



2026 Workforce and Succession Plan

Psychiatric Security Review Board
January 1, 2026

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[PSRB website](#)

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Mission

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

Vision

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

Future Workforce

The Psychiatric Security Review Board continuously recruits for future Board Members. Applications remain on file for up to two years. Serious candidates may contact the agency at 503-229-5596 or psrb@psrb.oregon.gov to request an information interview with the Board's Executive Director.

Values

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

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

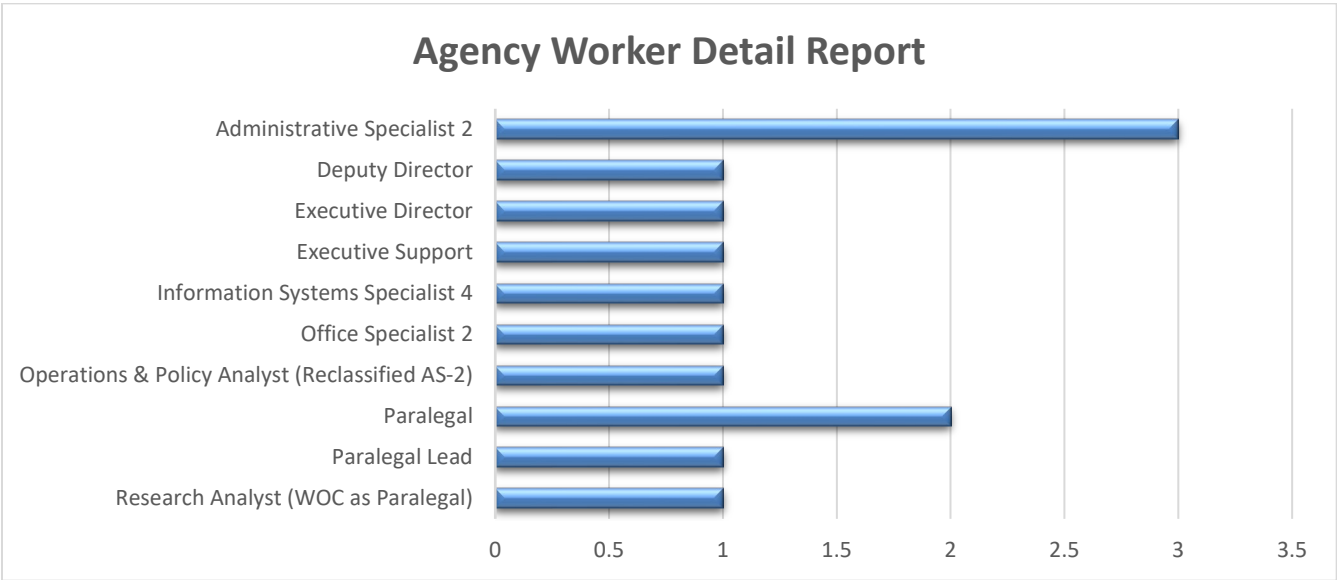
Workforce Planning

Overview | Workforce Planning

The Psychiatric Security Review Board (PSRB) is a small, specialized quasi-judicial board within Oregon’s Executive Branch, charged with a critical public safety mission: overseeing individuals under its jurisdiction who are affected by a qualifying mental health condition. Operating at the intersection of the criminal justice and behavioral health systems, the Board conducts contested hearings, monitors conditional release plans, and ensures compliance with state statutes and administrative rules. Its work requires balancing public safety with individual rights, applying principles of risk assessment and supervision, and promoting recovery through evidence-based practices. Workforce planning ensures PSRB has the expertise and capacity to protect public safety, uphold due process, and support recovery for the individuals it serves, both now and in the future.

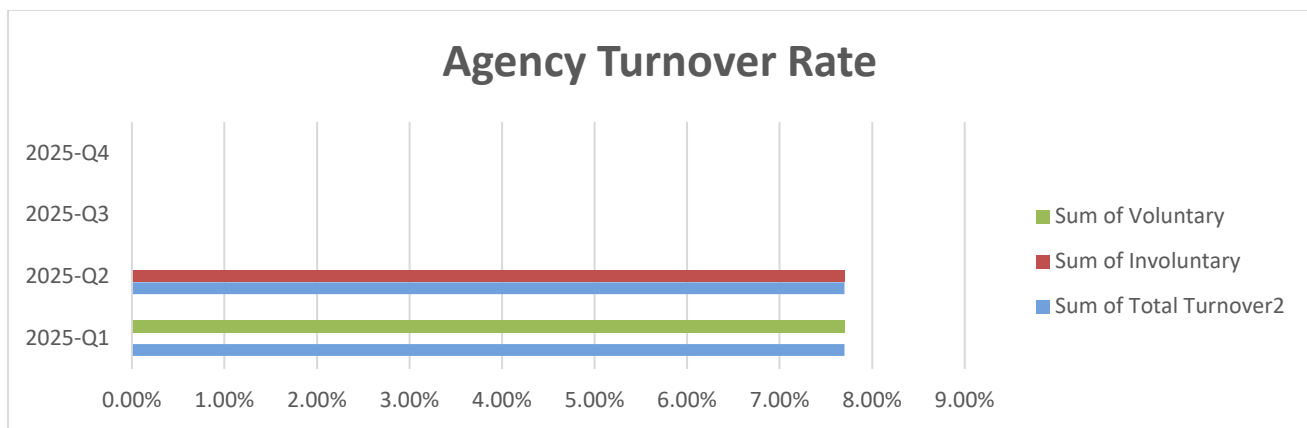
Given the complexity and high stakes of its mission, workforce planning is essential to sustaining PSRB’s effectiveness. Workforce planning ensures the agency has the right people, with the right skills, in the right roles right now, and in the future. For PSRB, this involves identifying talent gaps so the agency can proactively develop strategies for recruitment, retention, and competency development. It means systematically analyzing current staffing levels and competencies, evaluating workload trends, and forecasting future workforce needs in response to changes in case volume, service delivery models, legislation, rule changes, caselaw or lawsuits, and advancements in research and technology.

Current Workforce by Classification



Turnover Rate

The PSRB experienced a turnover in two positions during 2025, for a total turnover rate of 15.4%. All other positions remained stable throughout the year.



Turnover by Position	Termination Count Divided by Headcount
Administrative Specialist 2 (3)	15.4%
Deputy Director	0%
Executive Director	0%
Executive Support	0%
Information Systems Specialist 4	0%
Office Specialist 2	0%
Operations & Policy Analyst (Reclassified AS-2)	0%
Paralegal (2)	0%
Paralegal Lead	0%
Research Analyst (WOC as Paralegal)	0%

Current Staffing Needs | Vacancies

PSRB currently has all positions filled; however, achieving this stability has required creative and strategic measures to address critical operational needs. To strengthen program oversight and distribute decision-making more evenly across the agency, PSRB implemented two key workforce adjustments in 2025. More information about these adjustments is included in the 2025 progress updates of this report.

1. **Work Out of Class Assignment:** The Research Analyst-2 position was temporarily reassigned to work out of class as a Paralegal pending budget approval. This arrangement provides essential legal and procedural support for hearings and monitoring functions, particularly for the growing civil commitment program. It ensures continuity in critical program areas while leveraging existing staff capacity.
2. **Creation of a Limited-Duration Operations and Policy Analyst 1 (OPA-1) Position:** To alleviate executive leadership bandwidth and enhance policy and analytical capacity, PSRB used vacancy savings from an Administrative Specialist 2 position to create a non-budgeted, limited-duration OPA-1. This role has been instrumental in advancing rulemaking, policy development, and process improvement initiatives that previously relied exclusively on executive leadership.

These adjustments reflect strategic workforce planning. By reallocating resources and reclassifying duties, PSRB has shifted from a leadership-centric model to a more distributed structure, empowering staff to assume greater responsibility, work at the top of their classifications, and support long-term sustainability and succession planning. This approach not only addresses immediate capacity challenges but also lays the foundation for long-term sustainability and succession planning.

Future Staffing Needs | Anticipated Needs

While PSRB has filled all current positions through creative measures, these solutions are temporary and do not fully address long-term operational needs. The agency anticipates the following future staffing requirements:

1. **Permanent Operations and Policy Analyst 2 (OPA-2) Position:** The limited-duration OPA-1 position created in 2025 has been critical for advancing policy development, rulemaking, and process improvement. However, the classification limits autonomy and scope, requiring continued executive oversight for complex policy and legislative work. A permanent OPA-2 position is essential to sustain these functions, reduce dependency on executive leadership, and support the agency's shift toward a more distributed decision-making model.
2. **Permanent Paralegal Position:** The Research Analyst currently working out of class as a Paralegal has provided vital support for hearings functions. This arrangement is not sustainable long-term. A permanent Paralegal position is needed to ensure continuity in legal and procedural oversight, maintain compliance with statutory timelines, and strengthen operational resilience.
3. **Specialized Staff for Technology Modernization and Process Optimization:** As PSRB advances its modernization initiatives in its IT Strategic Plan, the agency anticipates a shift in workforce needs. Traditional administrative tasks will decrease as technology streamlines processes, while demand for staff with expertise in digital systems, data management, process improvement, and program evaluation will grow. Future positions may require reclassification or new classifications focused on technology and operational efficiency rather than administrative support. These roles will enable PSRB to leverage technology to improve transparency, reduce administrative burden, enhance service delivery for the populations we serve, and improve Oregon's behavioral health system.

This shift reflects PSRB's commitment to building a workforce that is adaptable, technology-savvy, and aligned with the agency's strategic priorities. By securing these positions and planning for reclassification where appropriate, PSRB will continue its transition from a leadership-centric model to a structure that empowers staff to work at the top of their classifications, supports professional growth, and ensures continuity of critical functions.

Talent Gaps

Talent Gaps: Current

PSRB's current workforce is highly committed and stable, but gaps remain in specialized areas that are critical to sustaining operations and advancing modernization. While recent creative measures have helped address immediate needs, these solutions are temporary and do not fully resolve structural limitations. Current gaps include:

- **Policy and Analytical Capacity:** The agency lacks sufficient staff with advanced policy analysis and rulemaking expertise, requiring executive leadership to remain heavily involved in technical and legislative work.
- **Technology and Process Improvement Skills:** Existing staff have limited capacity to lead modernization initiatives, such as database enhancements, paperless workflows, and digital collaboration tools. These projects are essential to improving efficiency and transparency but currently depend on leadership bandwidth.
- **Specialized Forensic Knowledge:** While leadership possesses deep expertise in forensic mental health, additional staff competency in evidence-based practices and risk assessment is needed to support training and consultation for community providers.

