

ANALYSIS

Item 5: Public Defense Commission Executive Branch Transition

Analyst: John Borden

Request: Acknowledge receipt of a report on the Public Defense Commission's transition from the judicial to the executive branch of government.

Analysis: The budget report for SB 5701 (2024), the omnibus budget measure for the 2024 legislative session, included the following budget note for the Public Defense Commission (PDC):

The Public Defense Commission is to report to the May 2024 and September 2024 meetings of the Emergency Board on the status of the agency's transition from the judicial to the executive branch of government. The reports are to include up-to-date scope, schedule, and cost information.

In 2023, the Legislature directed the transition of the PDC from the judicial to the executive branch of government with an operative date of January 1, 2025 (SB 337). The transition date may only be modified by change in law; however, the next regular session of the legislature is scheduled to occur after the operative date of the transition. The genesis of the budget note arose out of concern regarding PDC's preparedness to successfully meet the transition date.

Other relevant changes included as part of SB 337 were the preservation of PDC's statutory exemption from state personnel relations law, but the elimination of various statutory exemptions including those governing procurement and information technology beginning January 1, 2025.

The Legislature committed funding to ensure the transition of PDC to the executive branch, including one-time and ongoing funding for staffing (SB 337, 2023), a \$5 million special purpose appropriation (SPA) to the Emergency Board (SB 5506, 2023) and a \$500,000 General Fund appropriation for a contractor to assist PDC with the transition (SB 5701, 2024). After actions in the 2024 session, the SPA has a balance of \$3.8 million, which is available through December 2024 for additional transition costs.

Transition staff include one limited duration Program Manager 3/Project Manager (1.00 FTE) to plan and implement the transition, one Operations and Policy Analyst 4 (0.75 FTE) and one Operations and Policy Analyst 3 (0.75 FTE) for policy, procedure, and rule development. Staff was also added for information technology, financial management, and procurement (SB 337, 2023 and SB 5701, 2024).

PDC contracted with Moss Adams in March 2024 to provide organizational development consulting, including strategic and transition planning. This contract was let for \$250,000 with a not-to-exceed amount of \$500,000. The vendor's transition plan has a due date of July 2024, which will be one year since the July 13, 2023 date that the Governor signed SB 337 into law, leaving only a six-month window for implementation.

The scope of the transition project is comprised of activities that are directly related to a branch-to-branch transition of an agency, as well as other standard agency activities (e.g., organization chart,

records management, strategic planning, budget development), process improvements, legislative reporting, and current directives of the Governor to executive branch agencies. Although not directly related to the transition, the other activities will benefit the agency, provided focus on these activities does not compromise completion of the transition prior January 1, 2025.

PDC has established internal agency transition teams to focus on administration, information technology, human resources, procurement, and finance activities necessary to align processes to the executive branch. Procurement and information technology were identified as the two highest risk areas. The transition report identifies work required across each of these areas, including a preliminary schedule for completion of tasks. PDC also reports that the agency has been convening regular meetings with various divisions within the Department of Administrative Services, as well as the Governor's Office, related to such topics as information technology, human resources, accounting, payroll, risk management, procurement, and facilities.

Of note is that PDC is treating the agency's information technology transition as a sub-project and largely tracked separately from the overall transition effort due to its inherent complexity and need for specialized expertise. The agency is currently recruiting for an IT transition project manager and IT positions established in the 2024 session. Thus, the report provides little detail on the status of the information technology aspect of the transition, but IT transition work has been underway since the fall of 2023. PDC's transition planning is further complicated by the agency's efforts to complete the procurement of a major information technology project, the Financial and Case Management System (FCMS), prior to January 1, 2025 (Emergency Board Item #6). Moss Adams has also been contracted to conduct change management for the FCMS project.

The report contains few details specific enough to understand the true scope of the transition, such as a comparison of the current state of PDC's policies, procedures, and practices versus what will be required by statute. While the report does contain start and end dates associated with tasks, as well as the status of each task, there is no clearly articulated understanding of whether the transition is on schedule for a January 1, 2025. In fact, the information technology schedule shows that "Final testing/finalizing/transferring" will not be completed until June 2025, which is six months beyond the legal transition date. In order to mitigate this issue that was raised during the 2024 legislative session, the following instruction was provided to the Judicial Department (SB 5701, 2024):

The 2023 Legislature provided funding to the Public Defense Commission (PDC) for an inter-agency information technology services contract with OJD (\$929,270 General Fund). This contract allows OJD to provide the Commission with servers, network infrastructure, and related technical information technology services. With the transition of PDC from the judicial to the executive branch of government on January 1, 2025, concern arose around the continuation of these services for the period January 1 to June 30, 2025. While the statutory requirement is for PDC to fully transition to the executive branch of government on January 1, 2025, OJD has agreed to continue, if necessary, contractual information technology support to PDC until June 30, 2025.

