









2024-27 Strategic Plan & DEI Plan Progress Report

January 1, 2024 – May 31, 2025

Message from the Executive Director

Dear Colleagues, Partners, and Member of the Community,

It is with deep appreciation and pride that I share this progress report on the Psychiatric Security Review Board's (PSRB) 2024–2027 Strategic Plan and Diversity, Equity, and Inclusion (DEI) Plan. This report marks an important moment to pause and reflect—on what we've accomplished together, what we've learned, and where our continued focus must be.

At the heart of everything we do is our mission: to protect the public by promoting the safe and successful reentry of individuals under our jurisdiction into the community. This mission is rooted in the belief that safety and recovery are not mutually exclusive, and that with the right structures, supports, and oversight, individuals can rebuild their lives, contribute meaningfully, and thrive. We are equally committed to supporting the due process and recovery of victims—recognizing that healing and justice must be upheld for all parties impacted by mental illness and criminal behavior. Our vision calls us to pursue thoughtful balance—between accountability and compassion, structure and flexibility, and individualized care and system-level integrity.

Our work over the past 18 months has been shaped by our core values: due process, recovery, partnership, and research. These values are visible throughout our accomplishments and are reflected in the commitments we are making for the future.

Our Progress: January 2024 - May 2025

Collaborative System Reform

In partnership with the Oregon Health Authority's Behavioral Health Division (BHD), we continue to advance a shared Strategic Roadmap to address longstanding and new challenges in the forensic mental health system. Despite major external demands- including the *Mink-Bowman* litigation- we collaborated to deliver concrete tools like system process maps and a conditional release dashboard to improve transparency and reduce bottlenecks in client transitions to the community.

Expanded Legal Representation

We continued our work to diversify and strengthen defense services for individuals under our jurisdiction, responding to concerns raised in the 2023 Client Insight Report and the pillars of succession planning. We have onboarded one new attorney and offer legal professionals targeted trainings helped reinforce high standards of legal advocacy and promote consistent access to **due process**.

Enhanced Conditional Release Support

We rolled out onboarding programs for case monitors and medical practitioners, offered more than 35 START risk assessment trainings, launched a new expert witness training series, and provided dozens of consultations. These efforts directly support long-term client **recovery** and ensure our partners are equipped to deliver effective, evidence-informed supervision and treatment.

Operational Improvements and Customer Service

We implemented a stand-alone Succession Plan, integrated customer service training into regular staff development, launched a new website training catalog, and established better public-facing tools to support transparency. We also initiated the redesign of our customer service survey tools to better reflect the unique perspectives of our diverse stakeholder groups- including clients, providers, and **victims**.

Technology and Data Strategy

When our original case management system vendor was found unable to meet essential data security requirements, we adjusted course, developed a new phased implementation plan, and submitted a revised proposal for legislative consideration. The new approach emphasizes expert-led discovery and a data strategy that will improve access, evaluation, and system-level learning over time.

DEI Foundations and Employee Engagement

We continued to build internal systems that promote equity, access, and belonging. Results from the Gallup employee engagement survey informed our agency retreat and weekly trainings, while accessibility reviews and trauma-informed language audits are helping us ensure all public-facing communications are respectful, inclusive, and understandable.

Beyond the Plan

While many of our achievements are directly aligned with our strategic plan, we also took proactive steps to address needs and opportunities that emerged during this reporting period. Notably, we developed and proposed legislation aimed at protecting client confidentiality and strengthening agency programs. These legislative efforts reflect our continued focus on system improvement and our readiness to respond to emerging gaps and risks with clarity, collaboration, and purpose.

This forward-looking work is a reminder that a strong strategic plan must also be a flexible one—capable of adapting to new knowledge, community feedback, and evolving legal or clinical realities. The work of Oregon's forensic mental health is never static, and our commitment to public service requires that we stay nimble, curious, and proactive.

Looking Ahead: Our Continued Commitments

As we move forward, we will carry the lessons of this past year into the next phase of our work. In addition to completing our current strategic goals, we are committed to:

- Implementing the legislation we helped pass, including through rulemaking and system planning that reflects public input, best practices, and legal clarity;
- Deepening our focus on the victim experience, including clearer communication, improved access to information, and trauma-informed engagement at every stage of the process;
- Finalizing the PSRB-BHD Strategic Roadmap and using it to guide further system alignment and collaboration;
- Publishing the updated Conditional Release Handbook and Placement Guide, and supporting community partners in applying them effectively;
- Launching our revised customer service and stakeholder surveys, tailored to each group we serve;
- Building out the next phase of our case management system project, grounded in technical planning, staff input, and sustainable design;
- Continuing to refine our rulemaking and policy development processes, to ensure they remain responsive, inclusive, and clear.

Closing Reflections

The progress outlined in this report is the result of a deeply collaborative effort—and I'm profoundly grateful to our staff, Board members, and partners for their vision, integrity, and daily dedication. The work of the PSRB is often complex and unseen, but its impact is felt across every corner of our system: in communities, courtrooms, treatment settings, and most of all, in the lives of individuals who are navigating recovery, justice, and safety.

We remain grounded in our mission, committed to our values, and energized by the opportunity to continue growing a system that is fair, effective, and centered on healing.

With gratitude, Alison Bort, J.D., Ph.D. Executive Director Psychiatric Security Review Board











Strategic Plan Progress Report

INITIATIVE 1: Maximize Collaborative Partnerships to Resolve Complex Legal Issues

Goal 1.1

- ✓ In collaboration with the Health Systems Division, prioritize and update the 2023 joint Health Systems Division strategic roadmap by February 2024, ensuring comprehensive overview of complex systems issues.
- Conduct quarterly reviews with OHA partners to gauge progress and reassess challenges.
- ✓ Annually, evaluate if any roadmap initiatives should be incorporated into PSRB's strategic plan. Generate an annual report, showcasing achievements and providing recommendations for continuous improvement in the following year.
- Leverage insights from annual reviews to adapt and evolve the strategic roadmap, ensuring ongoing relevance.