Talent Gaps: Future

Looking ahead, PSRB anticipates a significant shift in workforce needs driven by technology and evolving operational priorities. As modernization reduces reliance on traditional administrative tasks, the agency will require staff with specialized skills in:

- **Digital Systems and Data Management:** Expertise in leveraging technology to streamline workflows, improve data accuracy, and enhance reporting capabilities.
- **Process Optimization and Change Management:** Ability to design and implement operational improvements that maximize efficiency and support evidence-based decision-making.
- **Advanced Policy and Legislative Analysis:** Capacity to independently manage complex rulemaking and policy development without requiring constant executive oversight.
- **Cross-Functional Competency Development:** Staff who can work at the top of their classifications, adapt to new technologies, and assume broader responsibilities as the agency transitions to a more distributed decision-making model.

These gaps underscore the need for strategic workforce planning, including reclassification of existing positions and targeted recruitment for roles that emphasize technology, policy, and operational innovation.

2026 Retirement Eligibility | One Year Forecast

ZERO percent of the agency's workforce are currently eligible to retire or will be within one year.

Challenges | Workforce Planning

The following section outlines the biggest challenges that impact the agency's overall workforce and the short- and long-term plans the agency has in place to address them. Notably, some of these objectives are new while others have evolved from the "activities" of the agency's previous succession plans. For more information about past objectives and the agency's progress on them, please refer to the [Summary of gains made from previous succession plan](#) section of this report.

Challenge #1: Recruitment of Board Members

To ensure a more robust and sustainable recruitment strategy, the agency will explore professional assistance from a recruitment strategist to develop innovative approaches to recruiting a large pool of qualified board member candidates.

Targeted Completion Date: December 31, 2026

Intermediate Milestones:

- April 2026: Procure the services of a professional recruitment strategist who specializes in public sector roles or board recruitment to create a targeted and sustainable recruitment strategy.
- June 2026: Develop a comprehensive recruitment plan with the strategist's assistance. The plan will outline targeted strategies, key messaging, outreach channels, and partnerships to emphasize the public service impact of Board member positions.
- August 2026: Finalize and approve the recruitment plan, ensuring that all key strategies are aligned with the agency's strategic and DEI objectives for diversifying the applicant pool and engaging with underrepresented groups as well as other agency priorities.
- September 2026: Begin the implementation phase, utilizing the recruitment plan to increase outreach efforts, including consideration of leveraging professional networks, social media, and strategic partnerships.

Contingencies:

- Delays in Procuring a Recruitment Strategist: If the recruitment strategist is not secured by April 2026, the agency may have to explore temporary partnerships with external organizations or rely on internal staff resources to draft a recruitment plan. This could delay strategy development and recruitment timeline.
- Limited Impact of the Recruitment Plan: If the initial plan does not generate sufficient interest or diverse applicants, the agency may need to refine the strategies and explore additional outreach avenues, such as partnerships with mental health organizations, community leaders, or leveraging state government networks.
- Budget Constraints: Financial limitations or procurements rules may affect the ability to procure a strategist or implement outreach activities. In this case, the agency will need to adjust the scope of the recruitment plan or prioritize strategies that are more cost-effective.

Metric Targets:

- Procurement of a Recruitment Strategist: A recruitment strategist should be engaged by April 2026.
- Completion of Recruitment Plan: The recruitment plan, with clearly defined outreach strategies and target metrics, should be finalized and approved by August 2026.
- Increase in Applicant Volume: Achieve at least 5 qualified applicants for Board member vacancies. This metric will be measured post-launch of the recruitment plan.

Metric Definitions:

- Procurement of a Recruitment Strategist: The engagement of a recruitment strategist will be considered complete when a signed contract is in place, and the strategist begins collaborating with the agency to develop the recruitment plan. The target is April 2026.
- Completion of Recruitment Plan: The recruitment plan will be considered finalized when it includes clearly defined outreach strategies, targeted messaging, specific channels (such as social media, professional networks, and partnerships), and measurable goals for increasing the applicant pool. The plan should be approved by August 2026.
- Increase in Applicant Volume: Success will be measured by receiving at least five qualified applications for Board member vacancies following implementation of the new recruitment plan. The establishment of this recruitment strategy in 2026 is expected to create a strong foundation for ongoing, targeted efforts to attract highly qualified candidates for future vacancies. To align with the anticipated start date of a new Board member on July 1, 2027, candidates will need to complete their applications by approximately December 2026, ensuring sufficient time for consideration and placement on the May 2027 Senate Confirmation Hearings calendar.

Challenge #2: Classification and Policy Capacity

Evaluate the scope, complexity, and operational limitations of the OPA-1 classification and develop a data-supported justification for a permanent position through the Policy Option Package process for an OPA-2 position. This initiative builds on the 2025 reclassification of the Research Analyst 2 to Paralegal and the hiring of a limited-duration OPA-1. It focuses on documenting classification constraints, operational impacts, and organizational need to support informed workforce planning in the 2027-29 budget submission.

Targeted Completion Date: June 30, 2027

Intermediate Milestones:

- February 2026: Implement a structured workload tracking tool to document OPA-1 duties, including tasks requiring Agency Director oversight due to classification limitations. Begin monthly summaries to identify tasks exceeding OPA-1 scope.
- May 2026: Complete initial analysis of OPA-1 workload trends and limitations; map current and emerging duties against DAS OPA-1 vs. OPA-2 classification criteria. Conduct initial consultation with HR/DAS Classification and Compensation to validate alignment.
- July 2026: Finalize draft OPA-2 position description and classification justification based on collected data. Confirm funding strategy and alignment with CFO and accounting staff.

- August 2026: Finalize POP narrative and supporting documentation in preparation for September 2026 submission of agency budget request to align with statewide budget deadlines.
- September 2026: POP request for an OPA-2 position to be implemented into the Agency's Requested Budget to the Governor's budget office.
- October–June 2026: Review feedback from DAS, CFO, LFO, Governor's budget staff; and legislative Ways and Means committees to adjust workforce planning and document ongoing operational needs to support funding for a permanent OPA-2 position. Provide education supporting the agency need for this funding.

Contingencies:

- Insufficient Documentation of OPA-2 Justification: If tracking or analysis does not sufficiently demonstrate that duties exceed OPA-1 scope, the agency will consider requesting permanent funding for an OPA-1 position.
- Funding Constraints or POP Deferral: If the agency does not receive support for the POP by CFO or LFO, the agency will maintain the current staffing structure and extend the limited duration position, continue collecting workload and impact data, and prepare a revised submission for the 2028 session.
- Changes to Classification Guidance: If DAS provides new guidance that affects OPA-2 eligibility, the agency will adjust the position description, workload documentation, or classification strategy accordingly.

Metric Targets:

- Workload Documentation: Complete monthly tracking of all OPA-1 duties, including executive-level review requirements, beginning in April 2026.
- Alignment with OPA-2 Criteria: Document that a majority of the OPA-1's core duties consistently meet OPA-2 classification factors by June 2026.
- POP Readiness: Finalize all classification, funding, and narrative documentation for POP submission by August 2026.
- POP Submission: Submit a fully vetted POP request for an OPA-2 position by the September 2026 budget deadline.

Metric Definitions:

- Workload Documentation: Measured by completion of monthly logs capturing the nature, complexity, and autonomy of OPA-1 tasks, including tasks requiring Agency Director intervention.
- Alignment with OPA-2 Criteria: Assessed by mapping documented duties to DAS OPA-2 factors (independence, scope, consequence of error, subject-matter expertise). Target is that the majority of duties meet OPA-2 standards.
- POP Readiness: Considered complete when position description, classification justification, funding strategy, and narrative are finalized, reviewed by CFO/HR, and ready for formal submission.
- POP Submission: Measured by the official submission of the POP request to the Governor's budget office in September 2026 (or by forthcoming deadline), including all supporting documentation and approval memos.

Challenge #3: Refine and Align Paralegal Competencies with Customer Service Goals

Strengthen the Paralegal function within the agency by formalizing roles and enhancing competencies to ensure alignment with customer service expectations. This objective includes both the permanent reclassification of the Research Analyst-2 position to a Paralegal role and the development of a comprehensive competency framework supported by stakeholder feedback mechanisms. Together, these initiatives aim to clearly define responsibilities, build skills, and optimize performance across all Paralegal positions, providing sustainable support for agency operations.

Targeted Completion Date: December 31, 2026

Initiative 1: Permanent Reclassification of Research Analyst-2 to Paralegal Position

Intermediate Milestones:

- January–May 2026: Prepare Policy Option Package (POP) and consult with CFO. Upon support, integrate POP into Agency Requested Budget narrative.
- July 2026: Extend work out of class agreement for Paralegal for another year.
- August 2026: Finalize POP narrative and supporting documentation in preparation for September 2026 submission of Agency Requested Budget to align with statewide budget deadlines.
- October–June 2026: Review and respond to feedback from DAS, CFO, LFO, Governor’s budget staff; and legislative Ways and Means committees to adjust workforce planning and document ongoing operational needs to support funding for a permanent OPA-2 position. Provide education supporting the agency need for this funding.

Contingencies:

- POP or Budget Deferral: If the September 2026 POP submission is deferred, maintain work-out-of-class agreement and continue documenting workload and operational need to support a subsequent submission.
- Insufficient Support: If early feedback suggests lack of CFO, LFO or budget office concurrence, the agency will refine the POP justification, provide additional workload data, or adjust the position description to strengthen alignment with classification criteria.
- Legislative Adjustments: If legislative guidance or budget priorities change, the agency will coordinate with CFO and LFO to revise the POP narrative and provide supplemental educational materials to demonstrate operational need.

Metric Targets:

- POP Consult: Inform CFO of agency plan to submit POP package as required in 2026 budget instructions.
- POP Submission: Submit a complete POP package for permanent reclassification by September 2026.
- Workload Documentation: Maintain updated records of Paralegal duties and operational impact throughout 2026 to demonstrate sustained alignment with agency priorities.
- Stakeholder Engagement: Conduct at least three formal briefings or consultations with CFO, DAS, or legislative budget staff to educate and document the operational rationale for the reclassification.

Metric Definitions:

- POP Submission: Considered complete when all required documentation, including position description, classification justification, and budget narrative, is submitted to the Governor's budget office by September 2026.
- Workload Documentation: Measured by regular updates (monthly or quarterly) that capture Paralegal duties, delegated responsibilities, and areas requiring continued executive involvement.
- Stakeholder Engagement: Measured by completed briefings, meetings, or written communications with key stakeholders (CFO, DAS, legislative staff) aimed at supporting the permanent reclassification and educating on agency need.

