



PSRB

STATE OF OREGON
PSYCHIATRIC
SECURITY
REVIEW BOARD

PARTNERSHIP



RESEARCH



DUE PROCESS



RECOVERY



IT Strategic Plan Progress Report

2025 – 2027

Year 1 Report

June 1, 2026

Executive Summary (also see [Progress At A Glance](#))

During this reporting period, the Psychiatric Security Review Board (PSRB) made substantial progress toward several objectives in its Agency IT Strategic Plan, while also identifying areas where additional work, resources, and process development are needed. The agency's progress reflects both continued modernization efforts and the practical realities of operating as a small agency with sensitive information, legally significant records, and complex public-safety responsibilities.

PSRB's most significant challenge remains replacement of its legacy Case Management System. The agency advanced planning, procurement, market research, and development of a clearer statement of work, but has not yet secured the Business Analyst and Project Manager support needed to formally begin the next phase of the project. Procurement barriers delayed progress, but the work completed during the reporting period strengthened the agency's procurement materials and clarified the services needed to move the project forward.

PSRB also made meaningful progress in modernizing its public website. The agency completed its website migration, updated branding, improved public-facing resources, created website training content, and substantially advanced digital accessibility work. Digital accessibility requirements required more staff time than anticipated and delayed full implementation of an ongoing website-maintenance workflow, but the agency improved its accessibility practices and achieved a Siteimprove score of 91.6. Accessibility remediation, particularly for agency forms, will remain a major focus in the next reporting period.

The agency made significant progress in strengthening cybersecurity, information security, continuity planning, data recovery, and staff technology proficiency. PSRB developed its first comprehensive Information Security Plan and related suite of policies and procedures, participated in the 2026 cybersecurity assessment process, completed IT readiness work for budget planning, transitioned staff to passwordless multi-factor authentication, developed a data-recovery process, and advanced staff use of tools such as FileCloud, Teams Premium, Microsoft Whiteboard, and OneNote. Cybersecurity, information security, and COOP work are moving from foundational development into a maintenance, training, evaluation, and testing phase.

Progress on data governance remains in an early stage. PSRB hired and onboarded an Operations and Policy Analyst 1 to support this work, completed initial knowledge transfer, and connected the position to relevant data-governance communications. The next reporting period will focus on confirming applicable deadlines and expectations, identifying the agency's data governance lead, assessing maturity and gaps, and preparing the agency's required Data Governance Plan.

Finally, PSRB advanced responsible artificial intelligence use by developing an AI policy, reviewing statewide GenAI guidance with staff, encouraging AI-related training, using AI to support fiscal impact statement review, and using AI as a drafting and review support tool in developing the agency's Information Security Plan and related materials. The agency will continue to identify appropriate AI use cases, including possible scripts or workflows to

reduce manual monitoring tasks, while maintaining human review, confidentiality, and accountability.

Overall, PSRB made important progress in building a stronger technology foundation, improving information-security governance, expanding staff capability, and preparing for future modernization. The next reporting period will focus on moving the CMS project forward, sustaining accessibility and security gains, formalizing data governance compliance, and identifying responsible ways to use technology and AI to improve agency operations.

Strategic Objectives Progress

Initiative 1: Agency Case Management System Replacement

Progress

The agency continued work toward replacing its current Case Management System by advancing planning, procurement, market research, and development of a clearer statement of work. During this reporting period, PSRB met with the Assistant State CIO and the Senior IT Portfolio Manager to review the agency's operational needs and discuss the broader goals of the Case Management System replacement. These discussions helped clarify functional and technical requirements, integration expectations, alignment with statewide standards, and consistency with Enterprise Information Services guidance.

The Department of Administrative Services, State Procurement Services, acting on behalf of PSRB, issued a Request for Quote to the pool of consultants with an active master price and services agreement. The RFQ was posted in OregonBuys to begin the formal solicitation process. PSRB responded to questions from interested contractors and participated in a public information session to provide additional clarification regarding the solicitation.

The procurement process has presented significant challenges. The first RFQ did not receive any bids. After reposting the RFQ and holding an information session, the agency received only three bids. Two bids were significantly outside the agency's available budget, and the third was determined not to be a strong fit for the project. The agency then participated in a last-best-offer process, but that process did not result in a viable or materially improved proposal.