1.1 Behavioral Health Division, OHA Strategic Roadmap

In April 2023, the PSRB partnered with colleagues at the Health Systems Division within the Oregon Health Authority to identify shared system challenges impacting our specialized systems. This collaboration led to the development of the PSRB-HSD Strategic Roadmap. While progress on the roadmap was impacted in 2024 by the ongoing Mink-Bowman federal lawsuit, which required significant focus and resources, as well as a transformative change with HSD to BHD, new leadership, and the development of their Intensive Services Team, the Roadmap is now under final review with BHD leadership, with the shared work plan expected to be published in early 2025.

Despite these challenges, the PSRB in partnership with BHD has made meaningful strides in several key areas. Key achievements have been realized, especially through alignment with recommendations from the neutral expert involved in the *Mink-Bowman* litigation. These milestones have focused on refining and enhancing processes for the state hospital admission and conditional release of PSRB clients. A highlight is the creation of a new dashboard and process map, developed in partnership with the Oregon State Hospital and BHD, which provides transparency into the conditional release process and identifies critical areas where clients are most vulnerable to delays. Other improvements include increased coordination and support with respect to the monitoring and supervision contract to ensure the Board is receiving timely information to execute its functions and ensure clients are not languishing within their programs.

Over this reporting period, the PSRB has also expended a great deal of resources serving as a consultant to support progress with directives and recommendations stemming from *Mink Bowman*. From identifying how recommendations may inadvertently negatively impact our system, to developing recommendations and contributing to process maps, to participating in rulemaking, agency leadership has prioritized this collaborative work with the goal of improving the system.

The PSRB is optimistic about continued progress. While we will not be issuing a comprehensive annual report this year as originally planned, we are confident that over the next year, we will have established the Roadmap and will have the ability to report out achievements in our shared work. The PSRB remains steadfast in its commitment to driving positive changes and improving Oregon's forensic mental health system through its collaborative partnerships.



Goal 1.2

- ✓ Engage with Oregon Public Defense Services (OPDS) and current and prospective public defense contractors to broaden the indigent defense contract, emphasizing diversity, succession planning, and enhanced customersatisfaction in PSRB defense representation.
- Conduct quarterly meetings with OPDS representatives until a minimum of two additional public defense contracts are established.
- ✓ Provide PSRB 101 training to new public defense contractors as required.
- ✓ Review the OPDS Client Insight Report results to pinpoint challenges and opportunities in defense representation, utilizing the survey for tracking improvements and refining strategies

1.2 Strengthening Defenses Representation

The PSRB is pleased to report steady progress in expanding legal defense representation for the individuals we serve. Historically, our caseload of over 600 clients has been primarily handled by a single law firm, which raised concerns about sustainability, succession planning, and a lack of choice for clients. A 2023 Client Insight Report also raised concerns about clients having sufficient time and attention from their attorney, potentially impacting the quality of representation. In 2024, the Oregon Public Defense Commission has actively engaged with the PSRB and other legal professionals to assess the workload and expand legal representation. This collaboration has provided valuable insights into enhancing both the quality and capacity of defense services.

While progress has been influenced by the ongoing uncertainty surrounding the future of defense contracts in Oregon, significant developments have taken place. In the second half of 2024, the PSRB successfully onboarded an additional defense attorney, who is steadily growing their caseload. This expansion is a significant step toward diversifying the pool of legal representation.

To support this expansion, PSRB management has proactively provided initial training and remains engaged to identify strategic opportunities to improve defense representation and building a sustainable network of defense attorneys capable of effectively managing the complexities of the PSRB caseload. The ongoing collaboration with the Oregon Public Defense Commission, combined with internal efforts to improve training and resources, demonstrates a shared commitment to advancing legal defense services for individuals consistent with the PSRB's core values of due process and procedural fairness.

With more work anticipated in the coming years, the PSRB is committed to sustaining this momentum and exploring additional avenues for enhancing legal defense services in the years to come.



Goal 1.3

- Establish and standardize the PSRB's role in end of jurisdiction planning process.
- ✓ By June 2024, collect baseline data to clarify anecdotal issues with the End of Jurisdiction, addressing concerns such as the perception of

1.3 Improve End of Jurisdiction Planning Process

The PSRB is committed to establishing and standardizing its role in the end-of-jurisdiction planning process, as outlined in the drafted PSRB-BHD Strategic Roadmap. As mentioned earlier, progress on the Roadmap has been influenced by the significant demands associated with the Mink-Bowman lawsuit, which required a substantial allocation of attention and resources. Nonetheless, the PSRB is pleased to report that meaningful progress has been made. While the Board has not yet finalized or published a standardized document to clearly define its role in relation to BHD, the Oregon State Hospital, county Exceptional Needs Case Coordinators, or Community Mental Health Providers, the

individuals ending their jurisdiction without services or effective discharge planning. This may include collaborations with key stakeholders and diverse voices to identify perceived challenges associated with the end of jurisdiction planning process.

- ✓ Develop a public-facing fact sheet, outlining inherent risks linked to the end of jurisdiction and suggesting mitigation strategies, to be published on the agency website by January 1, 2025.
- Utilize Board
 administrative meetings in
 2024 to engage Board
 members in a discussion
 regarding their role in risk
 mitigation related to client
 end of jurisdictions and
 consider rule-making
 processes or policy
 changes based on
 identified solutions.

ongoing efforts to address key issues surrounding the end of jurisdiction for individuals under our supervision have been both productive and forward-looking. This progress reflects the PSRB's commitment to ensuring a comprehensive and coordinated approach for individuals transitioning off PSRB jurisdiction.

The end-of-jurisdiction (EOJ) process is an inherent part of the PSRB's work, as approximately 80% of our caseload will experience a lapse in jurisdiction, even when individuals are still experiencing active symptoms of mental illness or are still considered dangerous. With this in mind, addressing the challenges that arise during this transition remains a key focus for the PSRB.

In 2024, one of the primary efforts to address these concerns involved identifying higher-risk EOJ cases and bringing them to the attention of the PSRB Director. These consultations take place during bimonthly meetings with the Behavioral Health Division (BHD) and the Oregon State Hospital (OSH), ensuring that all relevant voices are engaged in discussions about the ongoing needs of individuals approaching the end of their jurisdiction. These collaborative meetings foster the exchange of insights and perspectives, which ultimately supports more informed decision-making and facilitates smoother, safer transitions for individuals under PSRB jurisdiction.

