

Oregon Board of Forestry – Virtual Public Meeting

Wednesday, September 8, 2021

With the current public gathering restrictions, the Board of Forestry will hold its September meeting virtually to allow interested persons to view the meeting and participate statewide without having to travel or assemble indoors. The Board of Forestry public meeting will be conducted online and streamed live. There will be an opportunity for the public to provide live testimony under the general comment portion of item one and on decision item three during the meeting. Sign up to provide live testimony is required and available online, registration closes Friday September 3 at 5:00 p.m. Written testimony may be submitted for information items, before or up to two weeks after the meeting day to BoardofForestry@oregon.gov with the agenda item number included with the submission.

Link to view Board of Forestry Meeting available at
<https://www.youtube.com/c/OregonDepartmentofForestry>

Prior meetings' audio and this meeting's written material available on the web www.oregon.gov/odf/board. The matters under the Consent Agenda will be considered in one block. Any board member may request removal of any item from the consent agenda. Items removed for separate discussion will be considered after approval of the consent agenda. Public comment will not be taken on consent agenda items.

Consent Agenda

8:00 – 8:01	A.	<u>June 9, 2021, Board of Forestry Meeting Minutes</u>	State Forester Nancy Hirsch
8:00 – 8:01	B.	<u>Department Financial Report – July and August 2021</u>	Bill Herber
8:00 – 8:01	C.	<u>Regional Forest Practices Committee Appointments and Reappointments</u>	Josh Barnard
8:00 – 8:01	D.	<u>Emergency Fire Cost Committee Appointment</u>	Tim Keith
8:00 – 8:01	E.	<u>Wildfire Risk Reduction Program</u>	Jeff Burns

Action and Information

8:01 – 9:00	1.	<u>State Forester and Board Member Comments</u> A. <u>Public Comments</u> [topics not on agenda – see over]	Register online
9:00 – 10:00	2.	<u>Wildland Urban Interface and Risk Mapping</u> College of Forestry from Oregon State University (OSU) will provide an update on present rulemaking pertaining to Senate Bill 762, and present on the university's contributions to fire risk mapping, and defining Wildland Urban Interface (WUI).	Doug Grafe, Tim Holschbach, and Dr. Chris Dunn
10:00 – 10:15		Break	
10:15 – 10:50	3.	<u>Fire Season Update</u> <i>The Department will provide an update to the Board on the 2021 fire season. This is an information item.</i>	Doug Grafe
10:50 – 11:15	4.	<u>Macias Gini & O'Connell LLP (MGO) Department Implementation Plan Progress</u> <i>The Department to provide introductions to project management of implementation plan, update on plan's progress, and review coordination for implementing MGO recommendations. This is an information item.</i>	Bill Herber and Sabrina Perez with Cal Mukumoto and Leah Cochran
11:15 – 11:30	5.	<u>Forest Trust Land Advisory Committee Testimony</u>	David Yamamoto or John Sweet <i>The FTLAC is a statutorily established committee that advises the Board on State Forests policy. This is an information item.</i>
11:30 – 12:00	6.	<u>Executive Session</u> <i>The Board will meet in executive session for the purpose of conferring with legal counsel regarding the Board's rights and duties related to current litigation likely to be filed pursuant to ORS 192.660(2)(h).</i>	Chair Kelly
12:00 – 1:00		Lunch	

Pre-Decision Board Workshop

1:00 – 1:15		<u>Opening Comments and Discussion Framework</u> <i>Chair Kelly will provide opening comments on leadership intent for the Climate Change Carbon Plan, the policy pathways this plan can provide for the Department, Board, and State's future goals or vision. Facilitator and project leads introduced. The discussion framework and objectives outlined.</i>	Chair Kelly and Robin Harkless
1:15 – 1:35		<u>Draft Climate Change Carbon Plan Overview</u>	Danny Norlander and John Tokarczyk <i>Department to provide an overview on draft plan goals and overall process.</i>

- 1:35 – 1:50 **Board and Public Engagement**.....Danny Norlander and John Tokarczyk
Project team to review outreach process and feedback synthesis. Review the scope of engagement with the Board, stakeholders, and interested public. Review the themes of the input provided, how feedback was incorporated into the plan and proposed revisions developed.
- 1:50 – 2:50 **Public Testimony** Danny Norlander and John Tokarczyk
Testimony from a range of perspectives on the Climate Change Carbon Plan (CCCP) draft plan. All signed up in advance will be invited to answer a few questions that will lend to the Board’s pre-decision discussion, and each provider will have a maximum of three minutes.
- 2:50 – 3:00 Afternoon Break
- 3:00 – 4:00 **Board and Department Conversation** John Tokarczyk, Jeff Burns, and Division Chiefs
Department leadership will review their engagement with the draft plan process, what actions are currently in practice per program, and share how they plan to approach the implementation of the strategic action goals for climate-smart forestry.
- 4:00 - 4:45 **Board Summarization**Robin Harkless
The Board will discuss the information and perspectives presented, offer feedback to the project team to ensure the draft revision meets the expectations of the Board. Circle back with Division Chiefs and Program Directors to discuss leadership intent with the policy pathways codified in this plan. Department outlines next steps for CCCP leading up to November Board decision to adopt the plan.
- 4:45 – 5:00 **Board Closing Comments and Meeting Wrap Up**.....Chair Kelly and Board Members
Board Chair and members to summarize meeting’s action items and provide closing comments.

Times listed on the agenda are approximate. At the discretion of the chair, the time and order of agenda items—including addition of an afternoon break—may change to maintain meeting flow. The board will hear public testimony [*excluding marked items] and engage in discussion before proceeding to the next item. * A single asterisk preceding the item number marks a work session, and public testimony/comment will not be accepted.

BOARD WORK PLANS: Board of Forestry (Board) Work Plans result from the board's identification of priority issues. Each item represents commitment of time by the Board of Forestry and Department of Forestry staff that needs to be fully understood and appropriately planned. Board Work Plans form the basis for establishing Board of Forestry meeting agendas. Latest versions of these plans can be found on the Board's website at: <https://www.oregon.gov/odf/Board/Pages/AboutBOF.aspx>

PUBLIC TESTIMONY: The Board of Forestry places great value on information received from the public. The Board will accept both oral and written comments on agenda items except consent agenda and Work Session items [see explanation below]. Live oral testimony at the meeting is designated for decision items and open comment registration is required. Those wishing to testify or present information to the Board are encouraged to:

- Provide written summaries of lengthy, detailed information.
- Remember that the value of your comments is in the substance, not length.
- For coordinated comments to the Board, endorse rather than repeat the testimony of others.
- To ensure the Board will have an opportunity to review and consider your testimony before the meeting, please send comments no later than 72 hours prior to the meeting date. If submitted after this window of time the testimony will be entered into the public record but may not be viewed by the Board until after the meeting.
- For in-person meetings, sign in at the information table in the meeting room when you arrive. For virtual meetings, follow the sign-up instructions provided in the meeting agenda.

Written comments for public testimony provide a valuable reference and may be submitted before, during, or up to two weeks after the meeting for consideration by the Board. Please submit a copy to BoardofForestry@oregon.gov, and written comments received will be distributed to the Board. Oral or written comments may be summarized, audio-recorded, and filed as record. Audio files and video links of the Board's meetings are posted within one week after the meeting at <https://www.oregon.gov/odf/Board/Pages/BOFMeetings.aspx>

The Board cannot accept comments on consent agenda items or a topic for which a public hearing has been held and the comment period has closed. If you wish to provide oral comments to the Board, you must email the Board Administrator to sign up for live testimony, contact Hilary.Olivos-Rood@oregon.gov, by 5 p.m. Friday, September 3, 2021. Instructions for providing public comment virtually will be confirmed by email and the link provided before the meeting.

Three minutes will be allotted for each individual to provide their comments. The maximum amount of time for all public testimony for agenda items with a Board decision will be thirty minutes.

WORK SESSIONS: Certain agenda topics may be marked with an asterisk indicating a "Work Session" item. Work Sessions provide the Board opportunity to receive information and/or make decisions after considering previous public comment and staff recommendations. No new public comment will be taken. However, the Board may choose to ask questions of the audience to clarify issues raised.

- During consideration of contested civil penalty cases, the Board will entertain oral argument only if Board members have questions relating to the information presented.
- Relating to the adoption of Oregon Administrative Rules: Under Oregon's Administrative Procedures Act, the Board can only consider those comments received by the established deadline as listed on the Notice of Rulemaking form. Additional input can only be accepted if the comment period is formally extended (ORS 183.335).

GENERAL INFORMATION: For regularly scheduled meetings, the Board's agenda is posted on the web at www.oregonforestry.gov two weeks prior to the meeting date. During that time, circumstances may dictate a revision to the agenda, either in the sequence of items to be addressed, or in the time of day the item is to be presented. The Board will make every attempt to follow its published schedule and requests your indulgence when that is not possible.

In order to provide the broadest range of services, lead-time is needed to make the necessary arrangements. If special materials, services, or assistance is required, such as a sign language interpreter, assistive listening device, or large print material, please contact our Public Affairs Office at least three working days prior to the meeting via telephone at 503-945-7200 or fax at 503-945-7212.

Use of all tobacco products in state-owned buildings and on adjacent grounds is prohibited.

The June 9, 2021 Board of Forestry meeting minutes are in production.

The final draft version will be made available online before the meeting.

Board website: <https://www.oregon.gov/ODF/Board/Pages/BOFMeetings.aspx>

Agenda Item No:	B
Work Plan:	Administrative
Topic:	Financial Dashboard
Presentation Title:	Department Financial Report for July and August 2021
Date of Presentation:	September 8, 2021
Contact Information:	Bill Herber, Deputy Director for Administration (503) 945-7203, bill.herber@oregon.gov

SUMMARY AND CONTEXT

An executive financial report and summary will be submitted monthly to ensure the Board of Forestry (Board) has up-to-date information for oversight of the Department's financial condition. This report will include the financial and budgetary status of the Department as well as other ancillary topics as appropriate.

BACKGROUND AND ANALYSIS

This consent item is a transparent publishing of the Department's transmittal of monthly financial reports to the Board of Forestry. While executive-level in nature, the financial report provides information on various topics that are either germane, or direct impacts to the financial status of the agency, or other administrative functions of the organization during any given month.

This financial report will continue to evolve over time. As the Department's reporting ability matures and insights into its operational and administrative work improve, this financial report will reflect those improvements. These improvements could include operational or process improvements or the introduction of new systems and technologies that enhance the Department's administrative capabilities. In addition, Board input will be factored in as the report evolves.

NEXT STEPS

The Board will receive the Department's Financial Report the third week of every month, whether a Board meeting is occurring or not. This will allow the Department to report on the previous month while allowing for the fiscal month closing process to conclude.

ATTACHMENTS

- 1) Department of Forestry Financial Report for July 2021
- 2) Department of Forestry Financial Report for August 2021 (available before meeting)



Memorandum

Oregon Department of Forestry

Date: July 21, 2021
To: Board of Forestry Members
From: Bill Herber, Deputy Director for Administration
Subject: Department Financial Report

Department Financial Report

The department continues to position itself well in the face of what already proves to be a very taxing fire season. Across several fronts, the department has had success that bodes well for its immediate financial picture. Continued system improvements, large fire cost recoveries efforts, revenue inflows and a substantial increase in the biennial budget has arguably placed the department in the best possible position to stay financially solvent through the 2021 fire season.

The department's cash account surpassed \$50 million for the first time since last year, primarily driven by continued receipt of large fire reimbursements and timber revenue (Figure 1).

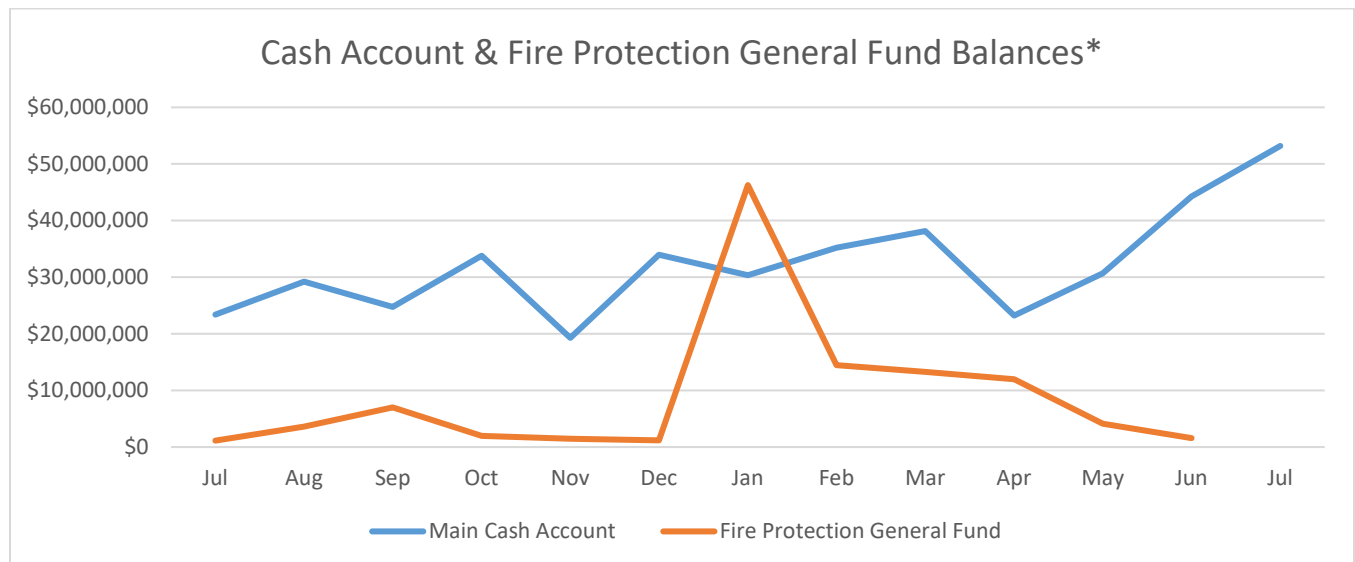


Figure 1, Monthly Balance for Main Cash Account and Fire Protection General Fund, Jun through Jul 19, 2021

* General Fund balances are not available, pending reconciliation with state budgeting systems

These revenue recoveries are the result of substantial effort by the department to fully invoice its outstanding large fire costs to its partners. Within the Federal Emergency Management Agency (FEMA) alone, the department invoiced almost \$58 million since the last report. The department Accounts Receivables total roughly \$87 million as of July 19 (Table 1).

Table 1, Current Accounts Receivables, as of July 19, 2021

Vendor Type	0 to 30 Days	31 to 60 Days	61 to 90 Days	91 to 120 Days	Over 120 Days	Total
Federal	53,611,935.35	7,505,495.07	532,664.94	800,624.17	2,602,051.61	65,052,771.14
Local Govt	86,220.55	3,889.54	63,038.58	0.00	263,714.26	416,862.93
Private	12,640,941.41	301,653.07	236,617.84	1,633,537.62	4,647,428.80	19,460,178.74
State	144,889.12	55,960.56	147,904.40	53,091.35	1,423,493.71	1,825,339.14
Total	66,483,986.43	7,866,998.24	980,225.76	2,487,253.14	8,936,688.38	86,755,151.95

As noted in the last report, a significant portion, \$52 million of the \$58 million, invoiced to FEMA was under their Public Assistance (PA) program. The processing of these claims is handled through the Oregon Office of Emergency Management (OEM). Of note regarding these PA claims, the \$52 million invoiced amounts to 75% of costs expended during those FEMA claim periods. Due to impact thresholds being met and work by the State of Oregon with FEMA, some or all those costs will be eligible for 90% to 100% recovery. The department is continuing to work closely with OEM as these claims develop.

With those most recent FEMA invoices, the department now only has outstanding a little over \$18 million in large fire cost reimbursables. This is the lowest amount the department has had since beginning to incur these costs since 2013. With its improved processes and procedures in place, the department is fully capable of ensuring that future fire seasons will be administered quickly and efficiently.

Table 2, Outstanding Large Fire Cost Recoveries, as of July 15, 2021

Fire Season	Other Agency Billings	FEMA	Total
2015	0.00	104,253.00	104,253.00
2017	0.00	79,013.21	79,013.21
2018	57,847.00	473,268.68	531,115.68
2019	350,080.00	153,675.00	503,755.00
2020	7,416,862.19	9,860,835.00	17,277,697.19
All Years	7,824,789.19	10,671,044.89	18,495,834.08

While the department's current cash balance and future revenues are looking favorable, there has yet to be significant pressure on Accounts Payables (AP) for the department. Current AP within the central financial systems is at \$12 million. With the fire season currently at \$28 million in gross costs and growing daily, it is only a matter of time before the full brunt of those costs hit the department's

accounts. In addition, the quarterly county disbursement is due July 31, and is estimated to be around \$23-\$24 million.

To more accurately and timely track costs and revenues that the department is incurring, significant effort is underway to improve transparency of these transactions at all levels of the organization. The department’s recent rollout of its Statewide Outstanding Assets and Liabilities Tracker (SOALT) has provided insight into financial transactions that have not yet manifested in our centralized accounting systems. Due to the nature of our business, especially during fire suppression efforts, costs, and income are often known well before documentation is received that allows these transactions to be entered in the department’s financial systems. Understanding these outstanding costs provides invaluable insight into our immediate cash flow needs (Table 3).

Table 3, Statewide Outstanding Assets and Liabilities as of July 15, 2021

Date Expected	Assets (AR)	Liabilities (AP)
1-3 Months	45,471.00	3,177,319.82
3-6 Months	233,521.89	5,344,302.99
6-9 Months	1,454,193.00	4,757,330.00
9-12 Months	0	552,532.40
More than 12 Months	4,428,243.61	1,395,500.00
Grand Total	6,161,429.50	15,226,985.21

Work is continuing within the department to provide increased awareness on these costs and revenues as well as improving the tools, systems, and processes to factor this information into future reporting.

As of July 1, 2021, the department has entered the 2021-23 biennium and begun operating under its 2021-23 Legislatively Adopted Budget. This budget likely highlights the largest single investment into department capacity in its recent history. 186 positions and 158.36 Full-Time Equivalents (FTE) were added throughout the organization. In addition, nearly \$74 million in General Fund (GF) was added to the department’s GF appropriations, which is a 78% increase from Current Service Level (CSL). For a full list of these 2021-23 biennial budget investments, see Attachment 1.

In all, the department is as well positioned to financially undertake the 2021 fire season as it can be. Current cash balances and upcoming AR will provide significant breathing room as fire costs begin to rise. In addition, the department has the ability to access the full 2021-23 GF appropriation for Fire Protection if needed. Increasing efficiency and improvements with financial processing and tracking will ensure that the situation is well monitored and managed.

Oregon Department of Forestry

2021-23 Legislatively Adopted Budget Summary



	2019-21 Legislatively Adopted Budget	2019-21 Legislatively Approved Budget	2021-23 Current Service Level	2021-23 Legislatively Adopted Budget	% Increase from 2021-23 CSL to 2021-23 LAB
General Fund	\$90,604,264	\$168,122,949	\$93,794,837	\$167,376,854	78%
Lottery Fund	\$2,543,451	\$2,543,451	\$2,564,210	\$2,564,210	0%
Other Funds	\$260,068,337	\$392,914,666	\$281,749,690	\$310,849,177	10%
Federal Funds	\$35,483,276	\$37,766,957	\$37,632,564	\$41,395,153	10%
Total Funds	\$388,699,328	\$601,348,023	\$415,741,301	\$522,185,394	26%
Positions	1,153	1,165	1,149	1,335	16%
Full-Time Equivalent	848.99	852.33	847.71	1006.07	19%

Senate Bill 762

Statewide map of wildfire risk: Requires ODF to develop and maintain a comprehensive statewide map of wildfire risk that includes wildland-urban interface boundaries and fire risk classes by June 30, 2022, in collaboration with Oregon State University, the Oregon State Fire Marshal, other state agencies, local governments, Indian tribes, and other public bodies.

Definition of “wildland-urban interface”: Directs the Board of Forestry to establish a definition of “wildland-urban interface” (WUI) within 100 days of the effective date of the bill. Additionally, the rules must establish criteria to identify and classify the WUI.

Prescribed fire: Requires ODF to establish by rule a Certified Burn Manager Program and to consult with the Oregon Prescribed Fire Council concerning best practices. Allows a person to conduct a prescribed fire that burns across land ownership boundaries if the person obtains a permit, complies with its conditions, and obtains consent from relevant landowners.

Baseline protection standards: Requires the State Forester—in collaboration with the State Fire Marshal, state agencies, and local governments—to adopt rules establishing baseline levels of wildfire protection that reflect regional conditions for lands outside of forest protection districts that are or may be susceptible to wildfire. Also requires counties to ensure all applicable lands have baseline or higher level of wildfire protection by January 1, 2026. Authorizes the State Forester to provide financial assistance for counties to assist landowners in forming or modifying wildfire protection jurisdictions, which can ensure adequate protection and development of wildfire protection facilities, equipment, training, and other resources can be achieved.

Reduction of wildfire risk: Requires ODF to design and implement a program to reduce wildfire risk through the restoration of landscape resiliency and the reduction of hazardous fuel on public or private forestlands and rangelands and in communities near homes and critical infrastructure. In collaboration with the Oregon State University Extension Service and other entities, ODF is directed to identify strategic landscapes that are ready for treatment. ODF must complete this work by June 30, 2023.

Senate Bill 762

Small Woodland Grant Program: ODF is required to establish a small woodland grant program to provide competitive grants to support small woodland owners in reducing wildfire risk through the restoration of landscape resiliency and the reduction of hazardous fuels on the small woodland ownerships.

- Agency Administration: \$1,467,358 Other Funds, 6 FTE, 6 Positions
- Equipment Pool-Radio: \$474,884 General Fund, 2 FTE, 2 Positions
- Fire Protection: \$25,611,235 General Fund and \$11,514,649 Other Funds, 60.40 FTE 88 Positions
- Partnership & Planning: \$27,990,713 General Fund, 12 FTE, 12 Positions

Fiscal Impact: \$54,076,832 General Fund, \$12,982,007 and Other Funds, 80.40 FTE, 108 Positions

Senate Bill 5518 (Policy Option Packages)

Continuation of Funding for Fire Severity Resources and Insurance Costs – Package 100

As in previous biennia, establishes a Special Purpose Appropriation in the Emergency Board Fund to pay the state’s share of fire insurance premium costs, and to provide critical, mobile resources—primarily contract air tankers and helicopters—positioned where and when fire danger is the highest.

Fiscal Impact: \$14,000,000 General Fund, 0.00 FTE, 0 Positions

Agency Administration and Fire Protection: Fire Org Sustainability & Modernization – Package 101

This package enhances Oregon’s complete and coordinated protection system that relies on a broad range of landowner, contractor, and cooperators engagement making this a highly functional model. Additional capacity is necessary to maintain this complete and coordinated system, ensure that ODF’s core business across all divisions are met and advance ODF’s initial and extended attack strategy to remain effective in the context of growing fire complexity. This package continues enhancements to the agency’s capacity that were authorized by the Emergency Board in January of 2021.

Fiscal Impact: \$2,046,694 General Fund and \$3,879,859 Other Funds, 20.46 FTE, 19 Positions

Agency Administration and Federal Forests Restoration: Implementing Shared Stewardship – Package 161

To date, ODF has GNA agreements in place to implement \$9 million of projects, including 18 timber sales totaling 30 million board feet. The actualization of GNA has overwhelmed existing ODF staff capacity authorized in the FFR program budget. With Shared Stewardship and recommendations expected from the Governor’s Council on Wildfire Response both the opportunities and expectations for ODF to staff up significantly to implement projects on public and private lands will grow over the 2021-2023 biennium. This package is a continuation and expansion of the funding by the Emergency Board in January 2021.

Fiscal Impact: \$5,553,425 General Fund, \$577,265 Other Funds, and \$3,000,000 Federal Funds, 31.00 FTE, 31 Positions

Agency Administration and Equipment Pool: Firefighter Life Safety – Package 171

This package supports the agency’s critical life safety communication and location tracking for firefighters and emergency response efforts through operation and maintenance of wireless communication systems,

Senate Bill 5518 (Policy Option Packages)

equipment, resources, and infrastructure. This package continues January 2021 Emergency Board funding for an additional safety specialist position for the agency.

Fiscal Impact: \$1,098,568 General Fund and \$526,501 Other Funds, 2.00 FTE, 2 Positions

Agency Administration: Diversity, Equity & Inclusion – Package 172

This package addresses capacity needs to further agency strategies on diversity, equity, inclusion, environmental justice, sustainability, and government-to-government leadership initiatives. Other Funds to fund the package come from internal assessments of department programs via the administrative pro-rate.

Fiscal Impact: \$238,738 General Fund and \$452,433 Other Funds, 2.00 FTE, 2 Positions

Agency Administration: Administrative Modernization – Package 173

This package continues work to align and enhance administrative functions across the department by streamlining processes and providing agency-wide data management services. The positions established under this package will address outdated processes, information systems, and agency-wide data management. Other Funds to fund the package come from internal assessments of department programs via the administrative pro-rate.

Fiscal Impact: \$774,716 General Fund and \$1,468,168 Other Funds, 7.00 FTE, 7 Positions

Agency Administration: Facilities Capital Management Capacity – Package 174

This package provides Other Funds expenditure limitation and authorizes the establishment of two limited-duration positions to address the workload related to the reconstruction of the agency's damaged and destroyed infrastructure during the 2020 wildfire season. This continues the funding and position authority that was authorized by the Emergency Board in December 2020.

Fiscal Impact: \$238,738 General Fund and \$452,433 Other Funds, 2.00 FTE, 2 Positions

Senate Bill 5518 (LFO Packages)

Agency Administration and Fire Protection: MGO Recommendations – Package 200

This package provides expenditure limitation and the authorization to transfer eight positions (7.5 FTE) to Agency Administration from the Fire Protection Division, as recommended by MGO. The positions provide accounting and financial functions that directly support the Fire Protection Division. The package also includes expenditure limitation and the authorization to establish four new financial permanent, full-time positions (4.00 FTE). These positions will ensure enhanced financial oversight for fire finance functions and the agency overall. A reclassification of two existing positions in Agency Administration is also included in the package due to expanded position responsibilities.

Fiscal Impact: \$474,044 General Fund and \$1,330,620 Other Funds, 4.00 FTE, 4 Positions

Agency Administration, Fire Protection, Federal Forests Restoration, and Private Forests: LFO Analyst Adjustments – Package 801

Senate Bill 5518 (Policy Option Packages)

The package includes two adjustments to the Agency Administration budget, as recommended by LFO, both of which deal with the timely implementation of recommendations made by MGO. Three limited-duration positions are established to provide dedicated capacity to recommendation implementation. The package includes General Fund to support these positions. In addition, \$500,000 General Fund is provided for the agency to continue the contractual relationship with MGO to provide direct implementation technical assistance, oversight, and reporting as directed by budget note.

This package also includes General Fund to correct an error that was made to technical adjustments in package 060 that removed funding for administrative pro-rate costs in the Fire Protection Division, Federal Forests Restoration Program, and Private Forests Division.

The package includes three adjustments to the Private Forests division budget as recommended by LFO. General Fund, Other Funds, and the establishment of one limited-duration project manager position (0.25 FTE) and one permanent pesticide application program administrator position (1.00 FTE) are included in the package to continue upgrades and enhancements to the departments forest reporting and notification system as required by SB 1602 (2020 1st Special Session). \$1.7 million General fund is included in the package for continued eradication and containment programs for Sudden Oak Death by the agency.

Fiscal Impact: \$4,078,504 General Fund and \$137,743 Other Funds, 4.25 FTE, 5 Positions

Senate Bill 5518 (Reductions & Fund Shifts)

The Legislatively Adopted Budget recommends a reduction for Microsoft 365 consolidation in Agency Administration (Pkg 099) and various fund shifts in Federal Forests Restoration program funding (Pkg 090).

Fiscal Impact: (\$829,617) General Fund, (\$822,550) Other Funds, and \$838,841 Federal Funds

House Bill 5006

Capital Construction & Debt Service: Deferred Maintenance

This package provides General Obligation bonds, authorized to be issued in the 2021-23 biennium, and anticipated to produce proceeds to address maintenance needs of department-owned facilities. This amount represents 2% of the replacement value of these facilities.

Fiscal Impact: \$260,395 General Fund and \$5,140,758 Other Funds

Private Forests: Seedling Nursery Grant

This package provides a General Fund appropriation to the Private Forests Division to provide grants to plant nurseries to develop tree seedling capacity to increase the supply of tree seedlings for replanting needs due to the 2020 wildfire season

Fiscal Impact: \$5,000,000 General Fund

Fire Protection: Rangeland Association

House Bill 5006

This package provides General Fund in the Fire Protection Division budget and authorizes the establishment of three positions to support the provisions of Senate Bill 590 (2021), which expands the definition of rangelands to include those lands that are used primarily for cultivating crops. Including these lands will allow for additional associations to be formed, providing access to assistance programs from the State Forester with organizing, training, acquisition of equipment, and insurance obligations.

Fiscal Impact: \$666,937 General Fund, 2.25 FTE, 3 Positions

Private Forests: Forest Practices Act Support

This package provides General Fund, increases Other Funds expenditure limitation, and authorizes the establishment of three positions for the Private Forests Division. The three positions will support the administration of the Forest Practices Act and provide technical assistance to forest landowners to ensure sound forest management and ecological protection.

Fiscal Impact: \$686,300 General Fund and \$457,530 Other Funds, 3.00 FTE, 3 Positions

Agencywide: DAS End of Session Adjustments

This package is the end of session Department of Administrative Services (DAS) State Government Service Charges (SGSC) adjustment to DAS charges to the agency.

Fiscal Impact: (\$887,217) General Fund, (\$1,811,575) Other Funds and (\$76,252) Federal Funds

Debt Service: Toledo Phase II Debt Service & Cost of Issuance

This package increases Other Funds expenditure limitation for the Agency Administration, to pay issuance costs for bonds to fund the replacement of the agency's facility in Toledo, Oregon. General Fund for the Debt Service program was increased, and Other Funds expenditure limitation was increased for debt service.

Fiscal Impact: \$105,260 General Fund and \$195,453 Other Funds

Senate Bill 5506

Capital Construction: Santiam Facility Replacement

This package provides Other Funds (insurance proceeds) to design and construct a new Santiam Unit Office to replace the facility that was destroyed by wildfire in 2020.

Fiscal Impact: \$2,500,000 Other Funds

Capital Construction: Toledo Phase II

This package provides Other Funds (Article XI-Q Bonds) to replace the Toledo Unit office and move it to a more centrally located area that will be outside of the mapped tsunami inundation zone.

Fiscal Impact: \$1,632,842 Other Funds



August 27, 2021

Sen. Betsy Johnson, Co-Chair
Sen. Elizabeth Steiner Hayward, Co-Chair
Rep. Dan Rayfield, Co-Chair
Joint Committee on Ways and Means
900 Court St. NE, H-178
Salem, OR, 97301

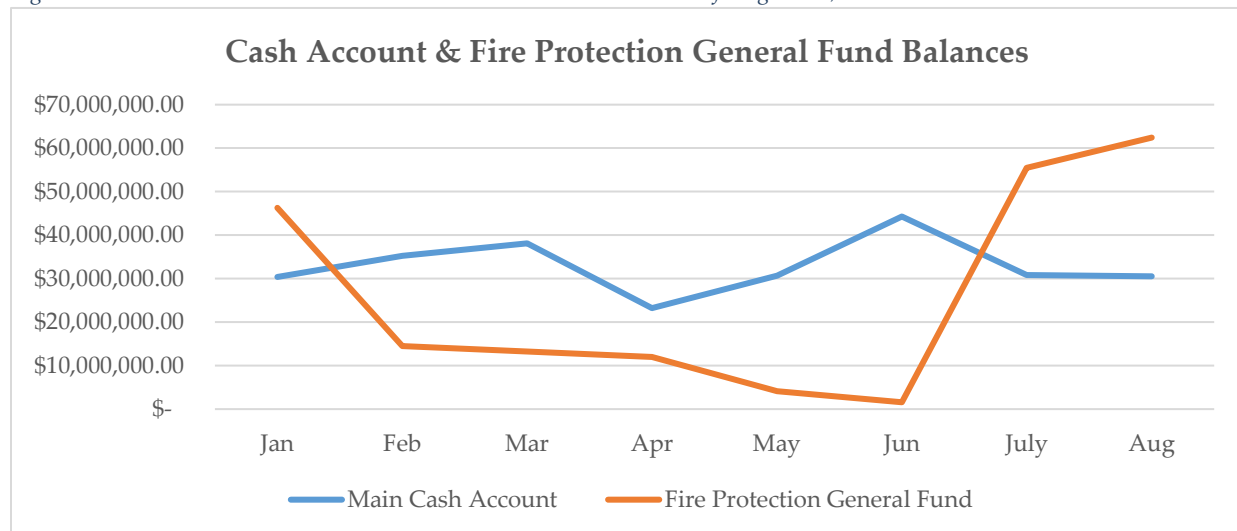
Re: Oregon Department of Forestry (ODF)—Monthly financial condition report

Dear Co-Chairs,

Cash and General Fund Balances

The department's cash balance has remained stable at around \$30 million following a \$22.6 million county timber revenue disbursement in July (see Figure 1). To date, the \$115 million of 2021 fire season gross costs have not put significant pressure on the department's financial resources, as only about 10% of those costs have been processed. While costs are being incurred, work is required by fire payment teams before those costs can start moving through the system. Significant investments into the department's biennial budget places a considerable amount of General Fund at the department's disposal to manage fire season expenditures as they are processed. The 21-23 Legislatively Adopted Budget appropriates over \$62 million to the department's Fire Protection Division.

Figure 1 - Cash Account and Fire Protection General Fund Balances as of August 23, 2021



Financial Projections

Current projections (based on projected fire season gross costs of \$132 million), show an increase in expenditures due to fire season resulting in a sharp decline in cash balances and expenditures against General Fund appropriations (see Table 1). The department’s capability to project its financial position accurately is critical to its ability to manage and mitigate cash flow issues. Performance of the projection in July fell short primarily driven by the lack of expenditures showing up as projected, specifically fire season costs, of which we have only seen 10% so far. This has the corresponding effect of lower revenues due to the lack of General Fund expenditure. Work is continuing to adapt and fine-tune projection methods for both revenues and expenditures allowing for increased accuracy and confidence as this work moves forward.

Table 1 - Financial Projections through September 2021

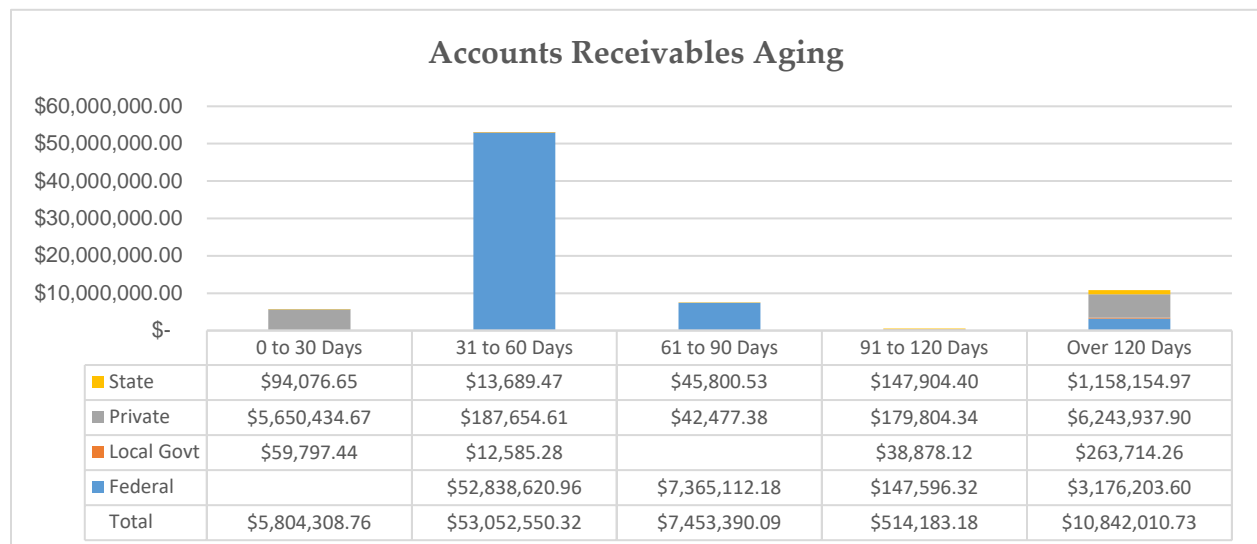
	Jul-21		Aug-21	Sep-21
	Projection	Actual*	Projection	Projection
Total Revenue	\$9,026,101.01	\$3,271,390.85	\$23,405,744.25	\$19,478,063.86
Total Expenditures	-\$30,765,634.57	-\$12,255,046.58	-\$28,643,306.67	-\$34,761,823.41
Net Total Exp/Rev	-\$21,739,533.55	-\$8,983,655.73	-\$5,237,562.42	-\$15,283,759.55
Beginning Cash Balance	\$44,205,902.33	\$44,205,902.33	\$21,350,095.80	\$26,355,276.27
EOM Cash Balance	\$22,466,368.78	\$35,222,246.60	\$16,112,533.39	\$11,071,516.72
Available GF Appr	\$143,890,721.17	\$146,736,432.68	\$137,634,602.86	\$131,378,484.54
Available Resources	\$166,357,089.94	\$181,958,679.28	\$153,747,136.24	\$142,450,001.26

* Typically, the current reporting month would be closed. However, given the fiscal year end, July 2021 is still open and numbers may change.

Accounts Receivables

The department still maintains significant accounts receivables, with the majority being Federal Emergency Management Agency (FEMA) reimbursements (see Figure 2) invoiced two months ago. It is anticipated these costs will extend beyond 120 days before payment is received.

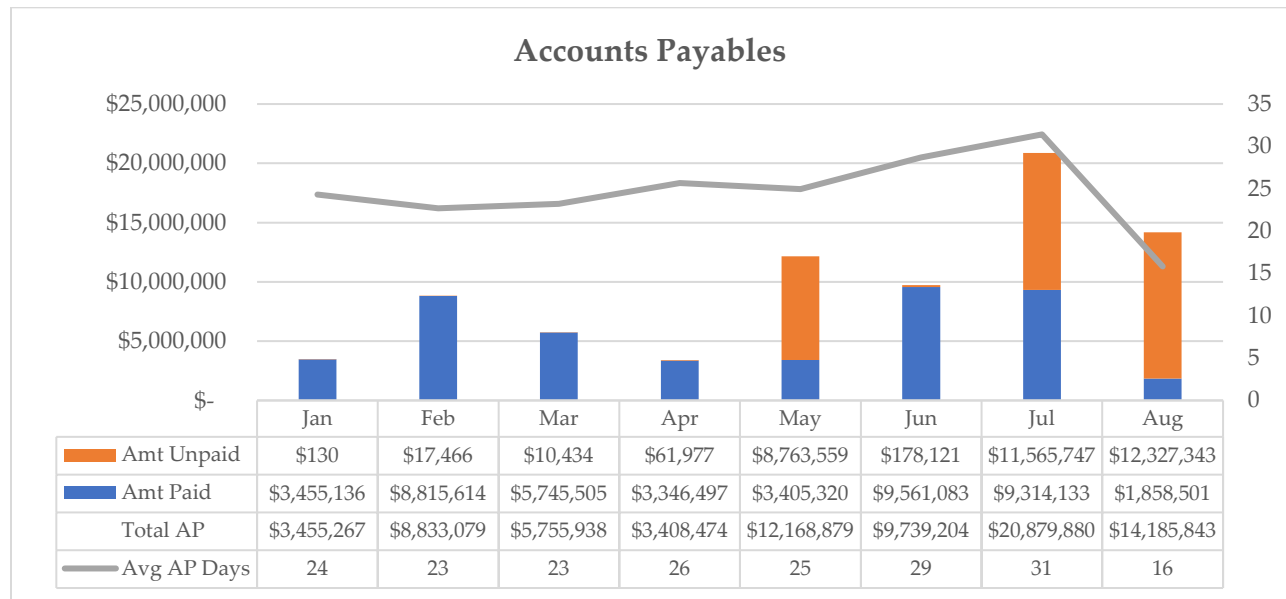
Figure 2 - Accounts Receivables Aging as of August 23, 2021



Accounts Payables

Accounts payables are starting to increase for the department as fire season continues. Even with having to manage staffing within the department’s disbursements program, payments to vendors have been keeping on pace. Several large federal expenditures are being withheld in an agreement with our federal partners to help mitigate cash flows as the department awaits FEMA reimbursement, notably the large unpaid balances in May and July (see Figure 3).

Figure 3 - Accounts Payable as of August 23, 2021



Large Fire Costs

Fire season 2021 continues to prove challenging for the state, with 920 fires, 188,662 acres burned on ODF-protected lands and ODF deploying its incident management teams 7 times. This is significantly more than average, and there are still a few weeks left in fire season. Current estimates have gross fire costs at near \$115 million with net costs of more than \$57 million. This is beyond the \$50 million threshold to trigger a claim against the state of Oregon’s firefighting expense insurance policy.

Previous years’ costs are continuing to be addressed, with most costs across all years either awaiting payments or further auditing and reconciliation as part of FEMA processes (see Table 2). The department must receive over \$62 million in claims payments before much of the outstanding \$17 million can be invoiced.

Table 2 - Large Fire Gross Cost Summary (red indicates estimates – in millions)

Fire Season	2015	2016	2017	2018	2019	2020	Total
Fire Costs	76.48	20.75	60.98	109.42	34.25	139.22	441.1
Currently Invoiced	(0.10)	(0.07)	(0.89)	(2.07)	(0.19)	(58.88)	(62.20)
Outstanding to Invoice	(0.11)	-	(0.07)	(0.38)	(0.57)	(15.79)	(16.92)

MGO Update

In addition to the ongoing internal work to address the recommendations identified by Macias, Gini, and O'Connell (MGO), the department is close to finalizing a work order contract with MGO to provide direct technical assistance and oversight of recommendation implementation from their April 2021 assessment of the department's fire finance function. Discussions are also underway with a change management consultant to ensure appropriate support for staff during the implementation of recommendations that significantly change business practices or organizational structuring. There has been further development and refinement of the Implementation Management Plan for MGO's recommendations, and the updated version will be presented to the Board of Forestry at their September meeting. As part of ongoing recommendation implementation work, the department continues to review and improve its financial reports and financial projection process.



Nancy Hirsch
Acting Oregon State Forester

c:
Legislative Fiscal Office
Chief Financial Office
Oregon State Treasurer
Board of Forestry
Governor's Deputy Chief of Staff
Governor's Natural Resource Policy Advisor

STAFF REPORT

Agenda Item No:	C
Work Plan Title:	Private Forests
Topic:	Annual topic, Regional Forest Practices Committee
Presentation Title:	Regional Forest Practices Committee Appointments and Reappointments
Date of Presentation:	September 8, 2021
Contact Information:	Josh Barnard, Deputy Chief Private Forests Division 503-551-8568 Josh.W.Barnard@oregon.gov

SUMMARY

The purpose of this agenda item is to recommend the appointment of four new members and re-appointment of six existing members to the Regional Forest Practice Committees.

CONTEXT

ORS 527.650 requires the Board of Forestry (Board) to establish a forest practice committee for each forest region. Each such committee shall consist of nine members, a majority of whom must reside in the region. Members of each committee shall be qualified by education or experience in natural resource management and not less than two-thirds of the members of each committee shall be private landowners, private timber owners or authorized representatives of such landowners or timber owners who regularly engage in operations.

ORS 527.660 states “[E]ach forest practice committee shall review proposed forest practice rules in order to assist the Board in developing rules appropriate to the forest conditions within its region.” Regional committees have provided a forum for the public; at each meeting members of the public may participate and offer information and suggestions. The Private Forests Deputy Chief serves as the secretary for all three committees.

BACKGROUND

The last reappointments to the regional committees occurred in September 2020. The regional committees are set with staggered terms so only one-third of committee members come up for reappointment in a given year. This approach ensures continuity of committee work over time. The Department recently contacted committee members whose terms expire in 2021, regarding their interest in reappointment. Six members wished to continue on the respective committees. One existing Northwest Oregon Regional Committee member and two existing members of the Southwest Oregon Regional Committee elected to discontinue their membership. One member of the Southwest Oregon Regional Committee resigned before their term expired. Gregory “Wade” Stringham has been put forth as the new committee member nomination for Northwest Oregon. Chris Arnold, Erik Culley, and Scott Nichols have been put forth as the new committee member nominations for Southwest Oregon. See attachment 2 for biographies. There is one additional vacancy on the Eastern Oregon Regional committee and the search is underway for new member nominations.

Attachment 1 shows current and new members and their term expiration dates. The recommended expiration column shows the term expiration date set to maintain the staggered term approach.

