Item 6: Public Defense Commission
Executive Branch Transition Plan

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 allocations approved by the Emergency Board in May 2024, the SPA has a balance of $3.5 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. PDC's report notes that the Project Manager left the agency at the end of May 2024 and that the agency is currently recruiting for a replacement.

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 was due July 2024, 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'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. Moss Adams has also been contracted to conduct change management for the FCMS project.

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 continue to be identified as the two highest risk areas and key information technology planning documents have yet-to-be developed. The transition report identifies work required across each of these areas, including a 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.

PDC's Workgroup Process Overview summarizes the progress of 369 identified transition tasks by department. Of the tasks, 71 have been completed, 88 are in progress, and 206 are upcoming. PDC reports that "79.6% of tasks are on track, with 19.8% being at risk (mainly in procurement and IT), and less than 1% are off track."

PDC's is reporting that the agency is within scope, on schedule, and within budget to transition to the executive branch on January 1, 2025 with the stated goal of entering "...the Executive Branch as a functioning agency that meets the Executive Branch's standard operating procedures and expectations." It should be noted that the identified scope of PDC's transition may understate or not fully identify routine executive branch responsibilities for which the agency will become subject and that some of PDC's transition tasks fall beyond the January 1, 2025 deadline.

Historically, as an independent agency within the judicial branch of government, PDC has operated with uncommon autonomy and has been expected to operate in reasonable conformity with the rest of state government. Under the current statutory construct, the oversight responsibility for PDC fell exclusively to the Legislature. Ultimately, the agency's success in transitioning to the executive branch will be measured by how well the agency is able to conform to the standards of state law, policies, procedures, and oversight that govern executive branch agencies under the control of the Governor.

With this report, PDC's will have satisfied the agency's reporting requirements to the Emergency Board related to the agency's transition to the executive branch.

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

Request: Report on the progress of the implementation of agency transition to the Executive Branch per Budget Note associated with Senate Bill 5701 (2024) by the Oregon Public Defense Commission.

Recommendation: The Oregon Public Defense Commission is not under Executive Branch budgetary authority.

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

> **Budget Note**:
> *"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."*

Senate Bill 337 (2023) changed the name of the Public Defense Services Commission 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. OPDC responded to the budget report requirements through benchmarks in these program areas.

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

- Administration continues to develop an agency emergency preparedness plan, reviewing/updating/creating administrative policies and working on the agency's strategic plan.

- Human Resources continues to review and update policies to align with the Executive Branch, updating organizational charts, and reviewing position descriptions. These goals are scheduled to be completed at the end of calendar year 2024, just before OPDC becomes a part of the Executive Branch.

- Information Technology continues to be presented as the most significant challenge of the move to the Executive Branch, and OPDC has hired a Chief Information Officer and has received additional staff to support this IT work.

- Procurement has focused on getting to an appropriate staffing level while working with OJD and the Department of Administrative Services (DAS) partners to transition existing contracts to state procurement standards.

- Facilities is responsible and has been 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.

- The 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 has submitted their 2025-27 Current Service Level and Agency Request Budget.

OPDC has also signed an interagency agreement with DAS 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, and relevant partners continue to be convened to mature this forecasting.

Schedule
OPDC have shared updated schedules in their report, though some items have changed from their previous reports, complicating long-term tracking. Of concern, the due date for development of a strategic plan has been pushed back from July to November and OPDC lists "Executive Project Manager Starts" as "Off Track." Both have been discussed as important components of the OPDC's transition to the Executive Branch.

Cost / Budget
No total cost information is provided in the report, but the agency relates plans to access the remainder of the Special Purpose Appropriation for transferring to the Executive Branch. OPDC also extended a consulting contract with Moss Adams for $250,000 with a not-to-exceed total of $500,000, to continue to aid in the operational and change management aspects of OPDC's transition to the Executive Branch.

August 26, 2024

Senate President Rob Wagner, Co-Chair
House Speaker Julie Fahey, Co-Chair
Joint Emergency Board
900 Court Street NE
H-178 State Capitol
Salem, OR 97301-4048

Dear Co-Chairs:

Nature of the Request

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.

Agency Action

The following report is responsive to this budget note. This report was approved at the OPDC meeting on August 21, 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

August 20, 2024

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 August 21, 2024.

CONTENTS

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.

Moss Adams has been brought on as a consultant to develop a transition plan for OPDC. They have developed that plan, providing action items for each transition area and tools to track progress and elevate risks.

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. Using the Moss Adams Transition Plan, OPDC can quickly review tasks and see if they are on schedule. Please see the spreadsheet attached to this plan for complete details.

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, finance, and facilities. Each team aligns policies and procedures with Executive Branch standards and addresses the Governor's expectations.

Risk: Information technology (IT) and procurement continue to be the highest areas of risk for this transition.

- IT: High-level discussions and planning are underway with Enterprise Information Services (EIS), Data Center Services (DCS), and Microsoft. Weekly status meetings include key stakeholders such as executive and IT leadership from OPDC, OJD, EIS, Legislative, and the Governor's Office. These meetings aim to communicate plans, progress, and risks.
- Procurement: OPDC has contacted the State Procurement Office in DAS to discuss the next steps towards assimilating the state procurement standards into the Commission's procurement standards and practices. 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. OPDC has also reorganized to utilize its procurement positions for procurement analyst work and is currently recruiting for a Procurement Analyst.

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 to meet the Governor's expectations of executive agencies as outlined in her letter dated January 11, 2023, and detailed here. OPDC is using these expectations to measure its efforts as well as to determine if an activity falls within this project's scope.

SCHEDULE

Below is an overview of the transition work as developed by Moss Adams. 369 tasks have been identified as part of the transition: 71 have been completed, 88 are in progress, and 206 are upcoming. 79.6% of tasks are on track, with 19.8% being at risk (mainly in procurement and IT), and less than 1% are off track. This report provides a summary of the objectives for each workgroup, though each objective has multiple sub-tasks. The full schedule, including the status of all 380 tasks, is in the spreadsheet attached to this report.