Initiative 2: Develop Paralegal Competency Framework and Stakeholder Feedback Processes. Continue development of a comprehensive competency framework for all Paralegal positions, aligned with agency priorities and customer service expectations, and implement stakeholder feedback mechanisms to inform continuous improvement.

Intermediate Milestones:

- January—June 2026: Survey key customers and stakeholders to understand their expectations of Paralegal performance and identify areas for improvement.
- July—November 2026: Utilize the newly established Paralegal position descriptions (achieved in 2025) and feedback from surveys to develop a refined competency framework for Paralegals, clearly documenting the skills, knowledge, and abilities required for each role.
- December 2026: Develop a customer satisfaction survey based on identified Paralegal competencies to be distributed annually to stakeholders. Identify the stakeholders that will be requested to complete the survey. Prepare an implementation plan for distributing and analyzing survey results to guide continuous improvement.

Contingencies:

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

Metric Targets:

- Establish Stakeholder Feedback Survey: Develop and implement a survey for stakeholders to provide feedback on Paralegal performance and expectations by June 2026.
- Establish Paralegal Competency Framework: Finalize and document the competency framework for all Paralegal positions by November 2026, including the necessary skills and customer service competencies.

- Establish Annual Customer Service Survey: Design and implement an annual customer satisfaction survey to assess Paralegal performance based on the identified competencies by December 2026.

Metric Definitions:

- Stakeholder Feedback Survey: Success will be measured by the development and implementation of a stakeholder survey that collects feedback on Paralegal performance and expectations. The survey should be completed and distributed by June 2026, with a goal of 50% response rate.
- Paralegal Competency Framework: Success will be measured by the finalization and documentation of a comprehensive competency framework for all Paralegal positions by November 2026. This framework will identify and define the required skills, knowledge, and customer service competencies for each role.
- Annual Customer Service Survey: Success will be measured by the creation and launch of an annual customer satisfaction survey by December 2026. This survey will assess Paralegal performance based on the established competencies and will be distributed to stakeholders to ensure ongoing feedback and improvement. The target is to achieve at least 50% stakeholder response rate.

Challenge 4: Desk Manual Updates: Ensure the timely completion, standardization, and active use of role-specific desk manuals as a core workforce and succession planning strategy. This objective is intended to capture institutional knowledge, promote job duty consistency, support onboarding and cross-training, and ensure continuity of critical functions.

Targeted Completion Date: December 31, 2026

Intermediate Milestones:

- March 2026: Adopt and implement an agency policy requiring the development, maintenance, and periodic review of role-specific desk manuals, including minimum content standards and update expectations.
- April 2026: Finalize and distribute a standardized desk manual template to be used across all agency positions.
- June 2026: Complete draft desk manuals for priority and critical positions, developed collaboratively with experienced staff to document core responsibilities, procedures, and best practices.
- September 2026: Complete desk manuals for at least 75% of agency positions and conduct internal reviews to ensure consistency, accuracy, and usability.
- December 2026: Complete and approve desk manuals for 100% of agency positions and establish a recurring annual review and update process.

Contingencies:

- Time and Workload Constraints: Competing operational demands may delay desk manual development. To mitigate this risk, work will be phased, prioritized by operational criticality, and incorporated into Performance Accountability Feedback (PAF) goals.

- **Resource Limitations:** Limited staffing and funding may restrict the ability to dedicate time exclusively to desk manual development. The agency will rely on internal expertise and streamlined templates to maintain progress.
- **Turnover or Role Changes:** Unexpected staffing changes may affect continuity. In such cases, desk manual development will focus on capturing essential functions to support interim coverage.

Metric Targets:

- **Policy Adoption:** Formal adoption of a desk manual policy by March 31, 2026.
- **Completion Rate:** Desk manuals completed and approved for at least 75% of positions by September 30, 2026, and 100% by December 31, 2026.
- **Standardization:** 100% of completed desk manuals conform to the agency's standardized template and content requirements.

Metric Definitions:

- **Policy Adoption:** Measured by the formal approval and agency-wide dissemination of the desk manual policy.
- **Completion Rate:** Measured by the number of role-specific desk manuals that are completed, reviewed, and approved by management by the identified deadlines.
- **Standardization:** Measured through management review confirming that desk manuals include required content and follow the standardized format.

Challenge 5: Succession Planning:

Strengthen leadership continuity and operational resilience by formalizing executive role documentation, onboarding processes, and recruitment and readiness planning for the Executive Director and Deputy Director positions, ensuring timely transitions, reduced institutional risk, and sustained agency effectiveness during periods of turnover.

Targeted Completion Date: December 31, 2026

Initiative 1: Executive Director Desk Manual. Refine and document the Executive Director's mission-critical duties, decision frameworks, and recurring obligations in a structured desk manual that supports day-to-day executive management, delegation, and prioritization, while also serving as a continuity and succession planning tool for future agency leadership.

Intermediate Milestones:

- **February–March 2026:** Identify and confirm a defined set of mission-critical functional areas and critical resources to perform job duties (e.g., key contacts, access to websites/software/portals).
- **April–September 2026:** For each mission-critical functional area, document:
 - Executive decision points and triggers
 - Statutory or time-sensitive obligations
 - Delegation pathways and backup coverage
 - Cross-references to supporting roles
 - Prioritize clarity and usability over procedural exhaustiveness.

- October–November 2026: Integrate and finalize the executive calendar framework as a core desk-manual component, consolidating weekly, monthly, and annual responsibilities across all functional areas. Review desk manual structure for navigability and internal consistency.
- December 2026: Conduct a usability review to ensure the desk manual supports executive continuity for an interim or incoming director. Document remaining gaps and establish carry-forward objectives for 2027, as needed.

Contingencies:

- **Evolving Agency Priorities:** Legislative changes, litigation, or system-level developments may alter executive responsibilities. The desk manual will be updated accordingly, which may affect sequencing or scope of documentation.
- **Workforce Structure Changes:** Changes in staffing levels, classifications, or delegation authority (e.g., establishment of new analyst or legal support roles) may require revisions to documented decision frameworks and delegation pathways.
- **Executive Bandwidth Constraints:** High-priority demands may limit time available for documentation during certain periods. In such cases, milestones may be adjusted to focus first on the most mission-critical functions.

Metric Targets:

- **Mission-Critical Coverage:** By September 2026, 100% of identified mission-critical functional areas will have documented executive decision frameworks and delegation pathways.
- **Executive Calendar Completion:** By November 2026, a consolidated executive calendar identifying all recurring statutory, Board, fiscal, and personnel obligations will be fully integrated into the desk manual.
- **Continuity Readiness:** By December 2026, the desk manual will be sufficient to support continuity of operations for an interim or incoming Executive Director for at least the first 90–120 days.

Metric Definitions:

- **Mission-Critical Coverage:** Measured by the presence of documented decision points, triggers, timelines, and delegation guidance for each identified functional area, rather than by task-level procedural detail.
- **Executive Calendar Completion:** Defined as a single, organized reference that captures recurring executive obligations by weekly, monthly, and annual cycles and is cross-referenced within relevant desk manual sections.
- **Continuity Readiness:** Assessed through an internal usability review evaluating whether the desk manual enables a qualified external leader to maintain agency operations, compliance, and governance during a leadership transition.

Initiative 2: Executive Director Onboarding Plan. Develop a structured, repeatable onboarding framework for the Executive Director that supports immediate operational effectiveness, accelerates integration into the role, and ensures continuity of leadership during executive transitions. The onboarding framework will be tailored to the unique demands of the PSRB and aligned with the agency's succession plan, workforce planning goals, and Executive Director desk manual.

Intermediate Milestones:

- February–March 2026:
Design a standardized Executive Director onboarding framework that can be customized based on the background and experience of an incoming director. The framework is anticipated to define core onboarding phases (e.g., pre-arrival, first 30 days, 60 days, 90 days, and first year) and identify required materials and resources, learning objectives, and key decision points.
- April–June 2026:
Develop an organizational orientation package that includes:
 - PSRB history, mission, values, and statutory authority
 - Overview of PSRB's role within Oregon's criminal justice and behavioral health systems
 - Key agency performance plans
 - Desk manual (which will include an array of onboarding materials as described in Initiative 1).
- July–September 2026:
Create a structured key partners engagement plan that identifies external system partners. The plan will strive to outline the purpose of each introduction and role of each partner to ensure meaningful relationship-building beyond formal orientation.
- October–November 2026:
Formalize knowledge transfer mechanisms, including:
 - Shadowing and mentorship opportunities with an outgoing Executive Director, when feasible
 - Structured knowledge-transfer sessions if overlap is not possible
 - Integration of desk manual materials, executive calendar tools, and active project tracking into onboarding activities
- December 2026:
Finalize and document the Executive Director onboarding framework, ensuring it is integrated with the desk manual and succession planning materials and is ready for implementation during future leadership transitions.

Contingencies:

- No Overlap Between Outgoing and Incoming Directors:
If shadowing or direct mentorship is not feasible, the onboarding framework will rely on structured knowledge-transfer sessions, documented decision frameworks, and the desk manual to ensure continuity.
- Varied Backgrounds of Incoming Directors:
The onboarding framework will be designed to allow customization based on an incoming director's prior experience in forensic mental health, administrative law, or executive leadership.
- Unanticipated Legal or System-Level Changes:
Legislative changes, litigation, or system reforms may require updates to onboarding content and learning objectives.

Metric Targets:

- **Framework Completion:**
By June 2026, a standardized Executive Director onboarding framework will be developed, including defined phases, learning objectives, and required materials.
- **Integration with Existing Tools:**
By November 2026, the onboarding framework will be fully integrated with the Executive Director desk manual, executive calendar, and succession planning documents.
- **Transition Readiness:**
By December 2026, the onboarding framework will be sufficient to support an incoming Executive Director in assuming operational and governance responsibilities within the first 90 days.

Metric Definitions:

- **Framework Completion:**
Defined as a documented onboarding plan that outlines onboarding phases, learning objectives, stakeholder engagement, and knowledge-transfer mechanisms.
- **Integration with Existing Tools:**
Measured by clear cross-referencing between the onboarding framework, desk manual sections, executive calendar tools, and succession plan competencies.
- **Transition Readiness:**
Assessed through an internal review confirming that the onboarding framework enables a qualified incoming Executive Director to manage core agency functions, comply with statutory obligations, and engage effectively with key stakeholders during the initial transition period.