PSRB also explored alternative procurement paths for obtaining Business Analyst and Project Manager support for the CMS replacement project. The agency identified an individual with significant state government and Stage Gate experience who appeared well suited to the project; however, because the individual was not on the applicable contract vehicle, the bid could not be considered through the RFQ process. PSRB also explored whether the needed support could be obtained through an EIS-related BA/PM service pathway. Although the agency was ultimately advised that this pathway could not be used and that the project would need to return to DAS Procurement, the process was still valuable. Through that work, PSRB developed a more complete statement of work, reconsidered the scope and structure of the original RFQ, and refined the project description to make the requested services simpler, clearer, and more closely aligned with the agency's actual needs. As a result, the agency now has a stronger statement of work that can support the next procurement step.

The agency has not yet been able to secure the Business Analyst and Project Manager support needed to move the CMS replacement project into the next phase. However, the work

completed through the attempted procurement pathways has helped the agency strengthen its procurement materials, refine the scope of services, and develop a clearer and more focused statement of work. PSRB has requested further review of available procurement options, including whether direct contracting or another viable procurement path may be available under the circumstances. The agency's objective is to comply with procurement requirements while using the work already completed to avoid unnecessary duplication, reduce further delay, and move this legislatively funded project forward through a viable procurement path.

PSRB also continued market research related to potential case management solutions. The agency met with Wingswept to review its CMTS solution, including third-party integrations, API capabilities, data encryption standards, backup and recovery protocols, training and support options, and scalability. After completing this round of market research, the agency determined that the evaluated solution did not sufficiently meet agency requirements. Further market analysis and planning will continue as part of the next phase of procurement preparation.

Performance Measures and Targets

The agency's original implementation goal for this initiative was to complete the planning and procurement work necessary to begin replacement of PSRB's Case Management System. During this reporting period, PSRB completed several key planning and procurement activities toward that goal. The agency consulted with Enterprise Information Services and DAS partners, issued and reposted an RFQ through DAS State Procurement Services, held a public information session for interested vendors, participated in a last-best-offer process, explored alternative procurement pathways for Business Analyst and Project Manager support, conducted market research on potential case management solutions, and developed a stronger statement of work. Although the attempted procurement pathways did not result in a viable contract, the work helped PSRB clarify the scope of services, simplify and strengthen the project description, and better define the Business Analyst and Project Manager support needed to move the project forward.

The agency's primary target for the next reporting period is to secure Business Analyst and Project Manager services and begin implementation of the statement of work. Once those services are in place, the next steps are to hold the project kickoff meeting, establish the project management plan and schedule, begin regular project meetings and status reporting, develop the required project artifacts, prepare the CMS solution RFP, and support vendor evaluation and selection. Progress will be measured by whether PSRB obtains an approved procurement path, executes a contract for BA/PM services, begins the structured project-planning process, and completes the initial deliverables needed to move the CMS replacement project toward Stage Gate review and eventual solution procurement.

Risks, Dependencies, and Mitigation

The primary risk for this initiative is continued procurement delay. The agency has received legislative funding to begin the CMS replacement project, but has not yet been able to secure the Business Analyst and Project Manager support needed to formally start the work. Because this support is necessary to implement the statement of work, continued delay affects the agency's ability to establish the project plan, complete Stage Gate preparation, develop the CMS solution RFP, and move toward vendor selection.

This initiative is also dependent on procurement guidance and approval from DAS Procurement, continued coordination with Enterprise Information Services, and availability of qualified BA/PM services within the agency's available budget. The procurement efforts to date have demonstrated that the applicable vendor pool and contract pathways may not be well aligned with PSRB's project needs, budget, and timeline.

PSRB is mitigating these risks by documenting the procurement barriers encountered to date, requesting further review of available procurement options, and seeking a viable path that does not unnecessarily repeat an unsuccessful process. The agency has also used the time spent on alternative procurement pathways to strengthen its statement of work, clarify the scope of services, and better define the deliverables needed to move the project forward. Once BA/PM services are secured, PSRB will use the statement of work to begin structured project planning, establish regular status reporting, develop required project artifacts, and prepare for the CMS solution procurement.