At present, the overall scope and cost of PDC's transition to the executive branch is indeterminate. While the schedule has a fixed end-date, the limited time to implement the transition plan, once completed by Moss Adams, coupled with the expansion of the scope beyond transition-related tasks, could result in the need for an additional allocation of funds from the SPA. The Public Defense Commission would benefit from receiving more regular status reporting on the progress of the transition.

PDC's next report on the agency's transition to the executive branch will be to the Emergency Board in September 2024.

Recommendation: The Legislative Fiscal Office recommends that the Emergency Board acknowledge receipt of the report.

05
Oregon Public Defense Commission
Gehringer

Request: Report on the progress of the implementation agency transition to the Executive Branch per Senate Bill 5701 (2023) by the Oregon Public Defense Commission (OPDC).

Recommendation: OPDC is not under Executive Branch budgetary authority.

Discussion: This report is in response to the following budget note included in Senate Bill 5701(2024):

Budget Note:

“The Public Defense Commission is to report to the Emergency Board’s May 2024 and September 2024 meetings on the status of the agency’s transition from the judicial to the Executive Branch of government. The reports are to include up-to-date scope, schedule, and cost information.”

Senate Bill 337 (2023) changed the name of PDSC to the Oregon Public Defense Commission (OPDC), while clarifying that OPDC “is a continuation of the Public Defense Services Commission and not a new authority.” Therefore, the agency will be referred to as OPDC hereafter.

OPDC has established transition teams by programmatic area to align policies and procedures with the Executive Branch. The agency responded to the budget report requirements through benchmarks in these program areas.

Scope

The transition teams have been established and are responsible for aligning the agency's administrative functions with the Executive Branch. Along with that overall mandate, progress in each program area was reported:

- Administration is developing an agency emergency preparedness plan, reviewing/updating/creating administrative policies, and working on the agency's strategic plan. They are currently in the process of developing the agency strategic plan and agency transition plan through a contact with Moss Adams.
- Human Resources is focused on reviewing and updating policies to align with the Executive Branch, updating organizational charts, and reviewing position descriptions. They are also working on developing an employee onboarding process, employee satisfaction plan, employee development plan, and employee training plan.
- Information Technology is presented as the most significant challenge of the move to the Executive Branch, and OPDC is working with the Oregon Judicial Department (OJD) and the Department of Administrative Services (DAS) through a gap analysis in positions, as well as IT policy and procedures. Because of the scope of this move, IT is being considered in a separate project.

- Procurement is focused on reviewing current contracting work and position descriptions, developing a process for provider contracts, and updating and writing policies to align with the Executive Branch.
- Facilities is responsible for working with DAS to lease office space, updating, and writing policies to align with the Executive Branch, and reviewing the agency continuity plan while their footprint is also growing.
- Risk team is responsible for reviewing existing risk coverage and updating and writing policies to align with the Executive Branch.
- Finance is focused on reviewing and updating policies/processes, participating in the Executive Branch budget development process, and building the 2025-27 Current Service Level and Agency Request Budgets.

OPDC has also signed an interagency agreement with the Oregon Department of Administrative Services, Office of Economic Analysis (OEA), for the state public defense population forecast. This includes reviewing existing forecast methodology, data inputs, and how the forecast feeds into contracting and budgeting. OEA released the first forecast on April 15, 2024.

Schedule

OPDC shared the following schedule in their report:

Task	Start	End	Status
Initial Conversations with the Executive Branch	May 2023	June 2023	Completed
Executive Project Manager Starts	Aug 2023		Completed
Establish Executive Transition Workgroups	Aug 2023	Sep 2023	Ongoing
Review Existing Policies and Identify Gaps	Sept 2023	Oct 2024	Ongoing
Initial Gap Analysis	Oct 2023	Oct 2023	Completed
Internal Work to Align Policies/Procedures	Jan 2024	Sep 2024	Ongoing
2 nd Gap Analysis for May Legislative Days	Mar 2024	Mar 2024	Completed
Moss Adams Consultant Brought On	Mar 2024		Completed
Strategic Plan	Mar 2024	July 2024	Developing
Executive Move Implementation Plan	Jun 2024	Oct 2024	Developing
3 rd Gap Analysis for Sep Legislative Days	Aug 2024	Aug 2024	-
4 th Gap Analysis for Dec Legislative Days	Oct 2024	Oct 2024	-
Process Improvements	Dec 2024	Feb 2025	-
Policy and Procedure Review/Development	Dec 2024	Feb 2025	-
Organization Staffing & Structure Assessment	Nov 2024	Jan 2025	-
Transition to Executive Branch	Jan 2025		

Cost / Budget

No total cost information is provided in the report, but costs are reported to be within the Special Purpose Appropriation for transferring the agency to the Executive Branch. OPDC discusses extending a consulting contract with Moss Adams to develop a comprehensive transition plan to aid in the operational and change management aspects of OPDC's transition to the Executive Branch, including activity, responsible party, required resources, timing, and relevant associated costs.