RECOMMENDATION

The department recommends the Board make the following six reappointments and 4 new appointments:

Northwest Oregon Region:

Scott Gray	term expiring September 2024
Jon Stewart	term expiring September 2024
Gregory “Wade” Stringham (New)	term expiring September 2024

Southwest Oregon Region:

Chris Arnold (New)	term expiring September 2022
Mikaela Gosney	term expiring September 2024
Erik Culley (New)	term expiring September 2024
Scott Nichols (New) (p)	term expiring September 2024

Eastern Oregon Region:

Vacant	term expiring September 2023
Irene K. Jerome (p)	term expiring September 2024
Bob Messinger (Chair) (p)	term expiring September 2024
Elwayne Henderson	term expiring September 2024

(p) Public Member

ATTACHMENTS

- (1) Current Regional Forest Practice Committee Membership
- (2) Biographies for new appointments

CURRENT REGIONAL FOREST PRACTICE COMMITTEE MEMBERSHIP
September 2021

NORTHWEST OREGON REGION

Member Name	Current Term Began	Term Expires	Recommended Expiration
Scott Gray	11/2014	09/2021	<u>09/2024</u>
Gregory "Wade" Stringham (New)			<u>09/2024</u>
Jon Stewart	09/2006	09/2021	<u>09/2024</u>
Mike Barnes (Chair)	09/2007	09/2022	_____
Tally Patton (p)	09/2007	09/2022	_____
Candace Bonner (p)	09/2011	09/2022	_____
Wendell Locke	09/2005	09/2023	
Steve McNulty	09/2017	09/2023	
Randy Silbernagel (p)	09/2005	09/2023	

SOUTHWEST OREGON REGION

Member Name	Current Term Began	Term Expires	Recommended Expiration
Erik Culley (New)			<u>09/2024</u>
Mikaela Gosney	09/2019	09/2021	<u>09/2024</u>
Scott Nichols (New) (p)			<u>09/2024</u>
Eric Farm	09/2013	09/2022	_____
Chris Arnold (New)			<u>09/2022</u>
Garrett Kleiner	09/2016	09/2022	_____
Daniel Fugate	09/2005	09/2023	
Dana Kjos (Chair)	09/2005	09/2023	
Darin McMichael	09/2019	09/2023	

EASTERN OREGON REGION

Member Name	Current Term Began	Term Expires	Recommended Expiration
Irene K. Jerome (p)	09/2006	09/2021	<u>09/2024</u>
Bob Messinger (Chair)(p)	09/2006	09/2021	<u>09/2024</u>
Elwayne Henderson	09/2011	09/2021	<u>09/2024</u>
Brandon Wood	01/2021	09/2022	_____
Paul Jones	09/2013	09/2022	_____
Bobby Douglas	09/2020	09/2022	_____
Vacant		09/2023	_____
Patrick Marolla	01/2019	09/2023	
Chris Johnson	09/2014	09/2023	

(p) Denotes public member

Biography for Gregory “Wade” Stringham

Gregory Wade Stringham (Wade) graduated from Philomath High School in 2003, went to work logging for his father Ben the day after high school graduation and worked for him steadily through 2006. In 2006 Wade went to work for Miller Timber Services as a timber faller before starting college at Oregon State University full time in September of 2006; he earned his Bachelor of Science Degree in Forest Operations Management in June of 2011. Wade went to work for Interfor US after graduation as an Operations Forester from June 2011 to April 2013. In April 2013 he went to work for Mason, Bruce, and Girard as a Forester, managing timberlands out of Florence, OR for Forest Investments Associates. Wade accepted a position with Campbell Global, LLC in January of 2017 as a Contract Logging Supervisor and has now moved into the role of Forest Supervisor for Campbell Global, LLC overseeing all the harvest activities on the McKenzie Tree Farm out of Junction City, OR. In his spare time, Wade enjoys fly fishing, archery hunting, building furniture, playing with his dogs, wine tasting with his wife, and playing with his daughter Sydney.

Biography for Chris Arnold

Chris graduated from Oregon State University College of Forestry in 2006 with a Bachelors Degree in Forest Management and was hired by Lone Rock Resources in 2007 to work on one of the yarder crews. Lone Rock is a privately held timber and logging company that owns and manages 150,000 acres in southwestern Oregon. After two years of working on the logging crews, Chris moved into a forester position working with various departments and learning all the steps required in preparing a unit for harvest. Soon after moving into a logging administrator position for Lone Rock’s coastal ownership, Chris responsibilities included road layout, neighbor relations, harvest unit layout and preparation, and management of active harvest operations. In 2012, Chris transitioned from working on the coastal ownership to logging administrator in the Umpqua Valley with responsibilities for harvest administration on 70,000 acres. Since 2019, harvests have been heavily focused on salvage efforts in the Umpqua Valley as we dealt with the effects of a major snowstorm in 2019 and the Archie Creek Fire of 2020. In 2021, Chris became the Head Logging Administrator for Lone Rock Resources.

Biography for Erik Culley

Erik Culley is a Forest Supervisor at Campbell Global, a Forest & Natural Resource Investment company. He currently oversees the Fairview Timber Tree Farm consisting of 28,000 acres located in Coos and Curry County, Oregon. Prior to joining Campbell Global, Mr. Culley Worked at Menasha Forest Products, where he started out in the Forest Management Services division. Erik holds a B.S. in Wood Science and Technology from Oregon State University.

Biography for Scott Nichols

Scott Nichols is a self-employed consulting forester at Next Generation Forestry, where he focuses on timber and land management. Scott Started his career in the logging industry setting chokers, spent some time working at Pacific Wood Laminates in Brookings, OR, and operated heavy equipment for a road-building contractor in Brookings before going back to school at Humboldt State University. After receiving his bachelor’s degree in Forestry and working in California for 2-years, he moved to Oregon to work for Coos County Forestry. He spent his last 7-years as a Senior Logging Supervisor for Plum Creek Timber Company/Weyerhaeuser and most recently the Timber Procurement Manager at South Coast Lumber Company. Scott started his consulting business in January of this year, and as a forestry consultant, he helps landowners navigate through the challenges today’s market swings bring, specializing in log marketing and evaluating economic feasibility of timberland. Outside of work, Scott spends his time with his wife and son enjoying the outdoors.

Agenda Item No.:	D
Work Plan:	Fire Protection Work Plan
Topic:	Appointment to Emergency Fire Cost Committee
Presentation Title:	Appointment of Erik Lease
Date Presented to Board:	September 8, 2021
Contact Information:	Tim Keith, Interim Emergency Fire Cost Committee Administrator 503-779-7760, Tim.keith@oregon.gov

SUMMARY

The purpose of this agenda item is to recommend appointment of one candidate to a position on the Emergency Fire Cost Committee (EFCC).

BACKGROUND

ORS 477.440 directs that the Board “shall appoint an Emergency Fire Cost Committee consisting of four members, who shall be forest landowners or representatives of forest landowners whose forestland is being assessed for forest fire protection within a forest protection district. At least one member shall be selected from each forest region of the state.” “Members of the Emergency Fire Cost Committee shall be appointed by the board for four-year terms.”

ORS 477.445 gives authority to the Emergency Fire Cost Committee (EFCC) to “supervise and control the distribution of funds from the Oregon Forest Land Protection Fund”. The Oregon Forest Land Protection Fund (OFLPF), established by ORS 477.750, is used to equalize (reimburse) emergency fire suppression costs expended in protecting forestland statewide by forest protection districts, both state and association. The annual expenditure limit of the OFLPF is \$13.5 million – an amount that is reviewed by the Legislature every two years.

Ken Cummings retired from his professional position and subsequently submitted his resignation from the Emergency Fire Cost Committee effective June 1, 2021. His term expired in April 2024. Mr. Cummings had served as Chair of the EFCC for several years; Brennan Garrelts was elected chair by the EFCC at their June 8, 2021, meeting. Mr. Cummings represented industrial woodland owners in Oregon’s southwest Oregon forest region on the EFCC. Since Brennan Garrelts also represents the southwest OR region and all three regions of Oregon are represented pursuant to ORS 477.440(1), there is an opportunity to appoint a member from another region. We propose that Erik Lease be appointed to the EFCC to serve a full four-year term to expire September 2025.

Attachment 1 contains a list of current committee members; the position scheduled for reappointment is in bold type. Attachment 2 contains a brief biography on Mr. Lease.

RECOMMENDATION

The Department recommends the Board make the following appointment:

Appoint Erik Lease to the Emergency Fire Cost Committee with a term expiring the end of September 2025.

ATTACHMENTS

1. Emergency Fire Cost Committee Membership
2. Biography of Erik Lease

EMERGENCY FIRE COST COMMITTEE MEMBERSHIP
September 2021

	First Term Began	Current Term Began	Term Expires
Brennan Garrelts, Chair	1/20	1/20	1/24
Steve Cafferata	3/11	4/19	4/23
Chris Johnson	7/18	7/18	7/22
Erik Lease	9/21	9/21	9/25

*Position recommended for appointment is in **bold**. Appointment term would end September of 2025.

Erik Lease Biography

Erik Lease is the Director of Silviculture and Regeneration for Weyerhaeuser Company in the western United States. Working through his 30-year career, he has performed the range of roles from tree planting to log scaling on both sides of the Cascades mountains. Erik believes that forest management and land stewardship are the cornerstone for what distinguishes the Pacific Northwest from the rest of the world.

Erik began his career with Weyerhaeuser in 2012. Prior to his current role, he was the Region Manager for the Lower Columbia region (Northwest Oregon and Southwest Washington), Area Manager for the Pe Ell Operations, and a staff Forester. From 2008 to 2012, he was the Principal for the Matrix Resource Group, LLC, which focused on private land management and valuations. 1993 to 2008, he worked in various roles for Longview Fibre Company across their entire Oregon and Washington ownership. His professional career began with the US Forest Service in central Oregon doing genetics and tree improvement work – as well as fighting fire.

Erik has been a nationally recognized, Certified Forester since 2002 by the Society of American Foresters. He has served on many state and local boards representing the industry and company. He holds a BS degree in Forest Management from Oregon State University and has numerous advanced training credentials.

Agenda Item No.:	E
Work Plan:	Partnership and Planning
Topic:	Senate Bill 762 Implementation
Presentation Title:	Wildfire Risk Reduction Program
Date of Presentation:	September 8, 2021
Contact Information:	Jeff Burns, Interim Partnership & Planning Director (503) 945-7346, jeff.d.burns@oregon.gov

SUMMARY

The purpose of this agenda item is to inform the Board of Forestry (BOF) of the legislative intent and outcomes from the passage of Senate Bill 762 from the 2021 legislative session. The 2021 legislative session enrolled bill codifies many of the recommendations brought forward by the Governor’s Council on Wildfire Response.

CONTEXT

Senate Bill (SB) 762 (Attachment 1), sections 18–20, (Reduction of Wildfire Risk) requires the Oregon Department of Forestry (ODF) to implement a treatment program to reduce wildfire risk on public and private forestlands and rangelands, within communities near homes and critical infrastructure, through restoration of landscape resiliency and reduction of hazardous fuels. The bill requires ODF to consult and cooperate with Oregon State University Extension, state and federal agencies, counties, cities, other units of local government, Indian tribes, public and private forestland and rangeland owners, forest collaboratives, and other relevant community organizations to select projects for treatment. The bill establishes criteria for project selection and design and prohibits commercial thinning on specified protected lands. The bill outlines reporting requirements for ODF to provide the status of the program development and implementation by January 15, 2022, and again upon completion of projects by June 30, 2023. The bill also requires ODF to develop a 20-year strategic plan, as described in the Shared Stewardship Agreement signed August 2019, that prioritizes restoration actions and geographies for wildfire risk reduction. It requires ODF to give public notice and allow a reasonable opportunity for public input when identifying and selecting landscapes.

The 20 Year Plan will be a collaborative all lands approach to map priority planning areas and provide strategic outreach for public meetings and community partner engagement. It will also explore opportunities for sustainable funding and capacity and explore opportunities to engage contractors in plan development. The plan will address cross boundary, landscape scale management for forest restoration and resilience to wildfire and other disturbances such as insect and disease. It will also address communities at risk and protection of watersheds and priority landscapes. The plan will also look to the future to enhance economic development and working forests.

SB 762, section 24, (Small Forestland Grant Program) directs ODF to establish a small forestland grant program to provide competitive grants to support small forestland owners to reduce wildfire risk through landscape restoration and resiliency and the reduction of hazardous fuels. Another

major aspect is providing consultation with partners and stakeholders. The department is mandated to set criteria for assessing grant applications and awarding grants.

SB 762 authorizes 28 additional positions for the Partnership and Planning Program. This will bolster the ranks of the Federal Forest Restoration staff and enable us to deliver the forest restoration and resiliency investments on priority landscapes across Oregon. These new positions are also earmarked for the facilitation of the 20-year strategic plan and the development of the small forestland owners grant program which will provide additional assistance to our small non-industrial private forests.

NEXT STEPS

ODF will assemble a Forest Restoration & Resiliency Committee to help develop grant criteria and identify priority landscapes for projects. They will develop a Call for Proposals (CFP) with assistance from our Diversity, Equity, and Inclusion and Climate Smart Forestry staff. Under the direction of ODF staff, the committee will review, select, and award proposals that meet the program criteria. The Partnership and Planning staff will finalize agreements by working with partners to provide a sound scope of work and budget. ODF staff will continue implementation, provide quality control, and progress checks. ODF staff will periodically reassess projects, and if necessary, develop modifications, and/or reallocate funds to ensure projects are meeting landscape scale mitigation strategies. As projects end, ODF will provide quality control field checks, confirm invoices, and finalize closeout reports.

RECOMMENDATION

This agenda item is for information only.

ATTACHMENT

(1) Senate Bill 762 Enrolled

Enrolled
Senate Bill 762

Sponsored by COMMITTEE ON NATURAL RESOURCES AND WILDFIRE RECOVERY (at the request of Senate Committee on Natural Resources and Wildfire Recovery, Governor Kate Brown)

CHAPTER

AN ACT

Relating to wildfire; creating new provisions; amending ORS 197.716, 205.130, 401.025, 477.015, 477.025, 477.027, 477.281 and 526.360; repealing ORS 477.017, 477.018, 477.023, 477.029, 477.031, 477.052, 477.054, 477.057, 477.059, 477.060 and 477.061; and declaring an emergency.

Be It Enacted by the People of the State of Oregon:

ELECTRIC SYSTEM PLANS

SECTION 1. Sections 2 to 4 of this 2021 Act are added to and made a part of ORS chapter 757.

SECTION 2. The Public Utility Commission shall periodically convene workshops for the purpose of helping public utilities that provide electricity, municipal electric utilities, people’s utility districts organized under ORS chapter 261 that sell electricity, electric cooperatives organized under ORS chapter 62 and operators of electrical transmission and distribution systems to develop and share information for the identification, adoption and carrying out of best practices regarding wildfires, including, but not limited to, risk-based wildfire protection and risk-based wildfire mitigation procedures and standards.

SECTION 3. (1) A public utility that provides electricity must have and operate in compliance with a risk-based wildfire protection plan that is filed with the Public Utility Commission and has been evaluated by the commission. The plan must be based on reasonable and prudent practices identified through workshops conducted by the commission pursuant to section 2 of this 2021 Act and on commission standards adopted by rule. The public utility must design the plan in a manner that seeks to protect public safety, reduce risk to utility customers and promote electrical system resilience to wildfire damage.

(2) A public utility that provides electricity shall regularly update a risk-based wildfire protection plan on a schedule determined by the commission. The plan must, at a minimum:

- (a) Identify areas that are subject to a heightened risk of wildfire and are:
 - (A) Within the service territory of the public utility; and
 - (B) Outside the service territory of the public utility but within a reasonable distance, as determined by the commission, of the public utility’s generation or transmission assets.
- (b) Identify a means for mitigating wildfire risk that reflects a reasonable balancing of mitigation costs with the resulting reduction of wildfire risk.
- (c) Identify preventive actions and programs that the public utility will carry out to minimize the risk of utility facilities causing a wildfire.

(d) After seeking information from regional, state and local entities, including municipalities, identify a protocol for the deenergizing of power lines and adjusting of power system operations to mitigate wildfires, promote the safety of the public and first responders and preserve health and communication infrastructure.

(e) Describe the procedures, standards and time frames that the public utility will use to inspect utility infrastructure in areas that the public utility identifies under paragraph (a) of this subsection.

(f) Describe the procedures, standards and time frames that the public utility will use to carry out vegetation management in areas that the public utility identifies under paragraph (a) of this subsection.

(g) Identify the development, implementation and administration costs for the plan.

(h) Identify the community outreach and public awareness efforts that the public utility will use before, during and after a wildfire season.

(3) To develop a plan described in subsection (2) of this section, a public utility may consult with and consider information from regional, state and local entities, including municipalities.

(4) The commission, in consultation with the State Forestry Department and local emergency services agencies, shall evaluate a public utility's wildfire protection plan and plan updates through a public process.

(5) Not more than 180 days after receiving a wildfire protection plan or plan update from a public utility, the commission shall approve or approve with conditions the plan or update if the commission finds that the plan or update is based on reasonable and prudent practices identified through workshops pursuant to section 2 of this 2021 Act and designed to meet all applicable rules and standards adopted by the commission.

(6) The commission's approval of a wildfire protection plan does not establish a defense to any enforcement action for violation of a commission decision, order or rule or relieve a public utility from proactively managing wildfire risk, including by monitoring emerging practices and technologies.

(7) The commission shall adopt rules for the implementation of this section. The rules may include, but need not be limited to, procedures and standards regarding vegetation management, public power safety shutoffs and restorations, pole materials, circuitry and monitoring systems.

(8) All reasonable operating costs incurred by, and prudent investments made by, a public utility to develop, implement or operate a wildfire protection plan under this section are recoverable in the rates of the public utility from all customers through a filing under ORS 757.210 to 757.220. The commission shall establish an automatic adjustment clause, as defined in ORS 757.210, or another method to allow timely recovery of the costs.

SECTION 3a. (1) In addition to all other penalties provided by law, violation of section 3 of this 2021 Act or a rule adopted pursuant to section 3 of this 2021 Act is subject to a civil penalty not to exceed \$10,000.

(2) Notwithstanding ORS 183.315 (6), 183.745 (7)(d) and 756.500 to 756.610, civil penalties under this section must be imposed by the Public Utility Commission as provided in ORS 183.745.

(3) Civil penalties collected under this section must be paid into the General Fund and credited to the Public Utility Commission Account as described in ORS 756.990 (7).

SECTION 4. (1) As used in this section, "consumer-owned utility" and "governing body" have the meanings given those terms in ORS 757.600.

(2) A consumer-owned utility must have and operate in compliance with a risk-based wildfire mitigation plan approved by the governing body of the utility. The plan must be designed to protect public safety, reduce risk to utility customers and promote electrical system resilience to wildfire damage.

(3) The consumer-owned utility shall regularly update the risk-based wildfire mitigation plan on a schedule the governing body deems consistent with prudent utility practices.

(4) A consumer-owned utility shall conduct a wildfire risk assessment of utility facilities. The utility shall review and revise the assessment on a schedule the governing body deems consistent with prudent utility practices.

(5) A consumer-owned utility shall submit a copy of the risk-based wildfire mitigation plan approved by the utility governing body to the Public Utility Commission to facilitate commission functions regarding statewide wildfire mitigation planning and wildfire preparedness.

SECTION 5. A public utility that provides electricity shall submit the first risk-based wildfire protection plan required of the public utility under section 3 of this 2021 Act for Public Utility Commission evaluation no later than December 31, 2021.

SECTION 6. A consumer-owned utility shall submit the first risk-based wildfire mitigation plan required under section 4 of this 2021 Act to the utility governing body no later than June 30, 2022.

SECTION 6a. (1) As used in this section, “electric utility” has the meaning given that term in ORS 757.600.

(2) Sections 3 and 4 of this 2021 Act do not affect the terms or conditions of easement held by an electric utility over private land as of the effective date of this 2021 Act.

SECTION 6b. Sections 3 and 3a of this 2021 Act do not apply to municipally owned utilities organized under ORS chapter 225.

STATEWIDE MAP OF WILDFIRE RISK

SECTION 7. (1) The State Forestry Department shall oversee the development and maintenance of a comprehensive statewide map of wildfire risk that displays the wildfire risk classes described in subsection (4) of this section and populates the Oregon Wildfire Risk Explorer.

(2) The Oregon Wildfire Risk Explorer must be the official wildfire planning and risk classification mapping tool for the State of Oregon.

(3) The State Board of Forestry shall establish by rule criteria by which the map must be developed and maintained, including criteria concerning the use of the most current wildfire assessments.

(4) In consultation with Oregon State University, the department shall establish five statewide wildfire risk classes of extreme, high, moderate, low and no risk. The classes must be:

(a) Consistent with ORS 477.027.

(b) Based on weather, climate, topography and vegetation.

(5) The department shall enter into an agreement with the university that provides that the university will develop and maintain the map and make the map publicly available in electronic form through the Oregon Wildfire Risk Explorer.

(6) The board shall adopt rules that:

(a) Provide opportunities for public input into the assignment of properties to the wildfire risk classes described in subsection (4) of this section.

(b) Require the department to provide notice and information about how a property owner may appeal an assignment of the property owner’s property to the extreme or high wildfire risk classes.

(c) Allow affected property owners and local governments to appeal the assignment of properties to the wildfire risk classes after the map is developed, after any updates to the map and within a reasonable time after delivery of the notice and information described in paragraph (b) of this subsection.

(d) Establish a specific process for appeals through which a requested change in assignment is assessed based on:

(A) Whether the assignment is consistent with the criteria described in subsection (3) of this section;

(B) Any pertinent facts that may justify a change in the assignment; and

(C) Any error in the data the department used to determine the assignment, if the error justifies a change in the assignment.

(7) The map must:

(a) Be based on the wildfire risk classes.

(b) Be sufficiently detailed to allow the assessment of wildfire risk at the property-ownership level.

(c) Include the boundaries of the wildland-urban interface, as defined in ORS 477.015, consistent with national standards.

(d) Include a layer that geospatially displays the locations of socially and economically vulnerable communities.

(8) To develop and maintain the map, the university shall collaborate with the department, the State Fire Marshal, other state agencies, local governments, federally recognized Indian tribes in this state, other public bodies and any other information sources that the university deems appropriate.

(9) In maintaining the map, the university shall make technical adjustments as needed and update the map consistent with the results of appeals described in subsection (6)(b) of this section.

(10) The university shall provide technical assistance to representatives of state and local government, and to landowners, that use the map.

SECTION 7a. (1) On or before December 31, 2021, the State Forestry Department shall report to an interim committee of the Legislative Assembly related to wildfire, in the manner provided in ORS 192.245, to the State Wildfire Programs Director and to the Wildlife Programs Advisory Council on the progress of the department and Oregon State University in complying with the requirements of section 7 of this 2021 Act.

(2) On or before June 30, 2022, the department and university must finish all actions required of the department and university by section 7 of this 2021 Act.

(3) Notwithstanding any contrary provision of law, the State Board of Forestry may adopt temporary rules to help ensure the requirements described in subsection (2) of this section are met.

DEFENSIBLE SPACE

SECTION 8. As used in sections 8a, 8b and 8c of this 2021 Act, “defensible space” means a natural or human-made area in which material capable of supporting the spread of fire has been treated, cleared or modified to slow the rate and intensity of advancing wildfire and allow space for fire suppression operations to occur.

SECTION 8a. (1) The State Fire Marshal shall establish minimum defensible space requirements for wildfire risk reduction on lands in areas identified on the statewide map of wildfire risk described in section 7 of this 2021 Act as within the wildland-urban interface.

(2) The State Fire Marshal:

(a) Shall consult with the Oregon Fire Code Advisory Board to establish the requirements.

(b) Shall establish requirements that are consistent with and do not exceed the standards pertaining only to defensible space that are set forth in the International Wildland-Urban Interface Code published by the International Code Council, including the standards pertaining only to defensible space that are set forth in sections 603 and 604 of the code.

(c) May consider best practices specific to Oregon in order to establish the requirements.

(d) Shall periodically reexamine the standards set forth in the International Wildland-Urban Interface Code and update the requirements to reflect current best practices, in consultation with the Oregon Fire Code Advisory Board.

(e) Shall enforce the requirements that are applicable to lands within the jurisdiction of a local government.

(f) Shall adopt rules governing administration of the requirements.

(g) May develop and apply a graduated fee structure for use in assessing penalties on property owners for noncompliance with the requirements.

(h) Shall consult on implementation of the requirements.

(i) May adopt rules concerning reports by local governments described in subsection (4)(a) of this section.

(3) Subject to additional local requirements, the requirements shall apply statewide for all lands in the wildland-urban interface that are designated as extreme or high risk, as identified on the map.

(4) Notwithstanding subsection (2) of this section, a local government may:

(a) Administer, consult on and enforce the requirements established by the State Fire Marshal, within the jurisdiction of the local government. A local government that administers or enforces the requirements established by the State Fire Marshal shall periodically report to the State Fire Marshal regarding compliance with the requirements, including the extent of compliance for each property within the jurisdiction of the local government, any change in the degree of compliance since the last report and any other information required by the State Fire Marshal by rule.

(b) Adopt and enforce local requirements for defensible space that are greater than the requirements established by the State Fire Marshal. Any local requirements that a local government adopts for defensible space must be defensible space standards selected from the framework set forth in the International Wildland-Urban Interface Code or other best practices specific to Oregon.

(c) Designate local fire districts, fire departments or fire agencies to enforce the requirements established by the State Fire Marshal or the local government pursuant to paragraph (b) of this subsection. A local government that designates enforcement must comply with the reporting requirements in paragraph (a) of this subsection.

(5) The State Fire Marshal shall administer a community risk reduction program that emphasizes education and methods of prevention with respect to wildfire risk, enforcement of defensible space requirements, response planning and community preparedness for wildfires.

(6) The State Fire Marshal may provide financial, administrative, technical or other assistance to a local government to facilitate the administration and enforcement of requirements within the jurisdiction of the local government. A local government shall expend financial assistance provided by the State Fire Marshal under this subsection to give priority to the creation of defensible space:

(a) On lands owned by members of socially and economically vulnerable communities, persons with limited proficiency in English and persons of lower income as defined in ORS 456.055.

(b) For critical or emergency infrastructure.

(c) For schools, hospitals and facilities that serve seniors.

SECTION 8b. (1) The minimum defensible space requirements established by the State Fire Marshal pursuant to section 8a of this 2021 Act may not be used as criteria to approve or deny:

(a) An amendment to a local government's acknowledged comprehensive plan or land use regulations.

(b) A permit, as defined in ORS 215.402 or 227.160.

(c) A limited land use decision, as defined in ORS 197.015.

(d) An expedited land division, as defined in ORS 197.360.

(2) Notwithstanding subsection (1) of this section, a local government may:

(a) Amend the acknowledged comprehensive plan or land use regulations of the local government to include the requirements; and

(b) Use the requirements that are included in the amended acknowledged comprehensive plan or land use regulations as a criterion for a land use decision.

SECTION 8c. The State Fire Marshal shall establish minimum defensible space requirements for wildfire risk reduction on lands in areas identified on the map described in section 7 of this 2021 Act on or before December 31, 2022.

SECTION 9. The Community Risk Reduction Fund is established in the State Treasury, separate and distinct from the General Fund. Interest earned by the Community Risk Reduction Fund shall be credited to the fund. Moneys in the fund are continuously appropriated to the State Fire Marshal for the purpose of carrying out community risk reduction and the local government financial assistance described in section 8a of this 2021 Act.

SECTION 10. (1) The State Fire Marshal shall biannually report regarding the status of State Fire Marshal and local government activities for carrying out section 8a of this 2021 Act to a committee or interim committee of the Legislative Assembly related to wildfire, in the manner provided in ORS 192.245, to the State Wildfire Programs Director and to the Wildfire Programs Advisory Council:

(a) On or before the date of convening of the regular session of the Legislative Assembly as specified in ORS 171.010.

(b) Approximately six months after the date described in paragraph (a) of this subsection.

(2) The report shall include, but need not be limited to:

(a) A status report regarding community risk reduction and the establishment, administration and enforcement of defensible space requirements;

(b) The amount of moneys expended during the year for community risk reduction and the establishment, administration or enforcement of defensible space requirements;

(c) The amount of moneys expended during the year for the suppression of fires on wildland-urban interface lands; and

(d) Any recommendations of the State Fire Marshal for legislative action, including, but not limited to, current or future resource and funding needs for community risk reduction and establishing, administering or enforcing defensible space requirements.

LAND USE

SECTION 11. (1) As used in this section, “defensible space” has the meaning given that term in section 8 of this 2021 Act.

(2) The Department of Land Conservation and Development shall identify updates to the statewide land use planning program and local comprehensive plans and zoning codes that are needed in order to incorporate wildfire risk maps and minimize wildfire risk, including the appropriate levels of state and local resources necessary for effective implementation.

(3) Updates may include, but need not be limited to, provisions regarding sufficient defensible space, building codes, safe evacuation and development considerations in areas of extreme and high wildfire risk, allowing for regional differences.

(4) On or before October 1, 2022, the Department of Land Conservation and Development shall:

(a) Complete the updates.

(b) Report to a committee or interim committee of the Legislative Assembly related to wildfire, in the manner provided in ORS 192.245, to the State Wildfire Programs Director and to the Wildfire Programs Advisory Council on the updates. The report must include recommendations concerning the updates.

(5) As necessary to identify needed updates and develop the recommendations required by subsection (4)(b) of this section, the department may consult with the State Fire Marshal, the State Forestry Department, the Department of Consumer and Business Services and local governments.

BUILDING CODES

SECTION 12. (1) For extreme and high wildfire risk classes in the wildland-urban interface that are identified pursuant to section 7 of this 2021 Act, the Department of Consumer and Business Services shall adopt wildfire hazard mitigation building code standards that apply to new dwellings and the accessory structures of dwellings, as described in section R327 of the 2021 Oregon Residential Specialty Code.

(2) The department shall amend section R327 of the Oregon Residential Specialty Code to include standards for additions to existing dwellings and accessory structures and for replacement of existing exterior elements covered in section R327 of the 2021 Oregon Residential Specialty Code.

(3) The department shall incorporate the standards described in subsections (1) and (2) of this section into any updates to the Oregon Residential Specialty Code.

SECTION 12a. (1) The Department of Consumer and Business Services shall take the actions required by section 12 (1) and (2) of this 2021 Act not later than October 1, 2022.

(2) The standards described in section 12 (1) and (2) of this 2021 Act may not become operative before April 1, 2023.

SECTION 12b. Not more than two years after the standards described in section 12 (1) and (2) of this 2021 Act are adopted, the Department of Consumer and Business Services shall update section R327 of the Oregon Residential Specialty Code to:

(1) Ensure that the code incorporates the standards described in section 12 (1) and (2) of this 2021 Act; and

(2) Make any necessary adjustments to the applicability of the standards and permitting requirements in the code.

SECTION 12c. The Department of Consumer and Business Services:

(1) Shall develop and maintain an interactive mapping tool that displays, at the property level, wildfire hazard mitigation standards covered in section R327 of the Oregon Residential Specialty Code. The tool must be designed to support future inclusion of snow load, seismic and wind building code standards at the property level.

(2) Shall collaborate with Oregon State University to obtain any needed information from the Oregon Wildfire Risk Explorer and national or science-based sources in order to develop the tool.

(3) Shall ensure that the tool is displayed in an electronic format and available to the public at no charge.

(4) Shall periodically update the tool when the relevant building code is updated.

(5) May enter into an agreement with the university concerning services required to develop and maintain the tool.

SECTION 12d. (1) The Department of Consumer and Business Services shall develop the interactive mapping tool described in section 12c of this 2021 Act not more than 60 days after the statewide map of wildfire risk described in section 7 of this 2021 Act is developed.

(2) Any delay in developing the tool may not affect a deadline concerning the map.

HEALTH SYSTEMS FOR SMOKE

SECTION 13. The Department of Environmental Quality shall develop and implement a program for supporting local communities, in detecting, preparing for, communicating or mitigating the environmental and public health impacts of wildfire smoke.

SECTION 13a. The Department of Environmental Quality shall establish a program for supporting local communities through intergovernmental agreements, grants, contracts or cooperative agreements to develop and implement community response plans to enhance the communities' readiness and mitigation capacity for smoke.

SECTION 13b. (1) The Department of Environmental Quality shall establish and implement a program to support communities across this state in monitoring, interpreting and communicating data related to ambient air quality conditions caused by wildfire smoke.

(2) As part of the program, the department shall:

(a) Conduct community outreach in areas of this state that are prone to poor air quality attributable to elevated levels of particulate matter.

(b) Deploy air quality monitoring equipment in a manner sufficient to evaluate an increased prevalence of poor air quality attributable to elevated levels of particulate matter.

(c) Monitor meteorological conditions in a manner sufficient to forecast occurrences of poor air quality.

SECTION 14. (1) As used in this section, "smoke filtration system" means an air filtration system capable of removing particulates and other harmful components of wildfire smoke in a public building.

(2) In consultation and coordination with the Oregon Health Authority, the Department of Human Services shall establish and implement a grant program that allows local governments to:

(a) Establish emergency clean air shelters.

(b) Equip public buildings with smoke filtration systems so the public buildings may serve as cleaner air spaces during wildfire smoke and other poor air quality events.

(3) The department shall require grantees to provide access to the clean air shelters at no charge.

SECTION 14a. The Department of Human Services is the lead state agency for clean air shelter operations. The department shall:

(1) Consult and collaborate with the Oregon Health Authority to align practices for voluntary evacuations and emergency sheltering operations.

(2) Coordinate with the authority in setting priorities for awarding grants described in section 14 of this 2021 Act.

(3) Provide support to local agencies that take lead roles in operating and planning clean air shelters in the local agencies' jurisdictions.

SECTION 14b. No later than June 30, 2023, in consultation with the Oregon Health Authority, the Department of Human Services shall report to an appropriate committee or interim committee of the Legislative Assembly, in the manner described in ORS 192.245, to the State Wildfire Programs Director and to the Wildfire Programs Advisory Council on:

(1) The grants administered pursuant to section 14 of this 2021 Act, including information about which local governments received grants.

(2) Any barriers to administering the grants.

(3) Areas for improving the grant program described in section 14 of this 2012 Act.

(4) Public health impacts from wildfire smoke events.

SECTION 15. (1) As used in this section, "smoke filtration device" means portable air cleaners and furnace, heating, ventilation and air conditioning filters that are intended to remove contaminants, including particulates and other harmful components of wildfire smoke, from the air in a room to improve indoor air quality.

(2) The Oregon Health Authority shall establish a program to increase the availability of residential smoke filtration devices among persons vulnerable to the health effects of wildfire smoke who reside in areas susceptible to wildfire smoke.

(3) The authority may award grants for the purchase of smoke filtration devices.

(4) If the authority awards grants described in this section, the authority shall give priority to funding for smoke filtration devices in residential buildings occupied by persons who

qualify for the Oregon Health Plan or Medicaid and are vulnerable to the health effects of wildfire smoke.

(5) The authority may adopt rules establishing standards for smoke filtration devices obtained with grant moneys received under this section, including, but not limited to, minimum acceptable efficiency for the removal of particulates and other harmful substances generated by wildfires.

(6) The authority may provide information and refer service providers to grantees that need housing interventions to facilitate effective use of smoke filtration devices, including interventions such as weather proofing.

SECTION 15a. The Oregon Health Authority shall periodically report to an appropriate committee or interim committee of the Legislative Assembly, as described in ORS 192.245, to the State Wildfire Programs Director and to the Wildfire Programs Advisory Council on:

(1) The use of smoke filtration devices funded under section 15 of this 2021 Act, including use of the smoke filtration devices by vulnerable and underserved communities.

(2) The effectiveness of the programs described in section 15 of this 2021 Act.

(3) Areas for improvement.

(4) Public health impacts during wildfire smoke events.

(5) Whether funding described in section 15 of this 2021 Act has provided a public health return on investment.

EMERGENCY RESPONSE AND DISASTER RECOVERY

SECTION 16. ORS 401.025 is amended to read:

401.025. As used in this chapter:

(1) "Emergency" means a human created or natural event or circumstance that causes or threatens widespread loss of life, injury to person or property, human suffering or financial loss, including but not limited to:

(a) Fire, **wildfire**, explosion, flood, severe weather, landslides or mud slides, drought, earthquake, volcanic activity, tsunamis or other oceanic phenomena, spills or releases of oil or hazardous material as defined in ORS 466.605, contamination, utility or transportation emergencies, disease, blight, infestation, civil disturbance, riot, sabotage, acts of terrorism and war; and

(b) A rapid influx of individuals from outside this state, a rapid migration of individuals from one part of this state to another or a rapid displacement of individuals if the influx, migration or displacement results from the type of event or circumstance described in paragraph (a) of this subsection.

(2) "Emergency service agency" means an organization within a local government that performs essential services for the public's benefit before, during or after an emergency, such as law enforcement, fire control, health, medical and sanitation services, public works and engineering, public information and communications.

(3) "Emergency services" means activities engaged in by state and local government agencies to prepare for an emergency and to prevent, minimize, respond to or recover from an emergency, including but not limited to coordination, preparedness planning, training, interagency liaison, fire fighting, oil or hazardous material spill or release cleanup as defined in ORS 466.605, law enforcement, medical, health and sanitation services, engineering and public works, search and rescue activities, warning and public information, damage assessment, administration and fiscal management, and those measures defined as "civil defense" in 50 U.S.C. app. 2252.

(4) "Local government" has the meaning given that term in ORS 174.116.

(5) "Major disaster" means any event defined as a "major disaster" under 42 U.S.C. 5122(2).

SECTION 17. (1) **The Office of Emergency Management shall update its statewide emergency plan as necessary to prepare for or respond to wildfire emergencies on an area-wide or statewide basis. The plan developed by the office to prepare for or respond to wildfire**

emergencies shall include, but need not be limited to, wildfire risk mitigation efforts and evacuation planning.

(2) The office shall coordinate with cities, counties, adult foster homes, health care facilities and residential facilities, the Department of Human Services and the Oregon Health Authority to establish local or private procedures to prepare for emergencies related to wildfire and ensure that local efforts to prevent, respond to or recover from an emergency caused by wildfire are conducted in a manner consistent with the plan developed by the office to prepare for or respond to wildfire emergencies. The coordinated activities may include, but need not be limited to, providing training, carrying out exercises and promoting community education.

SECTION 17a. The Office of Emergency Management shall conduct the update required by section 17 (1) of this 2021 Act on or before December 31, 2021.

REDUCTION OF WILDFIRE RISK

SECTION 18. (1)(a) The State Forestry Department shall design and implement a program to reduce wildfire risk through the restoration of landscape resiliency and the reduction of hazardous fuel on public or private forestlands and rangelands and in communities near homes and critical infrastructure.

(b) The department shall ensure that the program is consistent with the objectives described in this section and biennially select, administer and evaluate projects consistent with the objectives described in this subsection.

(c) When developing program and project selection criteria, the department shall, to the extent practicable, consult and cooperate with state and federal agencies, counties, cities and other units of local government, federally recognized Indian tribes in this state, public and private forestland and rangeland owners, forest and rangeland collaboratives and other relevant community organizations and ensure consistency with the priorities described in subsection (3) of this section.

(2) The department shall develop a 20-year strategic plan, as described in the Shared Stewardship Agreement signed on August 13, 2019, that prioritizes restoration actions and geographies for wildfire risk reduction. The plan must be able to be used to direct federal, state and private investments in a tangible way.

(3) In selecting and administering projects, the department shall:

(a) In collaboration with the Oregon State University Extension Service and other entities, identify strategic landscapes that are ready for treatment, giving priority to projects within the landscapes that are:

(A) On lands in the four highest eNVC risk classes identified in the United States Forest Service report titled "Pacific Northwest Quantitative Wildfire Risk Assessment: Methods and Results" and dated April 9, 2018;

(B) Inclusive of federal lands with treatment projects currently approved under the National Environmental Policy Act (42 U.S.C. 4321 et seq.);

(C) Focusing on treatments protective of human life, property, critical infrastructure, watershed health and forest or rangeland habitat restoration; and

(D) Part of a collaborative partnership with agreements across diverse forestland or rangeland stakeholders that use an expansive, landscape-scale approach to address underlying causes of poor wildfire resilience and elevated risk of wildfire or that establish innovative approaches to addressing the underlying causes that could be implemented on a larger scale.

(b) To the extent practicable, identify and support projects that are designed to:

(A) Evaluate varying types of fuel treatment methods;

(B) Leverage the collective power of public-private partnerships and federal and state funding, including leverage of the coordination of funding to support collaborative initiatives

that address the underlying causes of elevated forestland and rangeland wildfire risk across ownerships; and

(C) Optimize the receipt of federal government investments that equal or exceed department investments.

(c) Design the projects to involve existing forest-based and range-based contracting entities.

(d) Design the projects to complement programs and projects of the Oregon Watershed Enhancement Board or other state agencies as needed.

(e) Design the projects to involve the Oregon Conservation Corps Program established by section 21 of this 2021 Act, to the maximum extent possible, for community protection projects located in the wildland-urban interface, subject to funding available in the Oregon Conservation Corps Fund established by section 23 of this 2021 Act.

(f) Affirmatively seek, and enhance opportunities for, collaboration from stakeholders holding a wide variety of perspectives regarding forest and rangeland management and opportunities for significant involvement by communities in proximity to project sites.

(g) Engage in monitoring of the projects to produce useful information on which to base recommendations to the Legislative Assembly.

(4) A project under this section may not include commercial thinning on:

(a) Inventoried roadless areas;

(b) Riparian reserves identified in the Northwest Forest Plan or in federal Bureau of Land Management resource management plans;

(c) Late successional reserves, except to the extent consistent with the 2011 United States Fish and Wildlife Service Revised Recovery Plan for the Northern Spotted Owl (*Strix occidentalis caurina*);

(d) Areas protected under the federal Wild and Scenic Rivers Act (P.L. 90-542), national recreation areas, national monuments or areas protected under ORS 390.805 to 390.925;

(e) Designated critical habitat for species listed as threatened or endangered under the Endangered Species Act of 1973 (P.L. 93-205) or by the State Fish and Wildlife Commission under ORS 496.172, unless commercial thinning is already allowed under an existing environmental review or recognized habitat recovery plan; or

(f) Federally designated areas of critical environmental concern or federally designated wilderness study areas.

(5) The department shall give public notice, and allow reasonable opportunity for public input, when identifying and selecting landscapes under this section.

SECTION 19. Section 18 of this 2021 Act does not expand, diminish or otherwise affect a right, privilege, duty or function established under federal, state or local laws or rules that pertain to the management of private lands in this state.

SECTION 20. (1) The State Forestry Department shall complete the operation of projects under section 18 of this 2021 Act no later than June 30, 2023.

(2) The department shall report regarding progress in carrying out projects under section 18 of this 2021 Act to an interim committee of the Legislative Assembly related to natural resources, in the manner provided by ORS 192.245, and to the Governor, State Wildfire Programs Director and Wildfire Programs Advisory Council no later than January 15, 2022. The report shall include, but need not be limited to:

(a) An explanation of how landscapes were selected, a summary of the selected projects, a description of initial outcomes from projects selected under the requirements established by section 18 of this 2021 Act, anticipated time frames for completion of the projects and any initial recommendations concerning landscape identification and projects selected under the requirements established by section 18 of this 2021 Act;

(b) A description of the funding source types and amounts secured by the department as matching funds to implement projects; and

(c) A summary of outreach and coordination with relevant federal and state agencies, counties, cities and other units of local government, federally recognized Indian tribes in this state, public and private forestland and rangeland owners, forestland and rangeland collaboratives and other relevant community organizations to identify and select landscapes for treatment and develop selection criteria for projects.

(3)(a) The department shall report its findings and recommendations regarding wildfire risk reduction on forestland and rangeland and in communities, based on information obtained from the projects described in section 18 of this 2021 Act, to an interim committee of the Legislative Assembly related to natural resources, in the manner provided by ORS 192.245, and to the Governor, State Wildfire Programs Director and Wildfire Programs Advisory Council no later than July 15, 2023. The report shall include, but need not be limited to:

(A) A qualitative and quantitative summary of the project outcomes that, at a minimum, states the number of acres treated, the treatment actions carried out and any resulting or anticipated changes in landscape conditions related to enhanced resiliency or the mitigation of wildfire risk to public values;

(B) The identification of barriers to more efficient implementation and achievement of goals in future wildfire risk reduction projects;

(C) A qualitative and quantitative summary of the use of prescribed fire activities and invasive annual grass treatments for wildfire risk reduction that, at a minimum, states the number of acres burned or treated and any resulting or anticipated changes in landscape conditions related to enhanced resiliency or the mitigation of wildfire risk to public values;

(D) The identification of existing disincentives to, and recommendation for reducing barriers to, the use of prescribed fire;

(E) Recommendations for creating optimal working relationships with forestland or rangeland collaboratives and other relevant community organizations regarding future wildfire risk reduction projects;

(F) A description of the funding source types and amounts secured by the department as matching funds to carry out projects; and

(G) Recommendations for investment in future wildfire risk reduction projects to be carried out in the 2023-2025 biennium.

(b) In developing the report required under this subsection, the department shall work in coordination with federal land management agencies, institutions of higher education and third parties to develop consistent performance measurements and condition-based metrics for monitoring and communicating the effectiveness of state investments and project actions in reducing wildfire risk on public or private forestlands and rangelands and in communities.

OREGON CONSERVATION CORPS

SECTION 21. (1) The Oregon Conservation Corps Program is established for the purposes of:

(a) Reducing the risk wildfire poses to communities and critical infrastructure.

(b) Helping to create fire-adapted communities.

(c) Engaging youth and young adults in workforce training.

(2) Youth and young adults between 13 years of age and 26 years of age who have been qualified by a youth development organization may participate in projects undertaken by the corps.

(3) Notwithstanding any contrary provision of law, participants in projects undertaken by the corps:

(a) Are not employees of the corps.

(b) Are exempt from prevailing wage laws.

(c) Must receive compensation for their participation of at least minimum wage or an allowance or stipend that, when combined with other sources of payment the participant is eligible to receive, including academic credit or an AmeriCorps education award, is equivalent to the value of minimum wage.

SECTION 22. (1) As used in this section, “eligible organization” includes Oregon-based nonprofit youth development organizations and public entities that provide programs of job training, skill development and forest-related or rangeland-related career path training.

(2) The Oregon Conservation Corps Advisory Committee is established within the Higher Education Coordinating Commission for the purpose of managing the Oregon Conservation Corps Program.

(3) The Governor shall determine the number of members on the committee and appoint the members.

(4) The committee shall, in collaboration with a qualified nonprofit foundation, actively seek and source private donations to support the Oregon Conservation Corps Program.

(5) The committee may direct the expenditure of moneys from the Oregon Conservation Corps Fund for a promotional website and materials to solicit private funds.

(6) Members may not receive compensation for service on the committee, but, subject to any applicable laws regulating travel and other expenses of state officers and employees, may be reimbursed for actual and necessary travel and other expenses incurred in the performance of committee duties with moneys available to the commission for the purpose of reimbursing the members.

(7) The committee shall administer a grant process that:

(a) Provides funding to support the work conducted by the Oregon Conservation Corps Program.

(b) Defines and uses an equity lens in awarding grants by identifying and supporting populations with greater vulnerability including communities of color, indigenous communities, communities with members who have limited proficiency in English and communities with lower-income members.

(c) Awards grants to eligible organizations.

(d) Ensures that grant awards support activities described in section 21 (1) of this 2021 Act and subsection (8) of this section.

(e) Establishes guidelines for prioritizing grant-supported projects to reduce community fire risks, promote youth and young adult workforce development and educational experiences and reduce hazardous fuels.

(8) The committee shall consult with the State Forestry Department to ensure that the grant process awards funds to proposals that:

(a) Protect at-risk communities and infrastructure within the wildland-urban interface, as described in section 18 of this 2021 Act.