Initiative 2: Agency Website Revitalization & Modernization

Progress Summary

The agency continued work to improve the accuracy, accessibility, and usability of its public website. During this reporting period, PSRB focused on four related areas: reviewing and updating website content, improving public-facing information, completing the website migration and branding updates, and addressing digital accessibility requirements.

For content identification and planning, PSRB continued to review, assess, and update outdated or inaccurate website content as part of an ongoing improvement effort. The agency used an MS Lists tracker to document website-related tasks and milestones. PSRB also created a training series for website users utilizing the CTA-Card-Flipping-Grid web part to support consistent learning, improve navigation, and enhance the overall user experience. The agency also created multiple playlists on its YouTube channel to make training, board meetings, monthly provider meetings, and other relevant content easier for the public and stakeholders to locate.

For the comprehensive website update plan, PSRB made progress in several areas but has not yet achieved the ongoing website-maintenance workflow originally contemplated by the strategic plan. A significant and unforeseen barrier was the level of work required to address new federal digital accessibility requirements and related statewide accessibility expectations. This work became more time-intensive than anticipated and necessarily shifted staff attention toward accessibility review, remediation, training, and development of internal processes. Even so, the agency made meaningful progress on public-facing website improvements. For example, as part of the Governor's rulemaking guidance, PSRB added a new Rulemaking webpage to provide public access to proposed, temporary, public comment, and permanent rules. The page also includes a public rulemaking planning calendar and required links to key databases and other essential resources.

For website migration and rebranding, PSRB successfully completed migration of the agency website from SharePoint 2016 to SharePoint Subscription Edition in coordination with E-Governance and Tyler Technologies. The agency completed training and user acceptance testing to support accurate data transfer, compatibility with the new platform, and continuity

of website operations. PSRB also updated the website's visual identity by adding the new PSRB logo in accordance with branding guidelines, including updates to the cascade style sheet.

For digital accessibility compliance, PSRB developed a phased project approach and formal rollout of its accessibility effort. The agency improved digital accessibility across the website by resolving accessibility issues, supporting staff in creating accessible content, and developing a workflow chart to improve team understanding of accessibility remediation steps. Selected staff completed document-remediation training and performed remediation work using Allyant's CommonLook tool. PSRB also met with Allyant's remediation services team to evaluate outsourcing options and define a process for future remediation needs. The agency's website accessibility metrics improved in Siteimprove, reaching a score of 91.6.

Although significant progress was made, PSRB continues to have digital accessibility remediation needs, particularly for forms used to conduct agency business. These forms are more complex than standard webpages or basic documents because they must remain usable, accurate, legally sufficient, and accessible for individuals and stakeholders who rely on them. Continued remediation of these forms will remain a priority during the next reporting period.

Performance Measures and Targets

The agency's primary target for the next reporting period is to continue building a sustainable website-maintenance process while prioritizing digital accessibility compliance. Progress will be measured by whether PSRB maintains or improves its Siteimprove accessibility score, completes remediation of high-priority public-facing documents and forms, continues to track website updates through MS Lists or a similar tool, identifies website content owners or review responsibilities, and develops a more realistic ongoing workflow for reviewing, updating, and maintaining website content. Particular attention will be given to remediating forms that are necessary for agency business and ensuring that future content is created accessibly before publication.

Risks, Dependencies, and Mitigation

The primary risk for this initiative is that digital accessibility remediation will continue to require more time and staff capacity than originally anticipated. The agency made significant progress, but accessibility work has necessarily affected the pace of broader website modernization and delayed development of a routine workflow for keeping all website content current. This risk is particularly significant for agency forms, which are more complex to remediate and are necessary for conducting agency business.

This initiative is also dependent on staff capacity, availability of accessibility tools and training, support from E-Governance and Tyler Technologies, continued access to Siteimprove and remediation tools, and the availability of outside remediation services when internal capacity is not sufficient. The work is also dependent on staff understanding of accessibility expectations so that new content is created correctly and does not add to the remediation backlog.