Working Group Progress Overview

Department	Number of Tasks	Upcoming Tasks	In Progress Tasks	Completed Tasks	% Complete	On Track	At Risk	Off Track
Administration	109	42	29	36	33%	107	0	2
Facilities	10	0	8	2	20%	10	0	0
Finance	10	0	5	4	40%	10	0	0
Human Resources	74	32	22	20	27%	74	0	0
IT	134	113	17	3	2%	85	49	0
Procurement	32	19	7	6	19%	8	24	0
Total	369	206	88	71	19%	294	73	2

BUDGET

OPDC 2023-25 Budget included a $5 million special purpose appropriation (SPA) for transferring the OPDC to the Executive branch. During the 2024 session, OPDC received $1.23 million of the SPA for staffing identified through a gap analysis; at the May Emergency board, OPDC received a further $286,000 for staffing costs from the second gap analysis. OPDC will request $1,050,000 at the September Emergency Board for expenses related to the Executive transition. Should those requests be funded, OPDC will have $2,434,000 remaining in the Executive transition SPA for the December Emergency Board.

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.

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 six work teams: Administration, Information Technology, Human Resources, Procurement, Facilities, 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/Human Resources
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/Human Resources
Agency Emergency Preparedness	Administration/Facilities
Agency Hiring Practices	Human Resources
Audit Accountability	Administration
Developing New Employees and Managers	Human Resources
Agency Identified Area of Work	
Procurement	Procurement
Facilities	Facilities
Risk Management	Administration
Budget	Finance
Finance	Finance

ADMINISTRATION

OPDC's administration team is comprised of the agency's executive team. It is responsible for aligning the agency's administrative functions with the Executive Branch. As part of this work, the administration team:

- Finalized a Transition Plan with Moss Adams;
- Is monitoring the progress of the plan through a project management tool;
- Hired an Administrative Rules Coordinator;
- Worked with OEA to produce a public defense caseload forecast.

OPDC hired an Executive Project Manager for the transition in August 2023. This manager left the agency at the end of May 2024. OPDC is currently recruiting for a replacement in this position. Before leaving, this manager set the agency up for a successful transition, including working with Moss Adams on the Transition Plan.

Health	ACTION/TASK	STATUS	START	END	% COMPLETE
On Track	**Initial Conversations with Exec Branch**	Complete	05/01/23	06/30/23	100%
On Track	**Consultant Engaged to Support Transition Planning and Implementation**	Complete	03/18/24	03/18/24	100%
On Track	**Develop Agency Strategic Plan.**	In Progress	03/01/24	11/13/24	66%
Off Track	**Executive Project Manager Starts**	In Progress	08/01/23	08/31/23	50%
On Track	**Executive Transition Workgroups**	In Progress	08/01/23	7/1/25	85%
On Track	**Develop An Agency Transition Plan**	Complete	03/01/24	07/31/24	100%
On Track	**Administrative Rules**	In Progress	07/01/24	08/31/24	30%
On Track	**Agency Director Performance 360**	In Progress	08/01/24	11/30/24	20%
On Track	**Develop An Agency Emergency Preparedness Plan**	Upcoming	09/01/24	12/31/24	0%
On Track	**Legislative Reports**	In Progress	01/01/24	12/20/24	66%
On Track	**Executive Policies and Procedures**	In Progress	09/01/23	12/30/24	50%
On Track	**Organization Staffing & Structure Assessment**	Upcoming	09/01/24	01/01/25	0%
On Track	**Risk Management**	In Progress	10/01/23	11/30/24	50%
On Track	**DAS-OEA Population Forecast**	In Progress	10/01/23	04/30/25	80%
On Track	**Audit And Accountability**	Complete	06/15/24	4/1/23	100%

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. As part of this work, the human resources workgroup:

- Has updated its organizational chart to align with OPDC's budget;
- Is requesting package 60 and other reorganization changes to implement the new organizational chart;
- Is holding competitive recruitments for all positions.

Health	ACTION/TASK	STATUS	START	END	% COMPLETE
On Track	**Create And Update Necessary HR Policies to Align with Exec Branch**	In Progress	11/01/23	12/31/24	50%

On Track	**Update Organizational Charts**	In Progress	11/01/23	09/30/24	80%
On Track	**Review Position Descriptions to Ensure They Correctly Align with Class/Comp Standards.**	In Progress	12/01/23	12/01/24	50%
On Track	**Employee Onboarding Process**	In Progress	02/01/24	12/31/24	20%
On Track	**Employee Satisfaction Plan**	In Progress	04/01/24	12/31/24	30%
On Track	**Employee Development Plan**	In Progress	04/01/24	12/31/24	30%
On Track	**Employee Training Plan**	In Progress	04/01/24	12/31/24	30%
On Track	**Develop Performance Reviews for Employees**	In Progress	06/01/24	12/31/24	50%
On Track	**Succession Planning**	In Progress	07/01/24	12/31/24	33%
On Track	**Review/Update of DEI Plan**	In Progress	08/01/24	10/31/24	33%

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. As part of this work, OPDC:

- Has worked with DAS to lease office space for the Northwest, Southern, and Central Trial Division Office;
- Is planning for the development of the agency's Emergency Preparedness plan.

Health	ACTION/TASK	STATUS	START	END	% COMPLETE
On Track	**Work With DAS To Lease Office Space for Northwest, Southern, And Central Trial Division Offices**	Complete	10/01/23	05/31/24	100%
On Track	**A New Facilities Manager Was Hired**	Complete	02/01/24	02/29/24	100%
On Track	**Update And Write Policies to Align with The Exec Branch**	In Progress	02/01/24	09/30/24	20%

PROCUREMENT

Procurement is a significant change area 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.

OPDC recognizes the need to develop a procurement team with DAS-required training before transitioning to the Executive branch. In February 2024, OPDC requested three procurement positions, none of which were funded. Since that time, OPDC has worked to realign its organizational chart. Through that work, OPDC will present a request to the September Emergency Board to make appropriate position changes and moves to utilize existing staff and recruit a Procurement Manager and the proper Procurement and Contract Specialist to perform and meet the Commission's procurement and contract needs.