(b) Meet standards for fuel treatment established by the department.

(9) The committee shall biennially submit a report, on the timeline described in ORS 293.640, to an appropriate committee or interim committee of the Legislative Assembly, as described in ORS 192.245, and to the State Wildfire Programs Director and Wildfire Programs Advisory Council, regarding the expenditure of moneys deposited in the Oregon Conservation Corps Fund.

SECTION 23. (1) The Oregon Conservation Corps Fund is established in the State Treasury, separate and distinct from the General Fund. Interest earned by the Oregon Conservation Corps Fund shall be credited to the fund.

(2) The fund may receive contributions from individuals and private organizations.

(3) Moneys in the fund are continuously appropriated to the Higher Education Coordinating Commission to be used as directed by the Oregon Conservation Corps Advisory Committee and for related administrative expenses of the commission.

(4) The commission shall keep records of all moneys credited to and deposited in the fund and the activity or program against which each withdrawal from the fund is charged.

SMALL FORESTLAND GRANT PROGRAM

SECTION 24. (1) As used in this section, “small forestland owner” means an individual, group, federally recognized Indian tribe in Oregon or association that owns:

(a) Up to 160 acres of nonindustrial private forestland west of the crest of the Cascade Mountains; or

(b) Up to 640 acres of nonindustrial private forestland east of the crest of the Cascade Mountains.

(2) The State Forestry Department shall establish a small forestland grant program for the purpose of providing grants, on a competitive basis, to support small forestland owners in reducing wildfire risk through the restoration of landscape resiliency and the reduction of hazardous fuels on the owners’ property.

(3) In consultation with partners and stakeholders, the department shall set criteria for assessing grant applications and awarding grants. The criteria may include, but need not be limited to:

(a) Prioritization of projects on forestland in extreme or high wildfire risk classes described in section 7 of this 2021 Act.

(b) Owner commitment to maintaining fuel reduction treatments.

(c) Owner possession of a forest management plan.

(d) Project proximity to current or past fuel mitigation efforts, supported by any owner or funding source, that would contribute to cross-boundary, landscape-scale forest resiliency.

(e) Whether the project addresses additional resource concerns, such as insect and disease management.

(f) Whether critical facilities and infrastructure may receive enhanced protection due to project outcomes.

PRESCRIBED FIRE

SECTION 25. The State Forestry Department shall adopt rules to clarify that a person may:

(1) Conduct a prescribed fire that burns across land ownership boundaries if the person obtains a permit for the fire as described in ORS 477.515 or 477.625 and complies with the conditions of the permit.

(2) Obtain a single permit under ORS 477.515 or 477.625 for a prescribed fire that burns across land ownership boundaries if the person demonstrates to the department that the person has obtained consent to conduct the fire from all persons on whose lands the fire is planned to burn.

SECTION 25a. The State Forestry Department shall initiate the rulemaking described in section 25 of this 2021 Act on or before November 30, 2021, and finalize the rulemaking on or before November 30, 2022.

SECTION 26. ORS 526.360 is amended to read:

526.360. (1) The State Board of Forestry, [*and the forester*] **the State Forester and forest protective associations** may assist to the extent [*possible*] **practical** in developing, for forestry, grazing or agricultural uses, all forestland classified pursuant to ORS 526.328 or 526.340 for such uses, including the burning of brush or other flammable material for the purpose of:

(a) Removing a fire hazard to any property;

(b) Preparing seed beds;

(c) Removing obstructions to or interference with the proper seeding or agricultural or grazing development or use of that land;

(d) Promoting the establishment of new forest crops on cutover, denuded or underproductive lands;

(e) Implementing pest prevention and suppression activities, as provided in ORS 527.310 to 527.370; or

(f) Promoting improvements to forest health, including improvements to fish and wildlife habitat.

(2) Upon request of the owner or the agent of the owner of any forestland classified pursuant to ORS 526.328 or 526.340, the forester **or a forest protective association** may perform or supervise burning operations thereon for any of the purposes stated in subsection (1) of this section. The owner or the agent of the owner shall supply such personnel and equipment and shall perform such fire control actions and activities as the forester **or forest protective association** may require while there is danger of the fire spreading. The forester **or forest protective association** may refuse to perform or supervise burning or to issue any burning permit when, in the judgment of the forester **or forest protective association**, conditions so warrant.

(3) To accomplish the purposes set forth in subsection (1) of this section, the [*State Board of Forestry may*] **board shall** establish by rule a Certified Burn Manager program.

(4) The rules shall include:

(a) Certification standards, requirements and procedures;

(b) Standards, requirements and procedures to revoke certification;

(c) Actions and activities that a Certified Burn Manager must perform;

(d) Actions and activities that a Certified Burn Manager may not allow or perform;

(e) Limitations on the use of a Certified Burn Manager; and

(f) Any other standard, requirement or procedure that the board considers necessary for the safe and effective administration of the program.

(5) The rules may establish and impose fees for participation in the program.

[*(4)*] **(6)** When [*any*] a burning for any of the purposes stated in subsection (1) of this section on forestland classified pursuant to ORS 526.328 or 526.340 is started under the supervision of and supervised by the forester, **a forest protective association** or a Certified Burn Manager, [*no*] a person [*shall*] **may not** be **held** liable for property damage resulting from that burning unless the damage is caused by the negligence of the person.

SECTION 27. By December 1, 2021, the State Board of Forestry shall:

(1) Consult with the Oregon Prescribed Fire Council concerning best practices for conducting the Certified Burn Manager program described in ORS 526.360;

(2) Initiate rulemaking to establish the program; and

(3) Report in the manner provided in ORS 192.245 to an appropriate committee or interim committee of the Legislative Assembly on progress the board has made in establishing and implementing the program and when the board expects to launch the program.

FEDERAL PARTNERSHIPS

SECTION 27a. The State Forestry Department shall cooperate with federal agencies to increase the effectiveness of activities undertaken pursuant to ORS 526.271, 526.274 and 526.275.

PROTECTED AREAS

SECTION 28. (1) The State Forester, in collaboration with the State Fire Marshal, state agencies and local governments as defined in ORS 174.116, shall adopt rules establishing baseline levels of wildfire protection for lands that are outside of forest protection districts and susceptible to wildfire. When establishing the baseline levels for lands, the State Forester shall ensure that the levels are adapted to reflect regional conditions. A county, in collaboration with the State Forester and the State Fire Marshal, may work to ensure that all lands within the county that are outside of forest protection districts and susceptible to

wildfire are provided with wildfire protection services at the applicable baseline level or a higher level. As used in this subsection, "forest protection districts" means lands designated in State Forester rules as provided under ORS 477.225.

(2) A county, in collaboration with the State Forester and the State Fire Marshal, may assist:

(a) Landowners, individuals and businesses with forming jurisdictions to provide wildfire protection;

(b) Landowners, individuals, businesses and jurisdictions with obtaining expansion of or other changes to boundaries or facility locations of jurisdictions that provide wildfire protection;

(c) Jurisdictions to expand or adjust jurisdiction service boundaries to ensure adequate wildfire protection for lands; and

(d) Jurisdictions in developing wildfire protection facilities, equipment, training and other resources adequate to ensure that the jurisdiction provides timely and effective wildfire protection at the baseline level or higher on lands described in subsection (1) of this section throughout the jurisdiction.

(3) The State Forester may provide financial assistance to counties for carrying out county duties under subsection (2) of this section from any funds made available to the State Forester and designated for that purpose.

SECTION 29. A county shall ensure no later than January 1, 2026, that all lands described in section 28 (1) of this 2021 Act within the county have baseline level or higher wildfire protection as described in section 28 of this 2021 Act.

WILDFIRE RESPONSE CAPACITY

SECTION 30. (1) The State Forestry Department shall establish and maintain an expanded system of automated smoke detection cameras that includes staffing in detection centers to monitor and alert fire suppression staff when fires are detected.

(2) The system must serve the purposes of quickly detecting, locating and extinguishing fires and keeping fires as small as possible.

SECTION 30a. The State Forestry Department:

(1) Shall consult and coordinate with federal agencies, private stakeholders and other state agencies to determine the adequacy of state, federal and private wildfire response capacity. The department shall act to facilitate wildfire prevention and wildfire response communication and coordination between federal, state, local and private entities.

(2) Shall increase the department's wildfire readiness and response capacity, including increases to fire suppression response personnel, aviation assets and necessary administrative support personnel, to the extent the department receives funding for the increase.

(3) Shall, to the extent practicable, seek to leverage state moneys to obtain an increase in federal wildfire resources available to Oregon for effective initial response purposes.

(4) Shall consult with the office of the State Fire Marshal and with local fire defense board chiefs to assess the adequacy of available mutual aid to provide wildfire response on wildland-urban interface lands and to identify means for providing additional resources from the state or other entities to enhance wildfire response capacity on wildland-urban interface lands.

(5) Shall continually identify workforce development needs associated with wildfire risk mitigation and wildfire response and develop funding proposals for meeting those needs on a sustained basis. The identified workforce development needs must align with wildfire risk to provide an adequate level of wildfire protection, as described in ORS 477.062.

(6) May enter into cooperative agreements or contracts with a local or private entity for the purpose of assisting the entity to organize for purposes of wildfire risk mitigation or wildfire response, including, but not limited to, facilitating wildfire training and the acquisi-

tion of firefighting equipment for the entity and assisting with payment for liability insurance and other administrative expenses of the entity associated with wildfire risk mitigation or wildfire response.

SECTION 30b. (1) The office of the State Fire Marshal shall increase the office's wildfire readiness and response capacity to the extent the office receives funding for the increase, by means including:

(a) Increasing fire prevention and response personnel and fire administrative support personnel to address planning, communications, training, deployment and safety.

(b) Implementing innovative technologies and modernizing systems to expedite fire resource deployment in an efficient and safe manner.

(2) The State Fire Marshal may:

(a) Designate funding intended for the Oregon fire mutual aid system to support prepositioning of resources and costs.

(b) Enter into contracts with federal or state agencies, other states, political subdivisions, corporations and authorities having fire suppression jurisdiction for fire prevention, suppression, coordination and response.

WILDLAND-URBAN INTERFACE FIRE PROTECTION

SECTION 31. ORS 477.015 is amended to read:

477.015. [(1)] As used in **this section and** ORS [477.015 to 477.061] **477.025 and 477.027**, [unless the context otherwise requires,] "[forestland-urban] **wildland-urban** interface" [means] **has the meaning given that term in rule by the State Board of Forestry.** [a geographic area of forestland inside a forest protection district where there exists a concentration of structures in an urban or suburban setting.]

[(2) As used in ORS 477.015 to 477.057, unless the context requires otherwise:]

[(a) "Committee" means a county forestland-urban interface classification committee.]

[(b) "Governing body" means the board of county commissioners or county court of a county, as the case may be.]

SECTION 32. ORS 477.025 is amended to read:

477.025. The Legislative Assembly recognizes that the [forestland] **wildland-urban** interface in Oregon varies by condition, situation, fire hazard and risk, that different [forestland] **wildland-urban** interface fire protection problems exist across the state because of this variability, **and** that these different problems necessitate varied fire prevention and protection practices. [and that, in order to give recognition to such differences and their effect on the accomplishment of the public policy stated in ORS 477.023, certain classifications of the forestland-urban interface within the State of Oregon are established by ORS 477.027 to 477.057.]

SECTION 33. ORS 477.027 is amended to read:

477.027. (1) By [administrative] rule, **considering national best practices**, the State Board of Forestry shall establish:

(a) **A definition of "wildland-urban interface."**

(b) Criteria by which the [forestland-urban] **wildland-urban** interface [shall] **must** be identified and classified.

(2) The criteria [shall]:

(a) **Must** recognize differences across the state in fire hazard, fire risk and structural characteristics within the [forestland-urban] **wildland-urban** interface.

(b) **May not exclude a category of land from inclusion in the wildland-urban interface.**

(3) **Based on** the criteria [shall include not less than three nor more than], **the board shall establish** five classes of [forestland-urban] **wildland-urban** interface.

(4) **The classes must be integrated into the comprehensive statewide map described in section 7 of this 2021 Act.**

SECTION 33a. The State Board of Forestry shall adopt by rule the definition described in ORS 477.027 (1)(a), as amended by section 33 of this 2021 Act, not later than 100 days after the effective date of this 2021 Act.

SECTION 34. ORS 477.017, 477.018, 477.023, 477.029, 477.031, 477.052, 477.054, 477.057, 477.059, 477.060 and 477.061 are repealed.

STATE WILDFIRE PROGRAMS DIRECTOR

SECTION 35. (1) The Governor shall appoint a State Wildfire Programs Director to serve at the pleasure of the Governor.

(2) The duties of the director shall include:

(a) Overseeing implementation of requirements and authorization provided by this 2021 Act.

(b) Coordinating and integrating activities of state agencies and other entities that are required or authorized by this 2021 Act in order to optimize the efficiency and effectiveness of the activities.

(c) Ensuring compliance with deadlines set out in this 2021 Act.

(d) Monitoring and assessing any financial impacts of the activities on local jurisdictions and the equity of those financial impacts among the jurisdictions.

(e) Supervising staffing of the Wildfire Programs Advisory Council.

(f) Reporting at least every 60 days to the Governor, the President of the Senate, the Speaker of the House of Representatives and the chairs of relevant committees and interim committees of the Legislative Assembly to summarize progress on implementing the activities, note obstacles and opportunities and catalog possibilities for future improvements to further reduce wildfire risk in this state.

(g) Exploring additional opportunities to reduce wildfire risk, including but not limited to engaging with:

(A) Insurance companies regarding insurance policy coverage provisions, underwriting standards, insurance rates and any other topics relevant to enhancing the protection of property from wildfire at a reasonable cost.

(B) Electric utilities regarding further actions to protect public safety, reduce risk to electric company customers and promote electrical system resilience to wildfire damage.

(C) Congressional delegations and federal agencies to expand opportunities for cost-share partnerships for wildfire mitigation and develop strategies for improvements to federal fire management policies.

(h) Collaborating with the State Resilience Officer and participating in any relevant emergency preparedness advisory councils.

WILDFIRE PROGRAMS ADVISORY COUNCIL

SECTION 36. (1) As used in this section, “defensible space” has the meaning given that term in section 8 of this 2021 Act.

(2) There is established a Wildfire Programs Advisory Council to advise and assist the State Wildfire Programs Director by:

(a) Closely monitoring implementation of activities related to wildfire prevention and response, including receiving and evaluating agency reports related to wildfire prevention and response.

(b) Providing advice on potential changes to the activities in order to fulfill the goal of dramatically reducing wildfire risk in this state and ensuring that regional defensible space, building codes and land use applications are appropriate.

(c) Strengthening intergovernmental and multiparty collaboration and enhancing collaboration between governments and stakeholders on an ongoing basis.

(d) Developing strategies to enhance collaboration among governmental bodies and the general public.

(e) Assessing ways the statewide map of wildfire risk described in section 7 of this 2021 Act may inform development of building codes and land use laws, rules and decisions, in a regionally appropriate manner.

(f) Assessing the application of defensible space requirements to vineyards, crops and other cultivated vegetation.

(g) Reviewing Department of Land Conservation and Development findings and recommendations in the report required by section 11 of this 2021 Act and making additional recommendations related to potential updates to the statewide land use planning program, local comprehensive plans and zoning codes to incorporate wildfire risk maps and minimize wildfire risk to people, public and private property, businesses, infrastructure and natural resources.

(3) The council is not a decision-making body but instead is established to provide advice, assistance, perspective, ideas and recommendations to the State Wildfire Programs Director.

(4) The President of the Senate and Speaker of the House of Representatives shall jointly appoint 19 members to the council as follows:

(a) One member who represents county government.

(b) One member who is a land use planning director of a county that is wholly or partially within the wildland-urban interface.

(c) One member who represents city government.

(d) One member who is a land use planning director of a city that is wholly or partially within the wildland-urban interface.

(e) One member who represents fire chiefs and has experience with managing, fighting or preventing fire within the wildland-urban interface.

(f) One member who represents fire marshals and has experience with managing, fighting or preventing fire within the wildland-urban interface.

(g) One member who represents firefighters and has experience with managing, fighting or preventing fire within the wildland-urban interface.

(h) One member who represents rural residential property owners whose property is wholly or partially within the wildland-urban interface.

(i) One member who represents farming property owners whose property is wholly or partially within the wildland-urban interface.

(j) One member who represents ranching property owners whose property is wholly or partially within the wildland-urban interface.

(k) One member who represents forestland owners whose property is wholly or partially within the wildland-urban interface.

(L) One member who represents federally recognized Indian tribes with land wholly or partially within the wildland-urban interface.

(m) One member who represents a utility company.

(n) One member who represents environmental interests.

(o) One member who represents forest resiliency interests.

(p) One member who represents state or regional land use planning organizations.

(q) One member who represents land and housing development interests or real estate industry interests.

(r) One member who represents public health professionals.

(s) One member who represents the environmental justice community.

(5) The presiding officers shall provide public notice of an opportunity for interested parties to submit names of interest for appointment to the council.

(6) At least 30 days before appointing a member, the presiding officers shall consult in good faith with the minority leaders of the Senate and House of Representatives on the appointment.

(7) The term of service for each member is four years.
(8) The members are eligible for reappointment.
(9) The council shall elect a chairperson and vice chairperson to serve for one-year terms.

(10) The members shall serve on the council as volunteers and are not entitled to reimbursement for expenses.

(11) The Department of Consumer and Business Services, Department of Land Conservation and Development, office of the State Fire Marshal and State Forestry Department shall each provide 15 percent of the time of a full-time equivalent employee to:

- (a) Cooperatively staff the council.
- (b) Attend council meetings as informational resources.
- (c) Assist with drafting reports at the request of the council.
- (d) Support the work of the State Wildfire Programs Director.

(12) The Oregon State University Extension Service shall designate a person to serve as staff for the council.

(13) Each October the council shall submit a report to the Governor and appropriate committees or interim committees of the Legislative Assembly that describes progress on implementing program activities related to defensible space, building codes, land use and community emergency preparedness and that recommends improvements.

SECTION 37. (1) On or before September 1, 2021, members of the Wildfire Programs Advisory Council must be appointed as described in section 36 (4) of this 2021 Act.

(2) On or before November 1, 2021, the council must begin meeting regularly.

SECTION 38. Notwithstanding section 36 (7) of this 2021 Act, the term of service for the members first appointed from each category described in section 36 (4)(a), (c), (e), (g), (i), (k), (m), (o), (q) and (s) of this 2021 Act is three years.

SECTION 39. The Wildfire Programs Advisory Council must make the first report described in section 36 (13) of this 2021 Act in October 2022.

CONFORMING AMENDMENTS

SECTION 40. For purposes of the sellers' property disclosure statements described in ORS 105.464, "forestland-urban interface" has the same meaning as "wildland-urban interface," as defined in ORS 477.015.

SECTION 41. ORS 197.716 is amended to read:

197.716. (1) As used in this section:

(a) "Economic opportunity analysis" means an analysis performed by a county that:

(A) Identifies the major categories of industrial uses or other employment uses that could reasonably be expected to expand or locate in the county based on a review of trends on a national, state, regional or county level;

(B) Identifies the number of sites by type reasonably expected to be needed to accommodate the expected employment growth based on the site characteristics typical of expected uses;

(C) Estimates the types and amounts of industrial uses and other employment uses likely to occur in the county based on subparagraphs (A) and (B) of this paragraph and considering the county's economic advantages and disadvantages, including:

- (i) Location, size and buying power of markets;
- (ii) Availability of transportation facilities for access and freight mobility;
- (iii) Public facilities and public services;
- (iv) Labor market factors;
- (v) Access to suppliers and utilities;
- (vi) Necessary support services;
- (vii) Limits on development due to federal and state environmental protection laws; and
- (viii) Educational and technical training programs;

(D) Assesses community economic development potential through a public process in conjunction with state agencies and consistent with any categories or particular types of industrial uses and other employment uses desired by the community as identified in an existing comprehensive plan;

(E) Examines existing firms in the county to identify the types of sites that may require expansion;

(F) Includes an inventory of vacant and developed lands within the county designated for industrial use or other employment use, including:

(i) The description, including site characteristics, of vacant or developed sites within each plan or zoning district; and

(ii) A description of any development constraints or infrastructure needs that affect the buildable area of sites in the inventory; and

(G) Identifies additional potential sites for designation and rezoning that could reasonably accommodate expected industrial uses and other employment uses that cannot be met by existing inventories.

(b) "Industrial use" means industrial employment activities, including manufacturing, assembly, fabrication, processing, storage, logistics, warehousing, importation, distribution and transshipment and research and development.

(c) "Listed county" means Baker, Gilliam, Grant, Harney, Lake, Malheur, Sherman, Union, Wallowa or Wheeler County.

(d) "Other employment use" means all nonindustrial employment activities, including small scale commercial use, wholesale, service, nonprofit, business headquarters, administrative, governmental or employment activities that serve the medical, educational, social service, recreational or security industries and that occupy retail, office or flexible building types of any size or multibuilding campuses.

(e) "Reasonably be expected to expand or locate in the county" means that the county possesses the appropriate locational factors for the use or category of use.

(f)(A) "Small scale commercial use" means the low-impact use of land primarily for the retail sale of products or services, including offices.

(B) "Small scale commercial use" does not include use of land for factories, warehouses, freight terminals or wholesale distribution centers.

(2) A listed county that has adopted an economic opportunity analysis as part of its comprehensive plan may amend its comprehensive plan, land use regulations and zoning map to designate not more than 10 sites outside an urban growth boundary that cumulatively total not more than 50 acres of land if the sites were identified in any economic opportunity analysis as additional potential sites for industrial uses or other employment uses in order to allow for industrial uses and other employment uses without requiring an exception under ORS 197.732 to any statewide land use planning goals related to:

(a) Agriculture;

(b) Forest use; or

(c) Urbanization.

(3) A county may not designate a site under subsection (2) of this section:

(a) On any lands designated as high-value farmland as defined in ORS 195.300;

(b) Unless the county complies with ORS 197.714; and

(c) If any portion of the proposed site is for lands designated for forest use, unless the county:

(A) Notifies the State Forester in writing not less than 21 days before designating the site; and

(B) Cooperates with the State Forester in:

(i) Updating and classifying [*forestland*] **wildland**-urban interface lands in and around the site;

(ii) Taking necessary steps to implement or update the [*forestland*] **wildland**-urban interface fire protection system in and around the site as described in ORS [477.015 to 477.061] **477.027**; and

(iii) Implementing other fire protection measures authorized by the State Forester.

(4) A county may not amend its comprehensive plan, land use regulations or zoning map under this section to allow a use that would conflict with an administrative rule adopted for the purpose of implementing the Oregon Sage-Grouse Action Plan and Executive Order 15-18.

SECTION 42. ORS 205.130 is amended to read:

205.130. The county clerk shall:

(1) Have the custody of, and safely keep and preserve, all files and records of deeds and mortgages of real property and a record of all maps, plats, contracts, powers of attorney and other interests affecting the title to real property required or permitted by law to be recorded.

(2) Record, or cause to be recorded, in a legible and permanent manner, and keep in the office of the county clerk, all:

(a) Deeds and mortgages of real property, powers of attorney and contracts affecting the title to real property, authorized by law to be recorded, assignments thereof and of any interest therein when properly acknowledged or proved and other interests affecting the title to real property required or permitted by law to be recorded;

(b) Certificates of sale of real property under execution or order of court, or assignments of previously recorded certificates or of any interest in real property, when properly acknowledged or proved;

(c) Certified copies of death records of any person appearing in the county records as owning or having a claim or interest in land in the county. A certified copy of a death record recorded in the deed records of a county under this subsection is a public record and is not subject to the disclosure limitations under ORS 432.350;

(d) Instruments presented for recording by the United States or the State of Oregon, or a political subdivision of either, that affect title to or an interest in real property or that lawfully concern real property; **and**

(e) Instruments recognized under state law or rule or federal law or regulation as affecting title to or an interest in real property if the instrument is properly acknowledged or proved[; *and*].

[*f) Orders from a county forestland-urban interface classification committee filed under ORS 477.052.*]

(3) Keep and maintain:

(a) Deed and mortgage records;

(b) Statutory lien records;

(c) A record called the County Clerk Lien Record in which the following shall be recorded:

(A) The warrants and orders of officers and agencies that are required or permitted by law to be recorded; and

(B) All instruments presented for recordation when required or permitted by law to be recorded that affect the title to or an interest in real property, other than instruments recorded in the deed and mortgage records or the statutory lien records;

(d) Releases, satisfactions, assignments, amendments and modifications of recorded instruments; and

(e) Other instruments required or permitted by law to be recorded not affecting interests in real property.

(4) Perform all the duties in regard to the recording and indexing of deeds and mortgages of real property, contracts, abstracts of judgments, notices of pendency, powers of attorney and other interests when required or permitted by law to be recorded that affect the title of real property, and in regard to the entry of satisfaction and discharge of the same, together with other documents required or permitted by law to be recorded.

(5) Incur no civil or criminal liability, either personally or in an official capacity, for recording an instrument that does not comply with the provisions of law that require or allow the recording of the instrument.

SECTION 43. ORS 477.281 is amended to read:

477.281. (1) The obligation of an owner of timberland or grazing land for payment of assessments and taxes for fire protection of forestland is limited to:

(a) The payment of moneys pursuant to ORS 321.015 (2), 477.277, 477.295, 477.760 (4) and 477.880 to maintain the Oregon Forest Land Protection Fund; and

(b) The payment of forest protection district assessments pursuant to ORS [477.060 and] 477.205 to 477.281.

(2) As used in this section, “obligation of an owner of timberland or grazing land for payment of assessments and taxes for fire protection of forestland” does not include the duties or obligations of the owner under ORS 477.066, 477.068 or 477.120 or the obligations of an owner of land included in a rural fire protection district pursuant to ORS 478.010.

APPROPRIATIONS **(State Forestry Department)**

SECTION 44. Notwithstanding any other provision of law, the General Fund appropriation made to the State Forestry Department by section 1 (2), chapter __, Oregon Laws 2021 (Enrolled Senate Bill 5518), for the biennium beginning July 1, 2021, for fire protection, is increased by \$10,611,235, for carrying out the provisions of section 30a of this 2021 Act.

SECTION 45. Notwithstanding any other law limiting expenditures, the limitation on expenditures established by section 2 (2), chapter __, Oregon Laws 2021 (Enrolled Senate Bill 5518), for the biennium beginning July 1, 2021, as the maximum limit for payment of expenses from fees, moneys or other revenues, including Miscellaneous Receipts and federal funds from the United States Forest Service for fire protection and for research projects, but excluding lottery funds and federal funds not described in section 2, chapter __, Oregon Laws 2021 (Enrolled Senate Bill 5518), collected or received by the State Forestry Department, for fire protection, is increased by \$11,514,649, for carrying out the provisions of section 30a of this 2021 Act.

SECTION 46. Notwithstanding any other provision of law, the General Fund appropriation made to the State Forestry Department by section 1 (3), chapter __, Oregon Laws 2021 (Enrolled Senate Bill 5518), for the biennium beginning July 1, 2021, for federal forest restoration, is increased by \$27,990,713, for carrying out the provisions of sections 7, 18, 20, 24 and 30a of this 2021 Act.

SECTION 47. Notwithstanding any other law limiting expenditures, the limitation on expenditures established by section 2 (1), chapter __, Oregon Laws 2021 (Enrolled Senate Bill 5518), for the biennium beginning July 1, 2021, as the maximum limit for payment of expenses from fees, moneys or other revenues, including Miscellaneous Receipts and federal funds from the United States Forest Service for fire protection and for research projects, but excluding lottery funds and federal funds not described in section 2, chapter __, Oregon Laws 2021 (Enrolled Senate Bill 5518), collected or received by the State Forestry Department, for agency administration, is increased by \$1,467,358, for carrying out the provisions of sections 7, 18, 20 and 30a of this 2021 Act.

SECTION 48. In addition to and not in lieu of any other appropriation, there is appropriated to the State Forestry Department, for the biennium beginning July 1, 2021, out of the General Fund, the amount of \$15,000,000, for the purpose of offsetting potential increases in landowner forest patrol assessments under ORS 477.270 due to the implementation of the provisions of section 30a of this 2021 Act.

SECTION 49. Notwithstanding any other provision of law, the General Fund appropriation made to the State Forestry Department by section 1 (6), chapter __, Oregon Laws 2021 (Enrolled Senate Bill 5518), for the biennium beginning July 1, 2021, for the equipment pool, is increased by \$474,884, for carrying out the provisions of section 30a of this 2021 Act.

(Public Utility Commission)

SECTION 50. Notwithstanding any other law limiting expenditures, the amount of \$324,286 is established for the biennium beginning July 1, 2021, as the maximum limit for payment of expenses from fees, moneys or other revenues, including Miscellaneous Receipts, but excluding lottery funds and federal funds, collected or received by the Public Utility Commission, for carrying out the provisions of sections 2 and 3 of this 2021 Act.

(Department of State Police,
Office of the State Fire Marshal)

SECTION 51. Notwithstanding any other provision of law, the General Fund appropriation made to the Department of State Police by section 1 (1), chapter __, Oregon Laws 2021 (Enrolled House Bill 5028), for the biennium beginning July 1, 2021, for patrol services, criminal investigations, gaming enforcement and the office of the State Fire Marshal, is increased by \$13,506,889, for carrying out the provisions of sections 8a, 10 and 30b (1) of this 2021 Act.

SECTION 52. Notwithstanding any other provision of law, the General Fund appropriation made to the Department of State Police by section 1 (1), chapter __, Oregon Laws 2021 (Enrolled House Bill 5028), for the biennium beginning July 1, 2021, for patrol services, criminal investigations, gaming enforcement and the office of the State Fire Marshal, is increased by \$7,000,000, for carrying out the provisions of section 8a (5) of this 2021 Act.

SECTION 53. In addition to and not in lieu of any other appropriation, there is appropriated to the Department of State Police, office of the State Fire Marshal, for the biennium beginning July 1, 2021, out of the General Fund, the amount of \$25,000,000, for deposit in the Community Risk Reduction Fund established by section 9 of this 2021 Act.

SECTION 54. Notwithstanding any other law limiting expenditures, the amount of \$25,000,000 is established for the biennium beginning July 1, 2021, as the maximum limit for payment of expenses by the Department of State Police, office of the State Fire Marshal, from the Community Risk Reduction Fund established by section 9 of this 2021 Act for the purpose of carrying out the provisions of section 8a (6) of this 2021 Act.

SECTION 55. Notwithstanding any other provision of law, the General Fund appropriation made to the Department of State Police by section 1 (1), chapter __, Oregon Laws 2021 (Enrolled House Bill 5028), for the biennium beginning July 1, 2021, for patrol services, criminal investigations, gaming enforcement and the office of the State Fire Marshal, is increased by \$55,000,000, for carrying out the provisions of section 30b of this 2021 Act that are related to the Oregon fire mutual aid system.

(Department of Environmental Quality)

SECTION 56. Notwithstanding any other provision of law, the General Fund appropriation made to the Department of Environmental Quality by section 1 (1), chapter __, Oregon Laws 2021 (Enrolled Senate Bill 5516), for the biennium beginning July 1, 2021, for air quality, is increased by \$3,322,828, for carrying out the provisions of sections 13, 13a and 13b of this 2021 Act.

(Department of Human Services)

SECTION 57. Notwithstanding any other provision of law, the General Fund appropriation made to the Department of Human Services by section 1 (1), chapter __, Oregon Laws 2021 (Enrolled Senate Bill 5529), for the biennium beginning July 1, 2021, for central services, is increased by \$5,187,411, for carrying out the provisions of sections 14, 14a and 14b of this 2021 Act.

(Oregon Health Authority)

SECTION 58. Notwithstanding any other provision of law, the General Fund appropriation made to the Oregon Health Authority by section 1 (1), chapter __, Oregon Laws 2021 (Enrolled House Bill 5024), for the biennium beginning July 1, 2021, for health systems, health policy and analytics and public health, is increased by \$4,768,812, for carrying out the provisions of sections 14, 14a, 14b, 15 and 15a of this 2021 Act.

(Oregon Military Department)

SECTION 59. Notwithstanding any other provision of law, the General Fund appropriation made to the Oregon Military Department by section 1 (3), chapter __, Oregon Laws 2021 (Enrolled Senate Bill 5535), for the biennium beginning July 1, 2021, for emergency management, is increased by \$700,003, for carrying out the provisions of section 17 of this 2021 Act.

(Higher Education Coordinating Commission,
Oregon State University)

SECTION 60. Notwithstanding any other provision of law, the General Fund appropriation made to the Higher Education Coordinating Commission by section 1 (11), chapter __, Oregon Laws 2021 (Enrolled Senate Bill 5528), for the biennium beginning July 1, 2021, for distribution to public university statewide programs, is increased by \$1,138,040, for distribution to Oregon State University for carrying out the provisions of sections 7, 12c and 18 of this 2021 Act.

SECTION 61. Notwithstanding any other provision of law, the General Fund appropriation made to the Higher Education Coordinating Commission by section 1 (1), chapter __, Oregon Laws 2021 (Enrolled Senate Bill 5528), for the biennium beginning July 1, 2021, for Higher Education Coordinating Commission programs, is increased by \$643,668, for carrying out the provisions of section 22 of this 2021 Act.

SECTION 62. In addition to and not in lieu of any other appropriation, there is appropriated to the Higher Education Coordinating Commission, for the biennium beginning July 1, 2021, out of the General Fund, the amount of \$10,000,000, for deposit in the Oregon Conservation Corps Fund established by section 23 of this 2021 Act.

SECTION 63. In addition to and not in lieu of any other appropriation, there is appropriated to the Higher Education Coordinating Commission, for the biennium beginning July 1, 2021, out of the General Fund, the amount of \$1,000,000, to match private donations that are donated for the purposes of funding grant-supported projects related to the Oregon Conservation Corps Program established by section 21 of this 2021 Act.

(Office of the Governor)

SECTION 64. Notwithstanding any other provision of law, the General Fund appropriation made to the Office of the Governor by section 1, chapter __, Oregon Laws 2021 (Enrolled Senate Bill 5520), for the biennium beginning July 1, 2021, is increased by \$497,541, for carrying out the provisions of section 35 of this 2021 Act.

CAPTIONS

SECTION 65. The unit captions used in this 2021 Act are provided only for the convenience of the reader and do not become part of the statutory law of this state or express any legislative intent in the enactment of this 2021 Act.

EMERGENCY CLAUSE

SECTION 66. This 2021 Act being necessary for the immediate preservation of the public peace, health and safety, an emergency is declared to exist, and this 2021 Act takes effect on its passage.

Passed by Senate June 25, 2021

.....
Lori L. Brocker, Secretary of Senate

.....
Peter Courtney, President of Senate

Passed by House June 26, 2021

.....
Tina Kotek, Speaker of House

Received by Governor:

.....M,....., 2021

Approved:

.....M,....., 2021

.....
Kate Brown, Governor

Filed in Office of Secretary of State:

.....M,....., 2021

.....
Shemia Fagan, Secretary of State

Acting State Forester, Board Member, and Public Comments

Agenda Item No.:	2
Work Plan:	Fire Protection
Topic:	Evolving Topic: Governor’s Council on Wildfire Response
Presentation Title:	Wildland Urban Interface and Risk Mapping
Date of Presentation:	September 8, 2021
Contact Information:	Tim Holschbach, Deputy Chief – Policy & Planning 503-945-7434, Tim.J.Holschbach@Oregon.gov or Doug Grafe, Chief – Fire Protection 503-945-7351, Doug.Grafe@Oregon.gov Dr. Chris Dunn, Associate Professor 541-951-8910, chris.dunn@oregonstate.edu

SUMMARY

The purpose of this informational item is for the Department to provide the Board an update on the rulemaking progress and Oregon State University to present a synthesis of science. This synthesis will include characteristics of home loss to wildfires, wildfire hazard and risk mapping, and social vulnerability and economic distress.

BACKGROUND

Following the 2013-2015 fire seasons, two parallel review processes were initiated the Secretary of State Audit and the Fire Program Review. Both of these efforts were aligned to help continue a highly functioning wildfire protection system for Oregon into the future. The Department has fully embraced the findings and recommendations from both final reports. The 2017-2018 fire seasons experience reinforced the need for the agency to continue efforts on these recommendations. Additionally, the Governor issued Executive Order 19-01 creating the Governor’s Council on Wildfire Response.

- The Department’s 2015 Fire Protection Program Review - Response Committee was coordinated with all agency partners through a transparent process including legislators, governor’s office, forest landowners, and cooperators to reach for continuous improvement in Oregon’s complete and coordinated fire protection system;
- The Secretary of State Performance Audit offered a third-party review of the Department’s ability to sustain its multiple missions, as increased demand to support the fire protection effort has been required from the entire agency;
- The Governor’s Council on Wildfire Response offered 37 recommendations to improve Oregon’s wildfire protection system. Many of the recommendations required legislative action to be carried out.

Senate Bill 762 captured many of the recommendations of the Governor's Council on Wildfire Response, providing legislative direction to the Board of Forestry regarding the wildland-urban interface; statewide fire risk mapping; prescribed fire; directed the Department to review and clarify the enforcement of rules pertaining to forestland; and baseline standards for unprotected and under-protected lands in Oregon.

OVERVIEW OF RULEMAKING TO DATE

Statewide map of Wildfire Risk

- Rules advisory committee meeting bi-weekly started August 5, 2021. Initial meeting covered introductions, process overview, differences between the two Wildland-Urban Interface rules advisory committees, charter overview and feedback.

Definition of Wildland-Urban Interface

- Rules advisory committee met weekly from July 27, 2021, through August 17, 2021.
- Draft Wildland-Urban Interface definition presented to the Board August 24th.
- Rules advisory committee meeting bi-weekly starting September 7, 2021, to begin development of criteria to further define and identify the Wildland-Urban Interface boundaries.

Prescribed Fire

- Rules advisory committee meeting monthly starting August 18, 2021.

Presentation by Oregon State University

- Introductions by College of Forestry Dean DeLuca
- Characteristics of home loss to wildfires – presented by Dr. Erica Fischer
- Wildfire hazard and risk mapping – presented by Dr. Chris Dunn
- Social vulnerability and economic distress – presented by Dr. Mindy Crandall

All rulemaking related documents, agendas, presentations, and meeting summaries can be found at <https://www.oregon.gov/odf/board/Pages/rac.aspx> .

Oregon State University is coordinating and supporting the Department in multiple Rulemaking Advisory Committees. Dr. Chris Dunn will provide a briefing on current science being used to support the rulemaking process.

STAFF REPORT

Agenda Item No.:	3
Work Plan:	Fire Protection
Topic:	Ongoing Topic; Fire Season Update
Presentation Title:	2021 Fire Season Update
Date of Presentation:	September 8, 2021
Contact Information:	Doug Grafe, Chief, Fire Protection Division 503-945-7204; doug.grafe@oregon.gov

SUMMARY

Oregon revised statutes define the Department's Fire Protection policy, which requires a complete and coordinated system. This system relies on the partnership between the Department and forest landowners with a commitment to ongoing communication and collaboration with many other state and federal agencies. Fire management leaders from the Department will provide a briefing on some of the ongoing coordination and an up-to-date fire season status report during this agenda item.

Agenda Item No.:	4
Work Plan:	Administrative
Topic:	Macias, Gini & O'Connell (MGO) Recommendations
Presentation Title:	MGO Implementation Management Plan Progress
Date of Presentation:	September 8, 2021
Contact Information:	Bill Herber, Deputy Director for Administration (503) 945-7203 bill.herber@oregon.gov Sabrina Perez, Senior Strategy Manager (503) 945-7311 sabrina.perez@oregon.gov Cal Mukumoto; The Mukumoto Consultancy (541) 217-4901 mukumoto@gmail.com Leah Cochran, CPA; Director, MGO (916) 642-7109 ljue@mgocpa.com

SUMMARY

The Department will provide introductions to two external consultants that will be providing direct technical assistance, oversight, and reporting functions for the MGO Implementation Management Plan project and an update on plan progress and coordination.

CONTEXT

At the June 9, 2021, Board meeting, the Oregon Department of Forestry (Department) presented results of an independent external review of the agency's financial management structure and processes related to wildfire costs as conducted by Macias, Gini, & O'Connell and an accompanying implementation management plan developed to address the recommendations.

As the 2021 Legislative Session closed in late June, the Department received additional funding through its 2021-23 Legislatively Adopted Budget to help implement the recommendations. Details of the investments are included further in this report. As the Department gratefully embraces this influx of funding and actively adjusts its organizational structure to begin recruiting the new positions dedicated to this project, implementation of the recommendations has continued moving forward as defined in the management plan.

BACKGROUND

In late 2019, Governor Kate Brown established the Forestry Financial Oversight Team to support the Department of Forestry in the financial management of increasingly complex and expensive wildfire season costs. The Team pursued two primary tasks: 1) hire an independent contractor to provide recommendations for structural changes to expedite and standardize the processing of financial transactions associated with wildfire costs, and 2) evaluate options for a financial structure and cash flow management system that recognizes the reality of seasonal borrowing to support wildfire response.

Macias, Gini, & O'Connell LLP (MGO), a certified public accountant (CPA) and advisory firm, was hired by the Department of Administrative Services to assess the Department of Forestry's (ODF) fire finance operations, including accounts receivable, accounts payable, and district fire budgeting. MGO began their engagement with ODF in December 2019, conducted onsite visits at our Salem Headquarters office and multiple Field Protection District offices through spring, presented a preliminary set of findings, recommended process improvements in summer, and refined recommendations in late 2020.

ODF collaborated with its leadership to develop management responses to the recommendations and subsequently began efforts to define sequenced implementation actions to address the recommendations and mitigate risk. The external review by MGO was completed, and a final report was published on April 22, 2021, and subsequently presented to the Oregon Legislature on May 5.

MGO's report highlighted 28 observations and recommendations in the five original areas of concern: Budgeting, Financial Resources, Information Technology, Oversight, and Policies and Procedures. The observations fall into three risk categories (based on severity and impact to operations), with 12 in the high category, 12 medium, and 4 in the low.

ODF developed a comprehensive Implementation Management Plan consisting of critical deliverables and actions necessary for the agency to mitigate risk, implement structural changes, and refine our financial processes to reflect the reality of increasingly large wildfires. It is anticipated this plan will have multiple iterations as each recommendation progresses through a lifecycle of cascading refinement in planning and milestone achievements are accomplished. The first version of this comprehensive plan was presented to the Board in June, and an updated version will be shared in September.

Additional funding was provided to ODF through its 2021-23 Legislatively Adopted Budget to support the implementation of the recommendations. These investments are detailed in the 2021 Senate Bill 5518 to include: 1) Policy Option Package 200 transfers eight positions to Agency Administration from the Fire Protection Division as recommended by MGO and establishes four new financial permanent, full-time positions to ensure enhanced financial oversight for fire finance functions and the agency overall; 2) Policy Option Package 173 continues work in administrative modernization, establishing seven new positions to align and enhance administrative functions across the department by streamlining processes, addressing outdated information systems, and providing agency-wide data management services; and 3) Policy Option Package 801 includes three limited-duration positions to provide dedicated capacity to recommendation implementation and an additional \$500,000 to continue the contractual relationship with MGO to provide direct implementation, technical assistance, oversight, and reporting as directed by a budget note.

In response to these investments by the Legislature, ODF is adjusting its organizational structure and implementation approach to incorporate and leverage the new positions while sustaining core business and MGO project management functions. Recruitment processes are actively underway for the first-tier jobs with announcements opening in the next month. ODF has recently hired two external consultants to support implementation efforts: Cal Mukumoto with The Mukumoto Consultancy and Macias, Gini, and O'Connell LLP.

Cal Mukumoto is a management consultant with a diverse background solving complex business problems in economic and natural resource sectors in the realm of public, private, and tribal governments, and experience in bridging success across organizations through innovation in business processes and strategically assembling teams suited to address challenging and controversial projects. Cal's role with ODF is to: provide oversight, affirmation, and accountability of the Management Implementation Plan related to the MGO recommendations, report on progress and results as requested, assure that agency financial reporting and accountability needs are met, review financial reports and provide guidance to assure ODF is communicating agency solvency concerns and large fire funding status, engage in change management services relative to recommendation implementation, add capacity to support the agency in aligning priority work and organizational structure to implement the recommendations fully, and to overall help set the next state forester up for success and decision space on how to organize moving forward.

Leah Cochran, CPA, and Director for Macias, Gini & O'Connell LLP (MGO), has been working with ODF through the duration of the original assessment and review. ODF is actively securing a Work Order Contract with MGO through the state's procurement processes. MGO has an existing statewide price agreement with the State of Oregon, providing ease in execution. Services to be provided under the contract will include as assessment of ODF's implementation efforts, identification of improvements or gaps in desired outcomes of the MGO report and the implementation management plan, recommendations to adjust deliverables or timelines of the project in alignment with priorities identified by MGO, progress monitoring and reporting both internally and externally, collaborative consultation on the context of MGO recommendations, direct technical assistance on implementation deliverables as requested by ODF, and formal presentations to the Board of Forestry and the Oregon Legislature, Joint Committee on Ways & Means at regular intervals throughout the biennium.

Both Cal Mukumoto and Leah Cochran will be attending the September board meeting, providing an overview of services, their work with ODF, and an opportunity for the Board to engage in these professional relationships moving forward.

RECOMMENDATION

This is an informational item.

NEXT STEPS

ODF will continue to refine the Implementation Management Plan, report on milestone deliverables and progress, and adjust organizational support to fully implement MGO's recommendations. The upcoming October planning retreat of the Board will include discussion on Board priorities for MGO implementation, scheduling preferences relative to policy development defined in MGO Recommendation #16, and preferences in reporting intervals for the two-year 2022-2024 Board Administrative Work Plan.