PSRB is mitigating these risks by taking a phased approach to accessibility, training selected staff in remediation practices, using CommonLook and Siteimprove to identify and correct issues, developing internal workflow guidance, and evaluating when outsourcing may be needed for more complex documents or forms. The agency is also using the lessons learned from the accessibility effort to inform a more realistic website-maintenance process. This will

help PSRB move toward a sustainable model in which website content is reviewed, updated, and posted in a way that is accurate, accessible, and manageable for a small agency.

Initiative 3: Enhancing Performance through Technology Integration

Progress Summary

The agency continued work to enhance performance through technology integration by improving hearing-preparation workflows, strengthening cybersecurity and information-security practices, advancing continuity and data-recovery planning, and expanding staff use of technology tools that support efficiency, collaboration, and knowledge management.

For hearing preparation, PSRB introduced staff to newly available Microsoft 365 tools that support more efficient file handling, including OneDrive and SharePoint's updated PDF compression features. The agency also tested EverMap's AutoSplit plug-in in Adobe to determine whether it could help identify duplicate pages and improve efficiency in preparing hearing materials. However, procurement of the plug-in did not move forward due to identified risks and concerns. PSRB instead implemented a faster preparation method using Acrobat's guided action tool for bulk date-stamping, which has helped streamline one portion of the hearing-preparation process.

PSRB also began a more detailed review of the hearing-preparation workflow. Management met with hearing-team administrative specialists to better understand the current process and used Microsoft Whiteboard to begin identifying and mapping the steps involved in preparing hearing materials. This work confirmed that hearing preparation remains highly manual, legally complex, and difficult to automate without first documenting the current process and developing more consistent protocols.

For cybersecurity and information security, PSRB made sweeping progress in developing and establishing its first comprehensive Information Security Plan. The plan serves as the agency's umbrella framework for governing the protection of PSRB information assets, managing information-security risk, and aligning agency practices with DAS, EIS, CJIS, and statewide information-security expectations. This was a substantial undertaking and included development of a coordinated suite of policies and procedures, including the Information Security Governance Structure, Information Asset Classification, Employee Security Policy, Information Security Incident Response Plan, Data Recovery Process, controls for portable and removable storage devices, CJIS policy, and related acknowledgement requirements. The agency has completed the major policy-development phase of this work and is now moving into a maintenance and implementation phase focused on training, evaluation, updating, and continued staff reinforcement.

Separate from the Information Security Plan, PSRB participated in the 2026 cybersecurity assessment process conducted by EIS Cyber Security Services. During the initial stage of the assessment, PSRB gathered and submitted the requested artifacts by the required deadline. Some components of the Information Security Plan supported the assessment because they served as relevant artifacts demonstrating the agency's security governance, risk-management, and compliance work.

Separate from the cybersecurity assessment, PSRB also completed IT readiness work to support planning for the next biennial budget. This work required the agency to evaluate current IT

needs, identify anticipated technology and security requirements, and consider future funding needs necessary to sustain and improve agency operations.

PSRB also continued to strengthen staff awareness of cybersecurity risks and responsibilities. The agency completed quarterly executive reporting on phishing metrics based on KnowBe4 phishing and Phish Alert Button activity, with added key performance indicators. PSRB developed a Security Awareness Training Program and annual training calendar that includes policy reviews, core information-security training, and microlearning courses from EIS-CSS. The agency's information systems specialist supported EIS-CSS cybersecurity awareness efforts by providing presentations to staff and board members, helping increase agency-wide understanding of cybersecurity risks and best practices. PSRB also conducted an agency-wide cybersecurity quiz to assess staff knowledge and identify areas where additional training or reinforcement may be needed.

The agency successfully completed pre- and post-migration testing related to the border firewall migration by CSS and DAS-IT. In alignment with FBI CJIS policy and State of Oregon security standards, PSRB also transitioned staff to a passwordless environment to meet multi-factor authentication requirements.