Initiative 3: Competency Development for Deputy Director. Establish a streamlined plan to recruit, retain, and onboard a highly qualified Deputy Director, ensuring the position can be filled efficiently and that a new incumbent is prepared to assume full operational responsibilities with minimal disruption to agency operations.

Targeted Completion Date: December 31, 2026

Recruitment, Retention, and Onboarding Strategy:

Given the critical nature of the Deputy Director role and the specialized forensic, legal, and leadership expertise required, PSRB will focus on reducing vacancy risk and accelerating readiness through this initiative.

Intermediate Milestones:

- **March 2026:** Confirm and document recruitment and retention risks specific to the Deputy Director role, including workload, onboarding complexity, and labor market constraints.
- **June 2026:** Develop a Deputy Director onboarding plan (similar to ED onboarding plan).

- September 2026: Identify interim coverage and transition strategies to ensure continuity during recruitment or onboarding periods.
- December 2026: Finalize and adopt the Deputy Director recruitment, retention, and onboarding plan.

Metric Targets:

- Recruitment Readiness: By June 2026, PSRB will have a documented recruitment strategy and position narrative aligned with established competencies.
- Onboarding Readiness: By September 2026, a structured onboarding framework will be completed and ready for implementation.
- Continuity of Operations: By December 2026, PSRB will have an identified transition and interim coverage strategy for the Deputy Director role.

Metric Definitions:

- Recruitment Readiness: Defined as the availability of current position materials, recruitment messaging, and role expectations that support timely hiring.
- Onboarding Readiness: Measured by the existence of a documented onboarding framework that outlines learning priorities, key introductions, and early performance expectations.

Continuity of Operations: Assessed by the presence of a documented plan to maintain essential functions during a vacancy or leadership transition.

Succession Planning

Succession planning is the process of identifying the critical positions within your organization and developing action plans for individuals to assume those positions. Succession planning can lead to better employee retention, improved morale, and a stronger talent pipeline for the future. It also helps organizations retain valuable knowledge and experience as key employees transition out.

Succession Plan 2025 | Review Previous Plan Year to Current

Summary of gains made from previous succession plan.

The following provides an overview of the agency's original 2024 and updated 2025 objectives and progress made on each of them. For the 2026 Action Plan, new or modified action plans have been developed and included within the [Challenges: Workforce Planning](#) section of this plan.

ACTIVITY #1

2024 Original Objective: Implement a public information campaign to raise awareness about upcoming Board member vacancies and improve recruitment efforts.

2025 Updated Objective: Strengthen the recruitment of qualified candidates for Board member vacancies by showcasing the significant public service impact these positions have on the citizens of Oregon. Despite compensation and workload challenges, recruitment efforts will focus on emphasizing how Board members contribute to improving outcomes for individuals with mental health challenges, enhancing community safety, and making a meaningful difference in the lives of vulnerable populations. To ensure a more robust and sustainable recruitment strategy, the agency will explore professional assistance from a recruitment strategist to develop innovative approaches, as all available internal resources have been exhausted.

Progress Summary: In 2025, the agency successfully onboarded three new Board members, strengthening the leadership and diversity of experience on the Board. While the recruitment strategist position was not secured during this period, significant strides were made in enhancing the Board member onboarding process. The agency developed a comprehensive hearings preparation guide to support Board members in effectively reviewing case files. These materials are often extensive and complex; knowing what to look for and which questions to ask during hearings is pivotal to ensuring well-prepared, thoughtful decision-making.

This year also marked the centralization of the Board into a single panel, now covering both adult and juvenile cases. As a result, considerable effort was dedicated to training on the nuances between adult and juvenile hearing processes, ensuring Board members are confident and competent in applying the appropriate legal standards, assessment criteria, and decision-making approaches across populations.

In addition, the agency has intensified training for Board members on the civil commitment population, which continues to grow. This training helps ensure members are equipped with the knowledge and perspective necessary to make informed, evidence-based decisions that balance the needs of individuals with public safety considerations.

Board members also participated in a retreat that included tours of various residential facilities, providing an “in vivo” understanding of the levels of care in which clients reside. This hands-on experience strengthens Board members’ ability to evaluate and contextualize cases with real-world insights into clients’ living environments and program structure.

Efforts to enhance technology infrastructure have also progressed. The agency has implemented TEAMS channels to organize hearing preparation materials and other critical resources, streamlining access and reducing administrative burdens. These improvements empower Board members to focus on substantive review and deliberation rather than procedural logistics.

Despite these accomplishments, the agency continues to face practical challenges in recruiting new Board members, particularly for specialized roles such as psychiatrist and attorney positions, where the pool of viable candidates is small. Accordingly, procuring a recruitment strategist remains a high priority to develop innovative approaches, broaden outreach, and ensure a sustainable pipeline of qualified candidates for future vacancies.

Overall, the progress in 2026 reflects a stronger, more versatile, and better-prepared Board, with enhanced training, streamlined processes, and a clear recognition of the ongoing work needed to secure new recruits for critical positions.

ACTIVITY #2

2024 Original Objective: Develop a comprehensive Executive Director Desk Manual for the Psychiatric Security Review Board (PSRB) that covers essential aspects of the role.

2025 Updated Objective: Refine and document the Executive Director's duties by specifying the full scope of responsibilities in enough detail to provide clear, actionable guidance for a future ED. Reorganize the desk manual to reflect a fluid and interconnected approach that accurately mirrors the dynamic nature of the ED's role.

Progress Summary: Over the past year, there has been meaningful progress toward refining and documenting the Executive Director’s duties through the continued development of a desk manual. Rather than attempting to reduce the role to a static or overly prescriptive set of protocols, the work has focused on improving organization, usability, and continuity for a role that is inherently dynamic and responsive to changing legal, operational, and system-level demands.

The desk manual has been reorganized multiple times to better reflect how executive work occurs in practice across overlapping subject areas, timelines, and decision points rather than as a linear list of tasks. New categories and cross-references have been added to capture the

interconnected nature of responsibilities spanning across job duties. These changes have improved both accessibility and practical usefulness for the current director.

In addition, an “at-a-glance” executive calendar has been drafted to organize responsibilities by weekly, monthly, and annual cycles. This tool captures recurring obligations and deadlines that are difficult to convey through narrative documentation alone and provides a clear framework for managing time-sensitive executive responsibilities, particularly those that are infrequent.

To support delegation and succession planning, a complementary desk manual was drafted for the Operations and Policy Analyst role, cross-referencing executive functions and clarifying shared or delegated responsibilities. This work supports a shift away from a leadership-centric model by making institutional knowledge more transparent and accessible to the OPA-1.

Finally, systems for tracking active projects and initiatives were improved to allow for clearer prioritization, better continuity, and more effective transition planning, even where full protocols are still under development. Collectively, these efforts have strengthened the structure, clarity, and sustainability of the Executive Director function while recognizing the practical limits of fully proceduralizing an executive role.

This work will carry forward into 2026 with a refined focus informed by lessons learned during implementation. Experience has shown that the Executive Director manual is not well suited to exhaustive, linear procedural documentation; instead, the greatest value lies in documenting mission-critical functions, decision frameworks, recurring obligations, and delegation pathways. In 2026, the agency will continue refining the desk manual to function as a practical management and planning tool for the current Executive Director, while also supporting leadership continuity and succession readiness. Emphasis will be placed on usability, cross-referencing, and integration of the executive calendar framework so the manual actively supports prioritization, workload management, and decision-making in real time, rather than serving solely as a reference document.

ACTIVITY # 3

2025 Original Objective: Develop and successfully fill two Operations and Policy Analyst 2 (OPA 2) positions within the next year to relieve senior leadership of routine operational duties, redistribute administrative responsibilities, and enhance overall operational efficiency across the agency. These roles will be pivotal in overseeing daily program operations, ensuring compliance, coordinating legislative updates, and enabling the Executive Director (ED) and Deputy Director (DD) to focus on strategic initiatives.

Progress Summary: As part of Activity 3 of the 2025 Succession Plan, agency leadership developed position descriptions for two OPA-2 positions intended to strengthen analytical and policy capacity and support the delegation of higher-level functions from agency leadership to staff. One position involved the proposed reclassification of an existing Research Analyst 2 position to an OPA-2 classification. The second involved the creation of a new OPA-2 position. Both position descriptions were submitted to DAS Classification and Compensation for review.

During the classification review, the agency was advised that one of the proposed positions did not meet the specifications for an OPA-2 classification but did meet the criteria for a Paralegal classification. Based on this guidance, the agency adjusted its strategy and reclassified the Research Analyst 2 position to a Paralegal, ensuring appropriate alignment between assigned duties and classification while retaining essential organizational functions.

For the second proposed OPA-2 position, the agency was advised that additional funding approval would be required through the Permanent Financing Plan (PFP) process prior to establishment of the position. Agency leadership met with the agency's Chief Financial Officer and accounting staff and was advised that confirmation of classification eligibility and an approval memorandum would be necessary before initiating a PFP request.

The agency returned to DAS Classification and Compensation for further review and received confirmation that, while the position description met the technical specifications of an OPA-2 classification, the agency had not sufficiently demonstrated that its scope of work and organizational complexity supported an OPA-2 classification at this time. DAS advised that an OPA-1 classification could be justified.

In response, the agency adjusted its approach to maintain operational continuity and support future workforce planning. The agency elected to keep the AS-2 position vacant and used vacancy savings to recruit for a limited-duration OPA-1 position. This approach allows the agency to begin delegating analytical and policy support functions, assess long-term workload and organizational need, and develop the necessary foundation to support a potential Policy Option Package in the 2027 biennium should an OPA-2 position be warranted.

Although implementation of these reclassifications is still in its early stages, as anticipated in our Succession Plan, the organizational and cultural impact has been immediate and significant. The Paralegal reclassification became effective in July 2025, followed by the hiring of a limited-duration OPA-1 in August 2025. Together, these changes have materially altered how work is assigned, managed, and overseen within the agency.

The Paralegal position has assumed centralized oversight of our program areas, including sex offender classification and reclassification matters, relief proceedings, firearms relief, and the Board's expanding civil commitment population under ORS 426.701. Previously, oversight of these functions rested largely with the Agency Director, with multiple staff contributing in a fragmented manner and without consistent ownership or continuity. The reclassification has established clear accountability, improved coordination, and ensured sustained subject-matter oversight in areas that directly implicate public safety and statutory compliance.