ATTACHMENT

- 1) Department of Forestry MGO Implementation Management Plan, Version 2
(available before the meeting)

Oregon Department of Forestry



MGO Review and Assessment Recommendations Implementation Management Plan Version 2 September 8, 2021

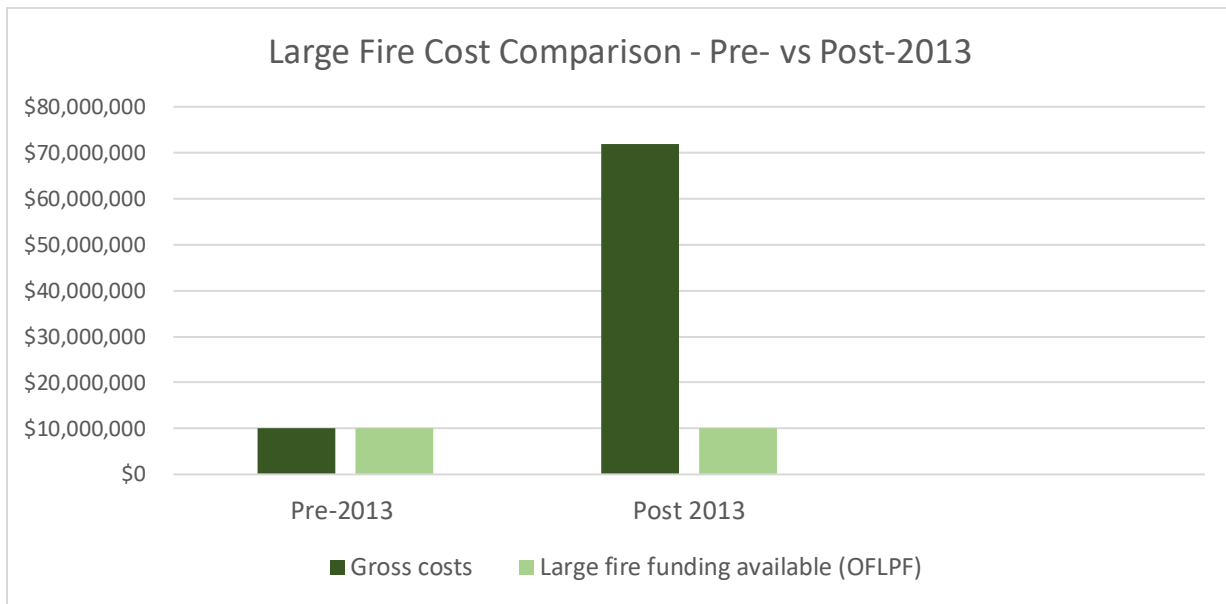
Contents

Background	3
Context for the Implementation Management Plan	5
Change Log.....	7
Recommendation #1 - Cost Share Agreements (Consistency)	9
Recommendation #2 - Cost Share Settlements (Signature Authority)	11
Recommendation #3 - Cost Share Collections.....	13
Recommendation #4 - Cash Flow Projections	15
Recommendation #5 - Accounts Receivable Collections.....	17
Recommendation #6 - Policy & Procedure Storage.....	19
Recommendation #7 - Cost Estimates	21
Recommendation #8 - BRIO Real-time	23
Recommendation #9 - Accounts Payable	25
Recommendation #10 - Electronic Records.....	27
Recommendation #11 - IT Systems.....	29
Recommendation #12 - ACC Rate Assessments	31
Recommendation #13 - Oversight Reports - AP and AR systems	33
Recommendation #14 - Training (Training/Onboarding for accounting personnel in Salem and Field)....	35
Recommendation #15 - Field Protection Districts Oversight	37
Recommendation #16 - Board of Forestry Oversight	39
Recommendation #17 - District Finance Accounting Oversight	41
Recommendation #18 - Change Management (Incident Finance Audits).....	44
Recommendation #19 - Invoicing	46
Recommendation #20 - Finance / Accounting (Org Structure)	48
Recommendation #21 - Finance Skillsets	51
Recommendation #22 – OFRS	53
Recommendation #23 - Budgeting Requirements.....	55
Recommendation #24 - Budgeting Requirements 2.....	57
Recommendation #25 - Operating Association Advances.....	59
Recommendation #26 - FEMA Claim Status	61
Recommendation #27 - OregonBuys.....	63
Recommendation #28 - Encumbrances	65

Background

Oregon’s large fire funding structure was designed for the average fire season of a decade ago. Under the current structure, the Department of Forestry starts the fire season with \$10 million in cash on hand for suppression of large fires. These funds come from landowner fees paid into the Oregon Forestland Protection Fund (OFLPF). This approach worked fine when average gross costs for fighting large fires was \$10 million or less, as was the case prior to 2013. Since then, the state has seen a significant change in the intensity of wildfires in recent years, and more extreme fire behavior has increased suppression costs by orders of magnitude.

Since 2013, the average gross fire season cost has risen to \$72 million. The primary method to cover vendor payments and other essential expenses until third-party reimbursable costs are collected has been the department’s main Forestry cash account. This fund combines multiple funds, in particular the State Forests Division’s Forest Development Fund, and serves as an operating reserve against above average spikes in large fire costs. However, this approach has depleted the cash available to the department to cover other key operating expenses until the other large fire revenue sources (General Fund, other agency billings, Federal Emergency Management Agency (FEMA) reimbursements, catastrophic insurance, and responsible party recoveries) can be collected. This is why paying for large fire is not solely a fire protection issue; all of our other divisions contribute budgeted funds to carry large-fire suppression expenditures, often at the expense of maintaining normal operations. This situation exists until the department can collect costs from partners or from the General Fund via the Emergency Board.



Given that these large fire seasons have been occurring back-to-back, the department has sustained continued shortfalls in its cash account to cover these costs. Typically, these shortfalls

have been addressed (approximately \$60 million annually) by using a line of credit from the Oregon State Treasury to provide the cash needed to maintain day-to-day operations throughout the agency.

Treasury lines of credit are structured to last one fiscal year and must be paid in full at the end of the fiscal year in order to be renewed. The first significant cash flow issue for the department occurred in 2014, following the \$100 million 2013 fire season. Since the line of credit came due mid-biennium, the department did not have cash on hand to pay the line of credit in full. At that time, the issue was addressed by converting the line of credit to a loan, which allowed the debt to be carried over the fiscal year close and ultimately paid off in that subsequent year.

In 2018, the department accrued over \$100 million in gross large-fire suppression costs, and most critically was that these costs were incurred in the last year of the biennium when available cash and remaining General Fund appropriations were at their lowest. Due to this situation, the department was required to secure a second line of credit with the Oregon State Treasury. Without the \$90 million in reimbursements from 2018, as well as carrying the cumulative debt of previous fire seasons, the department found itself in a situation where it did not have the cash available to pay off one of the lines of credit in June 2019. Working with the Oregon State Treasury, the Chief Financial Office (CFO) and the Emergency Fire Cost Committee, a short-term solution was found to avoid default on the credit line and position the department to prepare for large-fire suppression costs for the 2019 fire season. The solution involved paying off much of the line of credit with the department's available cash on hand and through a loan from the Oregon Forest Land Protection Fund and renewing the remaining balance of \$25 million until April 2020. The Treasury could not increase the line of credit, as they would be issuing credit with the full knowledge that the department would likely not be able to meet the terms of repayment due to our current funding structure. The department also implemented stringent cost containment measures to best manage its limited remaining funds to maximize the cash on hand available for the 2020 fire season and kept those measures in place for nearly a year. This approach, however, did have department-wide impacts on the department's ability to maintain and upgrade equipment and facilities, and limited training and professional development opportunities.

In addition to carrying the debt of large fire, the department is also responsible for invoicing and collecting all of that debt. Much like the funding structure, the department's fire finance function was built for the needs of pre-2013 fire seasons, which means the business processes and staffing levels are insufficient to handle today's fire season costs. As fire seasons have become more devastating and expensive, the cost accounting required to recover funds outpaced the department's capacity. Capacity limitations also limited the ability to dedicate time and resources to adapting business practices to help mitigate cash flow risks.

Context for the Implementation Management Plan

In late 2019, Governor Brown established the Forestry Financial Oversight Team to support the Department of Forestry in financial management of increasingly complex and expensive wildfire season costs. The team was given two primary tasks: 1) Work with an independent contractor to address the backlog of fire-related receivables and provide recommendations for structural changes to expedite and standardize the processing of financial transactions associated with wildfire costs, and 2) Evaluate options for a financial structure for managing seasonal borrowing and costs to support wildfire response.

Macias, Gini, & O'Connell LLP (MGO), a CPA and advisory firm, was hired by the Department of Administrative Services to perform a review and assessment of the Department of Forestry's fire finance operations, including accounts receivable, accounts payable, and district fire budgeting. Here is an overview of the key touch points between ODF and MGO.

- Engagement began in December 2019.
- Conducted onsite visits at ODF's Salem Headquarters and multiple district offices through spring 2020,
- MGO presented a preliminary set of findings and recommended process improvements to ODF in summer 2020.
- Refined recommendations in late 2020.
- Published its final report on April 22, 2021 and presented it to the Joint Committee on Ways and Means, Subcommittee on Natural Resources on May 5, 2021.

ODF collaborated with its leadership across the organization to develop the management responses to the recommendations and subsequently began efforts to define sequenced implementation actions to operationalize the recommendations and mitigate risk.

MGO's report highlighted 28 observations and recommendations in five areas of concern: Budgeting, Financial Resources, Information Technology, Oversight, and Policies and Procedures. The observations fall into three risk categories (based on severity and impact to operations), with 12 being in the high category, 12 medium and 4 in low.

Based on preliminary work with MGO, and continued development upon receipt of the final report, ODF has developed a comprehensive implementation management plan (IMP) consisting of key deliverables and actions necessary for the agency to mitigate risk, implement structural changes, and refine our financial processes to reflect the reality of increasingly large wildfires. Once the steps of this plan are complete, the issues identified by MGO that are in control of the department (not dependent on legislative or other external actions) will be fully addressed and the resultant outcomes documented.

In addition to outlining the effort needed to resolve the observations made through MGO's assessment, the IMP takes a broader view of the risks and impacts the recommendations are

trying to address to factor in further reaching process improvement efforts. By increasing the breadth and depth of some of the recommend solutions, the department can benefit from increased efficiencies, tangential improvements and more agency-centric (as opposed to strictly fire finance related) improvements to operational and administrative capacity. This often manifests in short-term solutions to address the immediate needs while laying the foundation for longer-term holistic approaches. These more evolved endeavors will still be tracked and managed through the IMP, while clearly documenting the fulfillment of the originally observed risk.

Given the overarching approach MGO took to understand how large fire financials move through the organization, from field operations to central headquarters processing, many recommendations overlap or have impacts that can manifest concurrently in the department's workflows. Addressing some of the recommendations will have compounded effects on other recommendations, provide the ability to leverage solutions across the recommendations, or impact the way some recommendations are ultimately resolved.

In order to expedite implementation, take advantage of the department's ability to leverage work, and benefit from increasing clarity of what solutions provide the best outcomes, the IMP is a living document that will be progressively elaborated as work advances and milestones are achieved. This progressive elaboration of the plan will allow the implementation team to define work and manage it to an increasing level of detail which can subsequently be incorporated into the next version of the implementation management plan.

While the intent of providing sufficient detail to assign responsibility, track progress and manage accountability within the IMP is unwavering, the format, layout, or presentation of the plan may also change as work progresses to better convey, clarify, or organize information for all responsible parties.

Further Context for Version 2 of the Implementation Management Plan

As the 2021 Legislative Session closed in late June, the Department received additional funding through its 2021-23 Legislatively Adopted Budget to help implement the recommendations. These investments are detailed in the 2021 Senate Bill 5518 to include new permanent positions in finance and administrative modernization, key organizational structure changes identified in MGO's assessment, limited duration positions to support implementation of the recommendations, and a technical budget note to continue the contractual relationship with MGO to provide direct implementation, technical assistance, oversight, and reporting.

Oregon Department of Forestry, MGO Implementation Management Plan Version 2, Status and Change Log

Sorted by ID#, by Risk

#	Recommendation (Type)	Risk Rating	Completion Date	Last Status Version 1	Current Status Version 2	Changes and Progress	Status Notes and Next Steps
#1	Cost Share Agreements (Consistency) (Policies & Procedures)	High	06/30/2021	Active	Complete and Enhanced	Published procedures and conducted cost share trainings.	Complete. Enhanced status for modernization and maintenance.
#2	Cost Share Settlements (Signature Authority) (Policies & Procedures)	High	06/30/2021	Active	Active	Published procedures and best practices, conducted cost share trainings, revised policy and implemented changes	Mostly complete. Policy in executive review and signature. Will move to enhanced status for maintenance post completion.
#3	Cost Share Collections (Policies & Procedures)	High	06/30/2021	Active	Active	Codified procedures, implemented business practices, and enhanced communications.	Mostly complete. Procedures in executive review and signature. Will move to enhanced status for maintenance post completion.
#4	Cash Flow Projections (Policies & Procedures)	High	06/30/2022	Initiated	Active	Added completion of new deliverable for Outstanding Assets & Liabilities tracker, progressing on policy development and implementation of systems.	Active. Modified estimated dates on procedures from 9/30 to 12/31/21 due to extreme fire season, system implementation, and staffing issues.
#5	Accounts Receivable Collections (Policies & Procedures)	High	12/31/2021	Initiated	Initiated	Progressing on policy development and implementation of systems.	Initiated. Policies underway but modified dates on procedures from 9/30 to 12/31/21 due to extreme fire season, system implementation, and staffing issues.
#6	Policy & Procedure Storage (Information Technology)	High	06/30/2022	Pending	Pending	No change.	Pending. Preparing recruitment for LD MGO position.
#7	Cost Estimates (Information Technology)	High	06/30/2022	On Hold	On Hold	No change.	On hold for capacity to support IT deliverables
#8	BRIO Real-Time (Information Technology)	High	06/30/2022	Not Started	Pending	Completed inventory of reports.	Pending. Engaging additional capacity soon.
#9	Accounts Payable (Policies & Procedures)	High	06/30/2022	Active	Active	Launched eProcurement side of OregonBuys as second state agency to do so and progressing on policy development.	Active. Modified estimated dates on procedures from 9/30 to 12/31/21 due to extreme fire season, system implementation, and staffing issues.
#10	Electronic Records (Information Technology)	High	06/30/2022	Not Started	Not Started	Initiated draft issue paper for project.	Not Started. Preparing recruitment for LD MGO position to support implementation. Preparing BOF Strategic Initiative for 2023-25 Agency Request Budget.
#11	I.T. Systems (Information Technology)	High	06/30/2023	Not Started	Not Started	No change.	Not Started. Modified estimated date on inventory from 8/1 to 11/30/21 due to extreme fire season staffing.
#12	ACC Rate Assessments (Budgeting)	High	06/30/2022	On Hold	On Hold	No change.	On hold for project team phasing outside of fire season. Preparing recruitment for LD MGO position.
#13	Oversight Reports (AP and AR systems) (Oversight)	Medium	06/30/2022	Not Started	Initiated	Refining key reports for AP and AR, cash flow projections, and outstanding assets & liabilities.	Initiated. Initial reports refined require documentation, automation, and comparison to MGO reports.
#14	Training for finance personnel (Salem and Field) (Oversight)	Medium	06/30/2022	Not Started	Not Started	No change.	Not Started.
#15	Field Protection Districts Oversight (Oversight)	Medium	06/30/2022	Not Started	Active	Published procedures and progressing on policy development.	Active.
#16	Board of Forestry Oversight (Oversight)	Medium	10/31/2021	Pending	Pending	No change.	Pending. BOF to discuss work plan at October retreat.
#17	District Finance / Accounting Oversight (Oversight)	Medium	12/31/2021	Not Started	Initiated	Added completion of new deliverable for Outstanding Assets & Liabilities tracker, progressing on policy and	Initiated. Preparing recruitment for LD MGO position to support implementation.
#18	Change Management (Incident Finance Audits) (Oversight)	Medium	06/30/2022	On Hold	On Hold	Developed and shared lessons learned from 2020 large fire audits.	On hold for fire season and administrator transition
#19	Invoicing (Policies & Procedures)	Medium	12/31/2021	Initiated	Active	Progressing on policy development and implementation of systems.	Active.
#20	Finance / Accounting (Org Structure) (Finance/Accounting Resources)	Medium	06/30/2023	Pending	Pending	Utilized bridge plan to maintain capacity through the 2021 Fire Season.	Pending. Seeking change management consultant.
#21	Finance Skillsets (Finance/Accounting Resources)	Medium	06/30/2023	Not Started	Not Started	No change.	Not Started.
#22	OFRS (Information Technology)	Medium	06/30/2022	On Hold	On Hold	No change.	On hold for capacity to support IT deliverables
#23	Budgeting Requirements (Budgeting)	Medium	06/30/2022	On Hold	On Hold	No change.	On hold for project team phasing outside of fire season
#24	Budgeting Requirements (Budgeting)	Medium	06/30/2022	On Hold	On Hold	No change.	On hold for project team phasing outside of fire season
#25	Operating Association Advances (Policies & Procedures)	Low	06/30/2022	Not Started	Not Started	No change.	Not Started.
#26	FEMA Claim Status (Policies & Procedures)	Low	12/31/2021	Active	Active	Progressing on FEMA tracking and communication.	Active.
#27	OregonBuys (Information Technology)	Low	06/30/2021	Active	Complete and Enhanced	Replaced Forestry Order System with alternative process for payments outside of OregonBuys.	Complete. Enhanced status for related policies and maintenance.
#28	Encumbrances (Budgeting)	Low	06/30/2023	Not Started	Not Started	Launched eProcurement side of OregonBuys.	Not Started.

- Active Work is actively being completed against the recommendation
- Complete Recommendations have been implemented and observed risk mitigated
- Enhanced Work has moved beyond the initial scope of the recommendation to further business value
- Initiated Work is in a preliminary phase, typically inventorying and/or documenting current products/processes
- Not Started Work for this recommendation has not started
- On Hold Some work has been completed, but progress has been temporarily halted due to resource constraints or work phasing
- Pending Work is beginning to be queued up and/or resources assembled

Oregon Department of Forestry, MGO Implementation Management Plan Version 2, Status and Change Log

Sorted by Completion Date, by Risk

#	Recommendation (Type)	Risk Rating	Completion Date	Last Status Version 1	Current Status Version 2	Changes and Progress	Status Notes and Next Steps
#1	Cost Share Agreements (Consistency) (Policies & Procedures)	High	06/30/2021	Active	Complete and Enhanced	Published procedures and conducted cost share trainings.	Complete. Enhanced status for modernization and maintenance.
#2	Cost Share Settlements (Signature Authority) (Policies & Procedures)	High	06/30/2021	Active	Active	Published procedures and best practices, conducted cost share trainings, revised policy and implemented changes	Mostly complete. Policy in executive review and signature. Will move to enhanced status for maintenance post completion.
#3	Cost Share Collections (Policies & Procedures)	High	06/30/2021	Active	Active	Codified procedures, implemented business practices, and enhanced communications.	Mostly complete. Procedures in executive review and signature. Will move to enhanced status for maintenance post completion.
#27	OregonBuys (Information Technology)	Low	06/30/2021	Active	Complete and Enhanced	Replaced Forestry Order System with alternative process for payments outside of OregonBuys.	Complete. Enhanced status for related policies and maintenance.
#16	Board of Forestry Oversight (Oversight)	Medium	10/31/2021	Pending	Pending	No change.	Pending. BOF to discuss work plan at October retreat.
#5	Accounts Receivable Collections (Policies & Procedures)	High	12/31/2021	Initiated	Initiated	Progressing on policy development and implementation of systems.	Initiated. Policies underway but modified dates on procedures from 9/30 to 12/31/21 due to extreme fire season, system implementation, and staffing issues.
#17	District Finance / Accounting Oversight (Oversight)	Medium	12/31/2021	Not Started	Initiated	Added completion of new deliverable for Outstanding Assets & Liabilities tracker, progressing on policy and procedure development.	Initiated. Preparing recruitment for LD MGO position to support implementation.
#19	Invoicing (Policies & Procedures)	Medium	12/31/2021	Initiated	Active	Progressing on policy development and implementation of systems.	Active.
#26	FEMA Claim Status (Policies & Procedures)	Low	12/31/2021	Active	Active	Progressing on FEMA tracking and communication.	Active.
#4	Cash Flow Projections (Policies & Procedures)	High	06/30/2022	Initiated	Active	Added completion of new deliverable for Outstanding Assets & Liabilities tracker, progressing on policy development and implementation of systems.	Active. Modified estimated dates on procedures from 9/30 to 12/31/21 due to extreme fire season, system implementation, and staffing issues.
#6	Policy & Procedure Storage (Information Technology)	High	06/30/2022	Pending	Pending	No change.	Pending. Preparing recruitment for LD MGO position.
#7	Cost Estimates (Information Technology)	High	06/30/2022	On Hold	On Hold	No change.	On hold for capacity to support IT deliverables
#8	BRIO Real-Time (Information Technology)	High	06/30/2022	Not Started	Pending	Completed inventory of reports.	Pending. Engaging additional capacity soon.
#9	Accounts Payable (Policies & Procedures)	High	06/30/2022	Active	Active	Launched eProcurement side of OregonBuys as second state agency to do so and progressing on policy development.	Active. Modified estimated dates on procedures from 9/30 to 12/31/21 due to extreme fire season, system implementation, and staffing issues.
#10	Electronic Records (Information Technology)	High	06/30/2022	Not Started	Not Started	Initiated draft issue paper for project.	Not Started. Preparing recruitment for LD MGO position to support implementation. Preparing BOF Strategic Initiative for 2023-25 Agency Request Budget.
#12	ACC Rate Assessments (Budgeting)	High	06/30/2022	On Hold	On Hold	No change.	On hold for project team phasing outside of fire season. Preparing recruitment for LD MGO position.
#13	Oversight Reports (AP and AR systems) (Oversight)	Medium	06/30/2022	Not Started	Initiated	Refining key reports for AP and AR, cash flow projections, and outstanding assets & liabilities.	Initiated. Initial reports refined require documentation, automation, and comparison to MGO reports.
#14	Training for finance personnel (Salem and Field) (Oversight)	Medium	06/30/2022	Not Started	Not Started	No change.	Not Started.
#15	Field Protection Districts Oversight (Oversight)	Medium	06/30/2022	Not Started	Active	Published procedures and progressing on policy development.	Active.
#18	Change Management (Incident Finance Audits) (Oversight)	Medium	06/30/2022	On Hold	On Hold	Developed and shared lessons learned from 2020 large fire audits.	On hold for fire season and administrator transition
#22	OFRS (Information Technology)	Medium	06/30/2022	On Hold	On Hold	No change.	On hold for capacity to support IT deliverables
#23	Budgeting Requirements (Budgeting)	Medium	06/30/2022	On Hold	On Hold	No change.	On hold for project team phasing outside of fire season
#24	Budgeting Requirements (Budgeting)	Medium	06/30/2022	On Hold	On Hold	No change.	On hold for project team phasing outside of fire season
#25	Operating Association Advances (Policies & Procedures)	Low	06/30/2022	Not Started	Not Started	No change.	Not Started.
#11	I.T. Systems (Information Technology)	High	06/30/2023	Not Started	Not Started	No change.	Not Started. Modified estimated date on inventory from 8/1 to 11/30/21 due to extreme fire season staffing.
#20	Finance / Accounting (Org Structure) (Finance/Accounting Resources)	Medium	06/30/2023	Pending	Pending	Utilized bridge plan to maintain capacity through the 2021 Fire Season.	Pending. Seeking change management consultant.
#21	Finance Skillsets (Finance/Accounting Resources)	Medium	06/30/2023	Not Started	Not Started	No change.	Not Started.
#28	Encumbrances (Budgeting)	Low	06/30/2023	Not Started	Not Started	Launched eProcurement side of OregonBuys.	Not Started.

- Active Work is actively being completed against the recommendation
- Complete Recommendations have been implemented and observed risk mitigated
- Enhanced Work has moved beyond the initial scope of the recommendation to further business value
- Initiated Work is in a preliminary phase, typically inventorying and/or documenting current products/processes
- Not Started Work for this recommendation has not started
- On Hold Some work has been completed, but progress has been temporarily halted due to resource constraints or work phasing
- Pending Work is beginning to be queued up and/or resources assembled

MGO Implementation Management Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #1 - Cost Share Agreements (Consistency)

ET Sponsor: Fire Protection Chief

Due Date: 06/30/2021

Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating MGO Recommendation:

High The ODF Operations and Administrative Branches should clearly define policies and procedures for cost share agreements to ensure the terms utilized by the Fire Protection Districts are appropriate (based on applicable regulations) and to ensure the ODF Operations and Administrative Branch are kept informed of the cost share terms and status.

(MGO) Action Plan:

The Green Book should be continually updated to ensure the cost share template terms are appropriate based on applicable regulations (e.g. provide templates by cost share partner). Additionally, procedures related to the tracking and communication of cost share terms, amendments, and status should be defined by the ODF Operations and Administrative Branch.

MGO Observation:

Each Fire Protection District Forester is responsible for drafting, negotiating and authorizing cost share agreements for incidents that occur within their district. However, based on inquiry with key personnel at the Fire Protection Districts and ODF headquarters, the ODF Operations and Administrative Branches are not consistently included in the decision making process and/or informed of the agreement terms prior to the cost share reconciliation, which occurs after the containment of an incident. Additionally, the current cost share agreement policies and procedures do not include procedures related to on-going monitoring or interdepartmental communication of executed cost share agreements.

MGO Potential Impact / Risk:

Lack of oversight by the ODF Operations and Administrative Branch could result in inefficiencies due to complex cost share terms leading to errors in accounts receivable or payable estimates and/or miscommunication related to the agreed upon incident terms or status of the cost share incidents.

ODF Management Response:

ODF agrees with this recommendation. Two cost share standard templates are established in our master agreement with federal partners. In 2020, all partners agreed to utilize the "percent acres" cost share template as a standard for the Labor Day fires. While the Green Book is traditionally positioned for annual updating in the off-season, we agree that business process updates made midway during fire season, should be captured and updated continually to ensure all parties are consistently referencing the same guidance. The Fire Protection Division (ODF Operations), Administration (ODF Administrative Branch), Districts and Emergency Fire Cost Committee (EFCC) administration meet weekly during the peak of fire season to collaborate on fire financials, including cost share establishment and reconciliation. We agree that procedures relative to this ongoing communication and coordination should be established to provide clear expectations on information needed to stay consistently informed of cost share terms and status.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Deliverable Review				Supporting Documentation
v	Deliverable Name			Status Indicator	Status		District Business Managers	LT	ET	BOF	
MILESTONES											
	Master Cooperative Wildland Fire Management and Stafford Act Response Agreement (01/01/2020) between ODF, operating associations, and federal agencies includes cost share agreement template and instructions	Fire Protection Deputy Chief	Done	●	Complete	State Forester	n/a	n/a	n/a		Master Agreement
	Oregon Statewide 2020 Operating Plan (01/01/2020) between ODF, operating associations, and federal agencies defines delegated authority, cost share methodologies, and preliminary review of cost share by ODF Incident Business Lead	Fire Protection Deputy Chief	Done	●	Complete	State Forester	n/a	n/a	n/a		Statewide Operating Plan
	Cost Share Tracker developed (MGO)	Protection Finance Manager	Done	●	Complete	Fire Protection Chief	n/a	n/a	n/a		Cost Share Tracker
	Cost Share Tracker joint review w/ODF Operations and Administrative Branch	Protection Finance Manager	05/24/2021	●	Complete	Deputy Director for Administration	n/a	n/a	n/a		n/a
POLICY AND PROCEDURES											
ODF Policy (list topics and define milestones)											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
ODF Procedures (list topic(s), define each)											
	Cost Share Tracker Updating Procedure for Protection Finance Manager (MGO)	Protection Finance Manager	06/30/2021	●	Complete	Fire Protection Deputy Chief	n/a	n/a	n/a		ODF Procedure - Cost Share Tracker
ODF Greenbook (list sections, define action needed)											
	Chapter 80 - Cost Share Field Procedures - updated w/ current template, terms, guidance, expectations for interdepartmental communications, timing, roles (MGO)	Protection Finance Manager	06/30/2021	●	Complete	Fire Protection Deputy Chief	Jun-21	Jun-21	Jun-21		ODF Green Book
ODF Guidance or Memorandum (list sections)											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
IT SYSTEM CONSIDERATIONS											
	Technical requirements for cost share tracker application defined, if desired	Protection Finance Manager	Fall	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Project formulated for prioritizing within internal application development capacity	Admin Modernization Program	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Application development and testing for cost share tracker	Admin Modernization Program	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Cost Share Tracker application deployment	Admin Modernization Program	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Procedures for updating Cost Share Tracker revised to incorporate new application	Protection Finance Manager	TBD	●	Not Started	Fire Protection Deputy Chief	TBD	TBD	TBD		

MGO Implementation Management Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #1 - Cost Share Agreements (Consistency)

ET Sponsor: Fire Protection Chief

Due Date: 06/30/2021

Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating MGO Recommendation:

High The ODF Operations and Administrative Branches should clearly define policies and procedures for cost share agreements to ensure the terms utilized by the Fire Protection Districts are appropriate (based on applicable regulations) and to ensure the ODF Operations and Administrative Branch are kept informed of the cost share terms and status.

(MGO) Action Plan:

The Green Book should be continually updated to ensure the cost share template terms are appropriate based on applicable regulations (e.g. provide templates by cost share partner). Additionally, procedures related to the tracking and communication of cost share terms, amendments, and status should be defined by the ODF Operations and Administrative Branch.

MGO Observation:

Each Fire Protection District Forester is responsible for drafting, negotiating and authorizing cost share agreements for incidents that occur within their district. However, based on inquiry with key personnel at the Fire Protection Districts and ODF headquarters, the ODF Operations and Administrative Branches are not consistently included in the decision making process and/or informed of the agreement terms prior to the cost share reconciliation, which occurs after the containment of an incident. Additionally, the current cost share agreement policies and procedures do not include procedures related to on-going monitoring or interdepartmental communication of executed cost share agreements.

MGO Potential Impact / Risk:

Lack of oversight by the ODF Operations and Administrative Branch could result in inefficiencies due to complex cost share terms leading to errors in accounts receivable or payable estimates and/or miscommunication related to the agreed upon incident terms or status of the cost share incidents.

ODF Management Response:

ODF agrees with this recommendation. Two cost share standard templates are established in our master agreement with federal partners. In 2020, all partners agreed to utilize the "percent acres" cost share template as a standard for the Labor Day fires. While the Green Book is traditionally positioned for annual updating in the off-season, we agree that business process updates made midway during fire season, should be captured and updated continually to ensure all parties are consistently referencing the same guidance. The Fire Protection Division (ODF Operations), Administration (ODF Administrative Branch), Districts and Emergency Fire Cost Committee (EFCC) administration meet weekly during the peak of fire season to collaborate on fire financials, including cost share establishment and reconciliation. We agree that procedures relative to this ongoing communication and coordination should be established to provide clear expectations on information needed to stay consistently informed of cost share terms and status.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Deliverable Review				Supporting Documentation
v	Deliverable Name			Status Indicator	Status		District Business Managers	LT	ET	BOF	
COMMUNICATION PLANNING											
	Announcement of 2021 Agency Administrator Training (Email)	Protection Training Coordinator	Done	●	Complete	Fire Protection Deputy Chief	May-21	May-21	May-21		Agency Administrator Seminar (calendar)
	Announcement of 2021 Incident Finance Trainings (Email)	Incident Finance / FEMA Unit Manager	05/12/2021	●	Complete	Fire Protection Deputy Chief	May-21	May-21	May-21		2021 Incident Finance Trainings (email)
	Communicate procedural changes to impacted personnel and supervisors	Incident Finance / FEMA Unit Manager	06/30/2021	●	Complete	Public Affairs Manager	Jun-21	Jun-21	Jun-21		Green Book Updates 2021 (Email)
	Request real-time input from personnel navigating the new procedure to allow for quick adjustments if needed	Incident Finance / FEMA Unit Manager	06/30/2021	●	Complete	Public Affairs Manager	Jun-21	Jun-21	Jun-21		Green Book Updates 2021 (Email)
TRAINING NEEDS											
	Agency Administrator Training Section on Cost Shares updated	Protection Finance Manager	06/11/2021	●	Complete	Fire Protection Deputy Chief	Jun-21	Jun-21	n/a		Agency Administrator Tool Kit on ODFnet
	Agency Administrator Seminar conducted June 14, 2021	Protection Training Coordinator	06/14/2021	●	Complete	Fire Protection Deputy Chief	Jun-21	Jun-21	n/a		Agency Administrator Seminar held on June 14, 2021
	2021 Incident Finance Training	Incident Finance / FEMA Unit Manager	05/12/2021	●	Complete	Fire Protection Deputy Chief	May-21	May-21	n/a		ODF pre-recorded training sessions published May 12, 2021
	Interagency Cost Share Training hosted by Regional 6 Forest Service	Incident Finance / FEMA Unit Manager	05/12/2021	●	Complete	Fire Protection Deputy Chief	May-21	May-21	n/a		Region 6 Forest Service hosted on May 12 and 27, 2021
MAINTENANCE NEEDS POST-IMPLEMENTATION											
	Cost share templates, procedures, and training updated (annually)	Protection Finance Manager	06/30/2022	●	Not Started	Fire Protection Deputy Chief	TBD	TBD	TBD		
	Protection Fiscal Year Operating Plan core duties updated	Fire Protection Deputy Chief	06/30/2022	●	Not Started	Fire Protection Deputy Chief	n/a	n/a	n/a		
	Position Descriptions updated w/duties	Fire Protection Deputy Chief	06/30/2022	●	Not Started	Human Resources Analyst	n/a	n/a	n/a		
	Master Agreement and Statewide Operating Plan updated (as needed)	Fire Prevention and Policy Manager	06/30/2023	●	Not Started	Fire Protection Deputy Chief	TBD	TBD	TBD		
BUDGETARY, LEGISLATIVE, OR ADMINISTRATIVE CONSIDERATIONS											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a

Status Legend:	
●	Not Started
●	Being Initiated
●	In Review / Underway
●	Approved / Completed

MGO Implementation Management Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #2 - Cost Share Settlements (Signature Authority)
ET Sponsor: Protection Division Chief
Due Date: 06/30/2021
Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating: MGO Recommendation:

High The ODF Operations and Administrative Branches should establish formal policies regarding cost share decision making authority limits and settlement attendance.

(MGO) Action Plan:

- Update 0-2-3-206 Directive (Internal Controls over Delegated Authority) to clearly define cost share decision-making authority limits by position (e.g. District Forester and District Business Manager limits), including amounts that require ODF Administrative Branch approval.
- Update Green Book Chapter 80 - Cost Accounting, Reporting, and Cost Shares as necessary to include authority and approval limits as defined within Directive 0-2-3-206.

MGO Observation:

Cost share agreements are settled by the District Business Managers and representatives from the Federal agencies. Authority limits have not been established for cost share settlements, and therefore, District Foresters and District Business Managers are able to approve final settlements without input or approval from the ODF Operations or Administrative Branch (headquarters).

MGO Potential Impact / Risk:

The lack of authority limits and/ or formal procedures related to settlement attendance could result in unauthorized individuals entering into commitments on behalf of ODF.

ODF Management Response:

ODF agrees with this recommendation. Cost shares are being settled on actual costs for 2020 fire season and beyond; the scrub process that was utilized to expedite outstanding cost shares in 2018 and 2019 is no longer in effect. Following cost share adjudication efforts at the District level, ODF could set limits of signature authority for closing out total cost share exposure. We recently set a process to have all cost share adjudications above \$5 million signed off by not only the District Forester but the Salem Division Chief as well. Updating Directive 0-2-3-206 was already scheduled for this fiscal year, subsequent to implementation of the new OregonBuys purchasing system. The revised directive will include definition of formalized authority limits applicable to cost-share settlements, while recognizing the unpredictable fire environment and flexibility needed within timeframes to adapt to changing fire size and cost conditions. For reconciliations of cost shares, ODF is currently limited in capacity at the Salem Operations and Administrative Branch level to attend all cost share adjudications and it is a District responsibility to settle these costs. If Area Business Coordinators are established (increasing capacity) and hired under Salem direct supervision, we would have the additional capacity to attend all cost share adjudications along with the District leadership. The Green Book will be updated prior to next fire season to include updated procedures and references relative to cost-share signature authorities, settlement attendance, and ensuring the cost share documents are used in conjunction with leader's intent and delegations of authority to address cost and fire management issues.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Deliverable Review				Supporting Documentation
v	Deliverable Name			Status Indicator	Status		District Business Managers	LT	ET	BOF	
MILESTONES											
	Master Cooperative Wildland Fire Management and Stafford Act Response Agreement (01/01/2020) between ODF, operating associations, and federal agencies includes cost share agreement template and instructions	Fire Protection Deputy Chief	Done	●	Complete	State Forester	n/a	n/a	n/a		Master Agreement
	Oregon Statewide 2020 Operating Plan (01/01/2020) between ODF, operating associations, and federal agencies defines delegated authority, cost share methodologies, and preliminary review of cost share by ODF Incident Business Lead	Fire Protection Deputy Chief	Done	●	Complete	State Forester	n/a	n/a	n/a		Statewide Operating Plan
	Settlement Process Review by Operations and Administrative Branch (MGO)	Protection Finance Manager	05/24/2021	●	Complete	Deputy Director for Administration	n/a	n/a	n/a		n/a
	Signature Authority thresholds defined for cost share settlements (MGO)	Protection Division Chief	05/24/2021	●	Complete	Deputy Director for Administration	Jul-21	Jul-21	n/a		n/a
	Attendance at settlement meetings defined (MGO)	Protection Division Chief	05/24/2021	●	Complete	Deputy Director for Administration	Jul-21	Jul-21	n/a		n/a
POLICY AND PROCEDURES											
ODF Policy (list topics and define milestones)											
	ODF Directive 0-2-3-206 Internal Controls over Delegated Authority Rescinded (MGO)	Deputy Director for Administration	06/30/2021	●	In Review / Underway	State Forester	Sep-21	Sep-21	Sep-21		
	ODF Policy - Signature Authority updated w/ cost share settlements defined (MGO)	Deputy Director for Administration	06/30/2021	●	In Review / Underway	State Forester	Sep-21	Sep-21	Sep-21		
ODF Procedures (list topic(s), define each)											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
ODF Greenbook (list sections, define action needed)											
	Chapter 80 - Cost Share Field Procedures and Appendices - updated w/ authorities, expectations for interdepartmental communications, timing, roles (MGO)	Protection Finance Manager	06/30/2021	●	Complete	Fire Protection Deputy Chief	Jun-21	Jun-21	Jun-21		ODF Green Book
ODF Guidance or Memorandum (list sections)											
	Cost Share Reconciliation Process Best Practices (new)	Protection Finance Manager	06/13/2021	●	Complete	Fire Protection Deputy Chief	Jun-21	Jun-21	Jun-21		ODF Green Book - Appendix 80.22
IT SYSTEM CONSIDERATIONS											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
COMMUNICATION PLANNING											
	Announcement of 2021 Agency Administrator Training (Email)	Protection Training Coordinator	Done	●	Complete	Fire Protection Deputy Chief	May-21	May-21	May-21		Agency Administrator Seminar (calendar)
	Announcement of 2021 Incident Finance Trainings (Email)	Incident Finance / FEMA Unit Manager	05/12/2021	●	Complete	Fire Protection Deputy Chief	May-21	May-21	May-21		2021 Incident Finance Trainings (email)
	Communicate procedural changes to impacted personnel and supervisors	Incident Finance / FEMA Unit Manager	06/30/2021	●	Complete	Public Affairs Manager	Jun-21	Jun-21	Jun-21		Green Book Updates 2021 (Email)
	Request real-time input from personnel navigating the new procedure to allow for quick adjustments if needed	Incident Finance / FEMA Unit Manager	06/30/2021	●	Complete	Public Affairs Manager	Jun-21	Jun-21	Jun-21		Green Book Updates 2021 (Email)

MGO Implementation Management Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #2 - Cost Share Settlements (Signature Authority)

ET Sponsor: Protection Division Chief

Due Date: 06/30/2021

Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating: MGO Recommendation:

High The ODF Operations and Administrative Branches should establish formal policies regarding cost share decision making authority limits and settlement attendance.

(MGO) Action Plan:

1. Update 0-2-3-206 Directive (Internal Controls over Delegated Authority) to clearly define cost share decision-making authority limits by position (e.g. District Forester and District Business Manager limits), including amounts that require ODF Administrative Branch approval.
2. Update Green Book Chapter 80 - Cost Accounting, Reporting, and Cost Shares as necessary to include authority and approval limits as defined within Directive 0-2-3-206.

MGO Observation:

Cost share agreements are settled by the District Business Managers and representatives from the Federal agencies. Authority limits have not been established for cost share settlements, and therefore, District Foresters and District Business Managers are able to approve final settlements without input or approval from the ODF Operations or Administrative Branch (headquarters).

MGO Potential Impact / Risk:

The lack of authority limits and/ or formal procedures related to settlement attendance could result in unauthorized individuals entering into commitments on behalf of ODF.

ODF Management Response:

ODF agrees with this recommendation. Cost shares are being settled on actual costs for 2020 fire season and beyond; the scrub process that was utilized to expedite outstanding cost shares in 2018 and 2019 is no longer in effect. Following cost share adjudication efforts at the District level, ODF could set limits of signature authority for closing out total cost share exposure. We recently set a process to have all cost share adjudications above \$5 million signed off by not only the District Forester but the Salem Division Chief as well. Updating Directive 0-2-3-206 was already scheduled for this fiscal year, subsequent to implementation of the new OregonBuys purchasing system. The revised directive will include definition of formalized authority limits applicable to cost-share settlements, while recognizing the unpredictable fire environment and flexibility needed within timeframes to adapt to changing fire size and cost conditions. For reconciliations of cost shares, ODF is currently limited in capacity at the Salem Operations and Administrative Branch level to attend all cost share adjudications and it is a District responsibility to settle these costs. If Area Business Coordinators are established (increasing capacity) and hired under Salem direct supervision, we would have the additional capacity to attend all cost share adjudications along with the District leadership. The Green Book will be updated prior to next fire season to include updated procedures and references relative to cost-share signature authorities, settlement attendance, and ensuring the cost share documents are used in conjunction with leader's intent and delegations of authority to address cost and fire management issues.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Deliverable Review				Supporting Documentation
v	Deliverable Name			Status Indicator	Status		District Business Managers	LT	ET	BOF	
TRAINING NEEDS											
	Agency Administrator Training Section on Cost Shares updated	Protection Finance Manager	06/11/2021	●	Complete	Fire Protection Deputy Chief	Jun-21	Jun-21	n/a		Agency Administrator Tool Kit on ODFnet
	Agency Administrator Seminar conducted June 14, 2021	Protection Training Coordinator	06/14/2021	●	Complete	Fire Protection Deputy Chief	Jun-21	Jun-21	n/a		Agency Administrator Seminar held on June 14, 2021
	2021 Incident Finance Training	Incident Finance / FEMA Unit Manager	05/12/2021	●	Complete	Fire Protection Deputy Chief	May-21	May-21	n/a		ODF pre-recorded training sessions published May 12, 2021
	Interagency Cost Share Training hosted by Regional 6 Forest Service	Incident Finance / FEMA Unit Manager	05/12/2021	●	Complete	Fire Protection Deputy Chief	May-21	May-21	n/a		Region 6 Forest Service hosted on May 12 and 27, 2021
	Cost Share Reconciliation Training (annual)	Protection Finance Manager	12/01/2021	●	Not Started	Fire Protection Deputy Chief	TBD	TBD	n/a		
MAINTENANCE NEEDS POST-IMPLEMENTATION											
	Cost share templates, procedures, and training updated (annually)	Protection Finance Manager	06/30/2022	●	Not Started	Fire Protection Deputy Chief	TBD	TBD	TBD		
	Protection Fiscal Year Operating Plan core duties updated	Fire Protection Deputy Chief	06/30/2022	●	Not Started	Fire Protection Deputy Chief	n/a	n/a	n/a		
	Position Descriptions updated w/duties	Fire Protection Deputy Chief	06/30/2022	●	Not Started	Human Resources Analyst	n/a	n/a	n/a		
	Master Agreement and Statewide Operating Plan updated (as needed)	Fire Prevention and Policy Manager	06/30/2023	●	Not Started	Fire Protection Deputy Chief	TBD	TBD	TBD		
	Delegated Authority Policy reviewed (as needed)	Assistant Deputy Director for Administration	10/01/2023	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
BUDGETARY, LEGISLATIVE, OR ADMINISTRATIVE CONSIDERATIONS											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a

Status Legend:	
●	Not Started
●	Being Initiated
●	In Review / Underway
●	Approved / Completed

MGO Implementation Management Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #3 - Cost Share Collections

ET Sponsor: Fire Protection Division Chief

Due Date: 06/30/2021

Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating: MGO Recommendation:

High Formal procedures related to cost share partner collection efforts should be implemented and include, at minimum, monthly reconciliation and collection meetings with the respective cost share partners. Additionally, roles and responsibilities should be clearly defined between ODF Operations and Administrative Branches as related to collection efforts.

Note: This recommendation is dependent upon the cost-share partner's attendance.

(MGO) Action Plan:

1. Implement a formal ongoing meeting scheduled with key partners and their respective decision makers. Meetings should occur at least monthly, and should include individuals from the ODF Administrative Branch.
2. Prior to the meeting, the ODF Administrative Branch and the key partners should individually perform reconciliations from accounts receivable to accounts payable.
3. Meetings should include discussion of variances noted, reasons for unapproved invoices or errors identified, barriers to collection, and estimated timeframes for collection of outstanding balances.

Cost-share partners include but are not limited to: Forest Service, BLM, BIA, National Parks, and US Fish and Wildlife Services.

MGO Observation:

Collection efforts with cost share partners are performed on an as needed basis, as noted during our inquiries with key ODF Operations and Administrative Branches personnel. Additionally formalized policies and procedures related to on-going cost share collection efforts, including definition of roles and responsibilities, do not exist.

Note: This recommendation is dependent upon the cost-share partner's attendance.

MGO Potential Impact / Risk:

The lack of formalized policies and procedures as related to on-going cost share collection efforts could result in an increase in the aging of past due balances, negatively impacting the availability of cash. Additionally, duplicative efforts related to collections could occur due to the lack of clarity regarding roles and responsibilities between ODF Operations and Administrative Branches.