For continuity of operations, disaster recovery, and business continuity planning, PSRB completed significant foundational work and is moving into a maintenance, training, and testing phase. The agency participated in COOP tabletop planning and exercise activities with support from agency leadership and emergency-management partners. PSRB also developed a data-recovery process to provide clear guidance to agency information users on recovering data and electronic files in the event of accidental deletion or modification. This process outlines recovery procedures for the agency's critical systems and supports more consistent response when data-recovery issues arise. Going forward, the agency will continue to evaluate, train, and test these procedures so they remain current and usable during an actual disruption.

For staff proficiency and operational efficiency, PSRB continued to use technology as a tool for improving consistency, institutional knowledge, and day-to-day operations. A major focus has been training staff on the use of Microsoft OneNote for agency desk manuals. Desk manuals remain in variable stages of development, but PSRB has made progress toward creating a more consistent approach to documenting shared procedures by position and function. The agency will continue training staff to make desk manuals more streamlined, interactive, and useful as operational resources.

PSRB also expanded its use of other technology tools to reduce administrative workload and improve collaboration. The agency created automated report-generation and workflow processes in FileCloud administration to streamline routine tasks and produce weekly reports. PSRB doubled its internet bandwidth to improve performance, support faster downloads and uploads, and reduce congestion during peak times. The agency also adopted Teams Premium to support enhanced collaboration, including Meeting Recap, AI-generated notes, and other advanced meeting features that improve documentation, follow-up, and overall productivity.

Performance Measures and Targets

For hearing preparation, the agency's primary target is to move from isolated tool-based improvements to a documented and consistent hearing-preparation process. PSRB remains far from its broader goal of automating and streamlining hearing preparation. The current process

is highly manual, varies among preparers, and requires significant legal, procedural, confidentiality, and records-management judgment. Before automation can be meaningfully pursued, the agency must first document the current state of the process, identify where practices differ, and establish consistent protocols.

During the next reporting period, progress on hearing preparation will be measured by completion of a documented current-state process map, identification of major process variations, development of consistent hearing-preparation protocols, and identification of specific tasks that may be automated, simplified, or supported through future technology. PSRB also intends to use the Business Analyst support being sought for the CMS replacement project to evaluate current business processes and identify which hearing-preparation functions may be supported by a future CMS. If that work falls outside the scope of the CMS Business Analyst engagement, PSRB may explore subcontracted support for a focused process-improvement review.

For cybersecurity and information security, the agency has substantially completed the foundational policy-development goal and is moving into implementation, maintenance, and continuous improvement. The next targets are to train staff on the Information Security Plan and related policies, implement the Security Awareness Training Program, continue quarterly cybersecurity metrics reporting, complete review and adoption of the Information Security Incident Response Plan, respond to any follow-up items from the cybersecurity assessment, and update security procedures as agency needs, statewide requirements, and risks evolve. Progress will be measured by completion of required cybersecurity and information-security training, continued quarterly phishing and reporting metrics, implementation of core security policies and procedures, and completion of identified assessment follow-up items.

For continuity of operations and data recovery, the agency has completed major foundational planning work and is now moving into a maintenance and testing phase. The next targets are to continue training staff, test procedures through tabletop or practical exercises, identify lessons learned, and update plans and procedures based on those findings. Progress will be measured by completion of review or exercise activities, documentation of lessons learned, and updates to procedures where needed.

For technology-driven staff proficiency, the agency's target is to continue building staff capacity to use approved tools in ways that improve consistency, documentation, and efficiency. PSRB will continue training staff on Microsoft OneNote desk manuals, work toward more consistent desk-manual development across positions, and identify ways to make desk manuals more interactive and useful for onboarding, coverage, and continuity. Because technology is changing quickly, this sub-goal will also remain a broader placeholder for the agency's ongoing commitment to stay current, evaluate new tools thoughtfully, and evolve business practices as appropriate.

Progress will be measured by continued development of OneNote desk manuals, increased consistency in shared protocols, staff participation in technology training, continued use of automated FileCloud reporting, staff adoption of approved collaboration tools, and identification of additional routine tasks that can be safely automated or simplified.

Risks, Dependencies, and Mitigation

The primary risks for this initiative are limited staff capacity, growing cybersecurity and information-security compliance demands, reliance on statewide technology partners, and the need to balance efficiency improvements with security, privacy, CJIS, accessibility, and records-management requirements. Some potential technology solutions may improve efficiency but also introduce procurement, security, or accountability concerns that must be evaluated before adoption.