This change has also created parity across the agency's programs. Similar to the Guilty Except for Insanity (GEI) program, which has long benefited from dedicated paralegal support, the civil commitment and other programs now have comparable infrastructure and oversight. This alignment supports consistency in legal processes, strengthens internal controls, and promotes equity in workload distribution.

The limited-duration OPA-1 position has likewise produced meaningful early outcomes. In just four months, the OPA-1 has led the development of a much-needed framework for reviewing,

updating, and organizing the agency's policies and procedures, work that had previously been addressed on an ad hoc basis due to capacity constraints. In addition, the OPA-1 has begun establishing a more deliberate and organized approach to rulemaking, including identifying priorities, clarifying internal roles, and improving documentation and tracking.

Collectively, these changes have begun to shift the agency's culture from one that relied heavily on leadership-driven oversight to one that is more distributed, structured, and sustainable. Staff now have clearer lines of responsibility, increased opportunities for professional growth, and a stronger sense of ownership over core functions. At the same time, implementation has clarified the practical limitations of the OPA-1 classification. While the OPA-1 has meaningfully improved capacity and organization, the classification limits the position's ability to independently perform functions requiring higher levels of subject-matter expertise, judgment, and autonomy. As a result, the Agency Director must continue to remain closely involved in substantive policy, rulemaking, and content-driven decisions.

Although these reclassifications are still in the early stages, they have demonstrated both meaningful improvement and a clear operational need for a higher-level policy classification. Together, they have laid a strong foundation for improved operational resilience and succession planning and provide compelling support for the future establishment of an OPA-2 position to fully realize the agency's long-term organizational and workforce planning goals.

ACTIVITY #4

2024 Original Objective: Review and update position descriptions to ensure accuracy in reflecting current job duties and competencies. Develop more concrete competencies as needed and determine whether additional training or other resources are necessary.

2025 Updated Objective: Review and update the position descriptions for the AS-2, Paralegal, and ESS-2 roles to clarify responsibilities and ensure alignment with the evolving needs and priorities of the agency. This objective aims to refine these positions to provide a clearer understanding of each role's duties

Progress Summary: The review and update of the three AS-2, three Paralegal, and one ESS-2 position descriptions was a key deliverable under the PSRB's 2025 Succession Plan and directly supports the agency's objectives of operational clarity, continuity, and workforce sustainability. This activity was intended to ensure that position duties accurately reflect current operational needs, support a more distributed operational model, and enable staff to work at the top of their classifications.

Over the past year, all targeted position descriptions were comprehensively reviewed and updated. This process resulted in the reallocation of some duties to eliminate redundancies, improve role differentiation, and better align responsibilities with agency priorities. The revised descriptions more clearly articulate expectations and delineate nuanced distinctions among positions within the same classification. In addition, the updates intentionally incorporated opportunities for cross-training to strengthen workforce flexibility and enhance the agency's capacity to maintain continuity of operations.

Although the original succession plan anticipated the elimination of one AS-2 position, unanticipated staffing constraints and the inability to secure OPA-2 positions required a strategic adjustment. Rather than filling the AS-2 vacancy, the agency maintained the vacancy and used resulting savings to establish a limited-duration OPA-1 position. This adjustment enabled the delegation of critical functions from agency leadership to staff, enhanced workload distribution, and strengthened operational capacity without increasing overall staffing levels.

Overall, the core objectives of Activity 4 have been met, including updated position descriptions, clarified responsibilities, reduced duplication of effort, and increased cross-functional capacity. It is recommended that these position descriptions continue to be reviewed on at least an annual basis to ensure ongoing alignment with agency priorities and emerging operational needs. With this ongoing review incorporated into broader workforce planning efforts, Activity 4 may be considered complete.

ACTIVITY #5

2025 Original Objective: Identify and develop specific competencies for the Paralegal positions to better align their roles with the agency's evolving priorities and enhance customer service. This objective aims to ensure that Paralegal roles are clearly defined with the necessary competencies to effectively support the agency's goals and meet customer expectations. The agency will assess customer and stakeholder expectations of Paralegal performance, incorporating their feedback to refine competencies and improve service delivery. The initiative will also evaluate the need for additional training or resources to develop these competencies, ultimately strengthening the Paralegals' capacity to meet their responsibilities.

Progress Summary: In 2025, the agency experienced limited progress on this objective due to resource constraints and competing priorities. A major factor was the reclassification process, which took longer than anticipated but ultimately resulted in the creation of an additional Paralegal position. As highlighted in the previous section, this new role has added substantial operational value, alleviating workload pressures and enabling the redistribution of duties among agency leadership and existing Paralegals, as well as a more strategic alignment of responsibilities across the team.

Building on this success, the agency has shifted its succession planning strategy. Rather than pursuing a second OPA-2, the focus is now on permanently reclassifying the Research Analyst-2 position to a Paralegal. This adjustment leverages lessons learned from the new Paralegal and strengthens the overall structure of the team.

The interim redistribution of duties has also provided valuable insights into workflow bottlenecks and skill gaps, which will directly inform the next phase of work: the development of a Paralegal competency framework and stakeholder feedback processes. Moving forward, the agency will proceed with this competency evaluation to clearly define the skills, knowledge, and customer service expectations for all Paralegal positions. Doing so will ensure that the team is fully equipped to meet agency priorities, enhance service delivery, and maintain operational efficiency.

Overall, the combination of reclassification, role creation, and strategic planning has established a strong foundation for enhanced performance and sustained success for continued workforce planning in 2026 and beyond.

ACTIVITY #6

2025 Original Objective: The agency will develop a structured training plan for a staff empowerment program that integrates its newly established customer service policy. This plan will serve as the foundation for promoting a culture of continuous professional growth while enhancing its commitment to exceptional customer service. By aligning staff development with customer service priorities, the plan will ensure that employees are equipped with the skills, knowledge, and confidence to provide excellent service. The goal is to create a strategic roadmap of training opportunities that will be rolled out in 2026.

Progress Summary: The initiative to develop a structured staff empowerment program remains an active and ongoing effort. While a formal, standalone program was not finalized in 2025, the agency made substantial progress toward the core objective of fostering continuous professional growth and strengthening customer service capacity. Due to time constraints and limited resources, the agency relied primarily on internal subject-matter expertise rather than external professional trainers. While this approach ensured continuity and relevance to PSRB-specific work, it also limited the pace and breadth of training development. Despite these constraints, staff demonstrated strong engagement and application of training content. In any case, the work completed during 2025 established a practical foundation for a more formalized training roadmap planned for implementation in 2026. The following is a summary highlighting progress:

- **Advancing Staff Engagement and Identifying Skill Needs:** In 2025, the agency administered its second Gallup Employee Engagement Survey, which yielded strong results and reflected high levels of staff engagement, collaboration, and satisfaction with leadership and peer relationships. These results informed leadership's understanding of workforce strengths and emerging development needs. In addition, a staff retreat held in May 2025 provided dedicated time for team-building, reflection, and goal-setting, while also identifying training priorities aligned with agency operations and customer service expectations. A key focus of the retreat was hands-on training related to the use of artificial intelligence to strengthen internal processes, clarify protocols, and support the development of desk manuals that promote consistency and efficiency.
- **Customer Service Policy Implementation and Internal Training Delivery:** Consistent with the objective of integrating staff development with customer service priorities, the agency finalized and implemented its customer service policy in March 2025. Staff were actively involved in developing the policy and were required to incorporate customer service-related goals into their PAFs. Throughout 2025, the Executive Director and Deputy Director led a coordinated series of internal trainings focused on customer service competencies, including advanced communication strategies, navigating challenging interactions, and applying agency policies with confidence.

In the final quarter of 2025, staff further integrated customer service principles with emerging technology by developing goals that combined the use of artificial intelligence and customer service delivery. Tabletop exercises were conducted to practice using AI tools to respond to common inquiries to the Board, reinforcing efficiency, accuracy, and consistency.

- **Safety and Emergency Preparedness:** The Executive Director and Deputy Director also engaged staff in quarterly safety and emergency preparedness trainings throughout 2025. These efforts culminated in an in-person annual safety meeting that included a focused review of the Continuity of Operations Plan (COOP), emergency response protocols, safe office access procedures, and guidelines for working alone. These activities strengthened organizational readiness, reinforced decision-making expectations, and contributed to a culture where staff feel confident, supported, and empowered.

Succession Plan 2025 | Identification

The following capture current positions identified as highly critical, as defined by the chart below. Use this space to capture current positions identified as highly critical or critical (see chart below). Include any positions from 2024 that are still considered highly critical or critical and any new positions the agency has identified for 2025.

Position(s) Identified in 2024	2024 Status (critical, highly critical)	2025 Status (non-critical, critical, highly critical)	Reason Provide brief narrative of why status changed or stayed the same
Board Members	Highly Critical	Highly Critical	No change needed
Executive Director	Highly Critical	Highly Critical	No change needed
Deputy Director	Not Rated	Highly Critical	This position is responsible for continuity of agency operations should the Executive Director be unavailable.
Paralegal (Hearings Officer)	Not Rated	Critical	The agency anticipates this will be designated as a Critical position upon further development of the position's desk manual.

Highly Critical

1. Position: Board Members

- a. Competencies of Position: Members of the Psychiatric Security Review Board serve in a quasi-judicial capacity and are entrusted with making legally sound, evidence-based decisions that directly affect public safety and the liberty interests of individuals under PSRB jurisdiction. Board members must exercise independent judgment while adhering to statutory authority, administrative law requirements, and principles of procedural fairness and due process. The position requires the ability to evaluate complex legal, clinical, and risk-related information; conduct fair and orderly hearings; and collaborate effectively with fellow Board members in a deliberative decision-making process. The following represent the minimum competencies required of PSRB Board members:
 - i. Legal and Statutory Expertise: Ability to understand, interpret, and apply Oregon Revised Statutes (ORS) and Oregon Administrative Rules (OAR) governing PSRB jurisdiction, hearings, and conditional release determinations.
 - ii. Quasi-Judicial and Hearing Management Competency: Ability to function as an administrative decision-maker, preside over hearings in compliance with public meetings law, maintain order, manage contested proceedings,

and ensure decisions are supported by appropriate findings of fact and conclusions of law.