Another significant development in 2024 was the Board's proactive approach to flagging hearings that are anticipated to be the last before an EOJ. This shift allows the PSRB to focus questioning on discharge planning, enabling parties and service providers to identify potential challenges before the individual's jurisdiction lapses. By addressing these challenges proactively, the Board aims to put resolutions in place before the person is formally discharged from PSRB jurisdiction.

While the PSRB has made it clear that it lacks the authority to extend jurisdiction or mandate treatment after discharge, there are still measures available to mitigate risks. If notified of a high-risk case, the PSRB can hold a public status hearing or use its discharge orders to provide critical information regarding an individual's ongoing risk. This process ensures that partners and the public are informed of any risks related to the individual's discharge and can take necessary steps to safeguard public safety.

In high-risk sex offender cases, the PSRB has the authority to share information more broadly under ORS 163A.215, and PSRB staff can provide assistance in exploring additional options to support safe transitions. These tools further strengthen the safeguards in place to address concerns related to the end of jurisdiction.

Collaboration with OSH and BHD in these meetings continues to be invaluable, bringing together diverse perspectives and expertise. This

collective approach strengthens the PSRB's capacity to manage highrisk cases and supports the creation of a more coordinated and effective end-of-jurisdiction planning process, ensuring that individuals transition off PSRB jurisdiction as safely as possible.

Looking ahead, the PSRB remains dedicated to developing a more structured policy that clearly defines its role and incorporates these strategies. While there is still work to be done, the PSRB is encouraged by the progress made thus far. We remain steadfast in our commitment to ensuring that the end-of-jurisdiction process supports our clients in transitioning to voluntary services and encourages their ongoing engagement in recovery.

INITIATIVE 2: Advance Competence in PSRB Conditional Release Programs

Goal 2.1

- ✓ Develop a project plan to update the PSRB
 Conditional Release
 Handbook by March 1,
 2024, with a planned distribution of the updated Handbook by September 1, 2024.
- ✓ Develop a project plan to update the PSRB Conditional Release Placement Guide by April 1, 2024, with a planned distribution of the updated Guide by October 1, 2024.
- ✓ By July 1, 2024, formally adopt an onboarding program establishing minimum training expectations for all professionals in the role of a PSRB "case monitor" to be completed within three months of starting that position.
- ✓ By July 1, 2024, formally adopt an onboarding program establishing minimum training expectations for all professionals in the role of PSRB "medical practitioner" to be accessed as requested.
- ✓ By January 1, 2025, publish a "training catalog" that outlines the various training sessions offered by the PSRB leadership team that includes objectives and target audiences.

2.1 PSRB Conditional Release Program Training Enhancements

The PSRB recognizes that our community-based conditional release programs are a vital part of our mission to foster long-term recovery, mitigate risk, and ensure the safe transition of our clients to the least restrictive level of care that supports public safety, while empowering individuals under PSRB jurisdiction to effectively manage their qualifying mental disorders. The PSRB is deeply appreciative of the incredible, specialized work conducted by our dedicated community providers, whose efforts are pivotal in the rehabilitation and reintegration of the clients we serve. As such, the PSRB remains committed to equipping our providers with the resources, training, and support necessary to ensure that these conditional release programs remain effective and impactful. The PSRB is pleased with the strides made in the area of enhancing conditional release program training during 2024.

PSRB Conditional Release Handbook Update

Updating the PSRB Conditional Release Handbook has proven to be a more extensive undertaking than initially anticipated, primarily due to the competing priorities of the agency's senior leadership. Nonetheless, we remain fully committed to completing this important project. Because much of the work requires subject matter expertise from senior staff, progress has been gradual. However, as part of PSRB's 2025 Succession Plan, the agency is actively working to redistribute leadership responsibilities—an effort that will expand capacity and help accelerate the completion of large-scale initiatives such as this one.

In the meantime, PSRB staff remain available to support community providers with any questions or consultations related to the handbook and their responsibilities. Monthly provider meetings, along with ad hoc consultations and training, continue to be offered to address the evolving needs of our provider community. We expect to have the handbook updated by our 2026 progress report.

PSRB Conditional Release Placement Guide Update

The PSRB has made consistent progress toward updating the Conditional Release Placement Guide. While this effort has proven more complex than expected, largely due to the need for information from our providers, the agency has made progress identifying the specific information needed by each agency and develop methods to obtain this information that ensures providers are not overburdened by additional requests. The agency will continue to make progress with this project over the course of 2025; however, the work has been made more complex following a change in practice that entails mixing traditional PSRB residential programs with other forensic populations, specifically, aid and assist populations.

Establish a Case Monitor Onboarding Program

In 2024, the PSRB successfully established a comprehensive Onboarding Toolkit for all new case monitors. This toolkit is emailed upon the assignment of new case monitors and offers valuable resources to ensure they are well-

prepared for their roles. Additionally, each new case monitor is given the opportunity for personalized training with the PSRB Deputy Director, offering deeper and tailored training on the responsibilities of the role. In addition, the PSRB has provided individualized PSRB onboarding training with 11 community providers during the period of June 2024 to May 2025. These training courses are provided in tandem with the training toolkit and focus on the Board's mission and values, a foundational understanding of the PSRB system, roles and responsibilities of community providers, and a review of required documentation and communication.

In 2025, the PSRB plans to further formalize this program, transitioning the toolkit into a more structured packet and updating resources to keep pace with the evolving needs of the agency and its partnering community case monitors.

Establish a Medical Practitioner Onboarding Program

The onboarding program for medical practitioners has been successfully implemented. A medical practitioner-specific addendum to the onboarding training for case monitors was created and has been administered to several programs throughout 2024. This targeted training equips medical professionals with knowledge about some of the more specialized roles and responsibilities associated with medical practitioners such as providing oral testimony at hearings, authoring jurisdictional opinions, and communicating significant medication changes. The PSRB will continue refining these materials in response to feedback and evolving needs.

Publish a Training Catalog

Although a formal training catalog is still in progress, the PSRB has made significant strides in making training opportunities more accessible. Our updated website now prominently features a comprehensive list of training options for various interested parties, including attorneys, medical practitioners, community providers, and more. These training opportunities continue to be customized to meet the specific needs of each group, strengthening our partnerships and supporting the effective reintegration of individuals under PSRB jurisdiction into the community.