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April 29, 2024

Senator Rob Wagner, Co-Chair
Representative Julie Fahey, Co-Chair
State Emergency Board
900 Court Street NE
H-178 State Capitol
Salem, OR 97301

Dear Co-Chairs:

Nature of the Request

The Oregon Public Defense Commission (OPDC) requests that the committee accept the report attached hereto about the status of OPDC's transition to the Executive Branch. This report is in response to the budget note included with SB 5701(2024):

The Public Defense Commission is to report to the Emergency Board's May 2024 and September 2024 meetings on the status of the agency's transition from the judicial to the Executive Branch of government. The reports are to include up-to-date scope, schedule, and cost information.

Agency Action

The following report is responsive to this budget note. This report was approved at the OPDC meeting on April 17, 2024.

Action Requested

The Oregon Public Defense Commission requests acknowledgment and receipt of the attached report.

Legislation Affected

No legislation is affected.

Sincerely,

Jessica Kampfe

Executive Director

cc:

Amanda Beitel, Legislative Fiscal Officer

John Borden, Principal Legislative Analyst, LFO

Kate Nass, Chief Financial Officer

Zack Gehringer, Policy and Budget Analyst, CFO

Oregon Public Defense Commission

EXECUTIVE BRANCH TRANSITION

April 22, 2024

NATURE OF THE REPORT

A budget note included with SB 5701(2024) directs the Oregon Public Defense Commission (OPDC) to submit the following report:

The Public Defense Commission is to report to the Emergency Board's May 2024 and September 2024 meetings on the status of the agency's transition from the judicial to the Executive Branch of government. The reports are to include up-to-date scope, schedule, and cost information.

The following report is responsive to this budget note. This report was approved at the OPDC meeting on April 17, 2024.

CONTENTS

Nature of the Report.....	1
Executive Summary	3
Executive Branch Transition.....	4
Scope	4
Schedule.....	4
Budget.....	5
Transition Teams	5
Administration	6
Human Resources	6
Facilities.....	7
Procurement.....	7
Risk	8
Budget.....	9
DAS-OEA Population Forecast.....	9
Moss Adams – Organizational Development Consulting.....	9
Introduction	9
Engagement Plan	10
Strategic Plan.....	10
Implementation Plan	10
Additional Support	10
Schedule.....	11
Information Technology Transition.....	11
March Progress Update	11
Scope	12
In Scope.....	12
Out of Scope.....	12
Schedule.....	12

EXECUTIVE SUMMARY

The Oregon Public Defense Commission (OPDC) 's executive branch transition (SB 337, 2023) represents a significant organizational endeavor, ensuring alignment with executive standards, strategic planning, and effective IT integration. With comprehensive planning, strategic partnerships, and diligent execution, OPDC aims for a successful transition by January 1, 2025, positioning itself for long-term growth and operational excellence within the Executive Branch.

Scope: The transition project encompasses many tasks, including policy review, strategic planning, staffing assessment, and IT integration. Each task is crucial to the successful alignment of OPDC with Executive Branch standards and expectations, as guided by the Governor's directives.

Schedule: A detailed timeline outlines critical milestones, such as initial conversations with the Executive Branch, policy review, strategic planning, and staff assessment. Quarterly gap analysis ensures progress alignment and timely adjustments.

Budget: A \$5 million special purpose appropriation (SPA) supports the transition, and OPDC is well within the SPA allocation.

Transition Teams: OPDC has established specialized work teams focusing on administration, information technology, human resources, procurement, and finance. Each team aligns policies and procedures with Executive Branch standards and addresses the Governor's expectations.

Risk: OPDC met with the Department of Administrative Services (DAS) in October 2023 to review focus areas for the transition to the Executive Branch. Information Technology (IT) and Procurement were the two major risk areas identified.

- OPDC is working closely with the DAS Enterprise Information System (DAS EIS) and has hired a new Chief Information Officer to lead the agency's Information Technology (IT) transition to the Executive Branch.
- Three procurement positions were requested during the 2024 legislative session but were denied. OPDC is in conversation with the Department of Justice regarding assisting with contract development to ensure agreements align with state contracting laws and procedures. OPDC anticipates another request for procurement assistance during the May Emergency Board meeting.

Moss Adams Consulting: Moss Adams provides expertise in organizational development, strategic planning, and transition management. Their engagement ensures the effective implementation of critical initiatives, including strategic and transition planning.

EXECUTIVE BRANCH TRANSITION

SCOPE

Senate Bill 337 (2023) transitions the Oregon Public Defense Commission (OPDC) from the Judicial to the Executive branch of government on January 1, 2025. The goal of this transition is for OPDC to enter the Executive Branch as a functioning agency that meets the Executive Branch's standard operating procedures and expectations.

All actions necessary to meet standard operating procedures and expectations are within the scope of the transition project. Along with standard procedures and policies, OPDC is working off of the Governor's expectations as outlined in her [letter](#) dated January 11, 2023, and detailed [here](#). These are what OPDC will be measuring itself off, as well as what will determine if an activity falls within this project's scope.

