarding manual.

**ACTIVITY #3:**

**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.

**Targeted Completion Date:** *July 2024*

**Intermediate Milestones:**

- ✓ Request each employee to review their position description and provide feedback regarding duties that are missing as well as duties included that they are not completing by January 31, 2024.
- ✓ Use January quarterly check-in to discuss job duties, competencies, and progress with respect to desk manual goals that were set last quarter.
- ✓ By March 31, 2024, review position descriptions and update in alignment with feedback discussed.
- ✓ Priority for position description review:
  - AS-2 (4 positions)
  - Paralegals
  - Executive Support Specialist

**Contingencies (if any):** None anticipated.

**Metric Target:** Achieve an 80% completion rate in updating and refining position descriptions within the specified timeline.

**Metric Definition:** The completion rate is calculated on the percentage of the 11 position descriptions (not including ED, Deputy, or Board) that have been reviewed and updated.

**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.

**Targeted Completion Date:** *January 2025*

**Intermediate Milestones:**

- ✓ By March 31, 2024, establish a framework for a year-long schedule of monthly themed staff development topics to be incorporated into staff meetings. This milestone entails the careful curation and alignment of diverse subjects, ensuring each topic goes beyond regular job duties, contributing significantly to the professional growth, team building, and overall competence of our staff.

- ✓ By May 30, 2024, establish a framework to introduce and execute quarterly in-depth training forums that delve into advanced and sophisticated topics. Identify subjects that propel our staff to the next level of expertise, ensuring a deeper exploration and understanding of complex concepts. This milestone underscores the necessity to elevate our training initiatives, equipping our team with advanced skills and knowledge crucial for their professional growth and the organization's sustained success.
- ✓ By August 31, 2024, establish a methodology to measure the success and impact of the staff empowerment training initiative. The goal is to quantifiably assess the effectiveness of both the monthly themed topics and the advanced quarterly training forums. This involves implementing key performance indicators (KPIs) that measure enhanced competency, increased team collaboration, and individual professional growth. Additionally, evaluation would entail collecting qualitative feedback to gauge employee satisfaction and identify areas for continued improvement.

**Contingencies (if any):** Budget and workforce bandwidth could impact the quality and quantity of sessions administered in the staff empowerment training program. Similarly, workforce bandwidth could interfere with the development of a feedback mechanism.

**Metric Target:** In 2025, implement monthly training topics in at least one staff meeting per month and hold at least two quarterly training forums.

**Metric Definition:** The completion rate is measured by holding the training.

## Conclusion |

The PSRB's 2024 Succession Plan is an integral to Initiative 5 of the PSRB's 3-Year Strategic Plan. To ensure relevance and responsiveness, the Succession Plan will undergo quarterly reviews and comprehensive updates at least annually. The outlined action plan encompassed within this document, is anticipated to be successfully executed within the first year of the overarching 3-Year Strategic Plan. The agency anticipates that the remaining recommendations identified within this plan will be executed within years two and three of the overarching Strategic Plan.