There are several avenues in which the PSRB provides ongoing training and consultation to community providers: monthly statewide meetings conducted by the PSRB, routine and as-needed consultation with individual providers and treatment teams, and the development of a training series focused on specific elements of successful conditional release. Monthly statewide provider meetings include real-time updates, feedback, and the dissemination of important information about system changes. Individualized meetings are conducted both routinely and as needed to community providers for consultation and training. These meetings provide the opportunity for situation and client-specific discussion, coordination, and problem-solving. A training series, which will launch in July 2025, is being developed to provide advanced training around specific elements of effective conditional release, such as client transitions, revocations, and conditional release modification requests.

Risk Assessment Training

A particularly progressive stride in supporting community providers has been the establishment of a robust training program to increase the frequency and quality of risk assessment using the START (Short Term Assessment of Risk and Treatability). Since April 2024, the PSRB has dedicated significant resources to conducting over 35 START training sessions, marking a major investment in improving risk assessment capabilities for our community providers.

Using tools like the START is crucial for informed decision-making and the safe management of our population. Without such a structured and evidence-based tool, progress can be delayed, decision-making can become uninformed, and, most importantly, community risk increases. The PSRB believes that consistent use of the START is critical to minimizing risks and responsibly and safely supporting client progress to lower levels of care.

Expert Witness Testimony Training

In collaboration with the Behavioral Health Division (BHD), Weyard Law, and Oregon's Department of Human Services (DHS), the PSRB undertook a significant initiative by hosting the first-ever PSRB Expert Witness Training for our community case monitors. This comprehensive training featured a daylong webinar and separate practical sessions where participants had the opportunity to practice giving testimony in a live setting, receiving immediate, constructive feedback. The evaluations from participants highlighted the immense value and success of the training. Remarkably, this training was offered at no cost to our valued community partners, and the PSRB deeply appreciates the considerable amount of time and resources invested by our conference staff to make this event possible. Moving forward, the PSRB hopes to continue this core training, ensuring ongoing support for our community partners, further enhancing their skills in providing expert testimony, and in turn, enhancing the Board's ability to make informed decisions.

Extremely Dangerous Persons with Civil Commitment Training

As the Board continues to receive a growing number of new petitions from this commitment type—while discharges remain comparatively limited—the program has expanded significantly. This growth has underscored the increasing need for targeted training and support. In response, the PSRB has developed and delivered specialized training tailored to the unique needs of this population. These training courses have been adapted for a diverse range of community partners, including legal professionals, victim advocates, treatment providers, and other professionals involved in supervision and care.



Goal 2.2

 ✓ Conduct a thorough analysis of Oregon's Specialty Court Standards,

2.2 Establish Key Components of Conditional Release Programs

The work to establish key components for effective conditional release programs is central to the PSRB's mission and core values of supporting long-term recovery, mitigating risks, and facilitating community integration for individuals under our jurisdiction. However, it has become clear that this initiative exceeds the agency's current expertise, resources, and budget.

alongside other relevant criminal justice and behavioral health models. Research extensively to identify best practices and innovative approaches in the monitoring, supervision, and treatment of forensic populations. ¹

Developing evidence-based services and meaningful evaluation measures for conditional release programs requires specialized knowledge and external expertise, which the PSRB currently lacks. The agency's budget is focused on core functions, such as hearings and oversight, and unfortunately, the agency did not effectively account for the significant financial and human resources needed for this specialized project.

While this project is of critical importance, it cannot take precedence over the competing priorities that the agency is mandated and expected to advance. These priorities include ensuring the timely processing of cases, overseeing individuals under PSRB jurisdiction, and maintaining public safety through the continued assessment of risk and treatment needs. These core responsibilities must remain the agency's focus, given the resources currently available.

Although the PSRB values this work and is committed to its success, advancing it will require external consultants, additional funding, and interagency collaboration. Without these resources, the agency is limited in its capacity to move forward. We remain committed to advocating for the necessary investments to fulfill this part of our mission and ensure more effective community integration for the individuals we serve while continuing to prioritize the essential functions entrusted to the agency.

¹ Other outcomes have been truncated given limited progress on this goal.

INITIATIVE 3: Operational Excellence and Customer Satisfaction

3.1 Sucession Planning

Goal 3.1

- ✓ Create a stand-alone Succession Plan by
- ✓ Create a stand-alone Succession Plan by January 1, 2024.
- Review and update the Succession Plan annually.

The PSRB successfully developed and implemented a stand-alone Succession Plan, meeting the January 1, 2024, deadline. The first annual review and update of the plan was completed and submitted in January 2025. This updated version reflects the agency's progress in leadership development, capacity building, and operational continuity planning.

For more detailed information, including specific strategies and milestones, please refer to the full Succession Plan: 2025 PSRB Succession Plan.

Goal 3.2

- ✓ Starting January 1, 2024, incorporate customer serivice training into weekly staff meetings on at least a monthy basis.
- ✓ By July 1, 2024, examine the agency's customer service metrics and associated Key Performance Measure to determine its effectiveness at gauging customer service quality.
- ✓ By December 31, 2024, develop a new and improved survey or possibly multiple surveys that are
- ✓ stakeholder specific and aligned with identified customer satisfaction benchmarks.
- ✓ Roll out the new Customer Service Survey on January 1, 2025.

3.2 Enhance Customer Service

Customer Service Training

Since January 2024, the PSRB has consistently incorporated customer service training into weekly staff meetings on a monthly basis. Trainings range from focusing on website navigation and document recognition, ensuring staff can confidently guide partners through the PSRB website and help users access key resources to discussions on balancing professionalism and public safety, equipping staff with strategies to recognize when issues need to be escalated to leadership or communicated with external partners. Staff also actively engaged in the development and implementation of PSRB's new Customer Service Policy. Additionally, customer service principles are being integrated into the agency's Performance, Accountability, and Feedback (PAF) sessions, aligning individual goals with broader service values and expectations.