SCHEDULE

Below is a high-level schedule of transition work. The schedule is further broken down under the Transition Teams section of this report.

Task	Start	End	Status
Initial Conversations with the Executive Branch	May 2023	June 2023	Completed
Executive Project Manager Starts	Aug 2023		Completed
Establish Executive Transition Workgroups	Aug 2023	Sep 2023	Ongoing
Review Existing Policies and Identify Gaps	Sept 2023	Oct 2024	Ongoing
Initial Gap Analysis	Oct 2023	Oct 2023	Completed
Internal Work to Align Policies/Procedures	Jan 2024	Sep 2024	Ongoing
2 nd Gap Analysis for May Legislative Days	Mar 2024	Mar 2024	Completed
Moss Adams Consultant Brought On	Mar 2024		Completed
Strategic Plan	Mar 2024	July 2024	Developing
Executive Move Implementation Plan	Jun 2024	Oct 2024	Developing
3 rd Gap Analysis for Sep Legislative Days	Aug 2024	Aug 2024	--
4 th Gap Analysis for Dec Legislative Days	Oct 2024	Oct 2024	--
Process Improvements	Dec 2024	Feb 2025	--
Policy and Procedure Review/Development	Dec 2024	Feb 2025	--

Organization Staffing & Structure Assessment	Nov 2024	Jan 2025	--
Transition to Executive Branch	Jan 2025		

BUDGET

OPDC 2023-25 Budget included a \$5 million special purpose appropriation (SPA) for transferring the Public Defense Services Commission to the Executive Branch. During the 2024 session, OPDC requested \$1.2 million of the SPA for staffing identified through a gap analysis. OPDC will review the gap analysis quarterly and likely make further requests to access the SPA.

OPDC also requested \$500,000 to contract with a consultant to assist with the transition. This request was for SPA funding, but the Legislature provided General Fund (GF) dollars instead. OPDC’s contract with Moss Adams is \$250,000 with a not-to-exceed \$500,000. This not-to-exceed language allows Moss Adams, at the OPDC’s request, to bring on additional resources, should they be needed, to facilitate the implementation of the transition plan.

The transition budget is still well within the \$5 million SPA allocated, and the Moss Adams contract has not exceeded the \$500,000 GF appropriation.

TRANSITION TEAMS

In preparation for the transition, ODPC has put multiple workgroups in place. In addition to meeting the governor’s expectations, the agency has done significant work to align policies and procedures with the executive branch. This work has been divided into five work teams: Administration, Information Technology, Human Resources, Procurement, and Finance. These teams are led by division/department managers. They are focused on evaluating, updating, and creating policies and procedures to align with the Executive Branch, and three of the groups are also working on implementing Governor expectations.

Governor Expectation	Team
Performance Reviews for Agency Directors	Administration
Performance Feedback for Employees	Human Resources
Measuring Employee Satisfaction	Human Resources
Supporting Strategic Planning and Measuring Agency Performance	Administration
Managing Information Technology Progress	Information Technology
Succession Planning for the Workforce	Human Resources
State Government Commitment to Diversity, Equity, and Inclusion	Administration
Agency Emergency Preparedness	Administration
Agency Hiring Practices	Human Resources
Audit Accountability	Administration
Developing New Employees and Managers	Human Resources
Agency Identified Area of Work	
Procurement	Procurement

Facilities	Procurement
Risk Management	Procurement
Budget	Finance
Finance	Finance

ADMINISTRATION

OPDC’s executive transition project manager leads the administration team, which is comprised of the agency’s executive team. It is responsible for aligning the agency's administrative functions with the Executive Branch. This work includes:

- Working with Moss Adams on the agency’s strategic plan, which includes DEI.
- Working with the Commission on a performance review of the Executive Director.
- Developing an agency emergency preparedness plan.
- Developing administrative rules as needed.
- Reviewing/updating/creating administrative policies as needed.

The executive transition project manager is also generally responsible for monitoring progress, keeping other teams on track, and identifying transition risks. With a wealth of experience working in the Executive Branch, particularly in DAS, she has helped connect the agency with the right people and, generally, has put OPDC on the right track to move forward successfully.

Additional details are under the “Moss Adams – Organizational Development Consulting” heading.

Task	Start	End	Status
Initial Conversations with the Executive Branch	May 2023	June 2023	Completed
Executive Project Manager Starts	Aug 2023		Completed
Establish Executive Transition Teams	Aug 2023	Sep 2023	Completed
Developed OPDC Remediation Plan	Oct 2023	Jan 2024	Completed
Initial Gap Analysis	Oct 2023		Completed
2 nd Gap Analysis for May Legislative Days	Mar 2024		Completed
Develop agency strategic plan.	Mar 2024	July 2024	Developing
Develop an agency transition plan.	Mar 2024	July 2024	Developing
3 rd Gap Analysis for Sep Legislative Days	Aug 2024	--	
Identify and train administrative rules coordinator.	Jul 2024	Aug 2024	--
Agency director performance 360	Aug 2024	Nov 2024	--
Create administrative rules as needed.	Aug 2024	Nov 2024	--
Developing an agency emergency preparedness plan	Sep 2024	Dec 2024	--

HUMAN RESOURCES

OPDC is exempt from ORS 240, the statute that regulates most human-resource-related issues within state agencies. However, OPDC is committed to adopting and adhering to Executive Branch policies as the default.