In the meantime, 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.

In preparation for the transition, OPDC has:

- Posted for a vacant Procurement Analyst 2 position to begin building a true procurement section; applications close August 20;
- Reorganized the organizational chart to align with the budget; will be requesting program analyst positions to vacate the current procurement positions;
- Worked closely with OJD on developing contracts for 2025-2027;
- Contacted the State Procurement Office in DAS to discuss the next steps towards assimilating the state procurement standards into the Commission's procurement standards and practices.

Health	ACTION/TASK	STATUS	START	END	% COMPLETE
On Track	**Review Current Contracting Work and Position Descriptions**	Complete	04/01/24	06/01/24	100%
At Risk	**Develop A Process for Provider Contracts to Align with Statewide Procurement Requirements.**	In Progress	11/01/23	04/01/25	40%
At Risk	**Procurement Training and Certifications (Contingent on Positions Being Approved and Staff Being Hired)**	Upcoming	09/01/24	12/31/24	0%
At Risk	**Work With DOJ To Develop 2025-2027 Provider Contracts**	In Progress	04/01/24	06/01/25	20%

BUDGET

OPDC currently operates in concurrence with DAS accounting policies and rules. In preparation for a smooth transition to the Executive branch, OPDC has:

- Participated in the Executive Branch budget development process;
- Received the Chief Financial Office's Gold Star Certificate for fiscal year 2023;

- Participated in the Chief Finacial Office's 2025-27 exercises.

Health	ACTION/TASK	STATUS	START	END	% COMPLETE
On Track	Reviewing And Updating Relevant Accounting Policies/Processes	Complete	07/01/23	10/31/2023	100%
On Track	Conduct Monthly CFO Check-Ins in Preparation for The Move	In Progress	02/01/24	12/31/24	65%
On Track	Review And Compare Budget Policies and Processes Between DAS And OPDC For Alignment and Needed Changes.	Complete	07/01/23	10/30/23	100%
On Track	Update Relevant Budget Policies and Procedures	In Progress	11/01/23	09/30/24	80%
On Track	CFO 25-27 Exercise	Complete	03/01/24	04/30/24	100%
On Track	Build 2025-2027 Current Service and Agency Request Budgets	In Progress	03/15/24	08/30/24	80%

INFORMATION TECHNOLOGY

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, which a project manager joins 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 six additional IT staff members; recruitment for these positions was completed, and positions were filled. These positions directly address the technical needs of the agency based on the gap analysis. 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 managing information technology progress per the Governor's expectation, which includes creating an IT strategic plan for the agency.

High-level discussions and planning are underway with Enterprise Information Services (EIS), Data Center Services (DCS), and Microsoft. Weekly status meetings, including key stakeholders such as executive and IT leadership from OPDC, OJD, EIS, Legislative, and the Governor's Office, are actively

scheduled. These meetings communicate plans, progress, and risks. OPDC has developed an agency IT Transition work breakdown structure to provide cohesive communication across all stakeholders and document tasks, resourcing, and schedule.

Health	ACTION/TASK	STATUS	START	END	% COMPLETE
At Risk	Applications	In Progress	06/01/23	6/30/25	75%
On Track	EISO	Upcoming		6/30/25	0%
At Risk	Infrastructure	In Progress	06/01/23	6/30/25	10%

Oregon Public Defense Commission

EXECUTIVE BRANCH TRANSITION PLAN

Executive Summary

Pillar Overview

Pillar 1: Policy Review
OPDC has been operating in compliance with DAS policies and procedures and will conduct a comprehensive review to update as relevant to align with the Executive Branch.

Pillar 2: Strategic Planning
Strategic planning will provide a roadmap for the Agency's major areas of work over the next six years. It will describe the goals, objectives, activities, and performance measures to track and communicate progress over time

Pillar 3: Staffing Assessment
To support growing services, and community needs a staffing assessment will help OPDC make sure it has the appropriate individuals in key roles to achieve the work outlined in the plan and meet community needs.

Pillar 4: IT Integration
Technology integration and modernization are critical to the Agency's transition, and its ability to take advantage of operational efficiencies, and provide excellent service.

Working Group Progress Overview

Department	Number of Tasks	Task Status				Task Health			Initiative Health		
		Upcoming Tasks	In Progress Tasks	Completed Tasks	% Complete	On Track	At Risk	Off Track			
Administration	109	42	29	36	33%	107	0	2	🟩		—
Facilities	10	0	8	2	20%	10	0	0	🟩		
Finance	10	0	5	4	40%	10	0	0	🟩		
Human Resources	74	32	22	20	27%	74	0	0	🟩		
IT	134	113	17	3	2%	85	49	0	🟩	🟨	
Procurement	32	19	7	6	19%	8	24	0	🟩	🟨	
Total	369	206	88	71	19%	294	73	2	🟩	🟨	—