Customer Service Surveys

The agency used its Annual Performance Progress Report as a means to evaluate the effectiveness of its customer service metrics associated with its Performance Measure on customer service. This analysis is thoroughly detailed in the agency's 2024 Annual Performance Progress Report [insert hyperlink if available]. The findings underscore the limitations of using a one-size-fits-all survey tool across diverse customer groups. In response, the PSRB launched a Customer Service Improvement Project in June 2024 to redesign its survey instruments with more targeted questions and improved distribution strategies. Implementation is anticipated in 2025.

In June 2024, the agency established a project plan to redesign its approach to evaluating customer service for the clients it serves, initiated through the Executive Director's participation in a Leadership Oregon project. This effort focused on improving client-facing materials to ensure that individuals under PSRB jurisdiction receive clear, accessible information about the agency's role, responsibilities, and available services leading up to a client's hearing.

Progress in developing additional surveys for other groups we support—such as victims, attorneys, and treatment providers—has been limited. The scope and complexity of designing multiple, audience-specific tools have highlighted the resource-intensive nature of this project.

The agency anticipates being able to advance this work by assigning it to an Operations and Policy Analyst, pending successful reclassification of an existing position. Additional support, such as consultation with experts in customer service and survey design, may also be necessary.

While foundational work is in place, full implementation of a new survey approach will require additional resources and staff capacity. The PSRB remains committed to improving its feedback systems to ensure all perspectives—especially those of clients and victims—are better understood and incorporated into service improvements.



Goal 3.3

- Design and execute a comprehensive annual employee satisfaction survey, meticulously crafted to unveil nuanced insights into the work environment, job satisfaction, and the overarching oorganizational culture.
- Explore the possibility of leveraging state-sponsored surveys as part of our commitment to continuous improvement.
- Establish a comprehensive procedure for survey administration, ensuring clarity on how data will be collected, analyzed, and utilized.
- Ensure the survey is inclusive, addressing diverse perspectives and concerns within the organization.
- Implement an efficient data collection process, utilizing modern technology and user-friendly interfaces to encourage employee participation.

3.3 Enhace Employee Satisfaction & Enagement

The PSRB has made significant progress toward its strategic goals related to employee satisfaction assessment. This effort was accelerated following Governor Brown's directive that all state agencies participate in an annual, standardized employee satisfaction survey. Under this statewide initiative, smaller agencies like the PSRB were required to use a DAS-approved vendor and question set.

As part of this enterprise-wide approach, the state procured a research-based employee engagement survey developed by Gallup, a globally recognized leader in workplace analytics. Gallup's survey is grounded in validated research and is designed to measure critical drivers of employee engagement and satisfaction, including clarity of expectations, opportunities for development, recognition, and workplace relationships. The use of this tool has provided a consistent and credible framework to evaluate organizational health across Oregon's public sector.

The PSRB administered the Gallup survey in both 2024 and 2025, achieving strong participation and positive results. The agency used these findings to inform the content and focus of its 2024 and 2025 staff retreats, ensuring that staff input played a central role in shaping discussions around workplace culture, employee well-being, and opportunities for growth. Survey data also guided internal practices aimed at reinforcing agency strengths and addressing areas for improvement.

While the use of the state-sponsored survey tool fulfilled many of the agency's original goals—including modern, anonymous data collection and a standardized analysis framework—the PSRB continues to explore ways to enhance the inclusivity and relevance of this process. Opportunities for refinement may include supplemental internal surveys or adding additional questions to the Gallup survey that allow for more nuanced exploration of specific issues unique to a small agency context.

- Maintain anonymity and confidentiality to foster open and honest responses.
- Present survey results transparently, ensuring clear communication of findings to all employees.
- ✓ Identify positive aspects and areas for improvement, promoting accountability and organizational learning.

The agency will continue to collaborate with DAS and other small agencies, boards and commissions to ensure its approach remains aligned with best practices and promotes a culture of transparency, accountability, and continuous improvement for our staff.



Goal 3.4

- ✓ By August 2024, establish a systematic schedule for the regular review and updating of the agency's administrative rules and a strategic approach to engaging the Board in the rulemaking process.
- ✓ By January 2025, establish a systematic schedule for the regular review and updating of internal policies and procedures, ensuring alignment with administrative rules.
- ✓ By January 2025, develop a comprehensive crosswalk between administrative rules and policies and procedures to ensure alignment.

3.4 Streamline & Optimize Administrative Rules and Policies and Procedures

Rulemaking Strategy Constraints

While the PSRB has not yet fully established a formalized, recurring schedule for reviewing administrative rules, we have made foundational progress in identifying the barriers and steps needed to move this work forward. The technical and highly specialized nature of the agency's rulemaking process—particularly the need to interpret complex statutes, case law, and clinical standards—requires deep subject matter expertise typically housed within senior leadership. These staff have been significantly engaged in other agency priorities, limiting their availability to dedicate time to rule review planning.

This issue was examined in the agency's 2025 Succession Plan, which identified the need for two Operations and Policy Analyst 2 (OPA-2) to support the agency in making progress toward strategic policy development and create a structured approach to rule review. After outlining the scope and justification for this role, it became clear that the agency lacked the funding to pursue two OPA-2 position; however, we proceeded with the process to reclassify one of our current administrative support positions at that level. In response, a position description for an OPA-2 was developed and submitted to DAS Classification and Compensation. Unfortunately, DAS determined that the size and scope of the PSRB did not meet the threshold for an OPA-2 either, keeping the agency in a position where there is a significant gap between leadership-level responsibilities and support staff roles. This creates an ongoing challenge in delegating the kind of policy and legal work necessary to maintain a sustainable rule review process.

Despite these constraints, the agency remains committed to improving its capacity and meeting expectations related to rulemaking. Agency leadership has continued to refine position descriptions and reassign responsibilities internally to expand capacity within existing resources. We will continue to explore every available option to address these challenges within our current service level budget. Should those efforts prove insufficient, we will consider requesting additional resources in a future budget cycle.