Task	Start	End	Status
Review and update policies to align with the Executive Branch	Nov 2023	Sep 2024	Ongoing
Update organizational charts	Nov 2023	May 2024	Ongoing
Reviewing position descriptions to ensure they correctly align with class/comp standards	Dec 2023	Mar 2024	Ongoing
Develop employee onboarding process.	Feb 2024	Apr 2024	Ongoing
Employee satisfaction plan	Apr 2024	Jun 2024	--
Employee development plan	Apr 2024	Aug 2024	--
Employee training plan	Apr 2024	Aug 2024	--
Develop/implement a performance feedback process.	Jun 2024	Aug 2024	--
Develop agency succession plan.	Jul 2024	Sep 2024	--
Review/update of diversity, equity, and inclusion DEI Plan	Aug 2024	Sep 2024	--

FACILITIES

OPDC does not currently have office space in any state-owned facilities, but it does engage DAS Leasing services when acquiring office space. OPDC is reviewing DAS policies related to facility use and working to adopt those that apply to OPDC leased facilities.

Task	Start	End	Status
Worked with DAS to lease office space for Northwest and Southern Trial Division offices	Oct 2023	May 2024	Completed
Update and write policies to align with the exec branch	Nov 2023	Sep 2024	Ongoing
Northwest Trial Office opened	Dec 2023		Completed
A new Facilities Manager was hired	Feb 2024		Completed
Southern Trial Office scheduled to open.	May 2024	--	
Central Valley Trial Office scheduled to open	April 2024	--	
Review agency continuity plan.	Jul 2024	Sep 2024	--

PROCUREMENT

Procurement and IT are the most significant areas of change for OPDC. The agency has been exempted from procurement statutes since its inception. This has led to OPDC contracts being administered by program analysts, who also serve as program administrators. The result is that the same people technically responsible for contract administration are tasked with supporting providers in their contracts. This process has led to numerous monthly contract amendments to accommodate provider workload and qualification changes and address provider staffing issues. Due to the large volume of procurement work generated regularly, analysts cannot provide the oversight to monitor the program and adequately evaluate performance.

As OPDC has evolved, the lines of responsibility have blurred, and the division of labor, expertise, and decision-making has been compromised. Procurement staff are needed to comply with procurement rules, post procurements, and manage the procurement process. At the same time, program analysts should perform contract administration, performance monitoring, and program development, including establishing policies and processes. Analysts have had to prioritize the contract work while setting aside the evaluation of the program outcomes to determine success. This dynamic places OPDC at risk as analysts are not focused on developing programmatic needs as OPDC grows from a pass-through agency to one that will not only contract with providers but also provide direct services. This process is cumbersome and creates a liability for OPDC when trying to report to the Legislature and account for caseloads and funding.

OPDC recognizes the need to develop a procurement team with DAS-required training before the transition. In February 2024, OPDC requested three procurement positions, which were not funded. OPDC intends to make another request for these positions during the May Emergency Board meeting.

OPDC is working with DOJ to develop provider contracts for the 2025-2027 biennium contract cycle to ensure compliance with state contracting standards and requirements. The new agreements will separate contractual language and deliverables from program elements and refer to established commission policies and procedures. Program analysts will refocus and help set up OPDC’s new programmatic needs while working with the CAP unit to help develop and enhance measures for performance monitoring.

Task	Start	End	Status
Review current contracting work and position descriptions	Sept 2023	Nov 2023	Completed
Request procurement position from the 2024 Legislature	Feb 2024		Completed
Develop a process for provider contracts to align with statewide procurement requirements.	Nov 2023	Sep 2024	Ongoing
Request procurement positions	May 2024		Ongoing
Work with DOJ to develop 25-27 provider contracts	April 2024	Dec 2024	Ongoing
Update and write policies to align with the exec branch.	Nov 2023	Sep 2024	Ongoing
Procurement training and certifications	Jul 2024	Dec 2024	--
Oregon Buys - staff access/training	Jul 2024	Dec 2024	--

RISK

DAS is currently providing OPDC with risk insurance coverage. Given the recent growth, OPDC and DAS Risk Management are working cooperatively to ensure proper coverage.