- iii. **Risk Assessment and Placement Decision-Making:** Competency in evaluating psychiatric, behavioral, and supervision-related risk factors to determine appropriate placement and conditions (hospital versus community), while balancing public safety, statutory requirements, and individual rights.
- iv. **Analytical and Critical Thinking:** Skill in reviewing and synthesizing complex clinical records, legal filings, and testimony; weighing evidence; and formulating reasoned, defensible decisions based on the record.
- v. **Promote Ethics and Due Process:** Demonstrated commitment to upholding the standards of public officials and professional ethics, ensuring hearings are conducted with integrity, impartiality, and fairness. This includes adherence to statutory and administrative law requirements, procedural fairness, and constitutional protections for individuals before the Board as well as actively recognizing and upholding the rights of victims throughout the hearing and decision-making process.
- vi. **Effective Communication and Deliberation:** Ability to preside over hearings and communicate clearly, professionally, and respectfully under scrutiny. This includes articulating the basis for decisions on the record and engaging in thoughtful, deliberative discussion with fellow Board members to reach well-reasoned outcomes.
- vii. **Adaptability and Continuous Learning:** Commitment to ongoing education and professional development to remain current with evolving mental health practices, changes in statute or rule, and emerging best practices in forensic oversight and public safety decision-making.

b. **Why Identified as Highly Critical**

- i. **Vacancy would cause significant operational impact:** A quorum of three members is required to conduct hearings. Without a quorum, hearings cannot proceed, delaying conditional release decisions, revocation actions, and statutory timelines, which directly affects public safety and legal compliance.
- ii. **Specialized knowledge and statutory requirements:** Each Board member holds expertise mandated by statute—psychiatrist, psychologist, attorney, parole/probation officer, or public member. These roles are not interchangeable, and their combined competencies are essential for balanced, legally sound, and evidence-informed deliberation.
- iii. **Challenging recruitment:** The candidate pool for these specialized roles is limited. Recruitment is further constrained by the part-time nature of the positions and compensation levels that are significantly below comparable private sector or statewide positions.
- iv. **Skill set in demand:** Board members' combination of clinical, legal, and forensic expertise is highly sought after across public, private, and academic sectors, making recruitment and retention increasingly competitive.

- v. Moderately competitive compensation: While the positions provide professional prestige, compensation is modest relative to the skills and responsibilities required, further challenging recruitment and retention.
 - vi. Promotional opportunities: Internal promotional pathways within PSRB are limited. Serving on the Board may provide statewide visibility, influence over policy and practice, and professional recognition that is valued across the justice and mental health systems.
 - vii. Anticipate vacancy within 1–5 years: Terms are statutorily limited, and turnover is predictable due to term expirations, retirements, or career transitions. Continuous recruitment and succession planning are necessary to maintain Board functionality and institutional knowledge.
- c. Was this position identified on your 2024 Succession Plan? Yes. Board Members have consistently been designated as highly critical.

2. Position: Executive Director

- a. Competencies of Position: The Executive Director of the Psychiatric Security Review Board (PSRB) is a highly critical executive leadership position requiring a rare combination of enterprise management capability and advanced, agency-specific legal and forensic expertise. The Executive Director serves as the agency's chief executive and final administrative authority, responsible for ensuring the effective operation of the agency, compliance with statutory and administrative requirements, and the integrity of PSRB's oversight functions in support of public safety.

Although the Board appoints and provides oversight of the Executive Director, the Executive Director is solely responsible for day-to-day agency operations and holds the organization accountable for performance, legal compliance, and implementation of Board direction and statewide priorities. This role requires mastery of the Statewide Manager Competencies—including business acumen, strategic communication, innovation, intentional engagement, mentoring and developing people, and stewardship—while also demonstrating advanced competencies unique to PSRB's statutory mission.

The position requires expert knowledge of Oregon criminal and mental health statutes, administrative law, conditional release oversight, legislative engagement, and complex interagency coordination. In addition, the Executive Director must possess a working knowledge of forensic mental health systems, risk assessment principles, and standards of forensic practice to ensure that agency policies, oversight models, and provider expectations reflect evidence-informed practices appropriate for PSRB's population. This integrated legal and forensic systems expertise supports sound decision-making, effective supervision frameworks, and defensible outcomes.

The Executive Director is responsible for translating legislative mandates, statewide priorities, and Governor's directives into actionable agency strategies; supporting the Board in carrying out its quasi-judicial functions; and ensuring that agency operations align with both statutory requirements and best practices in forensic oversight. Given the legal complexity, procedural rigor, and public safety implications

inherent in PSRB's work, this position requires, at minimum, a Juris Doctor (law degree) and substantial experience in program administration, policy development, and executive leadership within justice or behavioral health systems.

The following represent the minimum competencies required for this position:

- i. **Statutory and Administrative Law Expertise:** Expert ability to interpret, apply, and operationalize Oregon Revised Statutes (ORS) and Oregon Administrative Rules (OAR) governing PSRB programs, including hearings and oversight for GEI and REI clients, civil commitment cases, firearm relief, and sex offender relief and reclassification. This competency includes ensuring decisions are legally defensible, procedurally sound, and consistent with due process requirements, informed by an understanding of forensic mental health principles and risk assessment practices.
- ii. **Board Governance and Quasi-Judicial Support:** Advanced competency in supporting Board governance, including agenda development, compliance with public meetings law, and advising Board members on statutory authority, procedural fairness, and legal standards. The Executive Director ensures Board processes are consistent, transparent, and aligned with statutory mandates.
- iii. **Conditional Release Oversight and System Accountability:** Expertise in overseeing conditional release systems, including approval and denial of release plans and modifications, coordination of revocation processes, and accountability of community mental health providers, the Oregon State Hospital, and law enforcement partners. Effective oversight requires familiarity with evidence-informed supervision models, risk management strategies, and treatment standards applicable to forensic populations to promote public safety and client stability.
- iv. **Legislative Engagement and Policy Development:** Executive-level skill in drafting, analyzing, and implementing legislation and administrative rules; monitoring legislative activity; providing testimony; and advising policymakers. The Executive Director translates legislative and statewide policy direction into agency rules, procedures, and operational practices.
- v. **Budget Development and Fiscal Stewardship:** Responsibility for preparing, presenting, and administering the agency's biennial budget; monitoring expenditures; and ensuring compliance with statewide fiscal, procurement, and contracting requirements. This competency includes aligning fiscal decisions with statutory obligations, public safety priorities, and operational sustainability.
- vi. **Interagency and Systems Leadership:** Demonstrated ability to build, maintain, and lead complex partnerships with OHA, OSH, DHS, local hospitals, courts, law enforcement, direct service providers, and other system partners. The Executive Director negotiates and advances systemic solutions related to the administration of the agency's programs, including expanding system capacity, developing and advancing legislative concepts, convening and participating in workgroups, task forces, and advisory committees, and improving supervision and oversight

models. This competency includes identifying opportunities to streamline processes, reduce unnecessary administrative burden, enhance system effectiveness, and promote outcomes that support public safety, service quality, and stability for individuals under PSRB jurisdiction.

- vii. Public Relations and Executive Communication: Ability to serve as the agency's primary spokesperson; manage media and public inquiries; and communicate complex legal and forensic issues clearly, accurately, and credibly to diverse audiences, including policymakers, stakeholders, and the public.
- viii. Training and Education Leadership: Competency in designing and delivering high-level training and guidance for Board members, staff, and external system partners on statutory authority, PSRB policies, procedural requirements, and best practices related to forensic assessment and oversight.
- ix. Technology, Data, and Information Management: Executive-level responsibility to stay current with emerging technologies and lead the strategic use of data and information systems to strengthen agency effectiveness. This competency includes overseeing technology modernization and data governance initiatives, such as electronic records management, paperless and automated workflows, collaboration platforms, and database systems, to improve the quality, timeliness, and consistency of decision-making. The Executive Director ensures technology investments comply with enterprise-wide requirements
- x. Strategic Planning and Organizational Leadership: Executive-level skill in setting strategic direction, developing and implementing long- and short-range goals, managing agency performance measures, and ensuring alignment between daily operations and PSRB's mission, statutory responsibilities, and standards of forensic practice.
- xi. High-Risk Decision-Making and Crisis Leadership: Executive-level responsibility to provide continuous, on-call leadership and decision-making in high-risk and emergent situations involving individuals under PSRB jurisdiction, agency operations, or public safety concerns. This competency requires the ability to rapidly assess complex legal, clinical, and operational information; make timely, well-reasoned, and defensible decisions; and coordinate effectively with multiple agencies and system partners to stabilize situations, mitigate risk, and ensure compliance with statutory and due process requirements.
- xii. Ethics, Equity, and Due Process:
Demonstrated commitment to confidentiality, ethical governance, procedural fairness, and equity in all aspects of agency leadership. This competency includes utilizing the agency's DEI and Affirmative Action plans to integrate diversity, equity, and inclusion principles into recruitment and hiring, rulemaking, policy and procedure development, organizational practices, and decision-making.

b. • Why Identified as Highly Critical

- i. Vacancy would cause significant operational impact: The Executive Director is the chief executive officer of PSRB, responsible for the day-to-

day administration of all agency functions, ensuring statutory compliance, and overseeing Board operations. A vacancy would disrupt agency operations, delay hearings and conditional release decisions, compromise oversight of individuals under PSRB jurisdiction, and increase risk to public safety.

- ii. Specialized knowledge and expertise required: This position requires advanced legal expertise (administrative law, ORS/ OAR application, quasi-judicial oversight), forensic mental health knowledge, and risk assessment proficiency. These skills are not readily found in the candidate pool, and the combination is essential to ensure defensible, evidence-informed decision-making across Board and agency operations.
- iii. Challenging recruitment: Candidates with the requisite combination of legal, administrative, and forensic mental health expertise are rare. The position demands executive leadership experience in justice or behavioral health systems, which further limits the available pool.
- iv. Skill set in demand: High-level legal and forensic mental health expertise is highly sought across public, private, and academic sectors, intensifying competition for qualified candidates.
- v. Moderately competitive compensation: While the position offers prestige and significant professional influence, compensation is moderate relative to the extraordinary responsibilities required. The Executive Director is a 24/7 on-call position, responsible for high-risk decision-making involving individuals under PSRB jurisdiction, managing a high-risk population, and ensuring legally defensible agency actions. This includes exposure to potential legal liability, interagency coordination in complex or emergent situations, and ultimate accountability for statutory compliance and public safety outcomes.
- vi. Promotional opportunities: The position represents the highest leadership role within PSRB, offering statewide visibility and influence over public safety, forensic mental health policy, and statutory program development.
- vii. Anticipate vacancy within 1–5 years: While no specific vacancy is reasonably anticipated, the Executive Director serves at the pleasure of the Board and may be subject to political scrutiny or changes in governance priorities. Given the high level of institutional knowledge, specialized expertise, and unique leadership required for this role, proactive succession planning is critical to ensure continuity of agency operations, maintain public safety, and preserve organizational memory.

c. Was this position identified on your 2024 Succession Plan? Yes. Board Members have consistently been designated as highly critical.