Rulemaking Progress—Extremely Dangerous Persons Resistant to Treatment

While a formal, comprehensive rule review schedule has not yet been established, the agency has made meaningful progress by focusing on the areas of greatest urgency. In particular, the PSRB prioritized rule modernization efforts related to the Extremely Dangerous Persons Resistant to Treatment program, due to the rapid and ongoing growth of individuals civilly committed to the Board under this category. This population presents significant operational and legal complexities that have outpaced the existing statutory and rule frameworks. Beginning with this area has allowed the agency to focus limited resources where they are most needed. To date, the Executive Director has participated in four Rulemaking Advisory Committees (RACs) to ensure interested party input is integrated and the rules reflect the evolving realities of PSRB's work. These efforts are ongoing and expected to continue into late 2025. Rulemaking in this area has also been impacted by recent case law and proposed legislation during the 2025 session, which require a cautious approach to ensure that adopted rules remain relevant and aligned with statutory developments.

Rulemaking Progress—Responding to Judicial Action

Over the past year, the agency has taken action in response to a 2024 Oregon Court of Appeals decision that appeared to interpret an existing PSRB rule in a way that was inconsistent with the Board's long-standing practice. This decision created ambiguity and posed potential risks to the agency's ability to implement its statutory duties consistently.

To address this issue and maintain operational continuity, the Board adopted an emergency rule and began a formal rulemaking process to develop a permanent rule that clearly reflects the Board's intent and legal interpretation. As part of this process, the agency has actively engaged interested parties and legal counsel to ensure a well-informed, inclusive approach. The PSRB plans to adopt the permanent rule in July 2025.

In parallel, the agency is also responding to a lawsuit challenging the Board's authority to amend the rule, which has added a layer of legal complexity and required additional staff time and coordination with legal counsel. Despite these challenges, this rulemaking process reflects meaningful progress toward a more structured and responsive approach to rule review and demonstrates the Board's ability to pivot quickly and responsibly in response to legal action.

Rulemaking Progress—Improved Website

The PSRB is pleased to report that it successfully met the Governor's February 2025 expectation for all state agencies to maintain a public-facing administrative rulemaking webpage. In alignment with this directive, the agency launched a refreshed Rulemaking and Public Notices page ahead of the deadline, ensuring that interested parties have easy access to current and past rulemaking activity.

The new page provides clear, up-to-date information about active rulemaking efforts, public comment opportunities, Rulemaking Advisory Committee (RAC) participation, and links to relevant statutes and administrative rules. This resource reflects the agency's ongoing commitment to transparency, public engagement, and alignment with statewide standards for open governance.

The PSRB will continue to maintain and improve this page to support public understanding of our regulatory work and to facilitate meaningful input into the rulemaking process.

Policies & Procedures Constraints

While the PSRB has not yet established a formal schedule for reviewing and updating internal policies and procedures, progress continues through incremental and targeted efforts. Several longstanding agency practices have been identified as appropriate for formalization into written policy, and working drafts have been developed in key areas. In other cases, policy updates have occurred reactively in response to operational needs or external requirements.

To maintain baseline compliance and alignment with state standards, the agency has also adopted applicable statewide policies issued by the Department of Administrative Services (DAS) and Enterprise Information Services (EIS), particularly in areas such as human resources, IT and cybersecurity, procurement and fiscal managment. This approach has helped ensure a foundational policy framework while internal development continues. In addition, the

The agency recognizes that a more cohesive, strategic approach is still needed to support consistent policy development for its internal and agency specifc business oerations moving forward. Given the technical and legal nature of many policies, this work has often required direct involvement from senior leadership. As outlined in the PSRB's 2025 Succession Plan, efforts are underway to redistribute responsibilities and increase policy development capacity over time.

Although progress to date has been more piecemeal than planned, these early efforts have helped identify priorities and lay the groundwork for a more structured policy management process. The PSRB remains committed to building out a long-term strategy and will continue exploring how to integrate this work into agency operations with existing resources.

INITIATIVE 4: Advance Technological Modernization for Program Excellence

Goal 4.1

- ✓ Collaborate with the EIS Senior Portfolio Manager to initiate preliminary discussions with potential vendors.
- ✓ Actively liaise with the EIS Project Portfolio Performance team, engaging in the IT Governance Framework process.
- ✓ Submit a formal request to DAS Procurement Services, formally commencing the Request for Quotation (RFQ) process.
- ✓ Conduct a thorough review of all submitted proposals. Employ a discerning evaluation process to select the most suitable vendor based on defined criteria, ensuring alignment with project goals, technical capabilities, and overall suitability.
- ✓ Utilize the Agency IT
 Strategic Planning
 Template and Guide
 process to enhance
 integration of the CMS
 replacement initiative
 with broader
 organizational
 strategies and
 consistence with
 enterprise guidelines.

4.1 Agency Case Management System Replacement

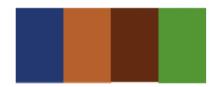
The PSRB made significant strides toward achieving its strategic goal of replacing its Case Management System (CMS), although the complexity of the project has required more time, staff capacity, and technical coordination than originally anticipated. Early in the process, the agency collaborated with the EIS Senior Portfolio Manager to clearly define the CMS's functional and data requirements. This early engagement helped align the agency's vision with the state's IT Governance Framework and positioned the project for thoughtful planning. Over the course of 2024, the PSRB completed market research, developed a comprehensive project proposal, submitted an RFP through Covendis, and selected a vendor with a solution based on the Microsoft 365 Power Platform. Initial excitement around a low-code, cost-effective platform soon gave way to technical concerns—specifically, that the solution could not meet Criminal Justice Information Services (CJIS) data security requirements. This was a critical limitation, as the PSRB's system must manage highly sensitive data.

Following an in-depth review of the proposal and consultation with DAS-IT and EIS, the agency made the difficult but necessary decision to halt implementation and reassess its approach. In May 2025, the PSRB formally pivoted to a revised strategy that emphasizes a more deliberate and structured project development process, beginning with the engagement of expert consultants to help shape a comprehensive project plan. The first phase involves contracting a Business Analyst to lead in-depth discovery, document business processes, and refine technical specifications that reflect the complexity of PSRB's statutory and operational requirements. In the second phase, the agency will bring on a dedicated Project Manager to guide procurement execution, oversee implementation planning, and coordinate closely with internal staff, vendors, and interagency partners. This revised strategy reflects key lessons learned from the initial approach and is informed by best practices from other state IT modernization efforts, positioning the agency for long-term success.