ODF Management Response:

ODF agrees with this recommendation. Routine meetings established in recent years with our interagency fire partners and their full commitment to close outstanding invoices has allowed ODF to catch up on past fire collections, leaving less than \$9 million in outstanding recoveries from other fire agencies. Codifying this meeting framework in our cost-collection procedures would provide consistency in ongoing collection efforts, clearly defined roles across the Operations and Administrative Branches, and standards for discussing variances, reasons for unapproved invoices or errors identified, barriers to collection, and estimated timeframes for collection of outstanding balances. Formalizing our collection procedures with interagency partners has been ongoing and is prudent. As we are actively implementing new accounts receivable technology (Sage A/R), our procedures for collections processes will capture aging of past-due balances and reporting mechanisms to reconcile with accounts payable.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Deliverable Review				Supporting Documentation
v	Deliverable Name			Status Indicator	Status		District Business	LT	ET	BOF	
MILESTONES											
	Monthly AR/AP aging meetings with key partners (MGO)	Protection Finance Manager	Done	●	Complete	Fire Protection Division Chief	n/a	n/a	n/a		Calendar and Email
	Quarterly AR/AP aging meetings with key partners (MGO)	Fire Protection Division Chief	Done	●	Complete	Deputy Director for Administration	n/a	n/a	n/a		Calendar and Email
	Aging Meeting Process Review w/Operations and Administrative Branch	Fire Protection Division Chief	05/24/2021	●	Complete	Deputy Director for Administration	n/a	n/a	n/a		Email
	Documentation of current meeting process for procedural incorporation	Protection Finance Manager	05/24/2021	●	Complete	n/a	n/a	n/a	n/a		Email
POLICY AND PROCEDURES											
ODF Policy (list topics and define milestones)											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
ODF Procedures (list topic(s), define each)											
	AR Collections on Federal Cost Shares (USFS, BLM, BIA, etc.) Procedures (MGO)	Protection Finance Manager	06/30/2021	●	In Review / Underway	Deputy Director for Administration	n/a	n/a	n/a		
	AR/AP aging meeting (reconciliation processes, agenda topics) Procedures (MGO)	Protection Finance Manager	06/30/2021	●	In Review / Underway	Deputy Director for Administration	n/a	n/a	n/a		
ODF Greenbook (list sections, define action needed)											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
ODF Guidance or Memorandum (list sections)											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
IT SYSTEM CONSIDERATIONS											
	Sage AR Accounts Receivable integrated into collection procedures once deployed	Financial Services Manager	12/31/2021	●	In Review / Underway	Assistant Deputy Director for Admin	TBD	TBD	n/a		
COMMUNICATION PLANNING											
	Follow up on conversations with partners in writing, for clear, broad understanding. Share with appropriate agency leadership	Fire Protection Division Chief	Done	●	Complete	Public Affairs Manager	n/a	n/a	n/a		Interagency status spreadsheet, progress updates, and formal communications as needed
TRAINING NEEDS											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a

MGO Implementation Management Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #3 - Cost Share Collections

ET Sponsor: Fire Protection Division Chief

Due Date: 06/30/2021

Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating: MGO Recommendation:

High Formal procedures related to cost share partner collection efforts should be implemented and include, at minimum, monthly reconciliation and collection meetings with the respective cost share partners. Additionally, roles and responsibilities should be clearly defined between ODF Operations and Administrative Branches as related to collection efforts.

Note: This recommendation is dependent upon the cost-share partner's attendance.

(MGO) Action Plan:

1. Implement a formal ongoing meeting scheduled with key partners and their respective decision makers. Meetings should occur at least monthly, and should include individuals from the ODF Administrative Branch.
2. Prior to the meeting, the ODF Administrative Branch and the key partners should individually perform reconciliations from accounts receivable to accounts payable.
3. Meetings should include discussion of variances noted, reasons for unapproved invoices or errors identified, barriers to collection, and estimated timeframes for collection of outstanding balances.

Cost-share partners include but are not limited to: Forest Service, BLM, BIA, National Parks, and US Fish and Wildlife Services.

MGO Observation:

Collection efforts with cost share partners are performed on an as needed basis, as noted during our inquiries with key ODF Operations and Administrative Branches personnel. Additionally formalized policies and procedures related to on-going cost share collection efforts, including definition of roles and responsibilities, do not exist.

Note: This recommendation is dependent upon the cost-share partner's attendance.

MGO Potential Impact / Risk:

The lack of formalized policies and procedures as related to on-going cost share collection efforts could result in an increase in the aging of past due balances, negatively impacting the availability of cash. Additionally, duplicative efforts related to collections could occur due to the lack of clarity regarding roles and responsibilities between ODF Operations and Administrative Branches.

ODF Management Response:

ODF agrees with this recommendation. Routine meetings established in recent years with our interagency fire partners and their full commitment to close outstanding invoices has allowed ODF to catch up on past fire collections, leaving less than \$9 million in outstanding recoveries from other fire agencies. Codifying this meeting framework in our cost-collection procedures would provide consistency in ongoing collection efforts, clearly defined roles across the Operations and Administrative Branches, and standards for discussing variances, reasons for unapproved invoices or errors identified, barriers to collection, and estimated timeframes for collection of outstanding balances. Formalizing our collection procedures with interagency partners has been ongoing and is prudent. As we are actively implementing new accounts receivable technology (Sage A/R), our procedures for collections processes will capture aging of past-due balances and reporting mechanisms to reconcile with accounts payable.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Deliverable Review				Supporting Documentation
v	Deliverable Name			Status Indicator	Status		District Business	LT	ET	BOF	
MAINTENANCE NEEDS POST-IMPLEMENTATION											
	Administration Fiscal Year Operating Plan core duties updated	Financial Services Manager	06/30/2022	●	Not Started	Assistant Deputy Director for Admin	n/a	n/a	n/a		
	Protection Fiscal Year Operating Plan core duties updated	Fire Protection Deputy Chief	06/30/2022	●	Not Started	Fire Protection Division Chief	n/a	n/a	n/a		
	Position Descriptions updated w/duties	Fire Protection Deputy Chief	06/30/2022	●	Not Started	Human Resources Analyst	n/a	n/a	n/a		
	Accounts Receivable Collection Procedures for Federal Cost Shares annual review	Financial Services Manager	06/30/2022	●	Not Started	Assistant Deputy Director for Admin	TBD	TBD	n/a		
BUDGETARY, LEGISLATIVE, OR ADMINISTRATIVE CONSIDERATIONS											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a

Status Legend:	
●	Not Started
●	Being Initiated
●	In Review / Underway
●	Approved / Completed

MGO Implementation Management Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #4 - Cash Flow Projections

ET Sponsor: Deputy Director for Administration

Due Date: 06/30/2022

Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating: MGO Recommendation:

High ODF Administrative Branch should develop and implement controls/ policies/ procedures as related to accounts payable, accounts receivable, and cash flow projections. Procedures related to accounts payable and receivables should include recording details at a transactional level, when possible.

(MGO) Action Plan:

1. Implement standard system for reporting and tracking of A/P and A/R.
2. Update policies and procedures as necessary to define the requirements for recording A/P and A/R at the Field Protection Districts and the ODF Administrative Branch, including timing of submission of supporting documentation.
3. Implement policies and procedures related to cash flow projections, including review and approval by appropriate oversight parties.

MGO Observation:

Formalized policies and procedures related to cash flow projections do not appear to exist based on review of documented finance/ accounting related documents and inquiry with ODF Administrative Branch personnel. Additionally, ODF Administrative Branch lacks the ability to appropriately estimate project future cash flow due to the lack of accurate accounts payable and receivable data (refer to observation numbers 21 and 1).

MGO Potential Impact / Risk:

The lack of formalized policies and procedures related to cash flow projections could result in inaccurate or incomplete current and future cash flow projections. Additionally, the lack of accurate accounts payable and receivable data could result in cash shortfalls or mismanagement of funds.

ODF Management Response:

ODF agrees with this recommendation. With the implementation of the Sage300 AR system, AR processes will be easier to standardize between the field and Salem. In addition, tracking of AR and AP can happen within the OFRS (currently in development), that will provide automated status and exception reporting to appropriate parties. Work will have to continue between the field and Salem staff to outline the necessary policies and procedures for recording AR and AP. ODF Administration Branch will develop policies and procedures once processes and systems are implemented for operational use.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Deliverable Review				Supporting Documentation
v	Deliverable Name			Status Indicator	Status		District Business Managers	LT	ET	BOF	
	Outstanding Assets & Liabilities Tracker	Protection Finance Manager	Done	●	Complete	Deputy Director for Administration	Jun-21	n/a	n/a		Outstanding Assets & Liabilities Tracker
POLICY AND PROCEDURES											
ODF Policy (list topics and define milestones)											
	ODF Policy - Disbursements and Expenditures (new) (MGO)	Financial Services Manager	09/30/2021	●	In Review / Underway	Deputy Director for Administration	Oct-21	Dec-21	Sep-21		
	ODF Policy - Accounts Receivable (AR) (MGO)	Financial Services Manager	09/30/2021	●	In Review / Underway	Assistant Deputy Director for Admin	Oct-21	Dec-21	Sep-21		
	ODF Policy - Procurement (new) (MGO)	Contract Services Program Manager	09/30/2021	●	In Review / Underway	Deputy Director for Administration	Oct-21	Dec-21	Sep-21		
	ODF Policy - Internal Controls (new) (MGO)	Assistant Deputy Director for Admin	06/30/2022	●	Not Started	Deputy Director for Administration	Jul-22	Jul-22	Jun-22		
	ODF Policy Cost Estimate Generation (new) (MGO)	Protection Finance Manager	06/30/2022	●	Not Started	Deputy Director for Administration	Jul-22	Jul-22	Jun-22		
	ODF Directive 1-2-7-001 Guidelines for Eligibility of Firefighting Costs for the Oregon Forest Land Protection Fund 07/01/2020 (revise from directive to policy)	Oregon Forestland Protection Fund Administrator	06/30/2022	●	Not Started	Deputy Director for Administration	Jul-22	Jul-22	Jun-22		
ODF Procedures (list topic(s), define each)											
	Invoicing and Recording Accounts Receivable (MGO)	Financial Services Manager	12/31/2021	●	Being Initiated	Assistant Deputy Director for Admin	Jan-22	Jan-22	n/a		
	Reconciliation Procedures for open market purchase orders and invoices (MGO)	Disbursements Manager	12/31/2021	●	Not Started	Financial Services Manager	n/a	n/a	n/a		
	Disbursements and Expenditure Procedures updated for OregonBuys (MGO)	Disbursements Manager	12/31/2021	●	Being Initiated	Financial Services Manager	TBD	TBD	TBD		
	Cost Share Tracker Updating Procedure for Protection Finance Manager (MGO)	Protection Finance Manager	06/30/2021	●	Complete	Fire Protection Deputy Chief	n/a	n/a	n/a		ODF Procedure - Cost Share Tracker
	Co-op Tracker Updating Procedure (MGO)	Protection Finance Manager	12/31/2021	●	Being Initiated	Fire Protection Deputy Chief	Jan-22	n/a	n/a		
	Outstanding Assets & Liabilities Tracker Updating Procedure (MGO)	Protection Finance Manager	12/31/2021	●	Being Initiated	Fire Protection Deputy Chief	Jan-22	n/a	n/a		
	Active Incident Tracker Updating Procedure (MGO)	Protection Finance Manager	12/31/2021	●	In Review / Underway	Fire Protection Deputy Chief	Jan-22	n/a	n/a		
	Cost Estimate and Cost Share Consolidation Procedures for Protection Finance and Oregon Forestland Protection Fund Administrator (MGO)	Protection Finance Manager	06/30/2022	●	Not Started	Oregon Forestland Protection Fund Administrator	Jul-22	Jul-22	n/a		
	OFRS Reporting Tool Use Procedures (MGO)	Financial Services Manager	06/30/2022	●	Not Started	Assistant Deputy Director for Admin	TBD	n/a	n/a		
	Cash Flow Procedures (MGO)	Financial Services Manager	06/30/2022	●	Not Started	Assistant Deputy Director for Admin	TBD	n/a	n/a		

MGO Implementation Management Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #4 - Cash Flow Projections
ET Sponsor: Deputy Director for Administration
Due Date: 06/30/2022
Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating: MGO Recommendation:

High ODF Administrative Branch should develop and implement controls/ policies/ procedures as related to accounts payable, accounts receivable, and cash flow projections. Procedures related to accounts payable and receivables should include recording details at a transactional level, when possible.

(MGO) Action Plan:

1. Implement standard system for reporting and tracking of A/P and A/R.
2. Update policies and procedures as necessary to define the requirements for recording A/P and A/R at the Field Protection Districts and the ODF Administrative Branch, including timing of submission of supporting documentation.
3. Implement policies and procedures related to cash flow projections, including review and approval by appropriate oversight parties.

MGO Observation:

Formalized policies and procedures related to cash flow projections do not appear to exist based on review of documented finance/ accounting related documents and inquiry with ODF Administrative Branch personnel. Additionally, ODF Administrative Branch lacks the ability to appropriately estimate project future cash flow due to the lack of accurate accounts payable and receivable data (refer to observation numbers 21 and 1).

MGO Potential Impact / Risk:

The lack of formalized policies and procedures related to cash flow projections could result in inaccurate or incomplete current and future cash flow projections. Additionally, the lack of accurate accounts payable and receivable data could result in cash shortfalls or mismanagement of funds.

ODF Management Response:

ODF agrees with this recommendation. With the implementation of the Sage300 AR system, AR processes will be easier to standardize between the field and Salem. In addition, tracking of AR and AP can happen within the OFRS (currently in development), that will provide automated status and exception reporting to appropriate parties. Work will have to continue between the field and Salem staff to outline the necessary policies and procedures for recording AR and AP. ODF Administration Branch will develop policies and procedures once processes and systems are implemented for operational use.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Deliverable Review				Supporting Documentation
v	Deliverable Name			Status Indicator	Status		District Business Managers	LT	ET	BOF	
ODF Greenbook (list sections, define action needed)											
	Chapter 80 - Cost Share Field Procedures - updated w/ current template, terms, guidance, expectations for interdepartmental communications, timing, roles (MGO)	Protection Finance Manager	06/30/2021	●	Complete	Fire Protection Deputy Chief	Jun-21	Jun-21	Jun-21		ODF Green Book
	Chapter 70 - Claims and Incident Cost Recovery Collection revised to integrate new Accounts Receivable policies and procedures (MGO)	Incident Finance / FEMA Manager	06/30/2022	●	Not Started	Protection Finance Manager	TBD	n/a	n/a		
ODF Guidance or Memorandum (list sections)											
	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD		
IT SYSTEM CONSIDERATIONS											
	Deployment of new OFRS Reporting Tool	Admin Modernization Program	06/30/2022	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
COMMUNICATION PLANNING											
	Instructions for Outstanding Assets & Liabilities Tracker (SOALT)	Protection Finance Manager	Done	●	Complete	Deputy Director for Administration	Jun-21	n/a	n/a		SOALT Tracker and Reminders (Email 6/23, 7/12, 7/22)
	Communicate procedural changes to impacted personnel and supervisors	Deputy Director for Administration	12/30/2021	●	Not Started	Public Affairs Manager	TBD	TBD	TBD		
TRAINING NEEDS											
	Training module on the use of the OFRS Reporting Tool	Admin Modernization Program	06/30/2022	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Fire Finance Training (annual) - Cost Estimates module	Incident Finance / FEMA Manager	05/17/2021	●	Complete	Protection Finance Manager	May-21	May-21	n/a		Incident Finance: Cost Estimates
MAINTENANCE NEEDS POST-IMPLEMENTATION											
	OFRS Reporting Tool updates, upgrades, and maintenance	Admin Modernization Program	06/30/2023	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Review and update policy/procedures to meet changing needs	Assistant Deputy Director for Admin	06/30/2022	●	Not Started	Deputy Director for Administration	n/a	n/a	n/a		
	Administrative Branch Fiscal Year Operating Plan core duties updated	Assistant Deputy Director for Admin	06/30/2022	●	Not Started	Deputy Director for Administration	n/a	n/a	n/a		
	Position Descriptions updated w/duties	Assistant Deputy Director for Admin	06/30/2022	●	Not Started	Deputy Director for Administration	n/a	n/a	n/a		
BUDGETARY, LEGISLATIVE, OR ADMINISTRATIVE CONSIDERATIONS											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a

Status Legend:	
●	Not Started
●	Being Initiated
●	In Review / Underway
●	Approved / Completed

MGO Implementation Management Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #5 - Accounts Receivable Collections

ET Sponsor: Deputy Director for Administration

Due Date: 12/31/2021

Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating: MGO Recommendation:

High The ODF Administrative Branch should establish formalized policies and procedures related to collections of accounts receivables including a clear definition of the roles and responsibilities.

(MGO) Action Plan:

Implement formal policies and procedures related to collections activities, including a definition of the roles and responsibilities and oversight by the ODF Administrative Branch.

MGO Observation:

The ODF Administrative Branch does not have clearly defined roles or responsibilities related to oversight of collection efforts, as the ODF Operations Branch and Field Protection Districts are responsible for collections. Furthermore, we noted that formally documented policies and procedures related to accounts receivable do not exist.

MGO Potential Impact / Risk:

Lack of centralized collection efforts could lead to inefficiencies and duplicative collection inquiries. Additionally, lack of formalized collection policies and procedures, including defining responsibility for overall accounts receivable balances, could result in an increase in the aging of past due balances.

ODF Management Response:

ODF agrees with this recommendation. Lack of formalized collection procedures certainly have contributed to the current cash flow situation of the agency. While many of the agency's receivables are not collectable through the state's normal collection processes (outstanding federal reimbursements), a set of standardized processes and clearly defined roles and responsibilities would allow the agency to better grasp its financial situation and engage with its partners to ensure payments are ultimately received. ODF will implement formal policies and outline oversight regarding collections, both through agency collections and Department of Revenue efforts to minimize the length of aging AR days as much as possible given the nature of the debt.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Deliverable Review				Supporting Documentation
v	Deliverable Name			Status Indicator	Status		District Business Managers	LT	ET	BOF	
MILESTONES											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
POLICY AND PROCEDURES											
ODF Policy (list topics and define milestones)											
	ODF Directive 0-2-3-240 Accounting for Revenue, Receivable Transactions Rescinded	Financial Services Manager	09/30/2021	●	In Review / Underway	Assistant Deputy Director for Admin	Oct-21	Dec-21	Sep-21		
	ODF Directive 0-2-3-204 Internal Controls Over Revenues and Receivables Rescinded	Financial Services Manager	09/30/2021	●	In Review / Underway	Assistant Deputy Director for Admin	Oct-21	Dec-21	Sep-21		
	ODF Policy - Accounts Receivable (AR) (MGO)	Financial Services Manager	09/30/2021	●	In Review / Underway	Assistant Deputy Director for Admin	Oct-21	Dec-21	Sep-21		
	Roles defined for ODF Administration and Operations for recording AR/Revenue (MGO)	Financial Services, Operating Programs	09/30/2021	●	In Review / Underway	Assistant Deputy Director for Admin	Oct-21	Dec-21	n/a		
	Updated policy includes defined responsibilities for ODF Admin and Operations for collection of invoices, past due, exempt and non-exempt invoices (MGO)	Financial Services Manager	09/30/2021	●	In Review / Underway	Assistant Deputy Director for Admin	Oct-21	Dec-21	Sep-21		
ODF Procedures (list topic(s), define each)											
	AR Collections on Federal Cost Shares (USFS, BLM, BIA, etc.) Procedures (MGO)	Protection Finance Manager	06/30/2021	●	In Review / Underway	Deputy Director for Administration	n/a	n/a	n/a		
	AR/AP aging meeting (reconciliation processes, agenda topics) Procedures (MGO)	Protection Finance Manager	06/30/2021	●	In Review / Underway	Deputy Director for Administration	n/a	n/a	n/a		
	Invoicing and Recording Accounts Receivable (MGO)	Financial Services Manager	09/30/2021	●	Being Initiated	Assistant Deputy Director for Admin	Oct-21	Dec-21	n/a		
	AR Collections with other fire partners (WA, CA, state agency, etc.) Procedures (MGO)	Financial Services Manager	09/30/2021	●	Being Initiated	Assistant Deputy Director for Admin	Oct-21	Dec-21	n/a		
	AR Collections with all other entities Procedures (MGO)	Financial Services Manager	09/30/2021	●	Being Initiated	Assistant Deputy Director for Admin	Oct-21	Dec-21	n/a		
ODF Greenbook (list sections, define action needed)											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
ODF Guidance or Memorandum (list sections)											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
IT SYSTEM CONSIDERATIONS											
	Sage AR Accounts Receivable integrated into collection procedures once deployed	Financial Services Manager	12/31/2021	●	In Review / Underway	Assistant Deputy Director for Admin	TBD	TBD	n/a		
	OFRS Interface updated for new application	Admin Modernization Program	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	n/a		
COMMUNICATION PLANNING											
	Communications with those currently involved with collections. Initially, for information gathering and later for communicating changes to policies and procedures.	Deputy Director for Administration	12/31/2021	●	Being Initiated	Public Affairs Manager	TBD	TBD	TBD		
TRAINING NEEDS											
	Policy and procedures as part of Sage training and updates	Financial Services Manager	12/31/2021	●	Being Initiated	Assistant Deputy Director for Admin	TBD	TBD	n/a		
	Collection policies and procedures for those responsible for collections	Financial Services Manager	12/31/2021	●	Not Started	Assistant Deputy Director for Admin	TBD	TBD	n/a		

MGO Implementation Management Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #5 - Accounts Receivable Collections

ET Sponsor: Deputy Director for Administration

Due Date: 12/31/2021

Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating: MGO Recommendation:

High The ODF Administrative Branch should establish formalized policies and procedures related to collections of accounts receivables including a clear definition of the roles and responsibilities.

(MGO) Action Plan:

Implement formal policies and procedures related to collections activities, including a definition of the roles and responsibilities and oversight by the ODF Administrative Branch.

MGO Observation:

The ODF Administrative Branch does not have clearly defined roles or responsibilities related to oversight of collection efforts, as the ODF Operations Branch and Field Protection Districts are responsible for collections. Furthermore, we noted that formally documented policies and procedures related to accounts receivable do not exist.

MGO Potential Impact / Risk:

Lack of centralized collection efforts could lead to inefficiencies and duplicative collection inquiries. Additionally, lack of formalized collection policies and procedures, including defining responsibility for overall accounts receivable balances, could result in an increase in the aging of past due balances.

ODF Management Response:

ODF agrees with this recommendation. Lack of formalized collection procedures certainly have contributed to the current cash flow situation of the agency. While many of the agency's receivables are not collectable through the state's normal collection processes (outstanding federal reimbursements), a set of standardized processes and clearly defined roles and responsibilities would allow the agency to better grasp its financial situation and engage with its partners to ensure payments are ultimately received. ODF will implement formal policies and outline oversight regarding collections, both through agency collections and Department of Revenue efforts to minimize the length of aging AR days as much as possible given the nature of the debt.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Deliverable Review				Supporting Documentation
v	Deliverable Name			Status Indicator	Status		District Business Managers	LT	ET	BOF	
MAINTENANCE NEEDS POST-IMPLEMENTATION											
	Administration Fiscal Year Operating Plan core duties updated	Financial Services Manager	06/30/2022	●	Not Started	Assistant Deputy Director for Admin	n/a	n/a	n/a		
	Position Descriptions updated w/duties	Fire Protection Deputy Chief	06/30/2022	●	Not Started	Human Resources Analyst	n/a	n/a	n/a		
	Accounts Receivable and Collection Procedures reviewed (annually)	Financial Services Manager	06/30/2022	●	Not Started	Assistant Deputy Director for Admin	TBD	TBD	n/a		
BUDGETARY, LEGISLATIVE, OR ADMINISTRATIVE CONSIDERATIONS											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a

Status Legend:	
●	Not Started
●	Being Initiated
●	In Review / Underway
●	Approved / Completed

MGO Implementation Management Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #6 - Policy & Procedure Storage

ET Sponsor: Deputy Director for Administration

Due Date: 06/30/2022

Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating: MGO Recommendation:

High The ODF Administrative Branch should maintain, review, approve, and upload all finance/ accounting policies, procedures, desktop manuals and flowcharts in a centralized location accessible by all Field Protection Districts.

(MGO) Action Plan:

1. All policies, procedures, desktop manuals and flowcharts should be stored in a centralized location accessible by all personnel, including the ability to download the documents for offline access.
2. The centralized location should be maintained by the ODF Administrative Branch.

MGO Observation:

Finance/ accounting policies, procedures, desktop manuals and flowcharts are not stored within in a centralized location and/ or are not easily located. Additionally, we noted that various versions of policies, procedures, desktop manuals and flowcharts were outdated, duplicative of existing documents, or had unrestricted editing access.

MGO Potential Impact / Risk:

Potential inaccurate, incomplete, duplicative, or missing finance and accounting policies, procedures, desktop manuals and flowcharts could lead to inefficient or incorrect processes performed by staff resulting in inefficiencies and/ or errors in finance reporting.

ODF Management Response:

ODF agrees with this recommendation. Policies, procedures and process documentation is a key tenet of establishing authority, responsibility and accountability among agency staff. ODF's Administrative Branch has been implementing a thorough review process for existing agency policies and has rescinded outdated policies and prioritized others for review. This work will continue until all policies have been updated. Part of this effort was to establish and maintain a centralized repository for these policies, available to all agency employees, as outlined in the sub-recommendations. Existing IT systems may provide an interim solution; however, investment in a more sophisticated storage solution to provide ease in downloads and offline viewing, or further investment in an application could provide built-in processes for ongoing policy maintenance and document management. Specific to finance policies, procedures, and desk manuals, the Administrative Branch will inventory current artifacts and identify gaps within existing processes, systems, and workflows. ODF agrees with centralized management and maintenance of all policies, procedures, desktop manuals, and flowcharts across the entire agency. Implementation will require dedicated project capacity and prioritization.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Deliverable Review				Supporting Documentation
v	Deliverable Name			Status Indicator	Status		District Business Managers	LT	ET	BOF	
MILESTONES											
	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD		
POLICY AND PROCEDURES											
ODF Policy (list topics and define milestones)											
	ODF Policy Management Policy updated to incorporate partial recommendation	Records Manager / Sr. Strategy Manager	06/30/2022	●	Being Initiated	State Forester	TBD	TBD	TBD		
	ODF Policy Management Policy updated to incorporate pending I.T. solution	Records Manager / Sr. Strategy Manager	06/30/2022	●	Not Started	State Forester	TBD	TBD	TBD		
ODF Procedures (list topic(s), define each)											
	Public Records Maintenance Procedures (new- link to current policy, archive guidelines)	Records Manager / Sr. Strategy Manager	06/30/2022	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Model File Naming Convention defined (TBD - asset classification, retention, title, tag)	Records Manager / Sr. Strategy Manager	06/30/2022	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Policy Numbering Convention defined (TBD - program, subject, procedure, guidance)	Records Manager / Sr. Strategy Manager	06/30/2022	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
ODF Greenbook (list sections, define action needed)											
	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD		
ODF Guidance or Memorandum (list sections)											
	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD		
IT SYSTEM CONSIDERATIONS											
	Content inventory / verification on existing ODFnet policy website (MGO)	Records Manager / Sr. Strategy Manager	06/30/2022	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Link ODFnet policy website to additional policy / procedure locations (MGO)	Records Manager / Sr. Strategy Manager	06/30/2022	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Technical requirements for policy storage / management solution defined (MGO)	Admin Modernization Program	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Technical requirements for document management system defined	Admin Modernization Program	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Cost analysis for internal / external application development needs	Admin Modernization Program	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Project(s) formulated for prioritizing within internal application development capacity or for upcoming budgetary request (MGO)	Admin Modernization Program	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Review potential application(s) for ODF compatability and standards, including storage, security, licensing, and ability to expand scope to other agency business lines. (MGO)	Chief Information Officer	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Application development and testing for policy storage / management solution (MGO)	Admin Modernization Program	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Application development and testing for document management system	Admin Modernization Program	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Content transferred to replacement policy storage / management system (MGO)	Records Manager / Sr. Strategy Manager	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Application deployment(s) (MGO)	Admin Modernization Program	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Removal of any alternate / adhoc processes or systems being utilized (MGO)	Chief Information Officer	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		

MGO Implementation Management Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #6 - Policy & Procedure Storage

ET Sponsor: Deputy Director for Administration

Due Date: 06/30/2022

Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating: MGO Recommendation:

High The ODF Administrative Branch should maintain, review, approve, and upload all finance/ accounting policies, procedures, desktop manuals and flowcharts in a centralized location accessible by all Field Protection Districts.

(MGO) Action Plan:

1. All policies, procedures, desktop manuals and flowcharts should be stored in a centralized location accessible by all personnel, including the ability to download the documents for offline access.
2. The centralized location should be maintained by the ODF Administrative Branch.

MGO Observation:

Finance/ accounting policies, procedures, desktop manuals and flowcharts are not stored within in a centralized location and/ or are not easily located. Additionally, we noted that various versions of policies, procedures, desktop manuals and flowcharts were outdated, duplicative of existing documents, or had unrestricted editing access.

MGO Potential Impact / Risk:

Potential inaccurate, incomplete, duplicative, or missing finance and accounting policies, procedures, desktop manuals and flowcharts could lead to inefficient or incorrect processes performed by staff resulting in inefficiencies and/ or errors in finance reporting.

ODF Management Response:

ODF agrees with this recommendation. Policies, procedures and process documentation is a key tenet of establishing authority, responsibility and accountability among agency staff. ODF's Administrative Branch has been implementing a thorough review process for existing agency policies and has rescinded outdated policies and prioritized others for review. This work will continue until all policies have been updated. Part of this effort was to establish and maintain a centralized repository for these policies, available to all agency employees, as outlined in the sub-recommendations. Existing IT systems may provide an interim solution; however, investment in a more sophisticated storage solution to provide ease in downloads and offline viewing, or further investment in an application could provide built-in processes for ongoing policy maintenance and document management. Specific to finance policies, procedures, and desk manuals, the Administrative Branch will inventory current artifacts and identify gaps within existing processes, systems, and workflows. ODF agrees with centralized management and maintenance of all policies, procedures, desktop manuals, and flowcharts across the entire agency. Implementation will require dedicated project capacity and prioritization.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Deliverable Review				Supporting Documentation
v	Deliverable Name			Status Indicator	Status		District Business Managers	LT	ET	BOF	
COMMUNICATION PLANNING											
	Communicate procedural changes to impacted personnel and supervisors	Deputy Director for Administration	06/30/2022	●	Not Started	Public Affairs Manager	TBD	TBD	TBD		
	Coordinate agency input and review into technology solution development	Deputy Director for Administration	06/30/2022	●	Not Started	Public Affairs Manager	TBD	TBD	TBD		
TRAINING NEEDS											
	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD		
MAINTENANCE NEEDS POST-IMPLEMENTATION											
	License renewal and software application updates	Chief Information Officer	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Policy and procedures reviewed and updated	Records Manager / Sr. Strategy Manager	TBD	●	Not Started	State Forester	TBD	TBD	TBD		
BUDGETARY, LEGISLATIVE, OR ADMINISTRATIVE CONSIDERATIONS											
	To be determined as deliverables progress to consider enhanced implementation through the 25-27 budget development cycle.	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD		

Status Legend:	
●	Not Started
●	Being Initiated
●	In Review / Underway
●	Approved / Completed

MGO Implementation Management Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #7 - Cost Estimates

ET Sponsor: Fire Protection Chief

Due Date: 06/30/2022

Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating: MGO Recommendation:

High The ODF Executive Team (with the ODF Operations and Administrative Branch) should limit cost estimate generators to e-ISuite and FIRES. The ODF Operations and Administrative Branches should define policies and procedures related to the use of the two systems and provide onboarding and on-going training to ensure all personnel understand how to properly and efficiently use the systems.

(MGO) Action Plan:

1. Clearly define policies and procedures around the systems used to track and report cost share estimates.
2. Consolidate systems when possible to avoid duplicate information being entered and residing in multiple places.
3. Provide training to the Field Protection District personnel.

MGO Observation:

Multiple systems are utilized for the generation of cost estimates for incidents including: e-ISuite, FIRES, and EFCC spreadsheets. Additionally, current documented policies and procedures do not specifically define the criteria assessed to determine which cost estimate systems are to be utilized by incident.

MGO Potential Impact / Risk:

The use of multiple systems for cost estimates could result in duplication of efforts, inconsistencies, or inaccurate/ incomplete data.

ODF Management Response:

ODF agrees with this recommendation. Multiple options do exist in generating cost estimates including E-ISuite, FIRES, and EFCC spreadsheets. These three solutions are currently utilized based on cost estimate thresholds, internet availability, timing of system availability on incident, and whether an IMT Finance Section Chief is deployed with a team or not. Interagency IMTs mainly utilize E-ISuite. ODF will ensure our policy and procedures accurately defines our business practices related to designated systems for tracking and reporting cost share estimates. Further exploration is needed to determine feasibility of consolidating the cost share estimating solutions with an IT solution. Training has been regularly provided on cost estimation methods and IT systems utilized. In the future, this training will become part of the required financial curriculum for field finance positions.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Deliverable Review				Supporting Documentation
√	Deliverable Name			Status Indicator	Status		District Business Managers	LT	ET	BOF	
MILESTONES											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
POLICY AND PROCEDURES											
ODF Policy (list topics and define milestones)											
	ODF Policy Cost Estimate Generation (new) (MGO)	Protection Finance Manager	06/30/2022	●	Not Started	Deputy Director for Administration	Jul-22	Jul-22	Jun-22		
	ODF Directive 1-2-7-001 Guidelines for Eligibility of Firefighting Costs for the Oregon Forest Land Protection Fund 07/01/2020 (revise from directive to policy)	Oregon Forestland Protection Fund Administrator	06/30/2022	●	Not Started	Deputy Director for Administration	Jul-22	Jul-22	Jun-22		
ODF Procedures (list topic(s), define each)											
	Cost Estimate and Cost Share Consolidation Procedures for Protection Finance and Oregon Forestland Protection Fund Administrator w/focus on systems used (MGO)	Protection Finance Manager	06/30/2022	●	Not Started	Oregon Forestland Protection Fund Administrator	Jul-22	Jul-22	n/a		
ODF Greenbook (list sections, define action needed)											
	Chapter 80 - Revise Cost Estimate Reporting Methods to define criteria for systems used on incident, expectations for interdepartmental communications, timing (MGO)	Protection Finance Manager	06/30/2022	●	Not Started	Fire Protection Deputy Chief	Jul-22	n/a	n/a		
ODF Guidance or Memorandum (list sections)											
	Tracking Fire Season Emergency Cost Estimates - Change in Roles and Responsibilities	Protection Finance Manager	04/08/2021	●	Complete	Oregon Forestland Protection Fund Administrator	n/a	n/a	n/a		Change in Tracking Fire Season Emergency Cost Estimates, 04/08/2021 (email)
IT SYSTEM CONSIDERATIONS											
	Evaluation of Field and Salem system use, limitations/capabilities, improvements	Admin Modernization Program	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Technical requirements for cost estimate consolidation defined	Admin Modernization Program	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Evaluation of process changes if any cost estimate tool removed (MGO)	Protection Finance Manager	TBD	●	Not Started	Oregon Forestland Protection Fund Administrator	TBD	TBD	TBD		
	Project formulated for prioritizing within internal application development capacity	Admin Modernization Program	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Application development and testing for cost estimate consolidation, if feasible (MGO)	Admin Modernization Program	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Cost estimate consolidation application deployment, if feasible (MGO)	Admin Modernization Program	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Removal / consolidation of cost estimating tools, if feasible (MGO)	Protection Finance Manager	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Procedures for cost estimates revised to incorporate new application	Protection Finance Manager	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
COMMUNICATION PLANNING											
	Announcement of annual Incident Finance Training for 2021	Incident Finance / FEMA Manager	04/26/2021	●	Complete	Protection Finance Manager	n/a	May-21	n/a		Email
	Communicate procedural changes to impacted personnel and supervisors	Fire Protection Chief	06/30/2022	●	Not Started	Public Affairs Manager	TBD	TBD	TBD		
	Request real-time input from personnel navigating the new procedure to allow for quick adjustments if needed.	Fire Protection Chief	06/30/2022	●	Not Started	Public Affairs Manager	TBD	TBD	TBD		

MGO Implementation Management Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #7 - Cost Estimates

ET Sponsor: Fire Protection Chief

Due Date: 06/30/2022

Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating: MGO Recommendation:

High The ODF Executive Team (with the ODF Operations and Administrative Branch) should limit cost estimate generators to e-Suite and FIRES. The ODF Operations and Administrative Branches should define policies and procedures related to the use of the two systems and provide onboarding and on-going training to ensure all personnel understand how to properly and efficiently use the systems.

(MGO) Action Plan:

1. Clearly define policies and procedures around the systems used to track and report cost share estimates.
2. Consolidate systems when possible to avoid duplicate information being entered and residing in multiple places.
3. Provide training to the Field Protection District personnel.

MGO Observation:

Multiple systems are utilized for the generation of cost estimates for incidents including: e-Suite, FIRES, and EFCC spreadsheets. Additionally, current documented policies and procedures do not specifically define the criteria assessed to determine which cost estimate systems are to be utilized by incident.

MGO Potential Impact / Risk:

The use of multiple systems for cost estimates could result in duplication of efforts, inconsistencies, or inaccurate/ incomplete data.

ODF Management Response:

ODF agrees with this recommendation. Multiple options do exist in generating cost estimates including E-Suite, FIRES, and EFCC spreadsheets. These three solutions are currently utilized based on cost estimate thresholds, internet availability, timing of system availability on incident, and whether an IMT Finance Section Chief is deployed with a team or not. Interagency IMTs mainly utilize E-Suite. ODF will ensure our policy and procedures accurately defines our business practices related to designated systems for tracking and reporting cost share estimates. Further exploration is needed to determine feasibility of consolidating the cost share estimating solutions with an IT solution. Training has been regularly provided on cost estimation methods and IT systems utilized. In the future, this training will become part of the required financial curriculum for field finance positions.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Deliverable Review				Supporting Documentation
v	Deliverable Name			Status Indicator	Status		District Business Managers	LT	ET	BOF	
TRAINING NEEDS											
	Fire Finance Training (annual) - Cost Estimates module (MGO)	Incident Finance / FEMA Manager	05/17/2021	●	Complete	Protection Finance Manager	May-21	May-21	n/a		Incident Finance: Cost Estimates
	ODF Incident Finance Cost Estimates module revised to integrate new procedures	Incident Finance / FEMA Manager	06/30/2022	●	Not Started	Protection Finance Manager	TBD	TBD	TBD		
	ODF Daily Cost Summary Training	Incident Finance / FEMA Manager	06/30/2022	●	Not Started	Protection Finance Manager	TBD	TBD	TBD		
	ODF FIRES for Cost Estimate Training	Incident Finance / FEMA Manager	06/30/2022	●	Not Started	Protection Finance Manager	TBD	TBD	TBD		
	E-Suite Cost Training - USFS or ODF	Incident Finance / FEMA Manager	06/30/2022	●	Not Started	Protection Finance Manager	TBD	TBD	TBD		
MAINTENANCE NEEDS POST-IMPLEMENTATION											
	Cost share templates, procedures, and training updated (annually)	Protection Finance Manager	06/30/2022	●	Not Started	Fire Protection Deputy Chief	TBD	TBD	TBD		
	Protection Fiscal Year Operating Plan core duties updated	Fire Protection Deputy Chief	06/30/2022	●	Not Started	Fire Protection Deputy Chief	n/a	n/a	n/a		
	Position Descriptions updated w/duties	Fire Protection Deputy Chief	06/30/2022	●	Not Started	Human Resources Analyst	n/a	n/a	n/a		
	Annual license renewal and maintenance for IT application, if applicable	IT Operations	06/30/2022	●	Not Started	Chief Information Officer	n/a	n/a	n/a		
BUDGETARY, LEGISLATIVE, OR ADMINISTRATIVE CONSIDERATIONS											
	Cost analysis for investment in internal / external application development needs	Admin Modernization Program	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		

Status Legend:	
●	Not Started
●	Being Initiated
●	In Review / Underway
●	Approved / Completed

MGO Implementation Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #8 - BRIO Real-time

ET Sponsor: Deputy Director for Administration

Due Date: 06/30/2022

Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating: MGO Recommendation:

High Field Protection Districts should be provided with real time access (read only) to key financial data /metrics, including the ability to run a specified set of BRIO reports. Additionally, the ODF Administrative Branch should provide BRIO training to the Field Protection Districts on an on-going basis including how to run reports and which reports should be utilized for which purposes.

(MGO) Action Plan:

The ODF Administrative Branch should:
 1. Provide the Field Protection Districts with read-only and limited access to BRIO
 2. Develop an initial and on-going training related to BRIO to the Field Protection Districts including how to run the reports needed, which reports should be utilized for what purposes, and identification of any needs not currently met by the BRIO reports.

NOTE: If a new system is developed for real-time financial data/ metrics, BRIO access may not need to be provided to the Field Protection Districts.

MGO Observation:

Field Protection Districts manually manipulate the standardized reports received, for various finance and accounting related purposes as needed. For additional reports requested by the Field Protection Districts outside of the standardized set of reports provided, the ODF Administrative Branch are producing on an ad-hoc basis. Additionally, Field Protection Districts do not have access to timely financial data or real-time access to Brio.

MGO Potential Impact / Risk:

Lack of real-time access to Brio reports by the Field Protection Districts impacts their ability to make timely discovery and correction of errors and timely and appropriate financial decisions, which could result in mismanagement of funds.

ODF Management Response:

ODF agrees with this recommendation. Providing contextual and time-relevant access to information to support business decisions has been a central theme within the modernization work being conducted within the agency's Administrative Branch. (See Note in MAP section). The implementation of Online Financial Reporting System (OFRS) will facilitate the dissemination of information the protection districts and the rest of the agency need to perform their work. While the initial OFRS implementation will provide the backbone infrastructure necessary to provide this functionality, a comprehensive assessment of reporting needs will have to be conducted across the agency to ensure needs are met. This reporting system will undoubtedly require the standardization of work across ODF districts to minimize the complexity of delivering and maintaining these services. The training and correct use of these reports will be paramount to their successful usage and that training will be incorporated into their development as well as in new employee orientation.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Deliverable Review				Supporting Documentation
v	Deliverable Name			Status Indicator	Status		District Business Managers	LT	ET	BOF	
MILESTONES											
	Inventory of existing standard and non-standard reports sent to the field (MGO)	Financial Services Manager	07/30/2021	●	Complete	Assistant Deputy Director for Admin	n/a	n/a	n/a		Inventory of reports
	Standardize reports as defined in MGO Recommendation #13 (MGO)	Financial Services Manager	06/30/2022	●	Not Started	Assistant Deputy Director for Admin	TBD	n/a	n/a		
	Identify any outstanding information needs not met in standardized reports (MGO)	Financial Services Manager	06/30/2022	●	Not Started	Assistant Deputy Director for Admin	TBD	n/a	n/a		
POLICY AND PROCEDURES											
ODF Policy (list topics and define milestones)											
	ODF Policy - Financial Reporting and Oversight	Financial Services Manager	06/30/2022	●	Not Started	Assistant Deputy Director for Admin	TBD	TBD	TBD		
ODF Procedures (list topic(s), define each)											
	Financial Reporting procedures for preparation of each standardized report (TBD)	Financial Services Manager	06/30/2022	●	Not Started	Assistant Deputy Director for Admin	TBD	n/a	n/a		
	Financial Oversight procedures for review of each standardized report (TBD)	Financial Services Manager	06/30/2022	●	Not Started	Assistant Deputy Director for Admin	TBD	n/a	n/a		
	OFRS Reporting Tool Use Procedures (MGO)	Financial Services Manager	06/30/2022	●	Not Started	Assistant Deputy Director for Admin	TBD	n/a	n/a		
ODF Greenbook (list sections, define action needed)											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
ODF Guidance or Memorandum (list sections)											
	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD		
IT SYSTEM CONSIDERATIONS											
	Report designs integrated into OFRS application (MGO)	Admin Modernization Program	06/30/2022	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
COMMUNICATION PLANNING											
	Deployment of new OFRS Reporting Tool with training opportunities (MGO)	Admin Modernization Program	06/30/2022	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Feedback mechanism for adaptive response in procedural use or training (MGO)	Admin Modernization Program	06/30/2022	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Coordinate agency input and review into technology solution development	Deputy Director for Administration	06/30/2022	●	Not Started	Public Affairs Manager	TBD	TBD	TBD		
TRAINING NEEDS											
	Training plan for use of the OFRS Reporting Tool (MGO)	Admin Modernization Program	06/30/2022	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Training module on the use of the OFRS Reporting Tool (MGO)	Admin Modernization Program	06/30/2022	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		

MGO Implementation Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #8 - BRIO Real-time

ET Sponsor: Deputy Director for Administration

Due Date: 06/30/2022

Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating: MGO Recommendation:

High Field Protection Districts should be provided with real time access (read only) to key financial data /metrics, including the ability to run a specified set of BRIO reports. Additionally, the ODF Administrative Branch should provide BRIO training to the Field Protection Districts on an on-going basis including how to run reports and which reports should be utilized for which purposes.

(MGO) Action Plan:

The ODF Administrative Branch should:
 1. Provide the Field Protection Districts with read-only and limited access to BRIO
 2. Develop an initial and on-going training related to BRIO to the Field Protection Districts including how to run the reports needed, which reports should be utilized for what purposes, and identification of any needs not currently met by the BRIO reports.

NOTE: If a new system is developed for real-time financial data/ metrics, BRIO access may not need to be provided to the Field Protection Districts.

MGO Observation:

Field Protection Districts manually manipulate the standardized reports received, for various finance and accounting related purposes as needed. For additional reports requested by the Field Protection Districts outside of the standardized set of reports provided, the ODF Administrative Branch are producing on an ad-hoc basis. Additionally, Field Protection Districts do not have access to timely financial data or real-time access to Brio.

MGO Potential Impact / Risk:

Lack of real-time access to Brio reports by the Field Protection Districts impacts their ability to make timely discovery and correction of errors and timely and appropriate financial decisions, which could result in mismanagement of funds.