3. Deputy Director

- a. Competencies of Position: The Deputy Director position at the Psychiatric Security Review Board (PSRB) is a highly critical leadership role that serves as the Executive Director's principal deputy and is essential to the continuity, stability, and effectiveness of agency operations. The Deputy Director supports and, when necessary, acts on behalf of the Executive Director in employee management, strategic planning, program administration, and compliance with

legal and enterprise-wide requirements. This position requires advanced competencies in forensic mental health systems, statutory and regulatory frameworks, and interagency coordination. The Deputy Director is highly relied upon to train and consult with agency staff, Board members, and community providers, and to ensure consistent, lawful, and effective oversight of individuals under PSRB jurisdiction. The following represent the minimum competencies required for this position:

- i. **Personnel and Organizational Leadership:** The Deputy Director must demonstrate the ability to lead, supervise, and develop a diverse workforce in alignment with agency goals while fostering a respectful, inclusive, and high-performing workplace culture. This competency extends beyond basic supervision and includes supporting staff to work at the top of their classifications, implementing Performance Accountability Feedback sessions (PAFs), and identifying and addressing skill gaps through targeted professional development. The Deputy Director provides coaching and mentoring, integrates competency-building into individual and team development plans, and supports succession planning to ensure organizational resilience. In all aspects of personnel leadership, the Deputy Director promotes safety, equity, and accountability while fostering continuous improvement.
- ii. **Program Administration, Project Management, and Continuity of Operations:** The Deputy Director plays a central role in supporting the Executive Director in administering the agency's programs and initiatives and ensuring continuity of operations. This includes assisting with the implementation of statewide directives, maintaining compliance with statutory and administrative requirements, and coordinating operational improvements. The Deputy Director is responsible for developing, maintaining, and implementing the agency's Continuity of Operations Plan (COOP) to ensure essential functions are sustained during leadership transitions or operational disruptions. Project management responsibilities include internal staffing initiatives, workflow and process improvements, and enhancements to community provider procedures that support consistent service delivery and operational effectiveness.
- iii. **Legal and Regulatory Acumen:** The Deputy Director must demonstrate strong analytical skills and the ability to rapidly learn, interpret, and apply Oregon statutes, administrative rules, and agency policies governing PSRB programs. While not required to possess the same depth of legal expertise as the Executive Director, the Deputy Director must be proficient in applying complex legal frameworks to operational decision-making. This includes developing working knowledge of statutory requirements related to hearings, conditional release monitoring, and Board authority across all program areas. The Deputy Director serves as a reliable internal and external resource on procedural compliance and statutory application.
- iv. **Policy Development and Rulemaking:** The Deputy Director must possess the ability to draft and implement administrative rules, internal policies, procedures, and performance measures in compliance with statutory mandates and enterprise standards. This competency includes

participating in rulemaking processes, developing agency guidance, and training staff and community partners to ensure consistent and lawful application of Board policies and requirements.

- v. Budget and Fiscal Stewardship: The Deputy Director assists in the development of the agency's biennial budget, monitors expenditures, and ensures compliance with statewide fiscal, procurement, and contracting policies. This role requires the ability to analyze fiscal impact statements, assess budgetary implications of policy and operational decisions, and provide informed recommendations that support agency priorities, service continuity, and responsible stewardship of public resources.
- vi. Interagency Collaboration and Resource Strategy: The Deputy Director must maintain and strengthen collaborative relationships with OHA, community mental health programs, residential providers, and other system partners. This competency includes strategic problem-solving and negotiation to identify and leverage resources that support individuals under PSRB jurisdiction while promoting public safety and client stability. The Deputy Director serves as a key liaison between the Board and external partners, anticipates systemic barriers, and develops coordinated solutions related to housing, treatment, supervision, and risk management.
- vii. Training and Education: The Deputy Director is responsible for designing and delivering internal training for agency staff and Board members to ensure consistent understanding and application of PSRB statutes, policies, and procedures. The position also develops and delivers external training and technical assistance for community providers responsible for supervising individuals on conditional release. These efforts emphasize evidence-informed practices, compliance expectations, and strategies that reduce risk, support recovery, and promote effective collaboration across the system.
- viii. High-Risk Decision-Making: The Deputy Director must demonstrate the ability to make sound, timely decisions in complex and high-risk situations by integrating legal, clinical, and operational information. This competency supports the agency's mission to protect public safety while safeguarding the legal rights of individuals under PSRB jurisdiction and ensures consistent application of Board authority across programs.
- ix. Equity and Inclusion Leadership: The Deputy Director leads the development, implementation, and integration of the agency's Diversity, Equity, and Inclusion (DEI) and Affirmative Action plans. This competency requires using these plans as strategic frameworks to guide agency operations, workforce practices, policy development, program administration, and system partnerships. The Deputy Director ensures alignment with Oregon's statewide equity goals and embeds equity considerations into decision-making, service delivery, and organizational culture.

b. Why Identified as Highly Critical

- i. Vacancy would cause significant operational impact:
The Deputy Director serves as the principal deputy to the Executive

Director and ensures continuity of agency operations. A vacancy would leave a critical gap in day-to-day leadership, personnel management, program administration, and statutory compliance oversight. The Deputy Director also supports the Executive Director in Board preparation, training, and policy implementation, functions essential to uninterrupted agency operations.

- ii. Specialized knowledge and expertise required: This role requires advanced competencies in forensic mental health, legal and administrative frameworks, interagency coordination, and strategic leadership. The combination of technical, operational, and systems knowledge is specialized and not easily replicated.
 - iii. Challenging recruitment: Candidates must possess experience in program administration, leadership within justice or behavioral health systems, and working knowledge of forensic oversight standards. Such candidates are rare, and recruitment is complicated by the need for continuity and the role's demanding responsibilities.
 - iv. Skill set in demand: Forensic mental health expertise, combined with operational leadership and legal knowledge, is highly sought across public agencies and the private sector, increasing competition for qualified candidates.
 - v. Moderately competitive compensation: While the Deputy Director role offers significant leadership experience and influence within PSRB, compensation is moderate relative to the high-stakes responsibilities. The position supports executive-level decision-making, program and personnel oversight, interagency coordination, and operational continuity, all of which carry substantial legal, organizational, and public safety implications.
 - vi. Promotional opportunities:
This position serves as a direct pipeline to the Executive Director role if the person holds a law degree or potentially other commensurate qualifying experience and provides extensive professional exposure and experience in statewide policy, forensic mental health systems, and agency leadership.
 - vii. Anticipate vacancy within 1–5 years: No turnover is anticipated in the next five years. Turnover is possible due to advancement opportunities in career. Making succession planning and internal development critical to sustaining leadership continuity and operational effectiveness.
- c. Was this position identified on your 2024 Succession Plan: No. With the increased familiarity with the purpose and expectations related to succession planning along with the updating of agency position descriptions, the Deputy Director position is now being added as a Highly Critical position for the above stated reasons.

POSITION IDENTIFICATION REFERENCE CHART

NOT A CRITICAL POSITION	• Vacancy would cause limited impact • Limited specialized knowledge or skills required • Strong recruitment potential • Competitive compensation package • Limited direct promotional opportunities
CRITICAL POSITION	• Vacancy would cause an impact • Some specialized knowledge or skills required • Challenging recruitment • Moderately competitive compensation package • Skill set in demand • Promotional opportunities • Anticipate vacancy within the next 1 to 5 years
HIGHLY CRITICAL POSITIONS	• Vacancy would cause a significant impact • Specialized knowledge or skills required • Very challenging recruitment • No competitive compensation package/compression issues • Skill set in high demand • Promotional opportunities • Anticipate vacancy within the next year

Highly Critical

1. Board Members: The plan below established in 2024 continues to guide the development of bench strength for Board Member positions, with a focus on recruitment and onboarding of qualified candidates to address the ongoing recruitment and retention challenges associated with these positions. Turnover is largely influenced by term limits requiring active recruitment efforts. In the 2026 plan, the agency has added targeted strategies to build current Board member competencies, including expanded meeting participation, enhanced tools and resources, increased training opportunities, courtroom management support, the Senior Board Member peer mentoring role, and an annual retreat for reflection and strategic planning.

Recruitment Strategies

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

Onboarding Strategies (coordinated by Board Chair and Executive Director)

- ✓ Onboarding Plan: Develop a customized onboarding plan tailored to the unique needs and background of the Board member. This plan should include a comprehensive orientation program that introduces new Board members to the PSRB's mission, values, strategic goals and hearings procedures as well as an overview of relevant statutes, administrative rules, and key legal precedents.
- ✓ Mentorship Program: Implement a mentorship program pairing new members with experienced colleagues. This provides a supportive environment for knowledge transfer, guidance, and insights into the nuances of administrative law and contested hearings.
- ✓ Knowledge Transfer Sessions: To the extent possible, facilitate structured knowledge transfer sessions between the outgoing and incoming Board member. These sessions should focus on sharing insights, experiences, and best practices related to preparing for and conducting hearings.¹
- ✓ Hearing Observations: Facilitate new Board members' exposure to diverse hearing scenarios by providing opportunities for observation. Develop a comprehensive catalog featuring various hearing types, offering insights and training on both routine and complex hearing issues.
- ✓ Public Hearing History: Facilitate new Board members' onboarding by providing them access to the comprehensive archive of meeting minutes from past administrative meetings. This initiative not only familiarizes new members with the dynamics of public meetings but also offers an in-depth account of the agency's historical discussions and key issues.

Ongoing Competency Development

- ✓ Expand Opportunities for Board Engagement: In 2026, the Board will hold additional meetings to provide members with more opportunities to connect with colleagues, engage in deliberation, and gain insight into agency operations and decision-making processes. This increase supports competencies in analytical thinking, quasi-judicial decision-making, and effective communication by allowing members to actively participate in discussions, provide feedback to the Executive Director, and contribute to training development and policy review.
- ✓ Develop and Enhance Board Tools and Resources: Building on the 2025 Board Member Preparation Guide, the agency will create additional tools and reference materials to support decision-making. These resources may include case summary templates, statutory and rule reference guides, risk assessment checklists, and best-practice procedural guides. Providing these tools enhances competencies in legal expertise, risk assessment, procedural fairness, and analytical thinking.