The agency also developed PERT-based cost estimates and a detailed project planning document outlining the roles and responsibilities needed for successful vendor selection and system implementation. These foundational planning and procurement activities are resource-intensive, and the agency anticipates that leveraging the same individual or firm for both the Business Analyst and Project Manager roles may provide cost and continuity benefits.

This initiative represents the most resource-intensive project in the PSRB's strategic plan. Despite setbacks, the agency has remained committed to a methodical, transparent, and standard-aligned approach. The refined strategy now positions the agency for long-term success in securing a CMS solution that meets its operational, legal, and data security needs—an essential foundation for supporting the individuals and systems the PSRB serves.

Importantly, the agency submitted this refined plan to the Legislature for consideration as part of the 2025–27 biennium funding process. The proposal has successfully passed out of the Ways and Means Subcommittee and is currently under consideration by the full committee. Pending final approval, PSRB will begin contractor selection and project initiation. Should this initial phase prove successful, the agency plans to return to the Legislature in the next session with a detailed funding request to build and sustain the new case management system.



Goal 4.2

✓ By January 2025, develop a comprehensive crosswalk between administrative rules and policies and procedures to ensure alignment.

4.2 Agency Website Revitalization

The PSRB has made meaningful strides in revitalizing its agency website, despite facing some of the same strategic planning challenges experienced in other complex initiatives such as administrative rules and policy development. While we continue to refine a formal, long-term content strategy, our team has remained focused on delivering tangible improvements that enhance public access, usability, and transparency. Throughout 2024, we embraced a more agile, iterative approach to website improvement, leveraging Microsoft 365 Lists to track content needs and coordinate updates. This practical tool has improved internal coordination and created a clear, actionable pathway for prioritizing content revisions. Although a meticulous content roadmap is still under development, we have made significant progress in identifying and addressing outdated or unclear information.

Several new features and pages have been launched to better serve our customers. These include a new Training Page, a Public Calendar, a Public Records Request Page that allows users to submit requests directly through the site, and a dedicated Rulemaking Page to increase transparency around regulatory activity. We also streamlined several commonly used forms to improve user experience and reduce confusion. To support broader engagement and increase accessibility to training materials, we launched a PSRB YouTube Channel where recordings of past trainings and public meetings are now available.

This work has occurred alongside a broader shift in state government's digital priorities, including the agency's involvement in e-governance, accessibility initiatives, and the state-mandated website platform transition. These efforts have temporarily stretched IT capacity but have also informed improvements in how we coordinate between content experts and technical staff—a learning curve we are actively navigating.

While formal documentation of our full website strategy is still a work in progress, the accomplishments to date demonstrate a strong commitment to improving the PSRB's digital presence in ways that support transparency, education, and accessibility for all users.











DEI Plan Progress Report

INITIATIVE 1: Cultivating Inclusive Workforce Practices

Goal 1.1

✓ Efficiently communicate employment opportunities through diverse channels to ensure broad reach and encourage a varied applicant pool. Recruit, promote, and retain qualified members of protected groups across all levels, including Board member positions, fostering diversity at every organizational tier. and reassess challenges.

1.1 Diversify Recruitment & Retention

In 2024 the PSRB the Board experienced position turn-over in both agency staff as well as Board positions. Board member terms are four years, and Board members may serve a total of two terms. Given this, turnover amongst the 10 Board member positions is limited. There has been a somewhat unique opportunity for progress in this area in the January 2024-June 2025 time period, as many of the Board member terms are expiring. The executive director for the PSRB is largely responsible for the for the recruitment efforts as they relate to new Board members. The ED has submitted recruitment flyers to be reviewed by the Governor's DEI office, and has then widely distributed them to an array of agencies including state boards that oversee psychologists, psychiatrists, and attorneys; Oregon Judicial Department; over 300 statewide providers and stakeholders, OHA's Office of Equity and Inclusion, Partners in Diversity, Disability Rights Oregon, and countless others with a request to further spread the word to their networks. Despite the large net cast for these recruitments, the response from interested parties is generally minimal. Ongoing challenges, including the expectations of Board member availability and the limited stipend provided, limit the number of qualified professionals who could fulfill the obligations of a Board member.

The PSRB agency also has limited turnover given its small staff of 13 FTE and the longevity of many of its employees. That said, there have been a total of 2 FTE staff departures and the subsequent hiring of 2 FTE. The agency is currently hiring for a 1.0FTE OPA1 position. It is important to note that recruitment efforts for PSRB staff are largely driven by the processes utilized by DAS, which the PSRB contracts recruitment through. To this end, recruitment efforts in this area, including as they relate to diversity, equity, and inclusion, are enhanced through those robust DAS policies.

Goal 1.2

✓ Collaborate with the Oregon Office of Cultural Change to maintain an alliance with the State of Oregon's DEI Action Plan, ensuring synchronization with broader state initiatives.

1.2. Office of Cultural Change Collaboration

The deputy director of the PSRB attends all meetings and sessions led by the Oregon Office of Cultural Change and ensures that the PSRB's DEI initiatives reflect the State's broader initiatives.

INITIATIVE 2: Alignment with State DEI Action Plan

Goal 2.1

✓ Create an environment that encourages open communication about differences and empowers individuals at all levels to contribute their best work. Value and sustain a culture of collaboration within the agency.

2.1 Building a Collaborative and Inclusive Culture

The PSRB strives to create an environment of openness and collaboration, where staff at all levels feel valued and respected. The PSRB utilizes weekly staff meetings and the annual staff retreat to focus on team building and to elicit participation from all staff in problem-solving. The PSRB's Wellness Committee, comprised of volunteer staff members, provides opportunities for staff to build relationships and creates a monthly "staff spotlight" newsletter to highlight individual employees in turn. Quarterly performance, action, feedback meetings with all staff are utilized in part to gain feedback about individual employee experience and ensure that staff members are receiving the support and opportunities necessary for collaboration and alignment.

Goal 2.2

✓ Leverage the OCC
TEAMS Channel for
streamlined access to
opportunities for
training, shared
information, and
collaborative
consultations. Actively
seek opportunities for
collaboration across
the enterprise.