This initiative is dependent on continued coordination with EIS-CSS, EIS-SOC, DAS-IT, and other statewide technology partners; availability of approved tools; staff participation in cybersecurity and information-security training; and the agency's ability to maintain internal documentation and workflows. COOP and data-recovery planning also depend on clear roles, tested procedures, and staff understanding of how to respond during disruptions or data-loss events. Future IT improvements are also dependent on budget planning and available resources in the next biennium.

PSRB is mitigating these risks by using approved enterprise tools where possible, reviewing technology options before procurement, developing formal security and recovery procedures, submitting the Information Security Incident Response Plan to EIS-SOC for review, tracking cybersecurity metrics, completing cybersecurity assessment and IT readiness requests, and creating an annual security-awareness training calendar. The agency is also focusing on practical tools and workflows that are realistic for a small agency, support staff productivity, and remain aligned with cybersecurity, CJIS, privacy, accessibility, and records-management expectations.

Initiative 4: Comply with the Oregon DAS Data Governance Policy

Progress Summary

The agency began building internal capacity to comply with Oregon's Data Governance Policy, but this initiative remains in an early stage of development. During this reporting period, PSRB completed the hiring and onboarding of an Operations and Policy Analyst 1 in August to support data governance activities and related agency policy work.

Because the position was newly established and the employee has been onboarding while also supporting several other agency priorities, PSRB has not yet made substantial progress on full implementation of the Data Governance Policy. However, the agency has taken initial steps to support continuity and prepare for future work. This included a knowledge-transfer session with the employee who had previously been covering portions of this work and ensuring that the new employee was added to the appropriate data-governance communications, email lists, and listservs.

PSRB also completed a Compliance Assessment Report for Electronic Records and System Requirements, titled "Compliance Assessment Report – Electronic Records (OAR 166-017-0045)." Although this work is distinct from the Data Governance Policy, it supports the agency's broader effort to better understand its electronic information environment, records systems, and compliance obligations.

Performance Measures and Targets

The agency's primary target for the next reporting period is to move from initial onboarding and knowledge transfer into active compliance planning under Oregon's Data Governance Policy. This includes confirming PSRB's Lead Data Steward or equivalent role, reviewing EIS guidance and available tools, assessing the agency's current data governance maturity, identifying gaps, and developing a practical Data Governance Plan appropriate for a small agency.

Progress will be measured by whether PSRB confirms its data governance lead, participates in applicable EIS/Chief Data Officer communications or support opportunities, completes or updates a data governance maturity assessment, identifies priority gaps, and prepares the agency's biennial Data Governance Plan for submission to the Chief Data Officer by the applicable deadline. Based on current EIS materials, agencies are expected to submit a Data Governance Plan by December 31 of every even-numbered year.

Risks, Dependencies, and Mitigation

The primary risk for this initiative is limited staff capacity. PSRB has only recently established dedicated policy capacity to support this work, and the assigned staff member has been onboarding while also supporting other agency priorities. Because data governance is a specialized area that overlaps with records management, information security, reporting, system modernization, and public transparency, the agency needs time to develop a realistic approach that fits its size and operational needs.

This initiative is dependent on continued guidance from EIS and the Chief Data Officer, access to statewide tools and templates, staff participation in identifying agency data assets and current practices, and leadership support for assigning governance responsibilities. It is also dependent on coordination with related agency work, including electronic records compliance, information security, and the CMS replacement project.

PSRB is mitigating these risks by assigning the work to the OPA 1 position, completing knowledge transfer from the prior staff member, connecting the new employee to appropriate statewide communications, and using existing compliance work to inform future data-governance planning. The agency will focus next on confirming applicable deadlines and expectations, identifying the required submission components, and developing a manageable plan for meeting statewide data-governance requirements.