Task	Start	End	Status
Review existing risk coverage.	Oct 2023	Apr 2024	Completed
Update and write policies to align with the exec branch	Apr 2024	Sep 2024	Ongoing
Identify risk manager and ensure training.	Jul 2024	Nov 2024	--

BUDGET

OPDC currently operates in concurrence with DAS accounting policies and rules. Moving forward, OPDC will participate in the Executive Branch budget development process. OPDC has been in conversation with the Governor’s Office and DAS to discuss a hybrid process for the 2025-27 biennium.

Task	Start	End	Status
Review and update policies/processes.	Jul 2023	Oct 2023	Completed
Update and write policies to align with the exec branch	Nov 2023	Sep 2024	Ongoing
CFO 25-27 exercise	Feb 2024	Apr 2024	Completed
Build 2025-2027 Current Service and Agency Request Budgets	Mar 2024	Aug 2024	Ongoing
Monthly CFO check-ins in preparation for the move	Feb 2024	Dec 2024	Ongoing
All budget activity and policy align with the Executive Branch	Jan 2025		--

DAS-OEA POPULATION FORECAST

SB 337 (2023) requires the Oregon Department of Administrative Services, Office of Economic Analysis (OEA), to issue a state public defense population forecast, including, but not limited to, expected populations of adults and juveniles eligible for appointed counsel. The forecasts will be released each year on April 15 and October 15.

OPDC signed an interagency agreement with OEA in late 2023 for this work. OPDC, OEA, and the Oregon Judicial Department met several times to review existing forecast methodology, data inputs, and how the forecast feeds into contracting and budgeting. OEA released the first [forecast](#) on April 15, 2024.

MOSS ADAMS – ORGANIZATIONAL DEVELOPMENT CONSULTING

INTRODUCTION

OPDC has contracted Moss Adams to assist with long-term organizational development to help the Commission achieve critical initiatives over the next five years. Moss Adams has an in-depth understanding of Oregon public defense, having previously partnered on the Oregon Project and

OPDC's six-year plan to reduce the representation deficiency. They are also working on the hourly rate survey and economic analysis (SB 337 (2023)). As Moss Adams was contracted with the agency in mid-March, and this report is being submitted in early April, more information and timelines about their work will be available soon. Additional information will be provided during the May legislative days.

ENGAGEMENT PLAN

STRATEGIC PLAN

Work in preparing for the transition considers the January 11, 2023, memo from the Governor setting Executive Branch agency expectations. This includes developing a strategic plan that outlines clear organizational goals and objectives that align with the Governor's Executive Branch expectations. A robust strategic plan is critical to a successful transition.

The strategic plan will be a comprehensive roadmap outlining OPDC's vision, mission, goals, and strategies for the next five years. It will serve as a guiding framework for decision-making and resource allocation, aligning OPDC's actions with its long-term objectives. By articulating clear priorities, anticipating challenges, and leveraging opportunities, the strategic plan will empower OPDC to adapt to changing environments, capitalize on strengths, and navigate uncertainties, positioning it for sustainable growth and success in the future.

The plan will accompany an annual planning calendar and supportive templates to make it a living document. The strategic plan will integrate current and proposed work, diversity, equity, inclusion, and additional initiatives from across the organization to create a grounding document to guide OPDC for the next five years.

IMPLEMENTATION PLAN

Moss Adams will assist in developing a comprehensive transition plan to aid in the operational and change management aspects of OPDC's transition to the Executive Branch. To ensure transition by January 2025, the plan will capture the full scope of operational considerations to enable OPDC to shift to this new structure effectively. The plan will outline the activity, responsible party, required resources, timing, and relevant associated costs.

ADDITIONAL SUPPORT

OPDC's contract with Moss Adams is \$250,000 with a not-to-exceed clause of up to \$500,000. The not-to-exceed in this contract allows additional staff to be available on a very short-term, limited duration, but immediate basis to assist with specific pieces of the transition plan. Examples include but are not limited to project managers that could:

- Assist with the implementation of a records management plan.

- Review existing statutes and processes to determine where/if agency administrative rules would be necessary/beneficial.
- Assisting with the review of procurement requirements to ensure OPDC is prepared for the additional responsibilities.

SCHEDULE

Task	Start	End	Status
Strategic plan kickoff, agency staff input, commission input, and analysis.	Mar 2024	April 2024	Ongoing
Management work sessions, draft (mission, vision, values, goals), and all staff survey.	May 2024	June 2024	--
Draft strategic and transition plans, staff and commission review of plan, and final strategic and transition plans.	June 2024	July 2024	--
Focus on implementing a transition plan.	Aug 2024	Dec 2024	--

INFORMATION TECHNOLOGY TRANSITION

Information Technology (IT) is one of the most significant pieces of the transition from the judicial branch to the executive branch; as such, it is being given particular focus. OPDC’s newly hired CIO leads the information technology team and will be joined by a contracted project manager specifically focused on the IT transition work.