WORK GROUP NAME	UPDATED LAST
Administration and Project Management	7/23/2024

ACTION/TASK	STATUS	START	END	DAYS until End Date	PERCENTAGE COMPLETE	NOTES & CONSIDERATIONS
OPDC Progress						
Administration/Project Management	In Progress	07/01/23	07/01/25	309		
Initial Conversations with Exec Branch	Complete	05/01/23	06/30/23		100%	
Consultant engaged to support transition planning and implementation	Complete	03/18/24	03/18/24		100%	
Develop agency strategic plan	In Progress	03/01/24	11/13/24	79	66%	Governor's Expectation
Project Kickoff	Complete	04/03/24	04/03/24	-145	100%	
Agency Staff Input Interviews, Document Review	Complete	04/23/24	05/14/24	-104	100%	
Commission Input Interviews	Complete	04/24/24	06/20/24	-67	100%	
Analysis SWOT, Data, documents, interview input	Complete	07/01/24	07/08/24	-49	100%	
Management Work Session A: Mission, Vision, Values	Complete	07/11/24	07/11/24	-46	100%	
Draft Mission, Vision, Values Statements	Complete	07/11/24	07/24/24	-33	100%	
Management Work Session B: Review Draft MVV, Brainstorm Goals	Complete	07/31/24	07/31/24	-26	100%	
Draft Strategic Plan Goals	Complete	08/01/24	08/10/24	-16	100%	
All Staff Survey Draft Mission, Vision, Values, and Goals	Upcoming	08/26/24	08/30/24	4	0%	
Work Session C: Objectives, and Activities	Upcoming	09/18/24	09/18/24	23	0%	
Draft Full Strategic Plan	Upcoming	09/23/24	10/04/24	39	0%	
Agency Management & Staff Draft Plan Review	Upcoming	10/09/24	10/16/24	51	0%	
Commission Draft Plan Review	Upcoming	10/23/24	10/30/24	65	0%	
Finalize Strategic Plan	Upcoming	11/01/24	11/13/24	79	0%	
Executive Project Manager	In Progress	08/01/23	08/31/23	-361	50%	
Fill vacant Executive Project Manger role	In Progress	07/23/24	10/01/24	36	50%	
Executive Transition Workgroups	In Progress	07/01/23	07/01/25	309	85%	
Identify individuals for each work group	Complete	07/01/23	07/31/23	-392	100%	
Establish working group outcomes, roles, responsibilities, and expectations.	Complete	08/01/23	09/30/23	-331	100%	
Develop a workplan per work group to achieve target outcomes	Complete	09/01/23	10/31/23	-300	100%	
Schedule and conduct regular meetings to review progress toward outcomes, identify risks, and allocate resources.	In Progress	11/01/23	07/01/25	309	75%	
Request regular updates to the transition plan from workgroups monthly.	In Progress	08/01/23	07/01/25	309	75%	
Prepare progress reports quarterly.	In Progress	07/01/23	07/01/25	309	75%	
Develop an agency transition plan	Complete	03/01/24	07/31/24	-26	100%	
Gather planning documents, and reports to assemble the draft transition plan	Complete	03/08/24	07/23/24	-34	100%	
Interview key staff to refine the plan's projects, tasks, timelines, and progress.	Complete	04/23/24	04/24/24	-124	100%	
Update the draft plan	Complete	05/01/24	07/23/24	-34	100%	
Hand-off the draft plan to Transition Workgroups for ongoing project management	Complete	07/24/24	07/24/24	-33	100%	
Administrative Rules	In Progress	07/01/24	08/31/24	5	0%	
Identify and train administrative rules coordinator	Complete	07/01/24	08/31/24	5	100%	
Conduct a review of administrative rules	In Progress	09/01/24	09/30/24	35	30%	
Develop list of missing rules, or rules requiring updates	Upcoming	09/01/2024	11/30/24	96	0%	This will be a living document with ongoing review into the future.
Develop a prioritized list of rules requiring creation or updates	Upcoming	12/01/2024	12/31/24	127	0%	This will be a living document with ongoing review into the future.
Execute the planned updates/development of administrative rules as prioritized	Upcoming	08/01/24	06/30/25	308	0%	This will be a living document with ongoing review into the future.
Agency director performance 360	In Progress	08/01/24	11/30/24	96	70%	
Review current performance evaluation template and identify revisions as needed	Complete	08/01/24	08/03/24	-23	100%	
Update the performance evaluation template or process as determined from the review	Complete	08/04/24	08/10/24	-16	100%	
Identify performance evaluators	Complete	08/04/24	08/04/24	-18	100%	
Present initial plan to Commission for input	Complete	08/21/24	08/21/24	-5	100%	
Finalize performance review plan	In Progress	08/21/24	09/11/24	16	70%	
Commission approves plan	Upcoming	09/18/24	09/18/24	23		
Send performance review to evaluators to conduct review	Upcoming	09/20/24	10/15/24	50		
Summarize performance review	Upcoming	10/16/24	10/30/24	65		
Submit final performance review to Commission	Upcoming	11/13/24	11/13/24	79	0%	
Develop an agency emergency preparedness plan	Upcoming	09/01/24	12/31/24	127	0%	Governor's Expectation
Conduct a risk assessment to identify the types of emergencies that could potentially affect the ag	Upcoming				0%	
Define the roles and responsibilities of each team member during an emergency.	Upcoming				0%	
Develop procedures the team should follow in response to each type of emergency.	Upcoming				0%	
Establish strategies for communication during an emergency.	Upcoming				0%	
Identify the resources and equipment needed to respond to an emergency.	Upcoming				0%	
Develop a training plan to educate the team on the emergency preparedness plan.	Upcoming				0%	
Develop the draft emergency preparedness plan	Upcoming				0%	
Finalize the emergency preparedness plan	Upcoming				0%	
Establish a protocol to regularly review and update the plan	Upcoming				0%	
Legislative Reports	In Progress	01/01/24	06/30/25	308		
Assign reports to the appropriate workgroup	Complete	07/01/23	07/31/23	-392	100%	
Establish schedule for report drafting, editing, and approval	Complete	07/01/23	07/31/23	-392	100%	
Quarterly Gap Analysis to identify staffing needs	In Progress	07/01/23	10/01/24	36	67%	
Draft reports, send to workgroups for subject matter expertise and updates	In Progress	08/01/23	06/30/25	308	71%	
Update reports	In Progress	08/01/23	06/30/25	308	71%	
Edit reports	In Progress	08/01/23	06/30/25	308	71%	
Review reports with Commission's Legislative Subcommittee	In Progress	08/01/23	06/30/25	308	71%	
Incorporate edits	In Progress	08/01/23	06/30/25	308	71%	
Commission approves reports	In Progress	08/01/23	06/30/25	308	71%	
Send reports to LFO	In Progress	08/01/23	06/30/25	308	71%	
Executive Policies and Procedures	In Progress	09/01/24	12/30/24	126	50%	
Review Existing Executive Policies and Identify Gaps	In Progress				60%	
Determine what executive policies from DAS need to be adopted and aligned with Commission's policies and procedures	In Progress				25%	
Internal Work to Align Policies/Procedures	In Progress				25%	as we create new policies, we have been incorporating DAS polices into our policies
Adopt necessary Policies/Procedures	In Progress					
Organization Staffing & Structure Assessment	Upcoming	09/01/24	12/31/24	127	0%	
Project kickoff	Upcoming				0%	
Document request	Upcoming				0%	
Interviews/ Fieldwork	Upcoming				0%	
Preliminary observations/ Analysis	Upcoming				0%	
Draft report	Upcoming				0%	
Draft Report Review	Upcoming				0%	
Final Report	Upcoming				0%	
Process Improvements	Upcoming	12/01/24	02/01/25	159	0%	
Project kickoff	Upcoming				0%	
Document request	Upcoming				0%	
Interviews/ Fieldwork	Upcoming				0%	
Preliminary observations/ Analysis	Upcoming				0%	
Draft report	Upcoming				0%	
Draft Report Review	Upcoming				0%	
Final Report	Upcoming				0%	
Risk Management	In Progress	10/01/23	11/30/24	96	50%	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.
Review existing risk coverage.	Complete	10/01/23	04/01/24	-147	100%	
Update and write policies to align with the exec branch	In Progress	04/01/24	09/30/24	35	25%	
Identify risk manager and ensure training.	Upcoming	07/01/24	11/30/24	96	0%	
DAS-OEA Population Forecast	In Progress	10/30/23				
Sign the inter-agency agreement between OPDC and OEA.	Complete	10/30/23	10/30/23	-301	100%	
Meet with OEA and the Oregon Judicial Department to review existing forecast methodology and data inputs.	Complete	11/01/23	03/15/23	-530	100%	
Develop a new forecast methodology if necessary, based on the discussions and requirements of SB 337.	Complete				100%	
Collect and analyze data needed for the forecast, including populations of adults and juveniles elig	Complete				100%	
Create the first forecast using the agreed-upon methodology and data.	Complete				100%	