ODF Management Response:

ODF agrees with this recommendation. Providing contextual and time-relevant access to information to support business decisions has been a central theme within the modernization work being conducted within the agency's Administrative Branch. (See Note in MAP section). The implementation of Online Financial Reporting System (OFRS) will facilitate the dissemination of information the protection districts and the rest of the agency need to perform their work. While the initial OFRS implementation will provide the backbone infrastructure necessary to provide this functionality, a comprehensive assessment of reporting needs will have to be conducted across the agency to ensure needs are met. This reporting system will undoubtedly require the standardization of work across ODF districts to minimize the complexity of delivering and maintaining these services. The training and correct use of these reports will be paramount to their successful usage and that training will be incorporated into their development as well as in new employee orientation.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Deliverable Review				Supporting Documentation
✓	Deliverable Name			Status Indicator	Status		District Business Managers	LT	ET	BOF	
MAINTENANCE NEEDS POST-IMPLEMENTATION											
	OFRS Reporting Tool updates, upgrades, and maintenance	Admin Modernization Program	06/30/2023	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Review and update policy/procedures to meet changing needs (annually)	Assistant Deputy Director for Admin	06/30/2022	●	Not Started	Deputy Director for Administration	n/a	n/a	n/a		
	Administrative Branch Fiscal Year Operating Plan core duties updated	Assistant Deputy Director for Admin	06/30/2022	●	Not Started	Deputy Director for Administration	n/a	n/a	n/a		
	Position Descriptions updated w/duties	Assistant Deputy Director for Admin	06/30/2022	●	Not Started	Deputy Director for Administration	n/a	n/a	n/a		
BUDGETARY, LEGISLATIVE, OR ADMINISTRATIVE CONSIDERATIONS											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a

Status Legend:	
●	Not Started
●	Being Initiated
●	In Review / Underway
●	Approved / Completed

MGO Implementation Management Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #9 - Accounts Payable

ET Sponsor: Deputy Director for Administration

Due Date: 06/30/2022

Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating: MGO Recommendation:

High ODF Administrative Branch should implement processes and procedures related to expense accruals, and consider the use of purchase orders within OregonBuys.

(MGO) Action Plan:

1. Purchasing/ disbursement policies and procedures should be updated to clearly state when purchase orders and vendor invoices are to be entered in the system.
2. Reconciliation procedures between open purchase orders and invoices received should be implemented and performed on a periodic (e.g. monthly) basis.
3. ODF should consider the use of OregonBuys as a procurement system in addition to a payment system. If a different system and or process must be utilized for recording and tracking of purchase orders, should be clearly communicated and outlined within the purchasing/ disbursement policies and procedures.

MGO Observation:

Purchase orders are not utilized for the purchase of good or services prior to the receipt of vendor invoices. Additionally, certain vendor invoices take years for ODF to receive, such as invoices from the U.S. Bureau of Land Management for fire retardant.

MGO Potential Impact / Risk:

The lack of recording of payables timely could lead to the inability to properly project cash flows resulting in cash gaps, due to incomplete expense data.

ODF Management Response:

ODF agrees with this recommendation. ODF will analyze the current tools we have available to determine the possibility of setting up a purchase order or tracker for each fire based on the estimated fire costs. ODF will also analyze the use of their accounting systems and reports to track current payments related to the fires. Using these tools should allow ODF to adequately project future payables and project cash flows more accurately.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Deliverable Review				Supporting Documentation
v	Deliverable Name			Status Indicator	Status		District Business	LT	ET	BOF	
MILESTONES											
	Transition Plan for ORPIN Users to OregonBuys	Contract Services Program Manager	06/01/2021	●	Complete	Assistant Deputy Director for Admin	Apr-21	Apr-21	n/a		ORPIN User Survey for Transition to OregonBuys 04/21/2021
	OregonBuys eProcurement side of the system launched for ODF use (MGO)	Contract Services Program Manager	07/01/2021	●	Complete	DAS	Jul-21	Jul-21	n/a		OregonBuys is Live (Email 07/02/21)
	Reconciliation of purchase orders in OregonBuys with invoices in SFMS (weekly)	Disbursements Manager	Done	●	Complete	Financial Services Manager	n/a	n/a	n/a		Process
	Preseason Agreements for fire vendors imputed into OregonBuys as master blanket purchase orders to support ability to accrue expenses	Contract Services Program Manager	06/30/2022	●	Not Started	Assistant Deputy Director for Admin	TBD	TBD	TBD		
	Analysis of feasibility / need to establish accruals for each fire within OregonBuys	Contract Services Program Manager	06/30/2022	●	Not Started	Assistant Deputy Director for Admin	TBD	TBD	TBD		
	Analysis of OregonBuys capabilities for reporting and tracking expenditures	Financial Services Manager	08/01/2021	●	Complete	Assistant Deputy Director for Admin	n/a	n/a	n/a		Data exports and reporting
	Analysis of OregonBuys encumbrances vs. SFMA encumbrances	Financial Services Manager	06/01/2022	●	Not Started	Assistant Deputy Director for Admin	n/a	n/a	n/a		
	Analysis of budget allocations to encumbrances, unknown liabilities	Financial Services Manager	06/01/2022	●	Not Started	Assistant Deputy Director for Admin	n/a	n/a	n/a		
	Reference Outstanding Assets & Liabilities Tracker to capture all unknown liabilities	Financial Services Manager	12/31/2021	●	Complete	Assistant Deputy Director for Admin	n/a	n/a	n/a		Outstanding Assets & Liabilities Tracker
POLICY AND PROCEDURES											
ODF Policy (list topics and define milestones)											
	ODF Directive 0-2-5-100 Purchasing Controls Rescinded	Contract Services Program Manager	09/30/2021	●	In Review / Underway	Deputy Director for Administration	Oct-21	Dec-21	Sep-21		
	ODF Directive 0-4-0-100 Procurement, Agreements, Contracts, and Leases Rescinded	Contract Services Program Manager	09/30/2021	●	In Review / Underway	Deputy Director for Administration	Oct-21	Dec-21	Sep-21		
	ODF Directive 0-2-3-250 Accounting for Disbursement Transactions Rescinded	Financial Services Manager	09/30/2021	●	In Review / Underway	Deputy Director for Administration	Oct-21	Dec-21	Sep-21		
	ODF Directive 0-2-3-205 Internal Controls Over Expenditures Rescinded	Financial Services Manager	09/30/2021	●	In Review / Underway	Deputy Director for Administration	Oct-21	Dec-21	Sep-21		
	ODF Policy - Disbursements and Expenditures (new) (MGO)	Financial Services Manager	09/30/2021	●	In Review / Underway	Deputy Director for Administration	Oct-21	Dec-21	Sep-21		
	ODF Policy - Procurement (new) (MGO)	Contract Services Program Manager	09/30/2021	●	In Review / Underway	Deputy Director for Administration	Oct-21	Dec-21	Sep-21		
	ODF Policy - Signature Authority updated for inclusion of OregonBuys	Contract Services Program Manager	09/30/2021	●	In Review / Underway	Deputy Director for Administration	Oct-21	Dec-21	Sep-21		
ODF Procedures (list topic(s), define each)											
	Disbursements and Expenditure Procedures updated for OregonBuys (MGO)	Disbursements Manager	12/31/2021	●	Being Initiated	Financial Services Manager	TBD	TBD	TBD		
	Reconciliation Procedures for open market purchase orders and invoices (MGO)	Disbursements Manager	12/31/2021	●	Not Started	Financial Services Manager	n/a	n/a	n/a		
ODF Greenbook (list sections, define action needed)											
	Chapter 20 - Procurement revised to integrate new OregonBuys procedures (MGO)	Incident Finance / FEMA Manager	06/30/2022	●	Not Started	Protection Finance Manager	Jul-22	n/a	n/a		
	Chapter 90 - Incident Payments revised to integrate new payment procedures (MGO)	Incident Finance / FEMA Manager	06/30/2022	●	Not Started	Protection Finance Manager	Jul-22	n/a	n/a		

MGO Implementation Management Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #9 - Accounts Payable

ET Sponsor: Deputy Director for Administration

Due Date: 06/30/2022

Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating: MGO Recommendation:

High ODF Administrative Branch should implement processes and procedures related to expense accruals, and consider the use of purchase orders within OregonBuys.

(MGO) Action Plan:

1. Purchasing/ disbursement policies and procedures should be updated to clearly state when purchase orders and vendor invoices are to be entered in the system.
2. Reconciliation procedures between open purchase orders and invoices received should be implemented and performed on a periodic (e.g. monthly) basis.
3. ODF should consider the use of OregonBuys as a procurement system in addition to a payment system. If a different system and or process must be utilized for recording and tracking of purchase orders, should be clearly communicated and outlined within the purchasing/ disbursement policies and procedures.

MGO Observation:

Purchase orders are not utilized for the purchase of good or services prior to the receipt of vendor invoices. Additionally, certain vendor invoices take years for ODF to receive, such as invoices from the U.S. Bureau of Land Management for fire retardant.

MGO Potential Impact / Risk:

The lack of recording of payables timely could lead to the inability to properly project cash flows resulting in cash gaps, due to incomplete expense data.

ODF Management Response:

ODF agrees with this recommendation. ODF will analyze the current tools we have available to determine the possibility of setting up a purchase order or tracker for each fire based on the estimated fire costs. ODF will also analyze the use of their accounting systems and reports to track current payments related to the fires. Using these tools should allow ODF to adequately project future payables and project cash flows more accurately.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Deliverable Review				Supporting Documentation
v	Deliverable Name			Status Indicator	Status		District Business	LT	ET	BOF	
ODF Guidance or Memorandum (list sections)											
	OregonBuys Payment Guidance revised to include new procedures	Disbursements Manager	06/30/2022	●	Not Started	Financial Services Manager	Jul-22	n/a	n/a		
IT SYSTEM CONSIDERATIONS											
	Sage AP module, scope of work, budget and timeline	Financial Services Manager	TBD	●	Not Started	Assistant Deputy Director for Admin	TBD	TBD	n/a		
	Sage AP module updated to integrate with business practices	Financial Services Manager	TBD	●	Not Started	Assistant Deputy Director for Admin	TBD	TBD	n/a		
COMMUNICATION PLANNING											
	Continued communications on the launch of OregonBuys procurement functionality	Contract Services Program Manager	06/30/2022	●	In Review / Underway	Assistant Deputy Director for Admin	TBD	TBD	n/a		
	Agency-wide emails that specifically address accounts payable documentation and processing expectations. Resend as necessary to reaffirm expectations.	Deputy Director for Administration	06/30/2022	●	Not Started	Public Affairs Manager	TBD	TBD	TBD		
TRAINING NEEDS											
	OregonBuys Department Access User Overview Training announced (4 modules) (MGO)	Department of Administrative Services	05/26/2021	●	Complete	n/a	May-21	May-21	May-21		Email: OregonBuys Training Now Available in iLearn 05/26/21
	OregonBuys Basic Procurement User Training (7 modules) (MGO)	Department of Administrative Services	05/26/2021	●	Complete	n/a	May-21	May-21	May-21		Email: OregonBuys Training Now Available in iLearn 05/26/21
	Fire Finance Training (annual) - Procurement and Incident Payment modules	Incident Finance / FEMA Manager	06/30/2022	●	Not Started	Protection Finance Manager	Jul-22	n/a	n/a		
MAINTENANCE NEEDS POST-IMPLEMENTATION											
	AP Payment Guidance/Procedures reviewed (annually)	Disbursements Manager	10/01/2022	●	Not Started	Financial Services Manager	TBD	TBD	TBD		
	Disbursements, Expenditures, Procurement, Signature Authority policies reviewed	Assistant Deputy Director for Admin	10/01/2023	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Administrative Branch Fiscal Year Operating Plan core duties updated	Assistant Deputy Director for Admin	06/30/2022	●	Not Started	Deputy Director for Administration	n/a	n/a	n/a		
	Position Descriptions updated w/duties	Assistant Deputy Director for Admin	06/30/2022	●	Not Started	Deputy Director for Administration	n/a	n/a	n/a		
BUDGETARY, LEGISLATIVE, OR ADMINISTRATIVE CONSIDERATIONS											
	Consider Temporary or LD Business Analyst capacity to support OregonBuys Encumbrance process development as deliverables progress	Contract Services Program Manager	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		

Status Legend:	
●	Not Started
●	Being Initiated
●	In Review / Underway
●	Approved / Completed

MGO Implementation Management Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #10 - Electronic Records
ET Sponsor: Deputy Director for Administration
Due Date: 06/30/2022
Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating: MGO Recommendation:

High All hard copies of significant supporting documentation (e.g. fire boxes) should be scanned, uploaded and maintained in an information technology system. Additionally, the documents should be easily searchable.

(MGO) Action Plan:

1. Identify and acquire a document management software
2. Convert historical hard copy/ manual financial data (e.g. fire boxes) to electronic files for storage on the document management software.
3. Establish policies and procedures which require hard copy / manual financial data obtained during fire incidents to be uploaded to the document management software, including the timeframe in which the documentation should be uploaded.

MGO Observation:

A significant amount of information required for the EFCC audits and FEMA claims are available solely in hard copy form. Additionally, fire boxes are retained in hard copy format and in a centralized location (Field Protection Districts) for storage.

MGO Potential Impact / Risk:

Maintaining documentation in hard copy form, in centralized locations, could result in a loss of data in the event of a natural disaster. Additionally, the use of hard copy documents results in inefficiencies due to the physical movement of documents and the inability to search through documents electronically.

ODF Management Response:

ODF agrees with this recommendation; however, additional investment of funds are needed to implement the information technology solution, ranging from approximately \$40,000/year for just the Salem Operations Fire Business Unit to \$100,000/year for the statewide price agreement solution that would cover all employees. Document management software solutions vary greatly in costs depending upon quantity of licensed users and sophistication of technology. Additional information technology solutions have also been evaluated for agency use that would more holistically mitigate the risk and these require even greater investment. To be most efficient in implementation for current agency business needs, the agency should utilize a combination of services that include document management software for long-term use, cloud technology storage for temporary use, a project manager and business analyst to assist with new implementation of systems, a dedicated resource to support ongoing document management, and additional temporary clerical capacity to convert historical documents over to newly implemented systems.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Deliverable Review				Supporting Documentation
√	Deliverable Name			Status Indicator	Status		District Business Managers	LT	ET	BOF	
MILESTONES											
	This recommendation's implementation plan is considerate of the Legislative Assembly's development of a 2023-25 Legislatively Adopted Budget by 07/30/2023, that is inclusive of ODF Policy Option Packages developed through the 23-25 biennial budget development cycle. ODF's timeline to develop these packages with the Board of Forestry aligns with the recommendation due date of 06/30/2022. (MGO)	State Forester	07/30/2023	●	Being Initiated	Oregon Legislative Assembly	TBD	TBD	TBD		
	Project management outline assessing resource needs for Fire Finance Document Management (sponsor, owner, project manager, business analyst, business case, with project, staffing, communication, implementation and production plans, etc.) (MGO)	Protection Finance Manager	12/31/2021	●	Being Initiated	Assistant Deputy Director for Admin	TBD	TBD	TBD		
	Fire Finance Document Management permanent resource needs (owner, position, organizational structure) (MGO)	Protection Finance Manager	12/31/2021	●	Being Initiated	Assistant Deputy Director for Admin	TBD	TBD	TBD		
	Short-term working group established to convert historical hard copy/manual financial data (e.g. fire boxes) to electronic files, catalogued for storage on the future document management software. (MGO)	Protection Finance Manager	06/30/2022	●	Not Started	Deputy Fire Protection Chief	TBD	TBD	TBD		
	Document classification methodology including grouping and security considerations.	Protection Finance Manager	06/30/2022	●	Not Started	Deputy Fire Protection Chief	TBD	TBD	TBD		
	Procure professional document management application - see budgetary (MGO)	Protection Finance Manager	TBD	●	Not Started	Deputy Fire Protection Chief	TBD	TBD	TBD		
	Inventory of all paper fire finance documents created on incident, including owner, criteria for documentation and, identifying opportunities for electronic alternatives.	Protection Finance Manager	TBD	●	Not Started	Deputy Fire Protection Chief	TBD	TBD	TBD		
POLICY AND PROCEDURES											
ODF Policy (list topics and define milestones)											
	ODF Policy - Fire Finance Document Management (w/implementation of system) (MGO)	Protection Finance Manager	TBD	●	Not Started	Deputy Fire Protection Chief	TBD	TBD	TBD		
ODF Procedures (list topic(s), define each)											
	Procedures for electronic management of each document type - what, when and how to capture, create, save and share documents (w/implementation of system) (MGO)	Protection Finance Manager	TBD	●	Not Started	Deputy Fire Protection Chief	TBD	TBD	TBD		
ODF Greenbook (list sections, define action needed)											
	Chapter 40 - Revise Incident Business Management Coordination to define procedures for electronic management of fire finance records (MGO)	Protection Finance Manager	06/30/2022	●	Not Started	Fire Protection Deputy Chief	Jul-22	n/a	n/a		
ODF Guidance or Memorandum (list sections)											
	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD		
IT SYSTEM CONSIDERATIONS											
	Technical requirements for electronic fire records solution defined	Admin Modernization Program	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Technical requirements for document management system defined (MGO)	Admin Modernization Program	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Cost analysis for internal / external application development needs (MGO)	Admin Modernization Program	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Project(s) formulated for prioritizing within internal application development capacity or for upcoming budgetary request (MGO)	Admin Modernization Program	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Review potential application(s) for ODF compatibility and standards, including storage, security, licensing, and ability to expand scope to other agency business lines. (MGO)	Chief Information Officer	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Application development and testing for electronic fire records solution	Admin Modernization Program	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Application development and testing for document management system (MGO)	Admin Modernization Program	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		

MGO Implementation Management Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #10 - Electronic Records
ET Sponsor: Deputy Director for Administration
Due Date: 06/30/2022
Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating: MGO Recommendation:

High All hard copies of significant supporting documentation (e.g. fire boxes) should be scanned, uploaded and maintained in an information technology system. Additionally, the documents should be easily searchable.

(MGO) Action Plan:

1. Identify and acquire a document management software
2. Convert historical hard copy/ manual financial data (e.g. fire boxes) to electronic files for storage on the document management software.
3. Establish policies and procedures which require hard copy / manual financial data obtained during fire incidents to be uploaded to the document management software, including the timeframe in which the documentation should be uploaded.

MGO Observation:

A significant amount of information required for the EFCC audits and FEMA claims are available solely in hard copy form. Additionally, fire boxes are retained in hard copy format and in a centralized location (Field Protection Districts) for storage.

MGO Potential Impact / Risk:

Maintaining documentation in hard copy form, in centralized locations, could result in a loss of data in the event of a natural disaster. Additionally, the use of hard copy documents results in inefficiencies due to the physical movement of documents and the inability to search through documents electronically.

ODF Management Response:

ODF agrees with this recommendation; however, additional investment of funds are needed to implement the information technology solution, ranging from approximately \$40,000/year for just the Salem Operations Fire Business Unit to \$100,000/year for the statewide price agreement solution that would cover all employees. Document management software solutions vary greatly in costs depending upon quantity of licensed users and sophistication of technology. Additional information technology solutions have also been evaluated for agency use that would more holistically mitigate the risk and these require even greater investment. To be most efficient in implementation for current agency business needs, the agency should utilize a combination of services that include document management software for long-term use, cloud technology storage for temporary use, a project manager and business analyst to assist with new implementation of systems, a dedicated resource to support ongoing document management, and additional temporary clerical capacity to convert historical documents over to newly implemented systems.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Deliverable Review				Supporting Documentation
√	Deliverable Name			Status Indicator	Status		District Business Managers	LT	ET	BOF	
	Application deployment(s) (MGO)	Admin Modernization Program	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Removal of any alternate / adhoc processes or systems being utilized (MGO)	Chief Information Officer	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Procedures for fire record keeping revised to incorporate new application	Protection Finance Manager	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
COMMUNICATION PLANNING											
	Communication Plan identifying stakeholders, RACI metrics, and change management	Project Manager	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
TRAINING NEEDS											
	District Electronic Fire Folders - Incident Finance Training module	Protection Finance Manager	TBD	●	Not Started	Deputy Fire Protection Chief	TBD	TBD	TBD		
	IMT Electronic Process - Incident Finance Training module	Protection Finance Manager	TBD	●	Not Started	Deputy Fire Protection Chief	TBD	TBD	TBD		
	Fire Finance Training (annual)	Incident Finance / FEMA Manager	TBD	●	Protection Finance Manager	Deputy Fire Protection Chief	TBD	TBD	TBD		
MAINTENANCE NEEDS POST-IMPLEMENTATION											
	Metrics on adoption and compliance gathered and monitored	Protection Finance Manager	TBD	●	Not Started	Deputy Fire Protection Chief	TBD	TBD	TBD		
	Metrics on storage usage gathered and monitored	Protection Finance Manager	TBD	●	Not Started	Deputy Fire Protection Chief	TBD	TBD	TBD		
	License renewal and software application updates	Chief Information Officer	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Policy and procedures reviewed and updated (annually)	Protection Finance Manager	TBD	●	Not Started	Fire Protection Deputy Chief	TBD	TBD	TBD		
BUDGETARY, LEGISLATIVE, OR ADMINISTRATIVE CONSIDERATIONS											
	LD/Temp Document Technician(s) positions defined for short-term workgroup (MGO)	Protection Finance Manager	12/31/2021	●	Not Started	Assistant Deputy Director for Admin	TBD	TBD	TBD		
	LD Project Manager position drafted for 2023-25 budget development (MGO)	Protection Finance Manager	12/31/2021	●	Not Started	Assistant Deputy Director for Admin	TBD	TBD	TBD		
	Perm Document Manager position drafted for 2023-25 budget development (MGO)	Protection Finance Manager	12/31/2021	●	Not Started	Assistant Deputy Director for Admin	TBD	TBD	TBD		
	Perm Document Technician position drafted for 2023-25 budget development (MGO)	Protection Finance Manager	12/31/2021	●	Not Started	Assistant Deputy Director for Admin	TBD	TBD	TBD		
	Document Management System(s) drafted for 2023-25 budget development (MGO)	Protection Finance Manager	12/31/2021	●	Not Started	Assistant Deputy Director for Admin	TBD	TBD	TBD		
	Strategic Initiatives for 2023-25 budget development	State Forester	10/30/2021	●	Not Started	Board of Forestry	TBD	TBD	TBD		
	Guiding Principles and Direction for 2023-25 budget development (MGO)	State Forester	01/30/2022	●	Not Started	Board of Forestry	TBD	TBD	TBD		
	Input on Budget Concepts for 2023-25 budget development (MGO)	State Forester	04/30/2022	●	Not Started	Board of Forestry	TBD	TBD	TBD		
	Policy Option Packages for 2023-25 budget development (MGO)	State Forester	06/30/2022	●	Not Started	Board of Forestry	TBD	TBD	TBD		
	2023-25 Agency Request Budget	State Forester	07/30/2022	●	Not Started	Board of Forestry	TBD	TBD	TBD		
	2023-25 Governor's Recommended Budget	Governor	02/28/2023	●	Not Started	Legislative Assembly	TBD	TBD	TBD		
	2023-25 Legislative Adopted Budget	Legislative Assembly	07/30/2023	●	Not Started	Legislative Assembly	TBD	TBD	TBD		
	Document Management System Acquisition (MGO)	Protection Finance Manager	TBD	●	Not Started	Assistant Deputy Director for Admin	TBD	TBD	TBD		

Status Legend:	
●	Not Started
●	Being Initiated
●	In Review / Underway
●	Approved / Completed

MGO Implementation Management Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #11 - IT Systems

ET Sponsor: Deputy Director for Administration

Due Date: 06/30/2023

Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating: MGO Recommendation:

High IT systems should be consolidated and the ODF Administrative Branch should establish policies and procedures for the acquisition and implementation of new IT systems.

(MGO) Action Plan:

1. Clearly define the purpose and use of each IT system, including the types of financial information recorded and tracked within each system (e.g. EFCC/FEMA/cost share information, large fire and small fire information).
2. Consolidate any systems that contain duplicate information.
3. The ODF Administrative Branch should establish policies and procedures for the acquisition and implementation of new information technology systems.

MGO Observation:

IT systems used by ODF Operations Branch, Administrative Branch, and the Field Protection Districts are inconsistent. Certain systems utilized are dated and manual processes are utilized to transfer data between systems due to lack of system integration.

MGO Potential Impact / Risk:

Financial information may be inaccurate and/or incomplete due to information residing in multiple IT systems and the use of manual data transfer. Additionally, the use of dated or duplicative IT systems could result in inefficiencies or inaccurate/ incomplete data.

ODF Management Response:

ODF agrees with this recommendation. To date, the agency has been operating at a very low IT maturity model, focusing on reactive and ad hoc implementation of systems to address emerging needs, without the ability to focus on industry best practices and enterprise solutions. The implementation of the Management Action (MAP) would allow the department to make progress into an established level of IT maturity and provide the foundation to move into a highly-optimized level where new technologies can be rapidly brought online to match the agency's continuous improvement efforts.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Deliverable Review				Supporting Documentation
v	Deliverable Name			Status Indicator	Status		District Business Managers	LT	ET	BOF	
MILESTONES											
	Inventory of software and services (identify owners and stewards) (MGO)	Chief Information Officer	11/30/2021	●	Being Initiated	Assistant Deputy Director for Admin					
	Data inventory of software and services (purpose and use of each system) (MGO)	Chief Information Officer	06/30/2023	●	Not Started	Assistant Deputy Director for Admin					
	Software/service roadmap including identification of potential consolidation (MGO)	Chief Information Officer	06/30/2023	●	Not Started	Assistant Deputy Director for Admin					
	Strategic IT roadmap for fire finance IT systems and support	Chief Information Officer	06/30/2023	●	Not Started	Assistant Deputy Director for Admin					
	Software coverage listing (high level data usage)	Chief Information Officer	06/30/2023	●	Not Started	Assistant Deputy Director for Admin					
	Defined software and service "Allow" and "Not-Allow" lists	Chief Information Officer	06/30/2023	●	Not Started	Deputy Director for Administration					
POLICY AND PROCEDURES											
ODF Policy (list topics and define milestones)											
	ODF Policy - I.T. Software and Service Governance (MGO)	Chief Information Officer	06/30/2023	●	Not Started	Deputy Director for Administration					
	ODF Policy - Data Governance	Chief Information Officer	06/30/2023	●	Not Started	Deputy Director for Administration					
	ODF Policy - I.T. Acceptable Use updated	Chief Information Officer	06/30/2023	●	Not Started	Deputy Director for Administration					
	ODF Policy - Mobile Device Acceptable Use updated	Chief Information Officer	06/30/2023	●	Not Started	Deputy Director for Administration					
ODF Procedures (list topic(s), define each)											
	Procedure to request new or updated applications or services (MGO)	Chief Information Officer	06/30/2023	●	Not Started	Deputy Director for Administration					
ODF Greenbook (list sections, define action needed)											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
ODF Guidance or Memorandum (list sections)											
	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD		
IT SYSTEM CONSIDERATIONS											
	Explore the option of self-service application installs and updates	Chief Information Officer	06/30/2023	●	Not Started	Deputy Director for Administration					
	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD		
COMMUNICATION PLANNING											
	Communicate procedural changes to impacted personnel and supervisors	Chief Information Officer	06/30/2023	●	Not Started	Public Affairs Manager	TBD	TBD	TBD		
TRAINING NEEDS											
	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD		

MGO Implementation Management Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #11 - IT Systems

ET Sponsor: Deputy Director for Administration

Due Date: 06/30/2023

Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating: MGO Recommendation:

High IT systems should be consolidated and the ODF Administrative Branch should establish policies and procedures for the acquisition and implementation of new IT systems.

(MGO) Action Plan:

1. Clearly define the purpose and use of each IT system, including the types of financial information recorded and tracked within each system (e.g. EFCC/FEMA/cost share information, large fire and small fire information).
2. Consolidate any systems that contain duplicate information.
3. The ODF Administrative Branch should establish policies and procedures for the acquisition and implementation of new information technology systems.

MGO Observation:

IT systems used by ODF Operations Branch, Administrative Branch, and the Field Protection Districts are inconsistent. Certain systems utilized are dated and manual processes are utilized to transfer data between systems due to lack of system integration.





MGO Potential Impact / Risk:

Financial information may be inaccurate and/or incomplete due to information residing in multiple IT systems and the use of manual data transfer. Additionally, the use of dated or duplicative IT systems could result in inefficiencies or inaccurate/ incomplete data.

ODF Management Response:

ODF agrees with this recommendation. To date, the agency has been operating at a very low IT maturity model, focusing on reactive and ad hoc implementation of systems to address emerging needs, without the ability to focus on industry best practices and enterprise solutions. The implementation of the Management Action (MAP) would allow the department to make progress into an established level of IT maturity and provide the foundation to move into a highly-optimized level where new technologies can be rapidly brought online to match the agency's continuous improvement efforts.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Deliverable Review				Supporting Documentation
v	Deliverable Name			Status Indicator	Status		District Business Managers	LT	ET	BOF	
MAINTENANCE NEEDS POST-IMPLEMENTATION											
	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD		
BUDGETARY, LEGISLATIVE, OR ADMINISTRATIVE CONSIDERATIONS											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a

Status Legend:	
	Not Started
	Being Initiated
	In Review / Underway
	Approved / Completed

MGO Implementation Management Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #12 - ACC Rate Assessments
ET Sponsor: Deputy Director for Administration
Due Date: 06/30/2022
Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating: MGO Recommendation:

High Formal policies and procedures should be implemented to define the process for setting the ACC rates. The ACC rate determination should be as systematic as possible and manual data entry or potential for manipulation should be limited.

(MGO) Action Plan:

1. Review the requirements as related to the ACC, and determine the most efficient formula for rate setting.
2. Implement formal policies and procedures to define ACC rate setting process including responsible parties and approval requirements.
3. Develop standard report(s) used to set ACC rates.
4. Utilize a IT system for the calculation of the ACC rates, if possible.

MGO Observation:

The Annual Rate Assessment (ACC) is completed in Excel, which requires manual data entry and all cells are editable (i.e. formulas are able to be manipulated). The calculations utilized are overly complex and require multiple sources of documentation for input purposes. The final fiscal budget rate is documented by the District Forester and is not reconciled to the ACC Excel calculation. The ACC rates are approved by the Fire Protection District's Board prior to the ODF Operations and Administrative Branch review and approval.

MGO Potential Impact / Risk:

The use of an unprotected Excel document and overly complex calculations for rate setting could result in inaccuracies whether due to error or fraud. Inaccuracies could result in the over allocation and mismanagement of funds.

ODF Management Response:

ODF agrees with this recommendation and will implement the MAP this coming spring as the ACC is set for the FY 2022 budget.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Deliverable Review				Supporting Documentation
v	Deliverable Name			Status Indicator	Status		District Business	LT	ET	BOF	
MILESTONES											
	Establish ODF Budget Divergence Project w/ cross-agency representation	Fire Protection Chief	01/25/2021	●	Complete	Deputy Director for Administration	n/a	n/a	n/a		2021 Protection GF Divergence Project Charter ver3 (draft)
	Phase 1 of Divergence Project - Comparison Analysis of Biennial and Fiscal Budgets (MGO)	Fire Protection Chief	04/30/2021	●	Complete	Deputy Director for Administration	n/a	n/a	n/a		Divergence Phase 1 Summary (draft)
	Phase 1 of Divergence Project - Underlying Statutory Policy Review (MGO)	Fire Protection Chief	04/30/2021	●	Complete	Deputy Director for Administration	n/a	n/a	n/a		Divergence Phase 1 Summary (draft)
	Phase 2 of Divergence Project - Further Comparison of Actual Expenditures (MGO)	Fire Protection Chief	06/30/2022	●	Being Initiated	Deputy Director for Administration	n/a	n/a	n/a		
	Phase 2 of Divergence Project - MGO #12 - Scope of work, timeline, integration w/plan (MGO)	Fire Protection Chief	01/30/2022	●	Being Initiated	Deputy Director for Administration	TBD	TBD	TBD		
	Phase 2 of Divergence Project - MGO #23 - Scope of work, timeline, integration w/plan	Fire Protection Chief	01/30/2022	●	Being Initiated	Deputy Director for Administration	TBD	TBD	TBD		
	Phase 2 of Divergence Project - MGO #24 - Scope of work, timeline, integration w/plan	Fire Protection Chief	01/30/2022	●	Being Initiated	Deputy Director for Administration	TBD	TBD	TBD		
	Assessment of Current ACC Rate Calculations	Fire Protection Chief	06/30/2022	●	Not Started	Assistant Deputy Director for Admin	TBD	TBD	TBD		
	ACC Template - integrate recommended improvements from Divergence Project (MGO)	Fire Business Coordinator	06/30/2022	●	Not Started	Protection Finance Manager	TBD	TBD	TBD		
POLICY AND PROCEDURES											
ODF Policy (list topics and define milestones)											
	ODF Policy - Budgetary Development, Tracking, and Reconciliation	Assistant Deputy Director for Admin	06/30/2022	●	Not Started	Deputy Director for Administration	Jul-22	Jul-22	May-22		
ODF Procedures (list topic(s), define each)											
	Actual Cost Computation (ACC) Rate Procedures (MGO)	Fire Business Coordinator	06/30/2022	●	Not Started	Protection Finance Manager	Jul-22	Jun-22	Jun-22		
	Budget Development Procedures (Biennial/Fiscal)	Assistant Deputy Director for Admin	06/30/2022	●	Not Started	Deputy Director for Administration	Jul-22	Jun-22	Jun-22		
	Budget Tracking Procedures	Assistant Deputy Director for Admin	06/30/2022	●	Not Started	Deputy Director for Administration	Jul-22	Jun-22	Jun-22		
	Budget Reconciliation Procedures	Assistant Deputy Director for Admin	06/30/2022	●	Not Started	Deputy Director for Administration	Jul-22	Jun-22	Jun-22		
	E-Board Coordination Procedures	Assistant Deputy Director for Admin	06/30/2022	●	Not Started	Deputy Director for Administration	Jul-22	Jun-22	Jun-22		
ODF Greenbook (list sections, define action needed)											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
ODF Guidance or Memorandum (list sections)											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a

MGO Implementation Management Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #12 - ACC Rate Assessments
ET Sponsor: Deputy Director for Administration
Due Date: 06/30/2022
Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating: MGO Recommendation:

High Formal policies and procedures should be implemented to define the process for setting the ACC rates. The ACC rate determination should be as systematic as possible and manual data entry or potential for manipulation should be limited.

(MGO) Action Plan:

1. Review the requirements as related to the ACC, and determine the most efficient formula for rate setting.
2. Implement formal policies and procedures to define ACC rate setting process including responsible parties and approval requirements.
3. Develop standard report(s) used to set ACC rates.
4. Utilize a IT system for the calculation of the ACC rates, if possible.

MGO Observation:

The Annual Rate Assessment (ACC) is completed in Excel, which requires manual data entry and all cells are editable (i.e. formulas are able to be manipulated). The calculations utilized are overly complex and require multiple sources of documentation for input purposes. The final fiscal budget rate is documented by the District Forester and is not reconciled to the ACC Excel calculation. The ACC rates are approved by the Fire Protection District's Board prior to the ODF Operations and Administrative Branch review and approval.

MGO Potential Impact / Risk:

The use of an unprotected Excel document and overly complex calculations for rate setting could result in inaccuracies whether due to error or fraud. Inaccuracies could result in the over allocation and mismanagement of funds.

ODF Management Response:

ODF agrees with this recommendation and will implement the MAP this coming spring as the ACC is set for the FY 2022 budget.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Deliverable Review				Supporting Documentation
v	Deliverable Name			Status Indicator	Status		District Business	LT	ET	BOF	
IT SYSTEM CONSIDERATIONS											
	Online ACC Rate Calculator	Admin Modernization Program	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Technical requirements for Budget Tracker defined	Admin Modernization Program	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Complimentary system data defined, i.e. Sage AR, OregonBuys, SFMS	Admin Modernization Program	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Project formulated for prioritizing within internal application development capacity	Admin Modernization Program	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Application development and testing for Budget Tracker, if feasible (MGO)	Admin Modernization Program	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Budget Tracker application deployment, if feasible	Admin Modernization Program	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Budget Tracker Interface for OFRS	Admin Modernization Program	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Procedures for ACC revised to incorporate new application(s)	Fire Business Coordinator	TBD	●	Not Started	Protection Finance Manager	TBD	TBD	TBD		
	Procedures for Budgeting revised to incorporate new application(s)	Assistant Deputy Director for Admin	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
COMMUNICATION PLANNING											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
TRAINING NEEDS											
	ACC Rate Calculations - a review of current ACC rate assessment	Assistant Deputy Director for Admin	06/30/2022	●	Not Started	Deputy Director for Administration	Jul-22	Jun-22	Jun-22		
	Budget Development, Tracking, and Reconciliation Training	Assistant Deputy Director for Admin	06/30/2022	●	Not Started	Deputy Director for Administration	Jul-22	Jun-22	Jun-22		
MAINTENANCE NEEDS POST-IMPLEMENTATION											
	Review and update policy/procedures to meet changing needs (annually)	Assistant Deputy Director for Admin	06/30/2022	●	Not Started	Deputy Director for Administration	n/a	n/a	n/a		
	Administrative Branch Fiscal Year Operating Plan core duties updated	Assistant Deputy Director for Admin	06/30/2022	●	Not Started	Deputy Director for Administration	n/a	n/a	n/a		
	Position Descriptions updated w/duties	Assistant Deputy Director for Admin	06/30/2022	●	Not Started	Deputy Director for Administration	n/a	n/a	n/a		
	Established feedback process for use of new budgeting tools to allow for real-time changes or additional training.	Assistant Deputy Director for Admin	06/30/2022	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
BUDGETARY, LEGISLATIVE, OR ADMINISTRATIVE CONSIDERATIONS											
	Assessment of staffing/technology to determine if additional investment is warranted	Assistant Deputy Director for Admin	06/30/2023	●	Not Started	Deputy Director for Administration	n/a	n/a	n/a		

Status Legend:	
●	Not Started
●	Being Initiated
●	In Review / Underway
●	Approved / Completed

MGO Implementation Management Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #13 - Oversight Reports - AP and AR systems

ET Sponsor: Deputy Director for Administration

Due Date: 06/30/2022

Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating: MGO Recommendation:

Medium ODF Administrative Branch should establish documented controls/ policies/ procedures related to oversight of fire protection finance, including the preparation and timely review of standardized reports.

(MGO) Action Plan:

- Examples of standardized reports which should be prepared and reviewed on an on-going basis:
1. Payroll coding/ exceptions
 2. Co-op fund classification
 3. Project coding, including large fire coding
 4. Spend against budget limitation
 5. Emergency cost estimate reports
 6. Severity Summary and Dashboard

MGO Observation:

Reports compiled for oversight of fire protection finance appear to be ad-hoc, manually manipulated, and prepared on an as needed basis. Formalized policies and procedures related to the preparation and review of fire protection finance related reports do not appear to exist based on review of documented finance/ accounting related documents and inquiry with ODF Operations and Administrative Branches personnel.

MGO Potential Impact / Risk:

Use of ad-hoc and manually manipulated reports for oversight of fire protection finance could result in the use of incomplete and inaccurate data for management decisions. Additionally, the lack of formalized policies and procedures and inefficiencies could lead to duplication of efforts.

ODF Management Response:

ODF agrees with this recommendation and has recognized ad hoc reporting as problematic for efficiencies, accuracy, standardization, and confidence in various financial processes. The Administrative Branch has identified and begun to implement numerous financial and budget reports within existing systems and has been developing the to address this need. Some of the identified reports regarding fire costs within the MAP will take some significant process changes both within Salem and the district offices, as well as on fires. IT solutions can greatly benefit this effort but are not required to begin undertaking the needed process changes to facilitate reporting. Procedures are being developed to codify these business practices while defining roles and responsibilities across the agency.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Deliverable Review				Supporting Documentation
v	Deliverable Name			Status Indicator	Status		District Business	LT	ET	BOF	
MILESTONES											
	Inventory of existing standard and non-standard reports sent to the field (MGO)	Financial Services Manager	07/30/2021	●	Complete	Assistant Deputy Director for Admin	n/a	n/a	n/a		Inventory of reports
	Payroll Coding /Exceptions Report - reviewed and standards defined (MGO)	Financial Services Manager	06/30/2022	●	Not Started	Assistant Deputy Director for Admin	TBD	n/a	n/a		
	Co-op Fund Classification Report - reviewed and standards defined (MGO)	Financial Services Manager	06/30/2022	●	Not Started	Assistant Deputy Director for Admin	TBD	n/a	n/a		
	Spend Against Budget Limitation Report - reviewed and standards defined (MGO)	Financial Services Manager	06/30/2022	●	Not Started	Assistant Deputy Director for Admin	TBD	n/a	n/a		
	Emergency Cost Estimate Reports - reviewed and standards defined (MGO)	Protection Finance Manager	06/30/2022	●	Not Started	Fire Protection Deputy Chief	TBD	n/a	n/a		
	Severity Summary and Dashboard - new report developed and standards defined (MGO)	Protection Finance Manager	06/30/2022	●	Not Started	Fire Protection Deputy Chief	TBD	n/a	n/a		
	Accounts Receivable Aging Report - reviewed and standards defined (MGO)	Financial Services Manager	10/31/2021	●	In Review / Underway	Assistant Deputy Director for Admin	TBD	n/a	n/a		
	Accounts Payable Report - reviewed and standards defined (MGO)	Financial Services Manager	10/31/2021	●	In Review / Underway	Assistant Deputy Director for Admin	TBD	n/a	n/a		
	Cash Flows - new report and standards defined (MGO)	Financial Services Manager	10/31/2021	●	In Review / Underway	Assistant Deputy Director for Admin	TBD	n/a	n/a		
	Fires to Be Invoiced Report - new report and standards defined (MGO)	Protection Finance Manager	10/31/2021	●	In Review / Underway	Fire Protection Deputy Chief	TBD	n/a	n/a		Outstanding Assets & Liabilities Tracker
	Exception Report Summaries - new report and standards defined (MGO)	Financial Services Manager	06/30/2022	●	Not Started	Assistant Deputy Director for Admin	TBD	n/a	n/a		
	District Fiscal Budgets to Actual Report - reviewed and standards defined (MGO)	Financial Services Manager	06/30/2022	●	Not Started	Assistant Deputy Director for Admin	TBD	n/a	n/a		
	District Fiscal Budgets to Biennial Report - reviewed and standards defined (MGO)	Financial Services Manager	06/30/2022	●	Not Started	Assistant Deputy Director for Admin	TBD	n/a	n/a		
	Biennial Budget to Actual Expenditures Report - reviewed and standards defined (MGO)	Financial Services Manager	06/30/2022	●	Not Started	Assistant Deputy Director for Admin	TBD	n/a	n/a		
	Additional standardized reports not defined in MGO report (TBD)	Financial Services Manager	06/30/2022	●	Not Started	Assistant Deputy Director for Admin	TBD	n/a	n/a		
POLICY AND PROCEDURES											
ODF Policy (list topics and define milestones)											
	ODF Policy - Financial Reporting and Oversight (MGO)	Financial Services Manager	06/30/2022	●	Not Started	Assistant Deputy Director for Admin	TBD	TBD	TBD		
ODF Procedures (list topic(s), define each)											
	Financial Reporting procedures for preparation of each standardized report (TBD) (MGO)	Financial Services Manager	06/30/2022	●	Not Started	Assistant Deputy Director for Admin	TBD	n/a	n/a		
	Financial Oversight procedures for review of each standardized report (TBD) (MGO)	Financial Services Manager	06/30/2022	●	Not Started	Assistant Deputy Director for Admin	TBD	n/a	n/a		
	Cash Flow Projection Procedures (MGO)	Financial Services Manager	06/30/2022	●	Being Initiated	Assistant Deputy Director for Admin	TBD	n/a	n/a		
	OFRS Reporting Tool Use Procedures	Financial Services Manager	06/30/2022	●	Not Started	Assistant Deputy Director for Admin	TBD	n/a	n/a		
	Procedures for Correcting Payroll	Financial Services Manager	06/30/2022	●	Not Started	Assistant Deputy Director for Admin	TBD	n/a	n/a		
	Cost Estimate and Cost Spend Consolidation Procedures for Protection Finance and Oregon Forestland Protection Fund Administrator w/focus on reports used (MGO)	Protection Finance Manager	06/30/2022	●	Not Started	Oregon Forestland Protection Fund Administrator	Jul-22	Jul-22	n/a	Page 33 of 65	AGENDA ITEM 4 Attachment 1 Page 33 of 65

MGO Implementation Management Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #13 - Oversight Reports - AP and AR systems

ET Sponsor: Deputy Director for Administration

Due Date: 06/30/2022

Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating: MGO Recommendation:

Medium ODF Administrative Branch should establish documented controls/ policies/ procedures related to oversight of fire protection finance, including the preparation and timely review of standardized reports.

(MGO) Action Plan:

- Examples of standardized reports which should be prepared and reviewed on an on-going basis:
1. Payroll coding/ exceptions
 2. Co-op fund classification
 3. Project coding, including large fire coding
 4. Spend against budget limitation
 5. Emergency cost estimate reports
 6. Severity Summary and Dashboard

MGO Observation:

Reports compiled for oversight of fire protection finance appear to be ad-hoc, manually manipulated, and prepared on an as needed basis. Formalized policies and procedures related to the preparation and review of fire protection finance related reports do not appear to exist based on review of documented finance/ accounting related documents and inquiry with ODF Operations and Administrative Branches personnel.

MGO Potential Impact / Risk:

Use of ad-hoc and manually manipulated reports for oversight of fire protection finance could result in the use of incomplete and inaccurate data for management decisions. Additionally, the lack of formalized policies and procedures and inefficiencies could lead to duplication of efforts.