Initiative 5: Use of Artificial Intelligence for Performance Optimization

Progress Summary

The agency continued work to explore the responsible use of artificial intelligence to support performance optimization, improve staff efficiency, and strengthen the development of agency materials. Because PSRB handles sensitive, confidential, and legally significant information, the agency's initial focus has been on establishing appropriate guardrails, building staff understanding, and identifying lower-risk uses before expanding AI into operational workflows.

During this reporting period, PSRB developed an agency AI policy to guide safe and effective use of AI tools. The agency reviewed the AI policy and the Updated Interim Guidance on GenAI Access and Usage with team members to support consistent understanding and compliance.

This helped establish a foundation for responsible AI use and clarified that AI tools must be used carefully, particularly where confidential information, legal analysis, protected records, or agency decision-making may be involved.

PSRB also supported staff learning and capacity-building related to AI. Team members were encouraged to attend the Prompt-a-thon webinar to enhance their AI proficiency and support the agency's adoption of responsible AI practices. Following that training opportunity, PSRB provided knowledge transfer to staff on prompt engineering and shared key takeaways to strengthen effective use of Copilot and other approved AI tools.

The agency also implemented a practical AI-assisted tool to support fiscal impact statement review for legislative bills. PSRB developed an AI script to help staff approach fiscal impact statements more consistently and align responses with the questions being asked during bill review. The agency built human review into the process so that AI-assisted output is reviewed, verified, and revised by staff before being used. This provided a useful example of how AI can support consistency and efficiency while preserving human judgment and accountability.

PSRB also used AI to support development of the agency's Information Security Plan and related suite of policies and procedures. AI was used as a drafting and review support tool to help compare the agency's materials against established EIS requirements, identify whether key components were addressed, and improve consistency across the policy suite. Staff retained responsibility for reviewing, revising, and approving the final materials. This use of AI helped the agency work more efficiently while maintaining human oversight and alignment with statewide information-security expectations.

PSRB also began considering how AI could support future operational improvements. While AI has not yet been fully implemented for case-summary drafting or monitoring functions, PSRB is continuing to evaluate whether AI-assisted scripts, workflows, or tools could help reduce manual work in areas such as monitoring, tracking, reporting, or identifying follow-up tasks. This work remains exploratory and will require careful review to ensure that any use of AI is accurate, secure, transparent, and consistent with agency responsibilities.

Performance Measures and Targets

The agency's original implementation goals for this initiative were to explore the use of AI for writing case summaries and to leverage AI in developing agency materials. During this reporting period, PSRB made foundational progress by developing an AI policy, reviewing statewide GenAI guidance with staff, encouraging staff participation in AI training, sharing prompt-engineering concepts and practical lessons with team members, developing an AI-assisted script for fiscal impact statement review, and using AI to support development of the agency's Information Security Plan and related policy suite.

The agency's primary target for the next reporting period is to move from general AI awareness into a more structured evaluation of specific, appropriate use cases. PSRB will continue identifying where AI may safely support agency work, including potential use of AI-assisted scripts or workflows to reduce manual monitoring tasks. The agency will also continue evaluating whether AI can assist with drafting, summarizing, organizing, or developing internal materials while maintaining appropriate human review and safeguarding confidential or legally sensitive information.

Progress will be measured by identification of approved AI use cases, documentation of any proposed workflows or scripts, staff participation in training or knowledge-sharing opportunities, continued compliance with agency and statewide AI guidance, and development of internal practices for reviewing AI-generated work before it is used in agency operations. PSRB will prioritize uses that improve efficiency and consistency without replacing required professional judgment, legal review, or human decision-making.

Risks, Dependencies, and Mitigation

The primary risks for this initiative are confidentiality, accuracy, overreliance on AI-generated content, and the possibility that AI tools may not be appropriate for certain legally significant or sensitive agency functions. PSRB's work involves confidential records, public-safety considerations, contested hearings, and legally important documents, so AI use must be approached cautiously and with clear boundaries.

This initiative is dependent on statewide AI guidance, availability of approved tools, staff training, and the agency's ability to identify use cases that are both useful and appropriate for the type of information PSRB handles. Future progress may also depend on whether approved AI tools can be configured or used in a way that protects agency data and supports auditability, transparency, and human review.