¹ It is imperative that Board members refrain from exchanging or discussing specific case details outside the formal deliberation process.

- ✓ **Increase Training Opportunities:** Expand training offerings, aiming to provide at least one targeted training session per Board meeting. Trainings will cover areas such as statutory changes, forensic mental health best practices, risk assessment methods, and evidence-based oversight strategies. This supports competencies in legal and clinical expertise, risk assessment, continuous learning, and informed decision-making.
- ✓ **Biannual Courtroom Management Training and Supporting Guides:** Courtroom management training will continue on a biannual basis to strengthen members' quasi-judicial skills, including presiding over hearings, maintaining order, ensuring procedural fairness, and issuing legally sound decisions. The agency will continue to refine the Courtroom Management Guide and develop scripts to assist members in effectively conducting hearings. This strategy directly supports judicial competency, procedural fairness, effective communication, and ethics.
- ✓ **Leverage the Senior Board Member Role to Support Peer Learning and Continuity:** Following the passage of HB 2804 in 2025, the Board will utilize the newly established Senior Board Member position to serve as a peer mentor and resource for other members. This role will provide guidance on statutory interpretation, hearing management, risk assessment, and deliberative practices while preserving institutional knowledge. By formalizing peer support within Board operations, this strategy strengthens competencies in analytical thinking, quasi-judicial decision-making, procedural fairness, and continuous learning, while ensuring continuity and consistency across Board decisions.
- ✓ **Annual Board Retreat for Reflection and Strategic Planning:** The Board will hold an annual retreat to review achievements from the past year, assess areas for growth, and set priorities for the upcoming year. This dedicated time supports competencies in strategic thinking, continuous learning, and collaborative decision-making, while fostering a shared understanding of agency goals, performance expectations, and best practices for Board operations.

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

Recruitment Strategies

- ✓ **Competency-Centric Interviewing:** Align the recruitment process with the competencies highlighted in the succession plan. Tailor interview questions to assess candidates' proficiency in key areas crucial for the Executive Director role. This ensures a focused evaluation of candidates against the specific requirements of the position.
- ✓ **Leadership Oregon Participation:** Nominate potential successors to participate in Leadership Oregon. This program offers invaluable insights into the intricacies of state-level leadership, providing candidates with a foundational understanding of state

government management competencies and also exposes participants to opportunities to develop an extensive network of colleagues across the enterprise.

- ✓ Inclusive Collaboration: Enhance the interview process by involving key partners who can contribute question drafting and participate in interviews. This collaborative approach ensures a comprehensive evaluation from diverse perspectives, incorporating insights from those directly impacted by the PSRB's operations.
- ✓ Strategic Job Announcement Distribution: Develop a targeted distribution list for the job announcement. Identify specific individuals, organizations, and platforms that can maximize the reach of the announcement within relevant networks. This strategic approach ensures that potential candidates with the right qualifications are reached effectively.
- ✓ Engage Professional Networks: Leverage professional networks and affiliations related to mental health, legal/justice, public safety, and governance. Engaging with these networks can help identify candidates with specialized knowledge and experience relevant to the PSRB's mission. This targeted outreach increases the likelihood of attracting candidates with a strong alignment to the PSRB's goals.
- ✓ Utilize Online Platforms: Explore online platforms and job portals that cater to executive-level positions in the public sector. This includes reputable websites and forums where experienced leaders often seek new opportunities. Maximizing the visibility of the job announcement on these platforms broadens the pool of qualified candidates.
- ✓ Diversity and Inclusion Focus: Prioritize diversity and inclusion in the recruitment process. Actively seek candidates from diverse backgrounds to ensure a broad range of perspectives and experiences. This approach contributes to a more inclusive leadership team, fostering innovation and effective decision-making.

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

- ✓ Onboarding Plan: Develop a customized onboarding plan tailored to the unique needs and background of the incoming ED. This plan should include a detailed schedule, key introductions, and specific learning objectives aligned with the competencies outlined in the succession plan.
- ✓ In-Depth Organizational Overview: Provide an extensive overview of the organization's history, mission, values, and strategic goals. Ensure the incoming ED gains a profound understanding of the agency's context within the mental health system, its role, and the impact it seeks to achieve.
- ✓ Structured Introduction to Key System Partners: Facilitate introductions to key internal and external stakeholders, including staff, board members, government officials, and interstate agency and community partners. These introductions should go beyond formalities, aiming to foster meaningful connections and an understanding of the diverse roles within the organization.
- ✓ Thorough Review of Agency Operations: Conduct a thorough review of agency operations, focusing on critical processes, programs, and ongoing initiatives. This includes an exploration of the PSRB's programs, strategic plan, affirmative action plan, legal and procedural policies, key partnerships, fiscal/budget matters, vendors/contractors, and the competencies crucial for the ED role.

- ✓ **Mentorship and Shadowing Opportunities:** Facilitate shadowing opportunities between the incoming and outgoing ED. This provides unparalleled insights into the intricacies of the role and fosters direct exposure to critical decision-making scenarios, operational challenges, and organizational nuances. Through this immersive experience, the successor gains a profound understanding of the organizational culture, strategic initiatives, and the rationale behind key decisions, ensuring a seamless and informed leadership transition. The real-time interaction between the outgoing and incoming EDs establishes a foundation for open communication, encourages the exchange of institutional knowledge, and nurtures a collaborative relationship, empowering the new Executive Director to confidently navigate the demands of their pivotal role. If not achievable during the transition, organize knowledge transfer sessions post-successor initiation to accomplish the same objectives.
- ✓ **Preparedness for Legal Issues:** Ensure access to legal resources and consultation for the successor. This includes establishing a mechanism for seeking guidance on complex legal matters related to board governance, public meetings, and other legal considerations.

Creation of an Executive Director Desk Manual

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

Develop a Training Facilitation Guide

- ✓ **Develop a Training Facilitation Guide** outlining the various types of trainings administered by the ED. This section should serve as a comprehensive guide, providing insights into the planning, execution, and evaluation of different training programs within the PSRB.
- ✓ **Provide a detailed overview of the types of training programs** regularly administered by the ED. This should encompass both internal staff development sessions and external training initiatives conducted by the PSRB.
- ✓ **Clearly articulate the objectives and goals of each training program.** Define the intended outcomes and competencies that participants are expected to acquire, aligning these goals with the broader mission and strategic objectives of the PSRB.
- ✓ **Specify the target audience for each training program.** Identify whether the training is designed for internal staff, external stakeholders, or specific groups within the community. This information ensures that training initiatives are tailored to the needs of diverse participants.
- ✓ **Outline the methodologies employed during training sessions.** This could include workshops, webinars, consultations, written materials, and any other innovative

approaches used to deliver content effectively. Highlight the adaptability of the ED in catering to diverse learning styles.

- ✓ Describe the mechanisms in place for evaluating the effectiveness of training programs. Include details on post-training assessments, feedback collection, and continuous improvement strategies. Emphasize the commitment to refining training initiatives based on participant feedback.
- ✓ Provide insights into the allocation of resources for training programs. This may include budgetary considerations, staffing requirements, and any external collaborations essential for successful training execution.

3. Deputy Director: The agency created an initiative (see [Challenge 5, Initiative 3](#)) to produce a competency development plan for the Deputy Director.

Agency-wide plans for competency development

The PSRB places immense value on its dedicated staff, recognizing their indispensable roles in ensuring the agency's seamless operations. While most positions have experienced turnover, the recruitment and onboarding of successors have efficiently maintained business continuity. Consequently, the agency continues to regard most positions as “not critical.”

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

Annual Position Description Review
✓ Conduct a yearly review of all position descriptions across various roles within the organization. ✓ Engage employees to gather insights on the evolving responsibilities and expectations associated with their positions. ✓ Incorporate feedback from outgoing employees to refine and enhance the accuracy of position descriptions. ✓ Evaluate the alignment of position descriptions with legal requirements, competencies, and organizational objectives.
Desk Manuals
Since 2020, the agency has maintained an ongoing expectation that staff develop and maintain position-specific desk manuals that promote consistency in procedures across all roles. While this expectation has been communicated and partially implemented, a review of the current status of desk manuals shows considerable variation in format, level of completion, and practical usefulness, particularly for employees entering new roles or assuming expanded responsibilities. To address these gaps, the 2024 Succession Plan established clear expectations for desk manual development as a foundational workforce and knowledge-transfer strategy. These expectations include: ✓ Develop comprehensive desk manuals for each role, outlining key responsibilities, procedures, and performance expectations. ✓ Include detailed guidelines on essential tasks, interactions with colleagues and stakeholders, and adherence to legal and ethical standards. ✓ Collaborate with experienced employees to capture institutional knowledge and best practices in the manuals.

- ✓ Regularly update desk manuals to reflect changes in policies, procedures, and industry standards.
- ✓ Provide ongoing training sessions to ensure employees are familiar with and effectively utilize the desk manuals.

In 2026, the agency will take more active and structured measures to advance this work and support the entire team. [Challenge 3](#) has been established to formalize desk manual development, standardize expectations, and strengthen accountability for completion and maintenance. This initiative is intended to improve onboarding, enhance operational consistency, reduce reliance on informal knowledge transfer, and reinforce the agency's overall succession planning and workforce sustainability goals..

Professional Development

The following strategies were developed in the agency's 2024 Succession Plan to

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

Overall Plan Review

How will the agency review the plan in its entirety (i.e. quarterly/annually and by whom)?

Approach: The agency's Executive Director oversees the development, implementation, and review of the Succession Plan. Review of the plan is driven by the timelines outlined in the Action Plan for 2026.

Highly Critical/Critical Positions

Has the work changed and has how the work is done changed or new programs added?

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

Competency Adjustment

How will the agency evaluate and adjust competencies?

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

Employee Goals

How will the agency evaluate employee goals (i.e., PAF guidelines to discuss employee interest and cross-training/promotional opportunities)?

Approach: Leadership will utilize the annual Employee Engagement Survey and PAF model to implement regular performance appraisal processes and discuss employee goals, interests, and identify opportunities for cross-training or career progression. Leadership will continue to facilitate open communication between employees and supervisors to align individual goals with organizational objectives.

Recruitment Strategies

What is the evaluation process to determine if the current and future recruitment and retention strategies are working and how will they be adjusted as needed?

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

Conclusion

The PSRB's 2026 Succession Plan is an integral to Initiative 3 of the PSRB's 2024-27 Strategic Plan. To ensure relevance and responsiveness, management aims to review the Succession Plan periodically and provide comprehensive updates at least annually.