WORK GROUP NAME	UPDATED LAST
Facilities	8/7/2024

ACTION/TASK	STATUS	START	END	DAYS until End Date	PERCENTAGE COMPLETE	NOTES & CONSIDERATIONS
OPDC Progress						
Facilities	Ongoing	10/01/23	12/30/24	126		
Work with DAS to lease office space for Northwest and Southern Trial Division offices	Complete	10/01/23	05/31/24		100%	
A new Facilities Manager hired	Complete	02/01/24	02/29/24		100%	
Update and write policies to align with the exec branch	In Progress	02/01/24	12/30/24	126	20%	
Review all existing policies and procedures to create a comprehensive inventory.	In Progress				80%	
Prioritize the policies and procedures based on their importance, urgency, and imp	In Progress				80%	
Update each policy and procedure as necessary.	In Progress				5%	
Share the updated policies and procedures with relevant stakeholders for review.	In Progress				5%	
Obtain approval for the updated policies and procedures from the appropriate auth	In Progress				5%	
Finalize the approved policies and procedures.	In Progress				5%	
Implement the new or updated policies and procedures.	In Progress				5%	

WORK GROUP NAME	UPDATED LAST
Finance	7/23/2024

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ACTION/TASK	STATUS	START	END	DAYS until End Date	PERCENTAGE COMPLETE	NOTES & CONSIDERATIONS
OPDC Progress						
Finance	**In Progress**	**07/01/23**	**12/31/2024**	**127**	**80%**	
Review and update relevant accounting policies/processes	Complete	07/01/23	10/31/2023		100%	OPDC uses the Oregon Accounting Manual, which is consistent with Executive Branch requirements.
Conduct monthly CFO check-ins in preparation of move	In Progress	02/01/24	12/31/24	127	65%	
Budget	**In Progress**				**95%**	
Review and compare budget policies and processes between DAS and OPDC for alignment, and needed changes	Complete	07/01/23	10/30/23	-301	100%	
Update relevant budget policies and procedures	In Progress	11/01/23	09/30/24	35	80%	
CFO 25-27 exercise	Complete	03/01/24	04/30/24	-118	100%	
Build 2025-2027 current service and agency request budgets	Complete	03/15/24	08/30/24	4	100%	
Accounts Payable	**In Progress**				**50%**	
Executive Order No. 17-09 Fiscal Responsibility by Recovering Monies Owed to the State. This is collecting funds from any of our providers or vendors who have an active garnishment with the Department of Revenue.	In Progress				50%	

WORK GROUP NAME	PDATED LAS
Human Resources	7/23/2024

ACTION/TASK	STATUS	START	END	DAYS until End Date	PERCENTAGE COMPLETE	NOTES & CONSIDERATIONS
OPDC Progress	In Progress					
Human Resources	In Progress	**11/01/23**	**12/31/24**	**127**		
Create and update necessary HR policies to align with Exec Branch	In Progress	11/01/23	12/31/24	127	50%	
Review all existing policies and procedures to create a comprehensive inventory.	In Progress				50%	
Prioritize the policies and procedures based on their importance, urgency, and impact.	In Progress				50%	
Update each policy and procedure as necessary.	Upcoming				0%	
Share the updated policies and procedures with relevant stakeholders for review.	Upcoming				0%	
Obtain approval for the updated policies and procedures from the appropriate authority.	Upcoming				0%	
Finalize the approved policies and procedures.	Upcoming				0%	
Implement the new or updated policies and procedures.	Upcoming				0%	
Update organizational charts	In Progress	11/01/23	09/30/24	35	80%	
Identify any changes in the organization's structure, such as new roles, departures, or changes in reporting lines.	Complete				90%	
Consult with division directors to confirm the accuracy of the current chart and understand any upcoming changes.	Complete				100%	
Update the organizational chart with the identified changes.	Complete				100%	
Share the updated chart with relevant stakeholders for feedback.	Complete				100%	
Incorporate any necessary revisions based on the feedback received.	In Progress				50%	
Finalize and distribute the updated organizational chart to all employees.	Upcoming				0%	
Review position descriptions to ensure they correctly align with class/comp standards	In Progress	12/01/23	12/01/24	97	50%	Procuring a contract with HR Answers to complete Classification and Compensation study for the agency.
Review current position descriptions.	Complete				100%	
Identify any discrepancies between descriptions and class/comp standards.	In Progress				50%	
Consult with managers and HR to confirm accuracy of descriptions.	In Progress				50%	
Update descriptions to align with class/comp standards.	In Progress				30%	
Review updated descriptions for accuracy.	In Progress				10%	
Share updated descriptions with relevant stakeholders.	In Progress				10%	