2.2 Leverage OCC Teams Channel

The PSRB has not yet met its goal of utilizing the OCC Teams Channel to access opportunities for training, information, and resources. The PSRB plans to continue to explore this avenue for potential resources and training opportunities. The deputy director has accessed training, information, and resources in other ways by attending all meetings and sessions with the OCC and collaborating with agencies across the enterprise through this venue.

INITIATIVE 3: Advancing Data-Informed Evaluation

Goal 3.1

✓ Conduct a comprehensive stakeholder assessment to identify and evaluate data instrumental in measuring potential disparities within PSRB programming.

3.1 Collaborator Assessment

The PSRB remains committed to identifying and evaluating potential areas of disparity within the system. Efforts in this direction have moved slowly, due to the prioritization amongst collaborative relationships to focus on alternative system issues, driven largely by forces outside of the PSRB. A comprehensive assessment has not yet been developed, however the PSRB continuously gathers data about the populations it serves. With the agency's new approach to developing the new case management system, a Business Analyst is expected to be contracted and will conduct interviews with our partners toward this effort.

Goal 3.2

✓ Ensure that the development of the agency's new case management system incorporates robust functionalities and features specifically designed to compile, track, and analyze data related to DEI identified metrics.

3.2 Case Management System

As described in initiative 4.1 of this progress report, the PSRB ran into roadblocks in the development of the case management system project. The agency is taking those lessons learned and moving forward with this initiative over the coming year. The PSRB remains committed to developing the case management system to incorporate functionalities and features specifically designed to compile, track, and analyze data related to DEI metrics.



Goal 3.3

✓ Following the identification of crucial data sets indicating disparities within PSRB programming, develop and implement a comprehensive plan to publish these identified data assets on the State's Open Data Portal.

3.3 Open Data Portal

This objective has not yet been met given the delays in developing a case management system that would enable identification of data sets that could be published on Oregon's Open Data Portal. The PSRB remains committed to developing the case management system to incorporate functionalities and features specifically designed to compile, track, and analyze data related to DEI metrics.

INITIATIVE 4: Transparency and Cultural Responsiveness

4.1 Employee Satisfaction Survey

Goal 4.1

✓ Develop inclusive **Employee Satisfaction** Surveys by integrating DEI questions that measure satisfaction with respect to inclusivity, feeling of belonging, and having voices heard, actively contributing.

In May 2024 and May 2025, PSRB employees participated in an employee satisfaction survey. The Gallup survey included questions related to feelings of belonging and value. Completion rates for the survey were 100%, with all employees completing the survey. Questions in the survey are rated on a 1-5 scale, with 1 being "strongly disagree" and 5 being "strongly agree". In the most recent survey, the question "My manager, or someone at work, seems to care about me as a person" resulted in a mean score of 4.9. Another question posed in the survey was "At work, my opinions seem to count". The mean result in the most recent survey was 4.3. The total mean for all 12 questions included on the survey was 4.4, indicating a high rate of employee satisfaction and feeling of being valued and included. The PSRB will continue to utilize this tool as a means to gauge employee inclusivity and to make further efforts for increased inclusivity within the agency.

Goal 4.2

✓ Enhance Employee Inclusivity Perception by integrating DEIrelated questions into employee satisfaction surveys and measure responses to assess for perceptions of inclusivity, belonging, opportunities for input and growth, diversity recognition, fair treatment, and workplace culture.

4.2 Employee Survey Integration

Beginning in 2024, with the completion of the first annual employee engagement survey, results have been utilized to drive the planning of the annual staff retreat, as well as ongoing staff training and development in weekly staff meetings. Results of the survey are provided anonymously and thus are used collectively to provide all agency staff with targeted opportunities for increased inclusion, growth, and workplace culture.



Goal 4.3

Conduct a comprehensive review and revision of the agency's external communications.

4.3 External Communication Review

The PSRB is in the process of reviewing external communications provided on our website to collaborators in the larger system, including community providers, clients, Oregon State Hospital, victims, and members of the public. This effort to ensure ADA accessibility has been enhanced by recent statewide accessibility expectations and federal law. The agency will ensure compliance with the WCAG 2.1 Level AA by April 24, 32026. In addition, PSRB staff receive customer service training at a minimum of quarterly, with an emphasis on trauma-informed care principles, cultural responsiveness, and inclusivity.

INITIATIVE 5: Staff Training & Support

Goal 5.1

Implement a specialized training program for Board members and staff, focusing on critical topics such as unconscious bias, microaggressions, cultural humility, and traumainformed care.

5.1 Board & Staff Training

The PSRB is in the process of developing specialized training for both Board members and agency staff. In part, the anticipated and substantial turnover in the Board appointments has led to an opportunity to develop and implement new and specialized training. As the turnover is currently in process, the training will largely begin upon the appointment of new Board members. At the annual Board retreat in October 2024 included a specialized training to Board members from a psychiatrist subject matter expert on gender affirming care and gender diversity as it relates to the population the Board oversees.

Agency staff training is ongoing, with current planning for a rollout of a 12-month training and professional development curriculum to begin in September 2025. The training and development plan will include diversity, equity, and inclusion topics such as cultural humility and unconscious bias. The PSRB intends to elicit presenters and subject matter experts from elsewhere in the enterprise to provide specialized trainings for agency staff.

Goal 5.2

✓ Foster a workplace culture that values continuous education and awareness.

5.2 Staff Education & Awareness

The PSRB remains committed to initiative 5.2, however has made minimal progress in this area. The prioritization of other DEI objectives, as well as time and bandwidth constraints related to agency functioning, Governor expectations, and staff turnover, has forestalled the progress of this objective.



Goal 5.3

Conduct a thorough review and update of Board and staff position descriptions to explicitly incorporate the state's equity vision, values, and goals.

5.3 Position Descriptions

Agency staff positions have been updated to include specific language regarding the state's equity vision, values and goals, and the dedication of the PSRB to upholding and fostering equity objectives.



Goal 5.4

✓ Integrate Diversity, Equity, and Inclusion (DEI) training seamlessly into staff development initiatives and goals.

5.4 DEI Implementation

The PSRB remains dedicated to integrating DEI training into staff development initiatives and goals. DEI principals have been integrated into quarterly staff meetings, and PSRB leadership is currently developing a comprehensive training and development curriculum that will highlight DEI themes.