ODF Management Response:

ODF agrees with this recommendation and has recognized ad hoc reporting as problematic for efficiencies, accuracy, standardization, and confidence in various financial processes. The Administrative Branch has identified and begun to implement numerous financial and budget reports within existing systems and has been developing the to address this need. Some of the identified reports regarding fire costs within the MAP will take some significant process changes both within Salem and the district offices, as well as on fires. IT solutions can greatly benefit this effort but are not required to begin undertaking the needed process changes to facilitate reporting. Procedures are being developed to codify these business practices while defining roles and responsibilities across the agency.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Deliverable Review				Supporting Documentation
v	Deliverable Name			Status Indicator	Status		District Business	LT	ET	BOF	
ODF Greenbook (list sections, define action needed)											
	Chapter 80 - Update standards in Emergency Cost Estimate reporting and review (MGO)	Incident Business / FEMA Manager	06/30/2022	●	Not Started	Protection Finance Manager	Jul-22	n/a	n/a		
ODF Guidance or Memorandum (list sections)											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
IT SYSTEM CONSIDERATIONS											
	Report designs integrated into OFRS application	Admin Modernization Program	06/30/2022	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
COMMUNICATION PLANNING											
	Deployment of new OFRS Reporting Tool	Admin Modernization Program	06/30/2022	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
TRAINING NEEDS											
	Training plan for use of the OFRS Reporting Tool	Admin Modernization Program	06/30/2022	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Training module on the use of the OFRS Reporting Tool	Admin Modernization Program	06/30/2022	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Correcting Payroll training module	Financial Services Manager	06/30/2022	●	Not Started	Assistant Deputy Director for Admin	n/a	n/a	n/a		
MAINTENANCE NEEDS POST-IMPLEMENTATION											
	OFRS Reporting Tool updates, upgrades, and maintenance	Admin Modernization Program	06/30/2023	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Review and update policy/procedures to meet changing needs (annually)	Assistant Deputy Director for Admin	06/30/2022	●	Not Started	Deputy Director for Administration	n/a	n/a	n/a		
	Administrative Branch Fiscal Year Operating Plan core duties updated	Assistant Deputy Director for Admin	06/30/2022	●	Not Started	Deputy Director for Administration	n/a	n/a	n/a		
	Position Descriptions updated w/duties	Assistant Deputy Director for Admin	06/30/2022	●	Not Started	Deputy Director for Administration	n/a	n/a	n/a		
BUDGETARY, LEGISLATIVE, OR ADMINISTRATIVE CONSIDERATIONS											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a

Status Legend:	
●	Not Started
●	Being Initiated
●	In Review / Underway
●	Approved / Completed

MGO Implementation Management Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #14 - Training (Training/Onboarding for accounting personnel in Salem and Field)

ET Sponsor: Human Resources Manager

Due Date: 06/30/2022

Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating: MGO Recommendation:

Medium The ODF Administrative Branch should develop a robust onboarding and training program for all finance and accounting personnel or those with finance and accounting related responsibilities.

(MGO) Action Plan:

1. Create a set of onboarding and ongoing training documents for all individuals with finance/ accounting related responsibilities. The onboarding training should include: (1) use of financial systems; (2) financial policies, procedures and processes; (3) monthly, quarterly, and annual reporting requirements; and (4) ODFnet and other available information and training resources.
2. Specify the required policies and procedures that must be reviewed and understood, along with the applicable finance systems, desktop procedures, and ongoing reporting requirements.

MGO Observation:

Based on our inquiry with ODF Administrative Branch personnel, there are no standard processes or procedures for the onboarding of finance or accounting personnel as related to financial systems and processes.

MGO Potential Impact / Risk:

Lack of sufficient training could lead to the use of inefficient or incorrect processes by finance and accounting personnel, which could result in errors in financial reporting and inefficiencies.

ODF Management Response:

ODF agrees with this recommendation and recognizes the need for standardized onboarding and training. Finance staff are actively revising guidance, procedures, and learning modules to aid in training employees on our new and existing financial systems and processes and Protection Finance staff have put together a robust fire finance training and annual refresher training. To help facilitate employee onboarding and build accountability for completion of training, the State of Oregon enterprise is currently implementing a new statewide Learning Management System that will replace the existing outdated system and be fully integrated with the state's Workday human resource management system. A financial curriculum that includes components listed in this sub-recommendation can be developed and assigned to employees with finance / accounting related responsibilities for both the initial onboarding stage and to facilitate ongoing training as well. Defining the core training requirements of the financial curriculum is the initial step in defining a roadmap that will assist with training module development and work planning for additional documentation needed to support our employees. Dedicated project capacity will be needed within the Finance and HR programs during 2021-2022 to support implementation of this new learning system and development of financial curriculum.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Deliverable Review				Supporting Documentation
v	Deliverable Name			Status Indicator	Status		District Business Managers	LT	ET	BOF	
MILESTONES											
	Update onboarding checklist for finance positions with key policies and training (MGO)	Assistant Deputy Director for Admin	06/30/2022	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Onboarding outline identifying position and system needs for each classification	Assistant Deputy Director for Admin	06/30/2022	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
POLICY AND PROCEDURES											
ODF Policy (list topics and define milestones)											
	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD		
ODF Procedures (list topic(s), define each)											
	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD		
ODF Greenbook (list sections, define action needed)											
	Chapters requiring updates or modifications in reference to Admin training modules	Incident Finance / FEMA Manager	06/30/2022	●	Not Started	Protection Finance Manager	May-22	May-22	n/a		
ODF Guidance or Memorandum (list sections)											
	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD		
IT SYSTEM CONSIDERATIONS											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
COMMUNICATION PLANNING											
	Communications on policy/procedural changes to affected personnel and supervisors	Assistant Deputy Director for Admin	06/30/2022	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Coordination on field and association review and feedback on curriculum	Assistant Deputy Director for Admin	06/30/2022	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Communications on new or revised financial training opportunities	Assistant Deputy Director for Admin	06/30/2022	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
TRAINING NEEDS											
	Training for hiring managers for requirements in the onboarding of financial positions	Human Resources Manager	06/30/2022	●	Not Started	Assistant Deputy Director for Admin	TBD	TBD	TBD		
	Identify gaps in person vs. position, conduct needs assesment and provide training to bridge gaps	Human Resources Manager	06/30/2022	●	Not Started	Assistant Deputy Director for Admin	TBD	TBD	TBD		
	Use of Learning Management System to assign required trainings at onboarding and annually (MGO)	Human Resources Manager	06/30/2022	●	Not Started	Assistant Deputy Director for Admin	TBD	TBD	TBD		
	Use of Financial Systems - Admin Training module (MGO)	Financial Services Manager	06/30/2022	●	Not Started	Assistant Deputy Director for Admin	TBD	TBD	TBD		
	Financial Policies, Procedures, and Processes - Admin Training module (MGO)	Financial Services Manager	06/30/2022	●	Not Started	Assistant Deputy Director for Admin	TBD	TBD	TBD		
	Financial Reporting Requirements - Admin Training module (MGO)	Financial Services Manager	06/30/2022	●	Not Started	Assistant Deputy Director for Admin	TBD	TBD	TBD		
	Financial References, Tools, and Resources - Admin Training module (MGO)	Financial Services Manager	06/30/2022	●	Not Started	Assistant Deputy Director for Admin	TBD	TBD	TBD		
	Fire Finance Training (annually)	Incident Finance / FEMA Manager	06/30/2022	●	Not Started	Protection Finance Manager	May-22	May-22	n/a		
	Dispatch and IMT training (MGO Implementation Management Plan)	Incident Finance / FEMA Manager	06/30/2022	●	Not Started	Protection Finance Manager	May-22	May-22	n/a	Page 35 of 65	AGENDA ITEM 4 Attachment 1

MGO Implementation Management Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #14 - Training (Training/Onboarding for accounting personnel in Salem and Field)

ET Sponsor: Human Resources Manager

Due Date: 06/30/2022

Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating: MGO Recommendation:

Medium The ODF Administrative Branch should develop a robust onboarding and training program for all finance and accounting personnel or those with finance and accounting related responsibilities.

(MGO) Action Plan:

1. Create a set of onboarding and ongoing training documents for all individuals with finance/ accounting related responsibilities. The onboarding training should include: (1) use of financial systems; (2) financial policies, procedures and processes; (3) monthly, quarterly, and annual reporting requirements; and (4) ODFnet and other available information and training resources.
2. Specify the required policies and procedures that must be reviewed and understood, along with the applicable finance systems, desktop procedures, and ongoing reporting requirements.

MGO Observation:

Based on our inquiry with ODF Administrative Branch personnel, there are no standard processes or procedures for the onboarding of finance or accounting personnel as related to financial systems and processes.

MGO Potential Impact / Risk:

Lack of sufficient training could lead to the use of inefficient or incorrect processes by finance and accounting personnel, which could result in errors in financial reporting and inefficiencies.

ODF Management Response:

ODF agrees with this recommendation and recognizes the need for standardized onboarding and training. Finance staff are actively revising guidance, procedures, and learning modules to aid in training employees on our new and existing financial systems and processes and Protection Finance staff have put together a robust fire finance training and annual refresher training. To help facilitate employee onboarding and build accountability for completion of training, the State of Oregon enterprise is currently implementing a new statewide Learning Management System that will replace the existing outdated system and be fully integrated with the state's Workday human resource management system. A financial curriculum that includes components listed in this sub-recommendation can be developed and assigned to employees with finance / accounting related responsibilities for both the initial onboarding stage and to facilitate ongoing training as well. Defining the core training requirements of the financial curriculum is the initial step in defining a roadmap that will assist with training module development and work planning for additional documentation needed to support our employees. Dedicated project capacity will be needed within the Finance and HR programs during 2021-2022 to support implementation of this new learning system and development of financial curriculum.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Deliverable Review				Supporting Documentation
v	Deliverable Name			Status Indicator	Status		District Business Managers	LT	ET	BOF	
MAINTENANCE NEEDS POST-IMPLEMENTATION											
	Training modules modified to reflect any new or changed processes/procedures	Incident Finance / FEMA Manager	06/30/2022	●	Not Started	Protection Finance Manager	May-22	May-22	n/a		
	Protection Fiscal Year Operating Plan core duties updated	Fire Protection Deputy Chief	06/30/2022	●	Not Started	Fire Protection Deputy Chief	n/a	n/a	n/a		
	Position Descriptions updated w/duties	Fire Protection Deputy Chief	06/30/2022	●	Not Started	Human Resources Analyst	n/a	n/a	n/a		
BUDGETARY, LEGISLATIVE, OR ADMINISTRATIVE CONSIDERATIONS											
	Training module development capacity to be determined as deliverables progress to consider enhanced implementation through upcoming budget development cycles.	Assistant Deputy Director for Admin	TBD	TBD	TBD	TBD	TBD	TBD	TBD		

Status Legend:	
●	Not Started
●	Being Initiated
●	In Review / Underway
●	Approved / Completed

MGO Implementation Management Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #15 - Field Protection Districts Oversight

ET Sponsor: Deputy Director for Operations

Due Date: 06/30/2022

Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating: MGO Recommendation:

Medium ODF Operations and Administrative Branches should develop and implement standardized processes and procedures for the Field Protection Districts, and assist in the implementation and continued oversight of the processes and procedures to ensure consistency in application.

(MGO) Action Plan:

1. Update Green Book to clearly define all fire incident business processes.
2. Prepare standardized policies, procedures, flow charts, and/ or desk manuals related to finance and accounting, including implementation and oversight processes and responsible parties.

MGO Observation:

During our site visits to the Field Protection Districts and ODF Operations (headquarters), we noted that the Field Protection Districts appear to operate independently and lack standardized processes and procedures.

MGO Potential Impact / Risk:

Lack of standardized processes and procedures across the Field Protection Districts could lead to inconsistencies in finance and accounting related transactions resulting in inaccurate and/or incomplete financial information.

ODF Management Response:

ODF agrees with this recommendation. Policies, procedures and process documentation is a key tenet of establishing authority, responsibility and accountability among agency staff and managers. The Green Book is designed to be a field guide of fire incident business process and procedures that are carried out on incident and through the field district offices. This guide will continue to be developed and regularly revised to clearly define these incident business processes. Other fire business is centralized to ODF Headquarters and coordination work across the Operations and Administrative Branches. Those processes should be captured in agency policy and procedure, or individual employee desk manuals, instead of the Green Book. ODF will continue to revise and develop this necessary documentation of business practices. Furthermore, providing the appropriate level of training prior to season, and ongoing communication throughout fire season, across field and division leadership and staff, regarding these business processes, will ensure consistency in accountability for efficiency in performance up through the chain of command.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Review Planning				Supporting Documentation
√	Deliverable Name			Status Indicator	Status		District Business	LT	ET	BOF	
MILESTONES											
	Inventory of employee desk manual contents within key finance positions (MGO)	Financial Services Manager	06/30/2022	●	Not Started	Assistant Deputy Director for Admin	Jul-22	Jul-22	Jun-22		
	Evaluation of desk manual contents to consider establishing formal procedures (MGO)	Financial Services Manager	06/30/2022	●	Not Started	Assistant Deputy Director for Admin	Jul-22	Jul-22	Jun-22		
	Defined, modernized, desk manual template for use in agency (MGO)	Senior Strategy Manager	06/30/2022	●	Not Started	Deputy Director for Administration	Jul-22	Jul-22	Jun-22		
	Timeline and expectation delivered for codifying employee desk manuals (MGO)	Financial Services Manager	06/30/2022	●	Not Started	Assistant Deputy Director for Admin	Jul-22	Jul-22	Jun-22		
POLICY AND PROCEDURES											
ODF Policy (list topics and define milestones)											
	ODF Policy Cost Estimate Generation (new) (MGO)	Protection Finance Manager	06/30/2022	●	Not Started	Deputy Director for Administration	Jul-22	Jul-22	Jun-22		
	ODF Directive 1-2-7-001 Guidelines for Eligibility of Firefighting Costs for the Oregon Forest Land Protection Fund 07/01/2020 (revise from directive to policy) (MGO)	Oregon Forestland Protection Fund Administrator	06/30/2022	●	Not Started	Deputy Director for Administration	Jul-22	Jul-22	Jun-22		
	ODF Policy - Internal Controls (updated/new) (MGO)	Internal Auditor	06/30/2022	●	Not Started	Deputy Director for Administration	Jul-22	Jul-22	Jun-22		
	ODF Policy - Disbursements and Expenditures (updated/new) (MGO)	Financial Services Manager	09/30/2021	●	In Review / Underway	Deputy Director for Administration	21-Oct	21-Dec	21-Sep		
	ODF Policy - Procurement (updated/new) (MGO)	Contract Services Program Manager	09/30/2021	●	In Review / Underway	Deputy Director for Administration	Oct-21	Dec-21	Sep-21		
	ODF Policy - Signature Authority (updated) (MGO)	Deputy Director for Administration	09/30/2021	●	In Review / Underway	State Forester	Oct-21	Dec-21	Sep-21		
	ODF Policy - Revenues and Receivables (updated/new) (MGO)	Financial Services Manager	09/30/2021	●	In Review / Underway	Deputy Director for Administration	21-Oct	21-Dec	21-Sep		
ODF Procedures (list topic(s), define each)											
	Cost Estimate and Cost Share Consolidation Procedures for Protection Finance and Oregon Forestland Protection Fund Administrator w/focus on systems used (MGO)	Protection Finance Manager	06/30/2022	●	Not Started	Oregon Forestland Protection Fund Administrator	Jul-22	Jul-22	n/a		
	EFCC, Operations, Administrative Joint Financial Review Procedures (MGO)	Oregon Forestland Protection Fund Administrator	06/30/2022	●	Not Started	Deputy Director for Administration	Aug-22	Sep-22	n/a		
	Incident AAR and Financial Review Change Management Procedures (MGO)	Protection Finance Manager	06/30/2022	●	Not Started	Oregon Forestland Protection Fund Administrator	Aug-22	Sep-22	n/a		
	Accounting procedures to be defined for implementing ODF policies listed above (TBD)	Financial Services Manager	06/30/2022	●	Not Started	Assistant Deputy Director for Admin	Jul-22	Jul-22	n/a		
ODF Greenbook (list sections, define action needed)											
	Chapter 10 - Personnel (new) (MGO)	Incident Finance / FEMA Manager	06/30/2022	●	Not Started	Protection Finance Manager	Jul-22	Jul-22	n/a		
	Chapter 20 - Procurement and Agreements (new) (MGO)	Incident Finance / FEMA Manager	06/30/2022	●	Not Started	Protection Finance Manager	Jul-22	Jul-22	n/a		
	Chapter 30 - Property Management (new) (MGO)	Incident Finance / FEMA Manager	09/30/2021	●	Complete	Protection Finance Manager	Jul-22	Jul-22	n/a		
	Chapter 40 - Incident Business Management Coordination (review/update) (MGO)	Incident Finance / FEMA Manager	06/30/2022	●	Not Started	Protection Finance Manager	Jul-22	Jul-22	n/a		
	Chapter 50 - Interagency Cooperative Relations (new) (MGO)	Incident Finance / FEMA Manager	09/30/2021	●	In Review / Underway	Protection Finance Manager	Jul-22	Jul-22	n/a		
	Chapter 60 - Accident Investigation and Reporting (new) (MGO)	Incident Finance / FEMA Manager	09/30/2021	●	Being Initiated	Protection Finance Manager	Jul-22	Jul-22	n/a		

MGO Implementation Management Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #15 - Field Protection Districts Oversight

ET Sponsor: Deputy Director for Operations

Due Date: 06/30/2022

Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating: MGO Recommendation:

Medium ODF Operations and Administrative Branches should develop and implement standardized processes and procedures for the Field Protection Districts, and assist in the implementation and continued oversight of the processes and procedures to ensure consistency in application.

(MGO) Action Plan:

1. Update Green Book to clearly define all fire incident business processes.
2. Prepare standardized policies, procedures, flow charts, and/or desk manuals related to finance and accounting, including implementation and oversight processes and responsible parties.

MGO Observation:

During our site visits to the Field Protection Districts and ODF Operations (headquarters), we noted that the Field Protection Districts appear to operate independently and lack standardized processes and procedures.

MGO Potential Impact / Risk:

Lack of standardized processes and procedures across the Field Protection Districts could lead to inconsistencies in finance and accounting related transactions resulting in inaccurate and/or incomplete financial information.

ODF Management Response:

ODF agrees with this recommendation. Policies, procedures and process documentation is a key tenet of establishing authority, responsibility and accountability among agency staff and managers. The Green Book is designed to be a field guide of fire incident business process and procedures that are carried out on incident and through the field district offices. This guide will continue to be developed and regularly revised to clearly define these incident business processes. Other fire business is centralized to ODF Headquarters and coordination work across the Operations and Administrative Branches. Those processes should be captured in agency policy and procedure, or individual employee desk manuals, instead of the Green Book. ODF will continue to revise and develop this necessary documentation of business practices. Furthermore, providing the appropriate level of training prior to season, and ongoing communication throughout fire season, across field and division leadership and staff, regarding these business processes, will ensure consistency in accountability for efficiency in performance up through the chain of command.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Review Planning				Supporting Documentation
√	Deliverable Name			Status Indicator	Status		District Business	LT	ET	BOF	
	Chapter 70 - Claims and Incident Cost Recovery Collection (review/update) (MGO)	Incident Finance / FEMA Manager	09/30/2021	●	Complete	Protection Finance Manager	Jul-22	Jul-22	n/a		
	Chapter 80 - Cost Accounting and Reporting and Cost Shares (review/update) (MGO)	Protection Finance Manager	06/15/2021	●	Complete	Fire Protection Deputy Chief	Jul-21	Jul-22	n/a		
	Chapter 90 - Incident Payments and Coding (review/update) (MGO)	Incident Finance / FEMA Manager	06/30/2022	●	Not Started	Protection Finance Manager	Jul-22	Jul-22	n/a		
	Chapter 100 - All-Hazards Incident Business Management (new) (MGO)	Incident Finance / FEMA Manager	06/30/2022	●	Not Started	Protection Finance Manager	Jul-22	Jul-22	n/a		
	Supplemental Appendices for each Chapter (review/update) (MGO)	Incident Finance / FEMA Manager	06/30/2022	●	Not Started	Protection Finance Manager	Jul-22	Jul-22	n/a		
	Updating Plan for Greenbook (review/update) (MGO)	Incident Finance / FEMA Manager	06/30/2022	●	Not Started	Protection Finance Manager	Jul-22	Jul-22	n/a		
	Chapters 30, 50, 60, 70, 80 reviewed again prior to Fire Season 2022 (MGO)	Incident Finance / FEMA Manager	06/30/2022	●	Not Started	Protection Finance Manager	Jul-22	Jul-22	n/a		
ODF Guidance or Memorandum (list sections)											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
IT SYSTEM CONSIDERATIONS											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
COMMUNICATION PLANNING											
	Coordination with agency subject matter experts for review of content as necessary	Incident Finance / FEMA Manager	06/30/2022	●	Not Started	Protection Finance Manager	May-22	May-22	n/a		
	Greenbook Overview and Summary of Updates - Email to All Forestry (annually)	Incident Finance / FEMA Manager	06/30/2022	●	Not Started	Protection Finance Manager	May-22	May-22	n/a		
TRAINING NEEDS											
	Fire Finance Training (annually)	Incident Finance / FEMA Manager	06/30/2022	●	Not Started	Protection Finance Manager	May-22	May-22	n/a		
	Dispatch and IMT trainings - update on new processes (annually)	Incident Finance / FEMA Manager	06/30/2022	●	Not Started	Protection Finance Manager	May-22	May-22	n/a		
MAINTENANCE NEEDS POST-IMPLEMENTATION											
	Incident Finance Training modules updated (annually)	Incident Finance / FEMA Manager	06/30/2022	●	Not Started	Protection Finance Manager	May-22	May-22	n/a		
	Greenbook updated (annually)	Incident Finance / FEMA Manager	06/30/2022	●	Not Started	Protection Finance Manager	May-22	May-22	n/a		
	Protection Fiscal Year Operating Plan core duties updated	Fire Protection Deputy Chief	06/30/2022	●	Not Started	Fire Protection Deputy Chief	n/a	n/a	n/a		
	Position Descriptions updated w/duties	Fire Protection Deputy Chief	06/30/2022	●	Not Started	Human Resources Analyst	n/a	n/a	n/a		
BUDGETARY, LEGISLATIVE, OR ADMINISTRATIVE CONSIDERATIONS											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a

Status Legend:	
●	Not Started
●	Being Initiated
●	In Review / Underway
●	Approved / Completed

MGO Implementation Management Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #16 - Board of Forestry Oversight

ET Sponsor: Deputy Director for Administration

Due Date: 10/31/2021

Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating: MGO Recommendation:

Medium Formalized policies and procedures should be established by the BOF related to financial oversight of ODF, including clearly defining the reporting requirements of ODF to the BOF.

(MGO) Action Plan:

BOF should implement a formal policy regarding their financial oversight of ODF. Additionally, clearly identify a set of standard reports which ODF should provide to the BOF and Forestry Finance Oversight Committee on an ongoing basis, such as:

- AR Aging
- AP Aging
- Cash flow projections
- Exception report summaries
- District fiscal budgets to actual
- District fiscal budget to the bi-annual budget
- Overall ODF agency bi-annual budget to actuals

MGO Observation:

Based on review of the BOF meeting minutes and respective bylaws, the BOF has a statutory responsibility to oversee the expenditures incurred by ODF, however, the reporting of finance related activities to the BOF is limited and inconsistent.

MGO Potential Impact / Risk:

Insufficient reporting of financial information to the BOF or the Forestry Finance Oversight Committee could result in lack of adequate oversight and transparency relative to the overall financial position of the agency.

ODF Management Response:

ODF agrees with this recommendation. The Board of Forestry (BOF) does have statutory responsibility to oversee the expenditures incurred under the statutes of their authority. ODF is committed to providing regular financial updates to the Board and has incorporated that work into the Board's Administrative Work Plan. ODF has been actively defining a set of standardized reports and consistent delivery timeframes to inform the Board and other required parties. As the deliverables of this process are further developed with the Board, a formalized policy and procedure can be presented for Board review and approval to codify their oversight responsibilities in agency business practices.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Deliverable Review				Supporting Documentation
√	Deliverable Name			Status Indicator	Status		District Business Managers	LT	ET	BOF	
MILESTONES											
	Draft 21-22 BOF Administrative Work Plan with new topic and timeline for Board Financial Oversight Policy Development considered at October planning retreat. Planning discussion includes review of existing financial dashboard processes. (MGO)	State Forester and Deputy Director for Administration	10/31/2021	●	Not Started	Board of Forestry	n/a	Sep-21	Sep-21		
	21-22 BOF Administrative Work Plan presented for Board of Forestry review	State Forester and Deputy Director for Administration	01/05/2022	●	Not Started	Board of Forestry	n/a	n/a	Dec-21		
	21-22 BOF Administrative Work Plan presented for Board of Forestry approval	State Forester and Deputy Director for Administration	03/09/2022	●	Not Started	Board of Forestry	n/a	n/a	Feb-22		
	Standardized reports identified for review and oversight by the Board of Forestry (MGO)	State Forester and Deputy Director for Administration	TBD	●	Not Started	Board of Forestry	TBD	n/a	n/a		
POLICY AND PROCEDURES											
ODF Policy (list topics and define milestones)											
	Board of Forestry Financial Oversight Policy (MGO)	State Forester	TBD	●	Not Started	Board of Forestry	TBD	TBD	TBD		
ODF Procedures (list topic(s), define each)											
	Procedures for Financial Reporting to the Board of Forestry	Deputy Director for Administration	TBD	●	Not Started	Board of Forestry	TBD	TBD	TBD		
ODF Greenbook (list sections, define action needed)											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
ODF Guidance or Memorandum (list sections)											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
IT SYSTEM CONSIDERATIONS											
	Board of Forestry Reports integrated with OFRS Reporting Interface	Admin Modernization Program	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
COMMUNICATION PLANNING											
	Communicate policy and procedures to impacted personnel and supervisors	Deputy Director for Administration	TBD	●	Not Started	State Forester	TBD	TBD	TBD		
TRAINING NEEDS											
	New Board policy integrated into Board Member Orientation package	Board Administrator	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		

MGO Recommendation # and Title: #16 - Board of Forestry Oversight

ET Sponsor: Deputy Director for Administration

Due Date: 10/31/2021

Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating: MGO Recommendation:

Medium Formalized policies and procedures should be established by the BOF related to financial oversight of ODF, including clearly defining the reporting requirements of ODF to the BOF.

(MGO) Action Plan:

BOF should implement a formal policy regarding their financial oversight of ODF. Additionally, clearly identify a set of standard reports which ODF should provide to the BOF and Forestry Finance Oversight Committee on an ongoing basis, such as:

- AR Aging
- AP Aging
- Cash flow projections
- Exception report summaries
- District fiscal budgets to actual
- District fiscal budget to the bi-annual budget
- Overall ODF agency bi-annual budget to actuals

MGO Observation:

Based on review of the BOF meeting minutes and respective bylaws, the BOF has a statutory responsibility to oversee the expenditures incurred by ODF, however, the reporting of finance related activities to the BOF is limited and inconsistent.

MGO Potential Impact / Risk:

Insufficient reporting of financial information to the BOF or the Forestry Finance Oversight Committee could result in lack of adequate oversight and transparency relative to the overall financial position of the agency.

ODF Management Response:

ODF agrees with this recommendation. The Board of Forestry (BOF) does have statutory responsibility to oversee the expenditures incurred under the statutes of their authority. ODF is committed to providing regular financial updates to the Board and has incorporated that work into the Board's Administrative Work Plan. ODF has been actively defining a set of standardized reports and consistent delivery timeframes to inform the Board and other required parties. As the deliverables of this process are further developed with the Board, a formalized policy and procedure can be presented for Board review and approval to codify their oversight responsibilities in agency business practices.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Deliverable Review				Supporting Documentation
v	Deliverable Name			Status Indicator	Status		District Business Managers	LT	ET	BOF	
MAINTENANCE NEEDS POST-IMPLEMENTATION											
	Review and update policy/procedures to meet changing needs	State Forester	TBD	●	Not Started	Board of Forestry	n/a	n/a	n/a		
	Administrative Branch Fiscal Year Operating Plan core duties updated	Assistant Deputy Director for Admin	TBD	●	Not Started	Deputy Director for Administration	n/a	n/a	n/a		
	Position Descriptions updated w/duties	Assistant Deputy Director for Admin	TBD	●	Not Started	Deputy Director for Administration	n/a	n/a	n/a		
BUDGETARY, LEGISLATIVE, OR ADMINISTRATIVE CONSIDERATIONS											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a

Status Legend:	
●	Not Started
●	Being Initiated
●	In Review / Underway
●	Approved / Completed

MGO Implementation Management Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #17 - District Finance Accounting Oversight

ET Sponsor: Deputy Director for Administration

Due Date: 12/31/2021

Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating: MGO Recommendation:

Medium The ODF Administrative Branch should establish policies and procedures related to oversight of finance/ accounting functions within the Field Protection Districts. The policies and procedures should include, but not be limited to:

1. Definition of reporting lines from the Field Protection Districts to the ODF Administrative Branch.
2. Identification of reporting requirements and key financial metrics from the Field Protection Districts to the ODF Administrative Branch.
3. Ongoing monitoring of key financial metrics within the Field Protection Districts.

In addition, the ODF Executive Team, with the ODF Operations and Administrative Branches, should set a clear "tone at the top" with respect to financial accountability within the Field Protection Districts.

(MGO) Action Plan:

1. Define the reporting lines from the Field Protection Districts to the ODF Administrative Branch.
2. Identify reporting requirements for the Field Protection Districts to the ODF Administrative Branch as related to finance/ accounting.
3. Update current policies and procedures to define reporting lines, reporting requirements, and ongoing monitoring from the Field Protection Districts to the ODF Administrative Branch.
4. Establish on-going review procedures of key financial metrics at the Field Protection District level by the ODF Administrative Branch. Metrics should include but are not limited to:
 - A/R and A/P agings
 - Incidents with open finance items by fiscal year and type (i.e. cost share, responsible party, etc.)
 - % complete of cost share reconciliation process (i.e. estimate to actual for open incidents)
 - % complete of co-op reconciliation process for each open incident
 - Number of cost share incidents open, settled and closed
 - Estimated payable invoices still outstanding with federal partners (ex. BLM, USFS)
 - Open purchase orders

MGO Observation:

Field Protection Districts operate with limited oversight as related to finance and accounting, due to the reporting structure in place. The current organizational structure does not include Field Protection Districts reporting to the ODF Administrative Branch, who is responsible for ODF's finance and accounting activities.

MGO Potential Impact / Risk:

Lack of oversight of the Field Protection Districts as related to finance and accounting could result in inaccurate and incomplete financial data or delays in identification of errors in financial reporting or poor financial performance.

ODF Management Response:

ODF agrees with the recommendation. A focused and prioritized approach would work best in order to achieve the recommended process improvements. The "clear tone" is set by the State Forester and implemented jointly by the Deputies through their chains of command. ODF will develop an organization chart which clearly shows the flow of accountability from District, to Area, to Division, to Leadership. The identified reporting requirements and financial metrics listed in the MAP were actively embedded into agency business practices. The use of weekly (or other) fire finance meetings which include field and division leadership ensure alignment on progress and process. ODF will continue to revise and develop policies and procedure that capture these improved business practices while clearly defining roles and responsibilities relative to financial reporting needs.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Deliverable Review				Supporting Documentation
√	Deliverable Name			Status Indicator	Status		District Business	LT	ET	BOF	
MILESTONES											
	Expectations for ODF Executive Team, Operations, Administration, and Field Protection Districts with respect to financial accountability and MGO Recommendations (MGO)	State Forester	Done	●	Complete	Board of Forestry	Jan-20	Jan-21	Jul-20		Multiple forums
	Organization Chart defining financial reporting lines to Administrative Branch (MGO)	Assistant Deputy Director for Admin	12/31/2021	●	Being Initiated	Deputy Director for Administration	Nov-21	Dec-21	Oct-21		
	Cost Share Tracker developed (MGO)	Protection Finance Manager	Done	●	Complete	Deputy Fire Protection Chief	n/a	n/a	n/a		Cost Share Tracker
	Outstanding Assets & Liabilities Tracker (MGO)	Protection Finance Manager	Done	●	Complete	Deputy Director for Administration	Jun-21	n/a	n/a		Outstanding Assets & Liabilities Tracker
	Co-op Tracker developed (MGO)	Protection Finance Manager	Done	●	Complete	Deputy Fire Protection Chief	Jun-21	n/a	n/a		Outstanding Assets & Liabilities Tracker
	Active Incident Tracker developed (MGO)	Protection Finance Manager	12/31/2021	●	Not Started	Deputy Fire Protection Chief	Jan-22	n/a	n/a		
	AR/AP Tracker for external partners (MGO)	Protection Finance Manager	12/31/2021	●	Being Initiated	Deputy Fire Protection Chief	Jan-22	n/a	n/a		
	Field reporting requirements defined and integrated into policies/procedures (MGO)	Financial Services Manager	12/31/2021	●	Being Initiated	Assistant Deputy Director for Admin	Jan-22	n/a	n/a		
	Metrics for A/R and A/P agings (MGO)	Financial Services Manager	12/31/2021	●	Not Started	Assistant Deputy Director for Admin	Jan-22	n/a	n/a		
	Metrics for incidents with open finance items by fiscal year and type (MGO)	Financial Services Manager	12/31/2021	●	Not Started	Assistant Deputy Director for Admin	Jan-22	n/a	n/a		
	Metrics for completed percentage of cost share reconciliations (MGO)	Financial Services Manager	12/31/2021	●	Not Started	Assistant Deputy Director for Admin	Jan-22	n/a	n/a		
	Metrics for completed percentage of co-op reconciliations (MGO)	Financial Services Manager	12/31/2021	●	Not Started	Assistant Deputy Director for Admin	Jan-22	n/a	n/a		
	Metrics for number of cost shares open, settled, or closed (MGO)	Financial Services Manager	12/31/2021	●	Not Started	Assistant Deputy Director for Admin	Jan-22	n/a	n/a		
	Metrics for outstanding payable invoices w/external partners (MGO)	Financial Services Manager	12/31/2021	●	Not Started	Assistant Deputy Director for Admin	Jan-22	n/a	n/a		
POLICY AND PROCEDURES											
ODF Policy (list topics and define milestones)											
	ODF Policy - Organization and Position Management (MGO)	Assistant Deputy Director for Admin	12/30/2021	●	Not Started	Deputy Director for Administration	Jan-22	Mar-22	Dec-21		
	ODF Policy - Disbursements and Expenditures (new) (MGO)	Financial Services Manager	09/30/2021	●	In Review / Underway	Deputy Director for Administration	Oct-21	Dec-21	Sep-21		
	ODF Policy - Accounting for Revenues and Receivables (new) (MGO)	Financial Services Manager	09/30/2021	●	In Review / Underway	Deputy Director for Administration	Oct-21	Dec-21	Sep-21		
	ODF Policy - Procurement (new) (MGO)	Contract Services Program Manager	09/30/2021	●	In Review / Underway	Deputy Director for Administration	Oct-21	Dec-21	Sep-21		

MGO Implementation Management Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #17 - District Finance Accounting Oversight

ET Sponsor: Deputy Director for Administration

Due Date: 12/31/2021

Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating: MGO Recommendation:

Medium The ODF Administrative Branch should establish policies and procedures related to oversight of finance/ accounting functions within the Field Protection Districts. The policies and procedures should include, but not be limited to:

1. Definition of reporting lines from the Field Protection Districts to the ODF Administrative Branch.
2. Identification of reporting requirements and key financial metrics from the Field Protection Districts to the ODF Administrative Branch.
3. Ongoing monitoring of key financial metrics within the Field Protection Districts.

In addition, the ODF Executive Team, with the ODF Operations and Administrative Branches, should set a clear "tone at the top" with respect to financial accountability within the Field Protection Districts.

(MGO) Action Plan:

1. Define the reporting lines from the Field Protection Districts to the ODF Administrative Branch.
2. Identify reporting requirements for the Field Protection Districts to the ODF Administrative Branch as related to finance/ accounting.
3. Update current policies and procedures to define reporting lines, reporting requirements, and ongoing monitoring from the Field Protection Districts to the ODF Administrative Branch.
4. Establish on-going review procedures of key financial metrics at the Field Protection District level by the ODF Administrative Branch. Metrics should include but are not limited to:
 - A/R and A/P agings
 - Incidents with open finance items by fiscal year and type (i.e. cost share, responsible party, etc.)
 - % complete of cost share reconciliation process (i.e. estimate to actual for open incidents)
 - % complete of co-op reconciliation process for each open incident
 - Number of cost share incidents open, settled and closed
 - Estimated payable invoices still outstanding with federal partners (ex. BLM, USFS)
 - Oaen purchase orders

MGO Observation:

Field Protection Districts operate with limited oversight as related to finance and accounting, due to the reporting structure in place. The current organizational structure does not include Field Protection Districts reporting to the ODF Administrative Branch, who is responsible for ODF's finance and accounting activities.

MGO Potential Impact / Risk:

Lack of oversight of the Field Protection Districts as related to finance and accounting could result in inaccurate and incomplete financial data or delays in identification of errors in financial reporting or poor financial performance.

ODF Management Response:

ODF agrees with the recommendation. A focused and prioritized approach would work best in order to achieve the recommended process improvements. The "clear tone" is set by the State Forester and implemented jointly by the Deputies through their chains of command. ODF will develop an organization chart which clearly shows the flow of accountability from District, to Area, to Division, to Leadership. The identified reporting requirements and financial metrics listed in the MAP were actively embedded into agency business practices. The use of weekly (or other) fire finance meetings which include field and division leadership ensure alignment on progress and process. ODF will continue to revise and develop policies and procedure that capture these improved business practices while clearly defining roles and responsibilities relative to financial reporting needs.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Deliverable Review				Supporting Documentation
√	Deliverable Name			Status Indicator	Status		District Business	LT	ET	BOF	
	ODF Policy - Internal Controls (new) (MGO)	Internal Auditor	06/30/2022	●	Not Started	Deputy Director for Administration	Jul-22	Jul-22	Jun-22		
ODF Procedures (list topic(s), define each)											
	AR/AP aging meeting Procedures (MGO)	Financial Services Manager	06/30/2021	●	Being Initiated	Assistant Deputy Director for Admin	n/a	n/a	n/a		
	Cost Share Tracker Updating Procedure for Protection Finance Manager (MGO)	Protection Finance Manager	06/15/2021	●	Being Initiated	Fire Protection Deputy Chief	n/a	n/a	n/a		
	Outstanding Assets & Liabilities Tracker Updating Procedure (MGO)	Protection Finance Manager	12/31/2021	●	Being Initiated	Fire Protection Deputy Chief	Jan-22	n/a	n/a		
	Co-op Tracker Updating Procedure (MGO)	Protection Finance Manager	12/31/2021	●	Being Initiated	Fire Protection Deputy Chief	Jan-22	n/a	n/a		
	Active Incident Tracker Updating Procedure (MGO)	Protection Finance Manager	12/31/2021	●	Not Started	Fire Protection Deputy Chief	Jan-22	n/a	n/a		
	Financial Metrics Review Procedures (MGO)	Financial Services Manager	12/31/2021	●	Not Started	Assistant Deputy Director for Admin	Jan-22	n/a	n/a		
ODF Greenbook (list sections, define action needed)											
	Chapter 80 - Cost Share Field Procedures - updated w/ current template, terms, guidance, expectations for interdepartmental communications, timing, roles (MGO)	Protection Finance Manager	06/15/2021	●	Complete	Fire Protection Deputy Chief	Jul-21	n/a	n/a		
	Chapter 50 - Interagency Cooperative Relations (new) (MGO)	Incident Finance / FEMA Manager	09/30/2021	●	In Review / Underway	Protection Finance Manager	Nov-22	n/a	n/a		
ODF Guidance or Memorandum (list sections)											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
IT SYSTEM CONSIDERATIONS											
	Technical requirements for incident finance tracker application defined, if desired	Protection Finance Manager	Fall	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Project formulated for prioritizing within internal application development capacity	Admin Modernization Program	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Application development and testing for incident finance tracker	Admin Modernization Program	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Incident Finance Tracker application deployment	Admin Modernization Program	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Procedures for updating Incident Finance Tracker revised for new application	Protection Finance Manager	TBD	●	Not Started	Fire Protection Deputy Chief	TBD	TBD	TBD		
	Interface developed for trackers and metrics to feed into OFRS application	Admin Modernization Program	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
COMMUNICATION PLANNING											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a

MGO Implementation Management Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #17 - District Finance Accounting Oversight

ET Sponsor: Deputy Director for Administration

Due Date: 12/31/2021

Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating: MGO Recommendation:

Medium The ODF Administrative Branch should establish policies and procedures related to oversight of finance/ accounting functions within the Field Protection Districts. The policies and procedures should include, but not be limited to:

1. Definition of reporting lines from the Field Protection Districts to the ODF Administrative Branch.
2. Identification of reporting requirements and key financial metrics from the Field Protection Districts to the ODF Administrative Branch.
3. Ongoing monitoring of key financial metrics within the Field Protection Districts.

In addition, the ODF Executive Team, with the ODF Operations and Administrative Branches, should set a clear "tone at the top" with respect to financial accountability within the Field Protection Districts.

(MGO) Action Plan:

1. Define the reporting lines from the Field Protection Districts to the ODF Administrative Branch.
2. Identify reporting requirements for the Field Protection Districts to the ODF Administrative Branch as related to finance/ accounting.
3. Update current policies and procedures to define reporting lines, reporting requirements, and ongoing monitoring from the Field Protection Districts to the ODF Administrative Branch.
4. Establish on-going review procedures of key financial metrics at the Field Protection District level by the ODF Administrative Branch. Metrics should include but are not limited to:
 - A/R and A/P agings
 - Incidents with open finance items by fiscal year and type (i.e. cost share, responsible party, etc.)
 - % complete of cost share reconciliation process (i.e. estimate to actual for open incidents)
 - % complete of co-op reconciliation process for each open incident
 - Number of cost share incidents open, settled and closed
 - Estimated payable invoices still outstanding with federal partners (ex. BLM, USFS)
 - Oaen purchase orders

MGO Observation:

Field Protection Districts operate with limited oversight as related to finance and accounting, due to the reporting structure in place. The current organizational structure does not include Field Protection Districts reporting to the ODF Administrative Branch, who is responsible for ODF's finance and accounting activities.

MGO Potential Impact / Risk:

Lack of oversight of the Field Protection Districts as related to finance and accounting could result in inaccurate and incomplete financial data or delays in identification of errors in financial reporting or poor financial performance.

ODF Management Response:

ODF agrees with the recommendation. A focused and prioritized approach would work best in order to achieve the recommended process improvements. The "clear tone" is set by the State Forester and implemented jointly by the Deputies through their chains of command. ODF will develop an organization chart which clearly shows the flow of accountability from District, to Area, to Division, to Leadership. The identified reporting requirements and financial metrics listed in the MAP were actively embedded into agency business practices. The use of weekly (or other) fire finance meetings which include field and division leadership ensure alignment on progress and process. ODF will continue to revise and develop policies and procedure that capture these improved business practices while clearly defining roles and responsibilities relative to financial reporting needs.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Deliverable Review				Supporting Documentation
√	Deliverable Name			Status Indicator	Status		District Business	LT	ET	BOF	
TRAINING NEEDS											
	Fire Finance Training (annually)	Incident Finance / FEMA Manager	06/30/2022	●	Not Started	Protection Finance Manager	May-22	May-22	n/a		
	Dispatch and IMT trainings - update on new processes (annually)	Incident Finance / FEMA Manager	06/30/2022	●	Not Started	Protection Finance Manager	May-22	May-22	n/a		
MAINTENANCE NEEDS POST-IMPLEMENTATION											
	Training modules modified to reflect any new or changed processes/procedures	Incident Finance / FEMA Manager	06/30/2022	●	Not Started	Protection Finance Manager	May-22	May-22	n/a		
	Protection Fiscal Year Operating Plan core duties updated	Fire Protection Deputy Chief	06/30/2022	●	Not Started	Fire Protection Deputy Chief	n/a	n/a	n/a		
	Position Descriptions updated w/duties	Fire Protection Deputy Chief	06/30/2022	●	Not Started	Human Resources Analyst	n/a	n/a	n/a		
BUDGETARY, LEGISLATIVE, OR ADMINISTRATIVE CONSIDERATIONS											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a

Status Legend:	
●	Not Started
●	Being Initiated
●	In Review / Underway
●	Approved / Completed

MGO Implementation Management Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #18 - Change Management (Incident Finance Audits)

ET Sponsor: Fire Protection Chief

Due Date: 06/30/2022

Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating: MGO Recommendation:

Medium Financial data by incident should be reviewed by appropriate personnel, including the ODF Operations and Administrative Branches and key finance and accounting personnel within the Field Protection Districts, on an ongoing and timely basis. Changes in finance and accounting processes and procedures should be properly documented through updates in policy or procedure documents and communicated timely.

(MGO) Action Plan:

Establish a financial data/ results review by incident and/ or overall fire season and identify the appropriate personnel to attend the respective reviews. Identify the financial data/ metrics to be reviewed and a change management process for any adjustments made to finance/ accounting policies or procedures resulting from the review.

MGO Observation:

While financial data is reviewed subsequent to the end of the fire season, the review does not extend beyond surface-level financial data to include consideration of reasonableness and other decision processes. The field audits conducted by the EFCC and the Fire Protection Division are duplicative. Changes in finance and accounting policies and procedures resulting from the reviews and audits are not communicated to the Field Protection Districts consistently or on a timely basis.

MGO Potential Impact / Risk:

Lack of timely review of incident financial data and communication of changes to policies and procedures related to finance and accounting could result in inefficiencies, inaccurate and/ or incomplete financial data or a lack of financial accountability within the Field Protection Districts.