Following the transition, OPDC will require a complete suite of IT services, as OJD currently provides most IT services. Between October and December 2023, OPDC worked with OJD and DAS-EIS on a gap analysis to identify information technology positions needed within OPDC following the transition. During the 2024 legislative session, OPDC received approval to hire four additional IT staff members; recruitment for these positions is in progress. Additional gap analysis will be performed quarterly with OJD and DAS-EIS to determine additional IT needs as the transition approaches.

In addition to the general transition of IT and a review of IT policy and procedures, the IT team is responsible for the Governor’s expectation of managing information technology progress, which includes creating [an IT strategic plan](#) for the agency.

OPDC is treating the IT Transition as a separate project. A project manager is currently in the recruitment process. The scope for April is documenting the project sponsor, governance committee, and project team. New OPDC IT positions are completing interviews. Once hired, they will provide strategic guidance on forward progress and next steps.

MARCH PROGRESS UPDATE

- CIO first review of ETSD services overview document;

- Recruiting for a dedicated IT transition project manager;
- Recruiting for a M365 administrator and server administrator;
 - Interviews completed 4/3/2025;
- OPDC-IT met with State Data Center Cloud Services and Enterprise Network Services for consultation;
- Created CoreView requests to meet with State Data Center x86 Services and M365 departments for consultation;
- Procured SD-WAN state network services for the Southern Trial Division office;
 - This will provide the network template for OPDC;
 - Coordinating with ETSD and DCS to bridge networks.

SCOPE

IN SCOPE

- Procure associated services and hardware to support the IT transition.
- Maintain a similar cost structure of the current services & hardware (Judicial Branch)
- End user training of the new services and tools for the OPDC team.
- Maintain current technical tools (i.e., databases and spreadsheets) with limited or no changes to each function until it has been transitioned.

OUT OF SCOPE

- New hardware/software not directly related to the IT transition to the Executive Branch.
- System-generated budget projections, payroll, supply procurement, and personnel management.
- New or redesigned office spaces, office furniture, and facilities.
- Other projects not directly related to IT transition to the Executive Branch.

SCHEDULE

Task	Start	End	Status
Gap Analysis with DAS and OJD	Oct 2023		Completed
Request positions	Dec 2023		Completed
New CIO starts	Feb 2024		Completed
Second gap analysis with OJD, DAS, new CIO	Mar 2024	April 2024	Ongoing
IT positions from the short session start.	April 2024		Ongoing
First-round IT transition work (M365, web services, desktop and mobile support, Nintex, and triage)	July 2024		--

Request positions from the emergency board (2 nd gap analysis)	May 2024		--
2nd gap analysis positions start	Jun 2024		--
Second round IT transition work (based on 2nd gap analysis)	July 2024	Oct 2024	--
Third gap analysis with OJD, DAS, CIO	July 2024	Aug 2024	--
Request positions from Emergency Board (3 rd gap analysis)	Sep 2024		--
3rd gap analysis positions start	Oct 2024		--
3rd round IT transition work (based on 3rd gap analysis)	Nov 2024	Feb 2025	--
Testing/finalizing/transferring	Nov 2024	Oct 2024	--
Request remaining positions based on 3rd gap analysis during the session	Jan 2025	June 2025	--
Final testing/finalizing/transferring	April 2025	June 2025	--
IT contract with OJD ends, IT provided by OPDC and DAS	July 2025		--