ACTION/TASK	STATUS	START	END	DAYS until End Date	PERCENTAGE COMPLETE	NOTES & CONSIDERATIONS
OPDC Progress						
IT	In Progress					
Application	In Progress					Governor's Expectation
Web Services Infrastructure and Development	Upcoming		6/30/2025	327	0%	Node.JS and C# Applications need to migrate to a native Data Solution
Web Services Code Support Long Term	Upcoming		6/30/2025	327	0%	Node.JS and C# Applications need to migrate to a native Data Solution
SharePoint Site Administration	In Progress	8/1/2024	6/30/2025	327	75%	Waiting permissions from ETSD for Full Sharepoint Admin
Nintex Form Develop and Administration	In Progress	8/1/2024	6/30/2025	327	75%	Waiting for permissionsfrom ETSD to Nintex automation
Cloudmersive	In Progress	8/1/2024	6/30/2025	327	75%	Waiting for permissionsfrom ETSD to Cloudmersive platform
Billing Programs and other custom developed programs	Complete		6/30/2025	327	100%	
EISO	Upcoming		6/30/2025	327		
Overall Security System Administration and Monitoring	Upcoming		6/30/2025	327	0%	
Incident Response	Upcoming		6/30/2025	327	0%	
IT Security Recommendations and Best Practices	Upcoming		6/30/2025	327	0%	
Digicert	Upcoming		6/30/2025	327	0%	Migrate to Cloud PKI
Information security training	Upcoming		6/30/2025	327	0%	Migrate to KnowBe4
Penetration Testing	Upcoming		6/30/2025	327	0%	
Infrastucture	In Progress		6/30/2025	327		
YubiKey stock administration	Complete	8/1/2024	6/30/2025	327	100%	
Tier two End User Support	Upcoming		6/30/2025	327	0%	
Tier three End User Support	Upcoming		6/30/2025	327	0%	Waiting on ETSD for Administrative Access
Data retention and restoration services	Upcoming		6/30/2025	327	0%	Waiting on ETSD for Administrative Access
Administrative Data Vaultine/Investiation Services	Upcoming		6/30/2025	327	0%	Waiting on ETSD for Administrative Access
OS Image Building	In Progress	8/1/2024	6/30/2025	327	25%	Intune Configuration
GPO Development and Management	Upcoming		6/30/2025	327	0%	Waiting on ETSD for Administrative Access
Map Drive Management	Upcoming		6/30/2025	327	0%	Waiting on ETSD for Administrative Access
End User Printer Management	Upcoming		6/30/2025	327	0%	Waiting on ETSD for Administrative Access
Printer HW management	In Progress	7/1/2024	6/30/2025	327	50%	Installed Devices at Interstate and Medford
Laptop HW management	Upcoming		6/30/2025	327	0%	Waiting on ETSD for Administrative Access
Desktop HW management	Upcoming		6/30/2025	327	0%	Waiting on ETSD for Administrative Access
Desktop OS management	Upcoming		6/30/2025	327	0%	Waiting on ETSD for Administrative Access
Desktop ATP/Defender Management and administration	Upcoming		6/30/2025	327	0%	Migrate to Intune
Package and software deployment	Upcoming		6/30/2025	327	0%	Migrate to Intune
SCCM services and administration	Complete		6/30/2025	327	100%	Migrate to Intune
Hardware and Software research, investigation and recommendation	Upcoming		6/30/2025	327	0%	
Hardware and Software Standards	Upcoming		6/30/2025	327	0%	
Software deployment and installation	Upcoming		6/30/2025	327	0%	
OneDrive for Desktop	Upcoming		6/30/2025	327	0%	Waiting on ETSD for Administrative Access
BitLocker Administration and Services	Upcoming		6/30/2025	327	0%	Migrate to Intune
MBAM infrastructure and administration	Upcoming		6/30/2025	327	0%	Migrate to Intune
Desktop Security Administration	Upcoming		6/30/2025	327	0%	Waiting on ETSD for Administrative Access
Desktop/Laptop hardening and security services	Upcoming		6/30/2025	327	0%	Waiting on ETSD for Administrative Access
Workstation patching (Windows OS, Software and Firmware)	Upcoming		6/30/2025	327	0%	Waiting on ETSD for Administrative Access
Copier HW management and Lifecycle	Upcoming	7/1/2024	6/30/2025	327	0%	Installed Devices at Interstate and Medford
Tier 1 Triage Services	In Progress	9/15/2024	6/30/2025	327	0%	
Ticket System	In Progress		6/30/2025	327	25%	
iSupport Asset System	In Progress	8/1/2024	6/30/2025	327	25%	Data export in scope
Help Desk Manager Email	Upcoming		6/30/2025	327	0%	
Onboarding processing	Upcoming		6/30/2025	327	0%	
Offboarding processing	Upcoming		6/30/2025	327	0%	
Help Desk Call Center Support	Upcoming		6/30/2025	327	0%	
Change Management Services	Upcoming		6/30/2025	327	0%	
Centralized Documentation for Tier Triage and Support	Upcoming		6/30/2025	327	0%	
Help Desk Central Phone Number/Call Tree Services	Upcoming		6/30/2025	327	0%	
MS license administration	In Progress		6/30/2025	327	75%	Waiting on ETSD for License Admin permissions in Azure
Datawarehouse connection....	Upcoming		6/30/2025	327	0%	
Tier 2/Tier 3 Troubleshooting	Upcoming		6/30/2025	327	0%	
Azure AD Administration	Upcoming		6/30/2025	327	0%	Waiting on ETSD for Administrative Access
Azule Account Management	Upcoming		6/30/2025	327	0%	Waiting on ETSD for Administrative Access
Mobile Service Management (Cellular)	Upcoming		6/30/2025	327	0%	Administrative Access Complete
Mobile Device HW management (Intune)	Upcoming		6/30/2025	327	0%	Administrative Access Complete
MFA administration Azure	Upcoming		6/30/2025	327	0%	Waiting on ETSD for Administrative Access
Mobile Device Administration	Upcoming		6/30/2025	327	0%	Waiting on ETSD for Administrative Access
Email Administration	Upcoming		6/30/2025	327	0%	Network "Critical path", preventing handover of Cloud Services
Email Configuration for State of Oregon integration	Upcoming		6/30/2025	327	0%	Waiting on ETSD for Administrative Access
MS365 Administration	Upcoming		6/30/2025	327	0%	Network "Critical path", preventing handover of Cloud Services
Conditional Access Policy Administration	Upcoming		6/30/2025	327	0%	Network "Critical path", preventing handover of Cloud Services
Object Management Services (New user, Offboarding, Mailbox administration)	Upcoming		6/30/2025	327	0%	Network "Critical path", preventing handover of Cloud Services
Third Product Services and connectivity (SSO)	Upcoming		6/30/2025	327	0%	Network "Critical path", preventing handover of Cloud Services
One Drive Administration and Services	Upcoming		6/30/2025	327	0%	Network "Critical path", preventing handover of Cloud Services
365 Data retention	Upcoming		6/30/2025	327	0%	Network "Critical path", preventing handover of Cloud Services
365 eDiscovery administration	Upcoming		6/30/2025	327	0%	Network "Critical path", preventing handover of Cloud Services