PSRB is mitigating these risks by establishing an agency AI policy, reviewing statewide guidance with staff, limiting AI exploration to appropriate use cases, and emphasizing human review of AI-assisted work. The fiscal impact statement script provides an example of this approach because it is designed to support consistency and efficiency while keeping staff responsible for review and final content. During the next reporting period, the agency will continue to focus on responsible experimentation, staff training, and careful evaluation before incorporating AI into additional operational workflows.

Conclusion

PSRB made meaningful progress during this reporting period toward modernizing agency technology, strengthening cybersecurity and information-security governance, improving public-facing digital services, and building staff capacity to use technology more effectively. Several initiatives reached important foundational milestones, including completion of the website migration, development of the Information Security Plan, creation of a data-recovery process, implementation of passwordless MFA, participation in the cybersecurity assessment, and development of responsible AI practices.

At the same time, several strategic objectives remain works in progress. The CMS replacement project continues to depend on resolution of procurement barriers and securing Business Analyst and Project Manager support. Website modernization remains closely tied to ongoing digital accessibility remediation, particularly for agency forms. Hearing preparation remains highly manual and will require additional process mapping and standardization before meaningful automation can occur. Data governance remains in an early stage and will require focused attention in the next reporting period.

The agency's next reporting cycle will focus on moving from foundational development into implementation, training, testing, and continuous improvement. PSRB will continue working to secure the resources needed to advance the CMS replacement project, maintain progress on

digital accessibility, implement and train staff on new security and continuity procedures, develop its data governance plan, and identify responsible AI and technology uses that improve efficiency while preserving confidentiality, legal integrity, public safety, and human accountability.

Progress at a Glance

Strategic Initiative	Overall Status	Key Progress This Reporting Period	Primary Focus for Next Reporting Period
Initiative 1: Agency Case Management System Replacement	In progress / delayed by procurement barriers	Advanced procurement planning; issued and reposted RFQ; held vendor information session; explored alternative procurement pathways; conducted market research; developed a stronger statement of work for BA/PM services.	Secure Business Analyst and Project Manager services; begin implementation of the statement of work; establish project planning, Stage Gate preparation, CMS solution RFP development, and vendor evaluation process.
Initiative 2: Agency Website Revitalization & Modernization	Significant progress / ongoing accessibility work	Completed website migration from SharePoint 2016 to SharePoint Subscription Edition; updated website branding; added public rulemaking webpage; created website training resources and YouTube playlists; improved accessibility practices; reached Siteimprove score of 91.6.	Continue building a sustainable website-maintenance process; remediate high-priority public-facing documents and forms; maintain or improve accessibility score; ensure future content is created accessibly before publication.
Initiative 3: Enhancing Performance through Technology Integration	Substantial progress / mixed status by sub-goal	Developed comprehensive Information Security Plan and related policy suite; participated in cybersecurity assessment; completed IT readiness work; transitioned to passwordless MFA; developed data-recovery process; improved hearing-prep tools; began hearing-prep process mapping; expanded use of OneNote, FileCloud automation, Teams Premium, and increased bandwidth.	Move security and COOP work into training, maintenance, evaluation, and testing; continue hearing-prep process mapping and standardization; expand staff proficiency with approved tools; identify additional safe opportunities for automation and workflow improvement.
Initiative 4: Comply with Oregon DAS Data Governance Policy	Early stage / capacity-building underway	Hired and onboarded Operations and Policy Analyst 1; completed knowledge transfer from prior staff; connected new staff to appropriate data-governance communications; completed electronic records compliance assessment.	Confirm data governance lead; review EIS guidance and tools; assess current maturity and gaps; develop a practical Data Governance Plan appropriate for a small agency; confirm and meet applicable submission deadlines.
Initiative 5: Use of Artificial Intelligence for Performance Optimization	Foundational progress / responsible experimentation underway	Developed agency AI policy; reviewed statewide GenAI guidance; supported staff AI learning; developed AI-assisted script for fiscal impact statement review with human review; used AI to support development and alignment of Information Security Plan materials.	Identify and document appropriate AI use cases; evaluate AI-assisted scripts or workflows for manual monitoring tasks; continue staff training; maintain human review, confidentiality, legal integrity, and accountability.