▶ Watch How to Make a Gantt Chart in Excel

		Sat, 7/1/2023																													
		Mon, 12/4/2023																													
			2023																												
			7/1/23	8/1/23	9/1/23	10/1/23	11/1/23	12/1/23	2024				2025																		
			Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul				
TASK	ASSIGNED TO	Start Month	END																												
Initial Conversations with the Executive Branch	OPDC	May-23	Jun-23																												
Review and update budget policies/processes	OPDC- Budget	Jul-23	Oct-23																												
Executive Project Manager Starts	OPDC	Aug-23	Aug-23																												
Establish Executive Transition Teams	OPDC- Administration	Aug-23	Aug-23																												
Review current contracting work and position descriptions	OPDC- Procurement	Sep-23	Nov-23																												
Review Existing Policies and Identify Gaps	OPDC	Sep-23	Oct-24																												
Developed OPDC Remediation Plan	OPDC- Administration	Oct-23	Oct-23																												
Gap Analysis with DAS and OJD	OPDC- Information Technology	Oct-23	Oct-23																												
Initial Gap Analysis	OPDC	Oct-23	Oct-23																												
Review existing risk coverage	OPDC- Risk	Oct-23	Apr-24																												
Work with DAS to lease office space for Northwest and Southern Trial Division offices	OPDC- Facilities	Oct-23	May-24																												
Update organizational charts	OPDC- Human Resources	Nov-23	May-24																												
Develop a process for provider contracts to align with statewide procurement requirements.	OPDC- Procurement	Nov-23	Sep-24																												
Review and update HR policies to align with the Executive Branch	OPDC- Human Resources	Nov-23	Sep-24																												
Update and write budgetary policies to align with the Executive Branch	OPDC- Budget	Nov-23	Sep-24																												
Update and write facilities policies to align with the Executive Branch	OPDC- Facilities	Nov-23	Sep-24																												
Northwest Trial Office opened	OPDC- Procurement	Nov-23	Sep-24																												
Request positions	OPDC- Facilities	Dec-23	Dec-23																												
Request positions	OPDC- Information Technology	Dec-23	Dec-23																												
Reviewing position descriptions to ensure they correctly align with class/comp standards	OPDC- Human Resources	Dec-23	Mar-24																												
Internal Work to Align Policies/Procedures	OPDC	Jan-24	Sep-24																												
A new Facilities Manager hired	OPDC- Facilities	Feb-24	Feb-24																												
New CIO starts	OPDC- Information Technology	Feb-24	Feb-24																												
Request procurement position from the 2024 Legislature	OPDC- Procurement	Feb-24	Feb-24																												
CFO 25-27 exercise	OPDC- Budget	Feb-24	Apr-24																												
Develop employee onboarding process.	OPDC- Human Resources	Feb-24	Apr-24																												
Monthly CFO check-ins in preparation for the move	OPDC- Budget	Feb-24	Dec-24																												
2nd Gap Analysis for May Legislative Days	OPDC	Mar-24	Mar-24																												
Moss Adams Consultant Brought On	OPDC	Mar-24	Mar-24																												
Strategic plan kickoff, agency staff input, commission input, and analysis.	Moss Adams/OPDC	Mar-24	Apr-24																												
Develop agency strategic plan	OPDC- Administration	Mar-24	Jul-24																												
Develop an agency transition plan.	OPDC- Administration	Mar-24	Jul-24																												
Build 2025-2027 Current Service and Agency Request Budgets	OPDC- Budget	Mar-24	Aug-24																												
Central Valley Trial Office scheduled to open	OPDC- Budget	Mar-24	Apr-24																												
IT positions from the short session start	OPDC- Facilities	Apr-24	Apr-24																												
Employee satisfaction plan	OPDC- Information Technology	Apr-24	Apr-24																												
Employee development plan	OPDC- Human Resources	Apr-24	Jun-24																												
Employee training plan	OPDC- Human Resources	Apr-24	Jun-24																												
Update and write Risk policies to align with the exec branch	OPDC- Human Resources	Apr-24	Aug-24																												
Work with DOJ to develop 25-27 provider contracts	OPDC- Human Resources	Apr-24	Aug-24																												
Finalize and approve project business case and schedule.	OPDC- Risk	Apr-24	Sep-24																												
Request positions from the emergency board (2nd gap analysis)	OPDC- Procurement	Apr-24	Dec-24																												
Request procurement positions	OPDC- Information Technology	May-24	May-24																												
Southern Trial Office opens	OPDC- Procurement	May-24	May-24																												
Management work sessions, draft (mission, vision, values, goals), and all staff survey	OPDC- Facilities	May-24	May-24																												
2nd gap analysis positions start	Moss Adams/OPDC	May-24	May-24																												
Draft strategic and transition plans, staff and commission review of plan, and final strategic and transition plans.	OPDC- Information Technology	Jun-24	Jun-24																												
Develop/implement a performance feedback process.	Moss Adams/OPDC	Jun-24	Jul-24																												
Executive Move Implementation Plan	OPDC- Human Resources	Jun-24	Aug-24																												
First-round IT transition work (M365, web services, desktop and mobile support, Nintex, and trage)	OPDC	Jun-24	Oct-24																												
Identify and train administrative rules coordinator.	OPDC- Information Technology	Jul-24	Jul-24																												
Third gap analysis with OJD, DAS, CIO	OPDC- Administration	Jul-24	Aug-24																												
Develop agency succession plan.	OPDC- Information Technology	Jul-24	Aug-24																												
Review agency continuity plan.	OPDC- Human Resources	Jul-24	Sep-24																												
Second round IT transition work (based on 2nd gap analysis)	OPDC- Facilities	Jul-24	Sep-24																												
Identify risk manager and ensure training	OPDC- Information Technology	Jul-24	Oct-24																												
Oregon Buys - staff access/training	OPDC- Risk	Jul-24	Nov-24																												
Procurement training and certifications	OPDC- Procurement	Jul-24	Dec-24																												
3rd Gap Analysis for Sep Legislative Days	OPDC- Procurement	Jul-24	Dec-24																												
Review/update of diversity, equity, and inclusion DEI Plan	OPDC	Aug-24	Aug-24																												
Agency director performance 360	OPDC- Human Resources	Aug-24	Aug-24																												
Create administrative rules as needed.	OPDC- Administration	Aug-24	Sep-24																												
Focus on implementing a transition plan.	OPDC- Administration	Aug-24	Nov-24																												
Request positions from Emergency Board (3rd gap analysis)	Moss Adams/OPDC	Aug-24	Dec-24																												
	OPDC- Information Technology	Sep-24	Sep-24																												