ADSS confiauration and administration with EIS DAS	Upcoming		6/30/2025	327	0%	Network "Critical path", preventing handover of Cloud Services
Quarantine Management	Upcoming		6/30/2025	327	0%	Network "Critical path", preventing handover of Cloud Services
Microsoft License Management	In Progress		6/30/2025	327	75%	Waiting on ETSD for License Admin permissions in Azure
Email domain change and alias	Upcoming		6/30/2025	327	0%	Network "Critical path", preventing handover of Cloud Services
Cloud monitoring and automation services	Upcoming		6/30/2025	327	0%	Network "Critical path", preventing handover of Cloud Services
Microsoft Guest Account Management	Upcoming		6/30/2025	327	0%	Network "Critical path", preventing handover of Cloud Services
Teams administration and management	Upcoming		6/30/2025	327	0%	Network "Critical path", preventing handover of Cloud Services
Exchange on prem configuration including SMTP services and server management	Upcoming		6/30/2025	327	0%	Network "Critical path", preventing handover of Cloud Services
Load Balancer	Upcoming		6/30/2025	327	0%	
App Proxy Server	Upcoming		6/30/2025	327	0%	
OPDS Tenant Case Creation	Upcoming		6/30/2025	327	0%	Network "Critical path", preventing handover of Cloud Services
On prem domain administration	Upcoming		6/30/2025	327	0%	Need access to create cases with Microsoft
AD connect services and administration	Upcoming		6/30/2025	327	0%	Waiting on ETSD for Administrative Access
On prem domain trust	Upcoming		6/30/2025	327	0%	Waiting on ETSD for Administrative Access
Storage services and administration	Upcoming		6/30/2025	327	0%	DCS Ticket
Server services (7 VMs at Anderson) (3 Physical domain controllers)	Upcoming		6/30/2025	327	0%	DCS Ticket
Server administration (7 VMs at Anderson) (3 Physical domain controllers)	Upcoming		6/30/2025	327	0%	DCS Ticket
Power BI administration and configuration services	Upcoming		6/30/2025	327	0%	Waiting on ETSD for Administrative Access
SQL Server DBA services	Upcoming		6/30/2025	327	0%	Waiting on ETSD for Administrative Access
WSUS Patching Services for servers	Upcoming		6/30/2025	327	0%	Migrate to Azure Arc
Print server services	Upcoming		6/30/2025	327	0%	Waiting on ETSD for Administrative Access
DHCP server administration	Upcoming		6/30/2025	327	0%	Waiting on ETSD for Administrative Access
DNS server administration	Upcoming		6/30/2025	327	0%	Waiting on ETSD for Administrative Access
DFS server and administration	Upcoming		6/30/2025	327	0%	Waiting on ETSD for Administrative Access
File Server Services and administration	Upcoming		6/30/2025	327	0%	Waiting on ETSD for Administrative Access
Certificate Authority infrastructure and services	Upcoming		6/30/2025	327	0%	Migrate to CloudPKI
DMZ server management	Upcoming		6/30/2025	327	0%	
DMZ administration for web services and web services infrastructure	Upcoming		6/30/2025	327	0%	Waiting on ETSD for Administrative Access
Defender management for servers	Upcoming		6/30/2025	327	0%	
Server build and administration	Upcoming		6/30/2025	327	0%	
GPO Development and Management	Upcoming		6/30/2025	327	0%	Waiting on ETSD for Administrative Access
Tier three system troubleshooting and support	Upcoming		6/30/2025	327	0%	Waiting on ETSD for Administrative Access
Active Directory Administration	Upcoming		6/30/2025	327	0%	
Commvault Backup/Recovery administration services	Upcoming		6/30/2025	327	0%	
2nd offsite backup and administration services	Upcoming		6/30/2025	327	0%	
Windows Server OS administration	Upcoming		6/30/2025	327	0%	Waiting on ETSD for Administrative Access
Windows Server hardening and security services	Upcoming		6/30/2025	327	0%	Waiting on ETSD for Administrative Access
Map Drive Management and Services	Upcoming		6/30/2025	327	0%	Waiting on ETSD for Administrative Access
On prem exchange security patch services and server management	Upcoming		6/30/2025	327	0%	Waiting on ETSD for Administrative Access
MDI configuration and administration	Upcoming		6/30/2025	327	0%	Waiting on ETSD for Administrative Access
WinDSX server configuration	In Progress	7/1/2024	6/30/2025	327	85%	Replace with PDK door system, pending Broadband installation at appellate office
WinDSX server conifauration and administration	Upcoming		6/30/2025	327	0%	Network "Critical path", preventing handover of Cloud Services
SCCM for servers	Upcoming		6/30/2025	327	0%	Move to Azure ARC
Server Reporting services and administration	Upcoming		6/30/2025	327	0%	Waiting on ETSD for Administrative Access
Host Secondary Datacenter for restoration of VM's in a disaster	Upcoming		6/30/2025	327	0%	
LAN access configuration	In Progress	6/15/2024	6/30/2025	327	25%	Meraki Procurement in Process
WAN access configuration	In Progress	6/15/2024	6/30/2025	327	25%	services ordered waiting on vendor installation
Firewall services	In Progress	6/15/2024	6/30/2025	327	75%	Network Core Configured, waiting on circuit installation
Internet connection services	In Progress	6/15/2024	6/30/2025	327	25%	services ordered waiting on vendor installation
Cisco CUCM (VOIP) system configuration and management	Upcoming		6/30/2025	327	0%	Waiting on ETSD for Administrative Access
Palo Alto URL filtering services	Upcoming		6/30/2025	327	0%	Migrate to Defender Web Filtering, need access to Defender Portal
WAN Transport services	In Progress	6/15/2024	6/30/2025	327	25%	services ordered waiting on vendor installation
SIP services	In Progress	8/1/2024	6/30/2025	327	10%	working with vendor to bring in independent SIP services
Qradar SIEM services	Upcoming		6/30/2025	327	0%	Migrate to Microsoft Sentinel Post Transition
WAN hardware management	Upcoming		6/30/2025	327	0%	
Wireless LAN access configuration and hardware	Upcoming		6/30/2025	327	0%	Meraki Procurement is not completed
Audio/Video services support	Upcoming		6/30/2025	327	0%	
DNS administration	Upcoming		6/30/2025	327	0%	Waiting on ETSD for Administrative Access
DHCP administration	Upcoming		6/30/2025	327	0%	Waiting on ETSD for Administrative Access
Cisco ISE for wireless authentication	Upcoming		6/30/2025	327	0%	Setup as Azure Service
Secure Network Configuration	Upcoming		6/30/2025	327	0%	
DMZ and Load Balancing Network Services for Web Services	Upcoming		6/30/2025	327	0%	
Tier three system troubleshooting and support	Upcoming		6/30/2025	327	0%	
VPN access and services	Upcoming		6/30/2025	327	0%	Pending Circuits from DAS

WORK GROUP NAME	UPDATED LAST
Procurement	7/23/2024

ACTION/TASK	STATUS	START	END	DAYS until End Date	PERCENTAGE COMPLETE	NOTES & CONSIDERATIONS
OPDC Progress						
Procurement						
Review current contracting work and position descriptions	Complete	04/01/24	06/01/24	-86	100%	Positions descriptions have been submitted to HR for classification review. Currently recruiting for a senior procurement officer.
Request procurement position from the Legislature	Complete	02/01/24	02/29/24	-179	100%	Will ask again for authority to self fund positions at September 2024 Emergency Board
Request procurement position from the 2024 Legislature	Complete	01/01/24	03/06/24	-173	100%	Request denied
Request procurement positions from the September Eboard through Org clean up	Complete	08/01/24	09/30/24	35	100%	Letter submitted asking for authority to self fund positions at September 2024 Emergency Board
Develop a process for provider contracts to align with statewide procurement requirements.	In Progress	11/01/23	04/01/25	218	40%	
Review statewide procurement requirements	Complete	11/01/23	02/01/24	-207	100%	
Review and document the current process for provider contracts	Complete	12/01/23	02/01/24	-207	100%	
Identify areas for improvement and update	In Progress				40%	
Develop updated provider contracts process that aligns with statewide procurement requirements	In Progress	05/01/24	09/30/24	35	40%	
Obtain approval for the updated process from the appropriate authority.	In Progress	05/01/24	09/30/24	35	60%	
Finalize the approved process	Upcoming					
Implement the new or updated process	Upcoming					
Procurement training and certifications (contingent on positions being approved and staff being hired)	Upcoming					Requesting positions and authority. Once positions are hired will do a needs assessment on what training is needed. Currently, one senior procurement officer is being recruited for. Results from September 2024 Emergency Board will guide future actions.
Determine DAS-required trainings and certificates	Upcoming					
Create a training schedule	Upcoming					
Schedule trainings before transition	Upcoming					
Oregon Buys - staff access/training	Upcoming					Select staff has access to Oregon Buys. Will need to develop a training plan for potential actors in the trial offices. Currently hiring professional procurement staff to ensure compliance with the Executive Branch expectations.
Identify the staff members who will need access to Oregon Buys.	Upcoming					
Request access for identified staff members through the appropriate channels.	Upcoming					
Confirm successful access for all relevant staff members.	Upcoming					
Develop a training plan for Oregon Buys, including key features and functionalities that staff members will need to use.	Upcoming					
Schedule training sessions for staff members.	Upcoming					
Conduct the training sessions, ensuring all staff members understand how to use Oregon Buys effectively.	Upcoming					
Provide resources for staff members to refer to after the training, such as user manuals or online guides.	Upcoming					
Monitor staff usage of Oregon Buys and address any issues or questions that arise.	Upcoming					
Gather feedback from staff members about the training and their use of Oregon Buys.	Upcoming					
Use the feedback to improve future training sessions and to address any issues with Oregon Buys.	Upcoming					
Schedule regular refresher training sessions to ensure staff members stay up-to-date with any changes or updates to Oregon Buys.	Upcoming					
Work with DOJ to develop 2025-2027 provider Contracts	In Progress	04/01/24	06/01/25	279	20%	
Plan provider contracts to comply with state contracting standards and requirements	In Progress	05/01/24	04/01/25	218	50%	Working with DOJ on developing contracts, monthly meetings occurring.
Execute provider contracts to comply with state contracting standards and requirements	Upcoming	04/01/25	06/30/25	308		
Program analysts will work with the CAP unit to develop and enhance measures for performance monitoring	In Progress	05/01/25	06/01/25	279	30%	