ODF Management Response:

ODF agrees with this recommendation. EFCC and the Division are building new efficiency in their processes by establishing joint audits this coming spring where they will review all eligible fire costs and incident findings will further inform business practices and promote financial accountability. Auditing metrics are defined in our business practices; however, the change management process for policy/procedure adjustments resulting from the findings and review have not been codified in formal procedure. Implementation of a more extensive review that includes results beyond surface-level financial data to include consideration of reasonableness and other decision processes would be more difficult to implement and would require significantly more time and capacity than currently stated, especially when evaluating how an incident's operational objectives or regional factors may have influenced financial outcomes and where those lessons learned could be implemented in agency business practices.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Deliverable Review				Supporting Documentation
v	Deliverable Name			Status Indicator	Status		District Business	LT	ET	BOF	
MILESTONES											
	Combine EFCC and Protective Division incident finance audit processes (MGO)	Protection Finance Manager	05/01/2021	●	Complete	Oregon Forestland Protection Fund Administrator	n/a	n/a	n/a		
	Audit criteria updated for supporting documentation, personnel, and review timelines (MGO)	Financial Services Manager	06/30/2022	●	Not Started	Oregon Forestland Protection Fund Administrator	Aug-22	Sep-22	n/a		
	Incident AAR process updated to review financial accounting and communicate results (MGO)	Protection Finance Manager	06/30/2022	●	Not Started	Fire Protection Division Chief	Aug-22	Sep-22	n/a		
POLICY AND PROCEDURES											
ODF Policy (list topics and define milestones)											
	ODF Directive 0-2-3-201 Internal Controls - General Overview rescinded	Assistant Deputy Director for Admin	06/30/2022	●	Not Started	Deputy Director for Administration	Jul-22	Jul-22	Jun-22		
	ODF Policy - Internal Controls (new)	Assistant Deputy Director for Admin	06/30/2022	●	Not Started	Deputy Director for Administration	Jul-22	Jul-22	Jun-22		
	ODF Policy - Disbursements and Expenditures (new)	Financial Services Manager	09/30/2021	●	In Review / Underway	Deputy Director for Administration	21-Oct	21-Dec	21-Sep		
ODF Procedures (list topic(s), define each)											
	EFCC, Operations, Administrative Joint Financial Review Procedures (MGO)	Oregon Forestland Protection Fund Administrator	06/30/2022	●	Not Started	Deputy Director for Administration	Aug-22	Sep-22	n/a		
	EFCC Emergency Fire Claim Procedures updated, if necessary	Oregon Forestland Protection Fund Administrator	06/30/2022	●	Not Started	Deputy Director for Administration	Aug-22	Sep-22	n/a		
	Incident AAR and Financial Review Change Management Procedures (MGO)	Protection Finance Manager	06/30/2022	●	Not Started	Oregon Forestland Protection Fund Administrator	Aug-22	Sep-22	n/a		
ODF Greenbook (list sections, define action needed)											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
ODF Guidance or Memorandum (list sections)											
	Lessons Learned from 2020 Financial Review (MGO)	Protection Finance Manager	08/01/2021	●	Complete	Oregon Forestland Protection Fund Administrator	Aug-21	Aug-21	n/a		2020 Lessons Learned from Large Fire Audits (Email 06/15/21)
	EFC Audit Prep and Guidelines updated, if necessary	Protection Finance Manager	06/30/2022	●	Not Started	Oregon Forestland Protection Fund Administrator	Aug-21	Aug-21	n/a		
IT SYSTEM CONSIDERATIONS											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
COMMUNICATION PLANNING											
	Communicate changes to audit process and expectations resulting from recommendation implementation in advance of first audit under new process, to include best practices for documentation and retention.	Fire Protection Chief	06/30/2022	●	Not Started	Public Affairs Manager	TBD	TBD	TBD		
TRAINING NEEDS											
	Fire Finance Training (annually) - Auditing and Emergency Fire Claim modules updated (MGO)	Incident Finance / FEMA Manager	06/30/2022	●	Not Started	Protection Finance Manager	May-22	May-22	n/a		
	Dispatch and IMT trainings - update on new processes (annually)	Incident Finance / FEMA Manager	06/30/2022	●	Not Started	Protection Finance Manager	May-22	May-22	n/a		

MGO Implementation Management Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #18 - Change Management (Incident Finance Audits)

ET Sponsor: Fire Protection Chief

Due Date: 06/30/2022

Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating: MGO Recommendation:

Medium Financial data by incident should be reviewed by appropriate personnel, including the ODF Operations and Administrative Branches and key finance and accounting personnel within the Field Protection Districts, on an ongoing and timely basis. Changes in finance and accounting processes and procedures should be properly documented through updates in policy or procedure documents and communicated timely.

(MGO) Action Plan:

Establish a financial data/ results review by incident and/ or overall fire season and identify the appropriate personnel to attend the respective reviews. Identify the financial data/ metrics to be reviewed and a change management process for any adjustments made to finance/ accounting policies or procedures resulting from the review.

MGO Observation:

While financial data is reviewed subsequent to the end of the fire season, the review does not extend beyond surface-level financial data to include consideration of reasonableness and other decision processes. The field audits conducted by the EFCC and the Fire Protection Division are duplicative. Changes in finance and accounting policies and procedures resulting from the reviews and audits are not communicated to the Field Protection Districts consistently or on a timely basis.

MGO Potential Impact / Risk:

Lack of timely review of incident financial data and communication of changes to policies and procedures related to finance and accounting could result in inefficiencies, inaccurate and/ or incomplete financial data or a lack of financial accountability within the Field Protection Districts.

ODF Management Response:

ODF agrees with this recommendation. EFCC and the Division are building new efficiency in their processes by establishing joint audits this coming spring where they will review all eligible fire costs and incident findings will further inform business practices and promote financial accountability. Auditing metrics are defined in our business practices; however, the change management process for policy/procedure adjustments resulting from the findings and review have not been codified in formal procedure. Implementation of a more extensive review that includes results beyond surface-level financial data to include consideration of reasonableness and other decision processes would be more difficult to implement and would require significantly more time and capacity than currently stated, especially when evaluating how an incident's operational objectives or regional factors may have influenced financial outcomes and where those lessons learned could be implemented in agency business practices.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Deliverable Review				Supporting Documentation
v	Deliverable Name			Status Indicator	Status		District Business	LT	ET	BOF	
MAINTENANCE NEEDS POST-IMPLEMENTATION											
	Training modules modified to reflect any new or changed processes/procedures	Incident Finance / FEMA Manager	06/30/2022	●	Not Started	Protection Finance Manager	May-22	May-22	n/a		
	Protection Fiscal Year Operating Plan core duties updated	Fire Protection Deputy Chief	06/30/2022	●	Not Started	Fire Protection Deputy Chief	n/a	n/a	n/a		
	Position Descriptions updated w/duties	Fire Protection Deputy Chief	06/30/2022	●	Not Started	Human Resources Analyst	n/a	n/a	n/a		
	Documentation review of all AAR and financial review findings, communications, and use of new change management procedures to update policy or procedures (annually) (MGO)	Protection Finance Manager	06/30/2023	●	Not Started	Deputy Fire Protection Chief	n/a	n/a	n/a		
BUDGETARY, LEGISLATIVE, OR ADMINISTRATIVE CONSIDERATIONS											
	Assessment of review methodologies to evaluate reasonableness and decision-making	External Consultant / TBD	06/30/2023	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		

Status Legend:	
●	Not Started
●	Being Initiated
●	In Review / Underway
●	Approved / Completed

MGO Implementation Management Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #19 - Invoicing
ET Sponsor: Deputy Director for Administration
Due Date: 12/31/2021
Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating: MGO Recommendation:

Medium The ODF Administrative Branch should establish policies and procedures related to invoice generation including limiting the ability to generate invoices to the ODF Administrative Branch.

(MGO) Action Plan:

Develop and implement policies and procedures related to invoice generation. The policies and procedures should include the following: (1) authority and approval limits by job position, (2) required supporting documentation to be provided to the ODF Administrative Branch, and (2) required timeframes for submission of supporting documentation.

Note: This should be addressed with the implementation of Sage 300.

MGO Observation:

The current process to generate certain invoices within the Field Protection Districts is manual (Word document) and limited or no supporting documentation is provided to the ODF Administrative Branch prior to receiving an invoice number. Furthermore, there are no formally documented policies related to submission of supporting documentation and invoices from the Field Protection Districts to the ODF Administrative Branch.

MGO Potential Impact / Risk:

The manual process to generate invoices and lack of supporting documentation could result in inaccurate or incomplete accounts receivable balances.

ODF Management Response:

ODF agrees with this recommendation. When the Sage300 AR system is implemented, the field will be submitting their invoices through that system. After they post their invoice batch, they will scan and send the supporting documentation along with an invoice cover sheet. This sheet will require the review (signature) by someone with authority to approve invoices. The expectation is the field submits the supporting documentation along with invoice cover sheet in a reasonable timeframe (3-5 days). Initial guidance has been developed and shared with the field related to this business process. Follow-up will include formal codification in agency policy and procedure.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Deliverable Review				Supporting Documentation
v	Deliverable Name			Status Indicator	Status		District Business Managers	LT	ET	BOF	
MILESTONES											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
POLICY AND PROCEDURES											
ODF Policy (list topics and define milestones)											
	ODF Directive 0-2-3-240 Accounting for Revenue, Receivable Transactions Rescinded	Financial Services Manager	09/30/2021	●	In Review / Underway	Assistant Deputy Director for Admin	Oct-21	Dec-21	Sep-21		
	ODF Directive 0-2-3-204 Internal Controls Over Revenues and Receivables Rescinded	Financial Services Manager	09/30/2021	●	In Review / Underway	Assistant Deputy Director for Admin	Oct-21	Dec-21	Sep-21		
	ODF Policy - Accounts Receivable (AR) (MGO)	Financial Services Manager	09/30/2021	●	In Review / Underway	Assistant Deputy Director for Admin	Oct-21	Dec-21	Sep-21		
	Roles defined for ODF Administration and Operations for recording AR/Revenue (MGO)	Financial Services, Operating Programs	09/30/2021	●	In Review / Underway	Assistant Deputy Director for Admin	Oct-21	Dec-21	n/a		
	Updated policy includes defined responsibilities for ODF Admin and Operations (MGO)	Financial Services Manager	09/30/2021	●	In Review / Underway	Assistant Deputy Director for Admin	Oct-21	Dec-21	Sep-21		
	ODF Policy - Signature Authority (MGO)	Deputy Director for Administration	09/30/2021	●	In Review / Underway	State Forester	Oct-21	Dec-21	Sep-21		
ODF Procedures (list topic(s), define each)											
	Invoicing and Recording Accounts Receivable (MGO)	Financial Services Manager	12/31/2021	●	Being Initiated	Assistant Deputy Director for Admin	Jan-22	n/a	n/a		
	Invoicing process includes supporting documentation and timelines (MGO)	Financial Services Manager	12/31/2021	●	Being Initiated	Assistant Deputy Director for Admin	Jan-22	n/a	n/a		
ODF Greenbook (list sections, define action needed)											
	Chapter 70 - Claims and Incident Cost Recovery Collection revised to integrate new Accounts Receivable policies and procedures (MGO)	Incident Finance / FEMA Manager	06/30/2022	●	Not Started	Protection Finance Manager	TBD	n/a	n/a	n/a	n/a
ODF Guidance or Memorandum (list sections)											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
IT SYSTEM CONSIDERATIONS											
	Sage AR deployed as only system for invoicing, removing manual process (MGO)	Financial Services Manager	06/29/2021	●	Complete	Assistant Deputy Director for Admin	Jul-21	Jul-21	n/a		
	Evaluate interface capabilities with other systems (WALT, DirectBill, Smoke Management, MotorPool/Comms) coordinating with operating divisions	Admin Modernization Program	TBD	●	Being Initiated	Deputy Director for Administration	TBD	TBD	TBD		
	Evaluate interface capabilities with future document management system	Admin Modernization Program	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
COMMUNICATION PLANNING											
	Communicate procedural changes to impacted personnel and supervisors	Deputy Director for Administration	12/31/2021	●	Being Initiated	Public Affairs Manager	TBD	TBD	TBD		
TRAINING NEEDS											
	Policy and procedures as part of Sage training and updates	Financial Services Manager	12/31/2021	●	Being Initiated	Assistant Deputy Director for Admin	TBD	TBD	n/a		
	Collection policies and procedures for those responsible for collections	Financial Services Manager	12/31/2021	●	Not Started	Assistant Deputy Director for Admin	TBD	TBD	n/a		

MGO Implementation Management Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #19 - Invoicing
ET Sponsor: Deputy Director for Administration
Due Date: 12/31/2021
Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating: MGO Recommendation:

Medium The ODF Administrative Branch should establish policies and procedures related to invoice generation including limiting the ability to generate invoices to the ODF Administrative Branch.

(MGO) Action Plan:

Develop and implement policies and procedures related to invoice generation. The policies and procedures should include the following: (1) authority and approval limits by job position, (2) required supporting documentation to be provided to the ODF Administrative Branch, and (2) required timeframes for submission of supporting documentation.

Note: This should be addressed with the implementation of Sage 300.

MGO Observation:

The current process to generate certain invoices within the Field Protection Districts is manual (Word document) and limited or no supporting documentation is provided to the ODF Administrative Branch prior to receiving an invoice number. Furthermore, there are no formally documented policies related to submission of supporting documentation and invoices from the Field Protection Districts to the ODF Administrative Branch.

MGO Potential Impact / Risk:

The manual process to generate invoices and lack of supporting documentation could result in inaccurate or incomplete accounts receivable balances.

ODF Management Response:

ODF agrees with this recommendation. When the Sage300 AR system is implemented, the field will be submitting their invoices through that system. After they post their invoice batch, they will scan and send the supporting documentation along with an invoice cover sheet. This sheet will require the review (signature) by someone with authority to approve invoices. The expectation is the field submits the supporting documentation along with invoice cover sheet in a reasonable timeframe (3-5 days). Initial guidance has been developed and shared with the field related to this business process. Follow-up will include formal codification in agency policy and procedure.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Deliverable Review				Supporting Documentation
v	Deliverable Name			Status Indicator	Status		District Business Managers	LT	ET	BOF	
MAINTENANCE NEEDS POST-IMPLEMENTATION											
	Invoicing Procedures reviewed (annually)	Financial Services Manager	06/30/2022	●	Not Started	Assistant Deputy Director for Admin	TBD	TBD	n/a		
BUDGETARY, LEGISLATIVE, OR ADMINISTRATIVE CONSIDERATIONS											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a

Status Legend:	
●	Not Started
●	Being Initiated
●	In Review / Underway
●	Approved / Completed

MGO Implementation Management Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #20 - Finance / Accounting (Org Structure)

ET Sponsor: State Forester

Due Date: 06/30/2023

Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating: MGO Recommendation:

Medium Job descriptions of current ODF personnel should be reviewed and the following reassignments should be made:
 1. Individuals with primarily finance and accounting responsibilities should be reassigned to the ODF Administrative Branch.
 2. Finance and accounting related job duties of individuals within the ODF Operations Branch should be reassigned to personnel within the ODF Administrative Branch.

(MGO) Action Plan:

1. Based on review of the job descriptions provided by Bill Herber, the following position(s) should report to the ODF Administrative Branch:
 - a) Protection Finance - Principal Executive Finance Manager
 - b) Protection Finance - Fiscal Analyst 2 (one position)
 - c) Protection Finance - Accounting Tech 3 (five positions)
2. Based on review of the Organizational Chart for the ODF Administrative Branch, the Fiscal Analyst should be reported to the Budget Management group as opposed to the Equipment Pool.
3. Based on review of the job descriptions provided by Bill Herber, certain finance/ accounting related job duties which should be reassigned to personnel within the ODF Administrative Branch.

MGO Observation:

Certain personnel with primarily finance or accounting responsibilities report to the ODF Operations Branch rather than the Administrative Branch under the current organizational structure. Additionally, certain positions within the ODF Operations Branch have some finance and accounting related job duties and do not consistently communicate with the appropriate personnel within the ODF Administrative Branch regarding the execution of those duties.

MGO Potential Impact / Risk:

Lack of proper oversight of finance and accounting personnel and/ or job functions by the ODF Administrative Branch could result in errors in financial reporting or failure to properly record accounts receivable or payable transactions, resulting in an inability to properly forecast cash flows.

In addition, the ODF Operations and Administrative Branches should review and approve job requisitions with finance and accounting responsibilities to determine whether the roles and responsibilities are appropriate given the position identified.

ODF Management Response:

ODF agrees with the process observation and potential impacts associated with a lack of proper personnel oversight and a lack of communication between personnel. Simply moving report lines in organization structure will not solve the problem. ODF will conduct further analysis to design and effectively reorganize our current fire finance structure to ensure needed controls and reporting structures are in place, while maintaining fire division strategic and operational control of goals and outcomes. Progress has been made in the agency on many of the procedural and technological recommendations within this consulting review. This progress has improved efficiencies and accuracies in our business practices and provided for more effective communications across the agency. Codifying these improved business practices in our governance, while properly training our employees, will address some observations related to personnel oversight by establishing authority, responsibility, and accountability amongst agency staff and managers. Implementing technical advances and upgrades in our information systems will also improve consistency and reliability in our financial reporting further mitigating risk of inefficiencies or inaccuracies. Alignment of work and technical classifications within business units provides more efficient and effective work, promotes the ability to provide redundant services, especially important during fire season, and provides for greater accountability through technical understanding by immediate managers. However, this approach must include meeting the needs of operational units and their leadership to influence goals and outcomes for these supporting elements as well as provide input on their performance. This will ensure operational units maintain strategic control while minimizing the need for administrative oversight. To assist with implementation, an analysis to determine how these listed and potential future reassignments would mitigate the potential risks should be conducted. There may be multiple solutions or phased approaches that will address concerns noted in the process observations, while considering associated tradeoffs of implementation, and evaluating the effectiveness of current process improvements underway.

ODF Revised Management Response - June 2021:

ODF agrees with the recommendation. The Governor's recommended budget includes these recommended changes, and we believe these changes will likely be included in the Legislative adopted budget. Even if they were not included, from a mechanical budget process, the reporting lines can and will still be implemented. Reorganizations require thoughtful handling consistent with union requirements with human resource expertise and support, along with careful planning to assure continuity in the operational support needed to assure timely decision-making - specifically during the 2021 fire season.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Deliverable Review				Supporting Documentation
√	Deliverable Name			Status Indicator	Status		District Business Managers	LT	ET	BOF	
MILESTONES											
	This recommendation's implementation plan is considerate of the Legislative Assembly's development of a 2021-23 Legislatively Adopted Budget, inclusive of ODF Policy Option Package #200 in the Governor's Recommended Budget. (MGO)	State Forester	06/28/2021	●	Complete	Oregon Legislative Assembly	TBD	TBD	TBD		
	Bridge plan for 2021 Fire Season to build capacity and understanding of operational needs of administrative/accounting support required for timely decisions that informs full implementation of organization changes.	Fire Protection Chief and Assistant Deputy Director for Admin	07/01/2021	●	Complete	Deputy Directors for Administration and Operations	TBD	TBD	TBD		
	Change Management consultant hired to support changing organizational structure and business processes	Deputy Director for Administration	10/31/2021	●	Being Initiated	State Forester	TBD	TBD	TBD		
	DRAFT Organizational Chart reflecting proposed reporting structure (9 positions + 4 new) (MGO)	Deputy Director for Administration	10/31/2021	●	Being Initiated	Deputy Director for Administration	TBD	TBD	TBD		
	FTE and reporting changes clarified for positions in Legislatively Adopted Budget, if any	Assistant Deputy Director for Admin	07/01/2021	●	Complete	Deputy Director for Administration	TBD	TBD	TBD		
	Technical adjustments implemented in budgeting system and documentation (MGO)	Budget Manager	10/01/2021	●	Not Started	Assistant Deputy Director for Admin	TBD	TBD	TBD		
	Agency's 2021-23 Legislatively Adopted Budget document to Chief Financial Office and Legislative Fiscal Office	State Forester	10/26/2021	●	Not Started	Oregon Legislative Assembly	TBD	TBD	TBD		
	Complete reorganization January 1, 2022, or sooner: the agency is absolutely committed to implementing these changes. The TBD timeline items that follow are contingent upon two key drivers: the actual budget/FTE the agency receives (added capacity/FTE/Positions) to fully implement all the MGO recommendations and the magnitude of the fire season, which requires current capacity to manage finances on assignment to large fires. With these key drivers, we would have organizational implementation by January 1, 2022, possibly sooner.										
	Recruitment processes initiated for new or vacant positions, if any	Assistant Deputy Director for Admin	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Interim analysis of core duties for affected positions specific to Operations Branch	Deputy Director for Operations	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Principles established for strategic and operational support of Operations Branch	Fire Protection Chief	TBD	●	Not Started	Deputy Director for Operations	TBD	TBD	TBD		
	Human Resource Analyst assigned to support implementation	Human Resources Manager	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Transition Plan for implementing organizational change	Deputy Directors for Administration and Operations	TBD	●	Not Started	State Forester	TBD	TBD	TBD		
	Communication Plan for implementing organizational change	Deputy Directors for Administration and Operations	TBD	●	Not Started	Public Affairs Manager	TBD	TBD	TBD		

MGO Implementation Management Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #20 - Finance / Accounting (Org Structure)

ET Sponsor: State Forester

Due Date: 06/30/2023

Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating: MGO Recommendation:

Medium Job descriptions of current ODF personnel should be reviewed and the following reassignments should be made:
 1. Individuals with primarily finance and accounting responsibilities should be reassigned to the ODF Administrative Branch.
 2. Finance and accounting related job duties of individuals within the ODF Operations Branch should be reassigned to personnel within the ODF Administrative Branch.

(MGO) Action Plan:

1. Based on review of the job descriptions provided by Bill Herber, the following position(s) should report to the ODF Administrative Branch:
 - a) Protection Finance - Principal Executive Finance Manager
 - b) Protection Finance - Fiscal Analyst 2 (one position)
 - c) Protection Finance - Accounting Tech 3 (five positions)
2. Based on review of the Organizational Chart for the ODF Administrative Branch, the Fiscal Analyst should be reported to the Budget Management group as opposed to the Equipment Pool.
3. Based on review of the job descriptions provided by Bill Herber, certain finance/ accounting related job duties which should be reassigned to personnel within the ODF Administrative Branch.

MGO Observation:

Certain personnel with primarily finance or accounting responsibilities report to the ODF Operations Branch rather than the Administrative Branch under the current organizational structure. Additionally, certain positions within the ODF Operations Branch have some finance and accounting related job duties and do not consistently communicate with the appropriate personnel within the ODF Administrative Branch regarding the execution of those duties.

MGO Potential Impact / Risk:

Lack of proper oversight of finance and accounting personnel and/ or job functions by the ODF Administrative Branch could result in errors in financial reporting or failure to properly record accounts receivable or payable transactions, resulting in an inability to properly forecast cash flows.

In addition, the ODF Operations and Administrative Branches should review and approve job requisitions with finance and accounting responsibilities to determine whether the roles and responsibilities are appropriate given the position identified.

ODF Management Response:

ODF agrees with the process observation and potential impacts associated with a lack of proper personnel oversight and a lack of communication between personnel. Simply moving report lines in organization structure will not solve the problem. ODF will conduct further analysis to design and effectively reorganize our current fire finance structure to ensure needed controls and reporting structures are in place, while maintaining fire division strategic and operational control of goals and outcomes. Progress has been made in the agency on many of the procedural and technological recommendations within this consulting review. This progress has improved efficiencies and accuracies in our business practices and provided for more effective communications across the agency. Codifying these improved business practices in our governance, while properly training our employees, will address some observations related to personnel oversight by establishing authority, responsibility, and accountability amongst agency staff and managers. Implementing technical advances and upgrades in our information systems will also improve consistency and reliability in our financial reporting further mitigating risk of inefficiencies or inaccuracies. Alignment of work and technical classifications within business units provides more efficient and effective work, promotes the ability to provide redundant services, especially important during fire season, and provides for greater accountability through technical understanding by immediate managers. However, this approach must include meeting the needs of operational units and their leadership to influence goals and outcomes for these supporting elements as well as provide input on their performance. This will ensure operational units maintain strategic control while minimizing the need for administrative oversight. To assist with implementation, an analysis to determine how these listed and potential future reassignments would mitigate the potential risks should be conducted. There may be multiple solutions or phased approaches that will address concerns noted in the process observations, while considering associated tradeoffs of implementation, and evaluating the effectiveness of current process improvements underway.

ODF Revised Management Response - June 2021:

ODF agrees with the recommendation. The Governor's recommended budget includes these recommended changes, and we believe these changes will likely be included in the Legislative adopted budget. Even if they were not included, from a mechanical budget process, the reporting lines can and will still be implemented. Reorganizations require thoughtful handling consistent with union requirements with human resource expertise and support, along with careful planning to assure continuity in the operational support needed to assure timely decision-making - specifically during the 2021 fire season.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Deliverable Review				Supporting Documentation
v	Deliverable Name			Status Indicator	Status		District Business Managers	LT	ET	BOF	
	Workday Human Resource Profiles reviewed and reporting updated	Human Resources Manager	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Position Descriptions reviewed and updated	Human Resources Manager	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Classification Study of Administrative Branch financial positions	Human Resources Manager	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Union coordination of Classification Studies / Technological Changes / Retraining	Human Resources Manager	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Recommendations for classification changes defined, if any	Deputy Director for Administration	TBD	●	Not Started	State Forester	TBD	TBD	TBD		
	Position classification changes implemented, if any	Human Resources Manager	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Facilities space planning and adjacency considerations defined and implemented	Facilities Manager	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Recommendation related to scope and breadth of future agency reviews (MGO)	Deputy Directors for Administration and Operations	06/30/2023	●	Not Started	State Forester	TBD	TBD	TBD		

POLICY AND PROCEDURES

ODF Policy (list topics and define milestones)

TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD		
-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	--	--

ODF Procedures (list topic(s), define each)

TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD		
-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	--	--

ODF Greenbook (list sections, define action needed)

TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD		
-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	--	--

ODF Guidance or Memorandum (list sections)

TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD		
-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	--	--

IT SYSTEM CONSIDERATIONS

	Onboarding or adjustments required for new or changing positions	Information Technology Manager	TBD	●	Not Started	Assistant Deputy Director for Admin	TBD	TBD	TBD		
--	--	--------------------------------	-----	---	-------------	-------------------------------------	-----	-----	-----	--	--

COMMUNICATION PLANNING

	Communications implementing organizational change	Deputy Director for Administration	TBD	●	Not Started	Public Affairs Manager	TBD	TBD	TBD		
--	---	------------------------------------	-----	---	-------------	------------------------	-----	-----	-----	--	--

MGO Implementation Management Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #20 - Finance / Accounting (Org Structure)

ET Sponsor: State Forester

Due Date: 06/30/2023

Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating: MGO Recommendation:

Medium Job descriptions of current ODF personnel should be reviewed and the following reassignments should be made:
 1. Individuals with primarily finance and accounting responsibilities should be reassigned to the ODF Administrative Branch.
 2. Finance and accounting related job duties of individuals within the ODF Operations Branch should be reassigned to personnel within the ODF Administrative Branch.

In addition, the ODF Operations and Administrative Branches should review and approve job requisitions with finance and accounting responsibilities to determine whether the roles and responsibilities are appropriate given the position identified.

(MGO) Action Plan:

1. Based on review of the job descriptions provided by Bill Herber, the following position(s) should report to the ODF Administrative Branch:
 - a) Protection Finance - Principal Executive Finance Manager
 - b) Protection Finance - Fiscal Analyst 2 (one position)
 - c) Protection Finance - Accounting Tech 3 (five positions)
2. Based on review of the Organizational Chart for the ODF Administrative Branch, the Fiscal Analyst should be reported to the Budget Management group as opposed to the Equipment Pool.
3. Based on review of the job descriptions provided by Bill Herber, certain finance/ accounting related job duties which should be reassigned to personnel within the ODF Administrative Branch.

MGO Observation:

Certain personnel with primarily finance or accounting responsibilities report to the ODF Operations Branch rather than the Administrative Branch under the current organizational structure. Additionally, certain positions within the ODF Operations Branch have some finance and accounting related job duties and do not consistently communicate with the appropriate personnel within the ODF Administrative Branch regarding the execution of those duties.

MGO Potential Impact / Risk:

Lack of proper oversight of finance and accounting personnel and/ or job functions by the ODF Administrative Branch could result in errors in financial reporting or failure to properly record accounts receivable or payable transactions, resulting in an inability to properly forecast cash flows.

ODF Management Response:

ODF agrees with the process observation and potential impacts associated with a lack of proper personnel oversight and a lack of communication between personnel. Simply moving report lines in organization structure will not solve the problem. ODF will conduct further analysis to design and effectively reorganize our current fire finance structure to ensure needed controls and reporting structures are in place, while maintaining fire division strategic and operational control of goals and outcomes. Progress has been made in the agency on many of the procedural and technological recommendations within this consulting review. This progress has improved efficiencies and accuracies in our business practices and provided for more effective communications across the agency. Codifying these improved business practices in our governance, while properly training our employees, will address some observations related to personnel oversight by establishing authority, responsibility, and accountability amongst agency staff and managers. Implementing technical advances and upgrades in our information systems will also improve consistency and reliability in our financial reporting further mitigating risk of inefficiencies or inaccuracies. Alignment of work and technical classifications within business units provides more efficient and effective work, promotes the ability to provide redundant services, especially important during fire season, and provides for greater accountability through technical understanding by immediate managers. However, this approach must include meeting the needs of operational units and their leadership to influence goals and outcomes for these supporting elements as well as provide input on their performance. This will ensure operational units maintain strategic control while minimizing the need for administrative oversight. To assist with implementation, an analysis to determine how these listed and potential future reassignments would mitigate the potential risks should be conducted. There may be multiple solutions or phased approaches that will address concerns noted in the process observations, while considering associated tradeoffs of implementation, and evaluating the effectiveness of current process improvements underway.

ODF Revised Management Response - June 2021:

ODF agrees with the recommendation. The Governor's recommended budget includes these recommended changes, and we believe these changes will likely be included in the Legislative adopted budget. Even if they were not included, from a mechanical budget process, the reporting lines can and will still be implemented. Reorganizations require thoughtful handling consistent with union requirements with human resource expertise and support, along with careful planning to assure continuity in the operational support needed to assure timely decision-making - specifically during the 2021 fire season.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Deliverable Review				Supporting Documentation
v	Deliverable Name			Status Indicator	Status		District Business Managers	LT	ET	BOF	
TRAINING NEEDS											
	Onboarding to the Administrative Branch	Deputy Director for Administration	TBD	●	Not Started	Assistant Deputy Director for Admin	TBD	TBD	TBD		
	Training requirements and plans defined for each position	Deputy Director for Administration	TBD	●	Not Started	Assistant Deputy Director for Admin	TBD	TBD	TBD		
MAINTENANCE NEEDS POST-IMPLEMENTATION											
	Workday Human Resource Profiles reviewed and updated as necessary	Human Resources Analyst	TBD	●	Not Started	Human Resources Manager	TBD	TBD	TBD		
	Fiscal Year Operating Plans updated	Deputy Director for Operations	06/30/2022	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
BUDGETARY, LEGISLATIVE, OR ADMINISTRATIVE CONSIDERATIONS											
	Strategic Initiatives for 2023-25 budget development	State Forester	10/30/2021	●	Not Started	Board of Forestry	TBD	TBD	TBD		
	Guiding Principles and Direction for 2023-25 budget development	State Forester	01/30/2022	●	Not Started	Board of Forestry	TBD	TBD	TBD		
	Input on Budget Concepts for 2023-25 budget development	State Forester	04/30/2022	●	Not Started	Board of Forestry	TBD	TBD	TBD		
	Policy Option Packages for 2023-25 budget development	State Forester	06/30/2022	●	Not Started	Board of Forestry	TBD	TBD	TBD		
	2023-25 Agency Request Budget	State Forester	07/30/2022	●	Not Started	Board of Forestry	TBD	TBD	TBD		

Status Legend:	
●	Not Started
●	Being Initiated
●	In Review / Underway
●	Approved / Completed

MGO Implementation Management Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #21 - Finance Skillsets

ET Sponsor: Human Resources Manager

Due Date: 06/30/2023

Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating: MGO Recommendation:

Medium The ODF Administrative Branch should assess current staffing for finance and accounting positions and/ or job duties of operational personnel performing finance and accounting job duties, to determine where there are skillset mismatches. For those identified, new positions should be created and/ or job duties should be reassigned.

(MGO) Action Plan:

1. Finance/ accounting related responsibilities should be reassigned to the ODF Administrative Branch.
2. Payroll classifications should be reassessed to ensure classifications are in line with the redefined job positions according to the education and experience requirements for each role.
3. All finance/ accounting related job positions should include a list of minimum educational requirements, experience, and skills needed to qualify for the position.

MGO Observation:

Certain personnel are performing job duties related to finance and accounting without the necessary skillset (e.g. training and/or qualifications).

MGO Potential Impact / Risk:

Lack of proper skillsets for finance and accounting positions and/ or job duties could result inaccuracies or incomplete financial information.

Note: Approval of new positions is dependent upon legislative approval.

ODF Management Response:

ODF agrees with the recommended process improvement to address personnel performing job duties without proper training and/or qualifications and recognize that this could result in inaccuracies or incomplete financial information. With regards to the management action plan sub-recommendations, the agency will assess current staffing for finance / accounting job duties with an initial review of the position descriptions and recommendations for allocations of the positions. While the assessment can be conducted internally, further position reclassifications or new position assignments are dependent upon executive and legislative approvals. State of Oregon job classifications do have pre-defined minimum qualifications. These minimum qualifications are utilized during the recruitment process to assure a qualified candidate pool. It is not uncommon for general government positions to have financial responsibilities, in addition to clerical and administrative functions, all with varying minimum requirements. Training for financial personnel is an agency priority, has been included in prior agency budget requests, and has been challenged with recent cost containment measures. Proper classification of positions, assignment of duties, and ongoing investments in training are the determining factors to assure personnel skillsets are properly matched to agency business needs. The agency will explore and further evaluate the recommended changes to organizational reporting structure to understand how this sub-recommendation addresses the observation and potential risk; however, financial responsibilities are currently distributed broadly across our decentralized agency in both the operational programs and field district offices, and the difficulty of implementing this sub-recommendation has been understated.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Deliverable Review				Supporting Documentation
√	Deliverable Name			Status Indicator	Status		District Business Managers	LT	ET	BOF	
MILESTONES											
	Coordinated review of finance position descriptions against classification specs (MGO)	Human Resources Analyst	06/30/2023	●	Not Started	Human Resources Manager	TBD	TBD	TBD		
	If changes in classifications or elimination of positions was to result from review, Collective Bargaining Agreement and notice to employees would be initiated (MGO)	Human Resources Manager	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
POLICY AND PROCEDURES											
ODF Policy (list topics and define milestones)											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
ODF Procedures (list topic(s), define each)											
	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD		
ODF Greenbook (list sections, define action needed)											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
ODF Guidance or Memorandum (list sections)											
	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD		
IT SYSTEM CONSIDERATIONS											
	Identification of security controls and access needs for financial positions, protocols on access, including coordination with Department of Administrative Services	Human Resources Manager	06/30/2023	●	Not Started	Assistant Deputy Director for Admin	TBD	TBD	TBD		
COMMUNICATION PLANNING											
	Communications to leadership and employees that position descriptions will be reviewed as per Collective Bargaining Agreement (MGO)	Human Resources Analyst	05/01/2022	●	Not Started	Human Resources Manager	TBD	TBD	TBD		
TRAINING NEEDS											
	Identify gaps in person vs. position, conduct needs assesment and provide training to bridge gaps	Human Resources Manager	06/30/2023	●	Not Started	Assistant Deputy Director for Admin	TBD	TBD	TBD		
	Evaluate changes in finance procedures and identify training needs (annually)	Financial Services Manager	TBD	●	Not Started	Assistant Deputy Director for Admin	TBD	TBD	TBD		
MAINTENANCE NEEDS POST-IMPLEMENTATION											
	Position and classification review every two years to evaluate if position needs have changed and ensure proper classification	Human Resources Analyst	TBD	●	Not Started	Human Resources Manager	TBD	TBD	TBD		
	Workday Human Resource Profiles reviewed and updated as necessary	Human Resources Analyst	TBD	●	Not Started	Human Resources Manager	TBD	TBD	TBD		

MGO Implementation Management Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #21 - Finance Skillsets

ET Sponsor: Human Resources Manager

Due Date: 06/30/2023

Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating: MGO Recommendation:

Medium The ODF Administrative Branch should assess current staffing for finance and accounting positions and/ or job duties of operational personnel performing finance and accounting job duties, to determine where there are skillset mismatches. For those identified, new positions should be created and/ or job duties should be reassigned.

(MGO) Action Plan:

1. Finance/ accounting related responsibilities should be reassigned to the ODF Administrative Branch.
2. Payroll classifications should be reassessed to ensure classifications are in line with the redefined job positions according to the education and experience requirements for each role.
3. All finance/ accounting related job positions should include a list of minimum educational requirements, experience, and skills needed to qualify for the position.

MGO Observation:

Certain personnel are performing job duties related to finance and accounting without the necessary skillset (e.g. training and/or qualifications).

MGO Potential Impact / Risk:

Lack of proper skillsets for finance and accounting positions and/ or job duties could result inaccuracies or incomplete financial information.

Note: Approval of new positions is dependent upon legislative approval.

ODF Management Response:

ODF agrees with the recommended process improvement to address personnel performing job duties without proper training and/or qualifications and recognize that this could result in inaccuracies or incomplete financial information. With regards to the management action plan sub-recommendations, the agency will assess current staffing for finance / accounting job duties with an initial review of the position descriptions and recommendations for allocations of the positions. While the assessment can be conducted internally, further position reclassifications or new position assignments are dependent upon executive and legislative approvals. State of Oregon job classifications do have pre-defined minimum qualifications. These minimum qualifications are utilized during the recruitment process to assure a qualified candidate pool. It is not uncommon for general government positions to have financial responsibilities, in addition to clerical and administrative functions, all with varying minimum requirements. Training for financial personnel is an agency priority, has been included in prior agency budget requests, and has been challenged with recent cost containment measures. Proper classification of positions, assignment of duties, and ongoing investments in training are the determining factors to assure personnel skillsets are properly matched to agency business needs. The agency will explore and further evaluate the recommended changes to organizational reporting structure to understand how this sub-recommendation addresses the observation and potential risk; however, financial responsibilities are currently distributed broadly across our decentralized agency in both the operational programs and field district offices, and the difficulty of implementing this sub-recommendation has been understated.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Deliverable Review				Supporting Documentation
√	Deliverable Name			Status Indicator	Status		District Business Managers	LT	ET	BOF	
BUDGETARY, LEGISLATIVE, OR ADMINISTRATIVE CONSIDERATIONS											
	Temporary or LD position may be required to help support the evaluation of positions and class review. To be considered for near-term or 23-25 budget development.	Human Resources Manager	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Classification changes could have budgetary impact, plus or minus	Budget Manager	05/01/2023	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Reassess human resources capacity and define needs for 25-27 budget development.	Human Resources Manager	06/30/2023	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Strategic Initiatives for 2025-27 budget development	State Forester	10/30/2023	●	Not Started	Board of Forestry	TBD	TBD	TBD		
	Guiding Principles and Direction for 2025-27 budget development	State Forester	01/30/2024	●	Not Started	Board of Forestry	TBD	TBD	TBD		
	Input on Budget Concepts for 2025-27 budget development	State Forester	04/30/2024	●	Not Started	Board of Forestry	TBD	TBD	TBD		
	Policy Option Packages for 2025-27 budget development	State Forester	06/30/2024	●	Not Started	Board of Forestry	TBD	TBD	TBD		
	2025-27 Agency Request Budget	State Forester	07/30/2024	●	Not Started	Board of Forestry	TBD	TBD	TBD		

Status Legend:	
●	Not Started
●	Being Initiated
●	In Review / Underway
●	Approved / Completed

MGO Implementation Management Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #22 - OFRS

ET Sponsor: Deputy Director for Administration

Due Date: 06/30/2022

Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating: MGO Recommendation:

Medium ODF should implement the recommended process improvements identified within the report to ensure that source data is accurate and complete within the respective systems. An independent validation and stress-test of OFRS should be completed prior to implementation. The ODF Administrative Branch should provide initial and on-going training related to the use and capabilities of OFRS.

(MGO) Action Plan:

The following are examples of data needed within OFRS in order to ensure proper oversight/ accountability as related to Fire Protection Finance:

1. Total Expenses: Actuals from the state GL system (direct feed) and cost estimates from FIRES (direct feed) and e-Suite (daily export/ import)
2. Revenue: Actuals from the state GL system (direct feed) and estimates (system generated calculation based on pending cost-share estimates)
3. General Fund Revenue Estimate: EFCC estimates (generated by EFCC)
4. Accounts Receivable: Actuals from the state GL system
5. Net: Estimate (system generated calculation)
6. Cost Share Estimation: Key data points utilized for cost share agreements such as acres, boots on the ground, etc.
7. Informational Data: Fire code, paying agency, cost share period, FEMA period, fire start date, district, etc.

NOTE: Currently, the processes/ procedures in place do not support using OFRS as a financial management system due to data inaccuracies.

MGO Observation:

While the necessary data related to Fire Protection Finance could be extracted and input into OFRS for fire finance oversight, the current processes utilized by ODF cause certain data within existing information technology systems to be unreliable, inaccurate or incomplete.

MGO Potential Impact / Risk:

Inaccurate and/ or incomplete data within the source systems and/ or errors in system coding could result in inaccurate or incomplete information being utilized for key management decisions.

ODF Management Response:

ODF agrees with this recommendation. The core code base of the OFRS system is fully developed and has begun to be rolled out into production. This initial phase is focused on state data sets and ensuring their accuracy and completeness with all applicable state systems. Even though the state systems are based on outdated technologies, there are enough interfaces, endpoints and existing technologies to fully automate data exchange and transformation processes; the same cannot be said for the agency's fire financial information. As noted in several recommendations, current fire finance processes make system automation extremely difficult. While further automation of the agency's various fire finance processes would greatly assist the ability to integrate systems, the standardization of manual processes can certainly provide transitional improvement to this effort. The agency will have to invest additional effort and capacity to acquire the data as outlined in the MAP.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Deliverable Review				Supporting Documentation
v	Deliverable Name			Status Indicator	Status		District Business	LT	ET	BOF	
MILESTONES											
	OFRS Total Expenses via SFMA Data Transfer Interface (MGO)	Admin Modernization Program	06/30/2022	●	Being Initiated	Deputy Director for Administration	n/a	n/a	n/a		
	OFRS Total Expenses via FIRES Data Transfer Interface (MGO)	Admin Modernization Program	06/30/2022	●	Not Started	Deputy Director for Administration	n/a	n/a	n/a		
	OFRS Total Expenses via e-iSuite Data Transfer Interface (MGO)	Admin Modernization Program	06/30/2022	●	Not Started	Deputy Director for Administration	n/a	n/a	n/a		
	OFRS Revenue via SFMA Data Transfer Interface (MGO)	Admin Modernization Program	06/30/2022	●	Not Started	Deputy Director for Administration	n/a	n/a	n/a		
	OFRS Revenue Estimation Component (MGO)	Admin Modernization Program	06/30/2022	●	Not Started	Deputy Director for Administration	n/a	n/a	n/a		
	OFRS General Fund Revenue Estimate Data Transfer Interface (MGO)	Admin Modernization Program	06/30/2022	●	Not Started	Deputy Director for Administration	n/a	n/a	n/a		
	OFRS Accounts Receivable via SFMA Data Transfer Interface (MGO)	Admin Modernization Program	Done	●	Complete	Deputy Director for Administration	n/a	n/a	n/a		
	OFRS Net Estimate Component (MGO)	Admin Modernization Program	06/30/2022	●	Not Started	Deputy Director for Administration	n/a	n/a	n/a		
	OFRS Cost Share Estimate Component (MGO)	Admin Modernization Program	06/30/2022	●	Not Started	Deputy Director for Administration	n/a	n/a	n/a		
	OFRS Lookup Data (MGO)	Admin Modernization Program	06/30/2022	●	Not Started	Deputy Director for Administration	n/a	n/a	n/a		
	Implementation of associated process improvements in MGO Recommendations (MGO)	Deputy Director for Operations	06/30/2022	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
POLICY AND PROCEDURES											
ODF Policy (list topics and define milestones)											
	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD		
ODF Procedures (list topic(s), define each)											
	OFRS Reporting Tool Use Procedures	Financial Services Manager	06/30/2022	●	Not Started	Assistant Deputy Director for Admin	TBD	n/a	n/a		
ODF Greenbook (list sections, define action needed)											
	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD		
ODF Guidance or Memorandum (list sections)											
	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD		
IT SYSTEM CONSIDERATIONS											
	OFRS Buildout (individual components are specified in Milestones section)	Admin Modernization Program	06/30/2022	●	Not Started	Deputy Director for Administration	n/a	n/a	n/a		
	OFRS Independent Validation and Stress-test	Admin Modernization Program	06/30/2022	●	Not Started	Deputy Director for Administration	n/a	n/a	n/a		
	OFRS System Documentation integrated with I.T. information and retention systems	Deputy Director for Administration	06/30/2022	●	Not Started	Chief Information Officer	n/a	n/a	n/a		
	OFRS integrated with Continuity Plan	Chief Information Officer	06/30/2022	●	Not Started	Deputy Director for Administration	n/a	n/a	n/a	Page 53 of 65	AGENDA ITEM 4 Attachment 1 Page 53 of 65

MGO Implementation Management Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #22 - OFRS

ET Sponsor: Deputy Director for Administration

Due Date: 06/30/2022

Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating: MGO Recommendation:

Medium ODF should implement the recommended process improvements identified within the report to ensure that source data is accurate and complete within the respective systems. An independent validation and stress-test of OFRS should be completed prior to implementation. The ODF Administrative Branch should provide initial and on-going training related to the use and capabilities of OFRS.

(MGO) Action Plan:

The following are examples of data needed within OFRS in order to ensure proper oversight/ accountability as related to Fire Protection Finance:
 1. Total Expenses: Actuals from the state GL system (direct feed) and cost estimates from FIRES (direct feed) and e-Isuite (daily export/ import)
 2. Revenue: Actuals from the state GL system (direct feed) and estimates (system generated calculation based on pending cost-share estimates)
 3. General Fund Revenue Estimate: EFCC estimates (generated by EFCC)
 4. Accounts Receivable: Actuals from the state GL system
 5. Net: Estimate (system generated calculation)
 6. Cost Share Estimation: Key data points utilized for cost share agreements such as acres, boots on the ground, etc.
 7. Informational Data: Fire code, paying agency, cost share period, FEMA period, fire start date, district, etc.

MGO Observation:

While the necessary data related to Fire Protection Finance could be extracted and input into OFRS for fire finance oversight, the current processes utilized by ODF cause certain data within existing information technology systems to be unreliable, inaccurate or incomplete.

MGO Potential Impact / Risk:

Inaccurate and/ or incomplete data within the source systems and/ or errors in system coding could result in inaccurate or incomplete information being utilized for key management decisions.

NOTE: Currently, the processes/ procedures in place do not support using OFRS as a financial management system due to data inaccuracies.

ODF Management Response:

ODF agrees with this recommendation. The core code base of the OFRS system is fully developed and has begun to be rolled out into production. This initial phase is focused on state data sets and ensuring their accuracy and completeness with all applicable state systems. Even though the state systems are based on outdated technologies, there are enough interfaces, endpoints and existing technologies to fully automate data exchange and transformation processes; the same cannot be said for the agency's fire financial information. As noted in several recommendations, current fire finance processes make system automation extremely difficult. While further automation of the agency's various fire finance processes would greatly assist the ability to integrate systems, the standardization of manual processes can certainly provide transitional improvement to this effort. The agency will have to invest additional effort and capacity to acquire the data as outlined in the MAP.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Deliverable Review				Supporting Documentation
v	Deliverable Name			Status Indicator	Status		District Business	LT	ET	BOF	
COMMUNICATION PLANNING											
	Deployment of new OFRS Reporting Tool	Admin Modernization Program	06/30/2022	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
TRAINING NEEDS											
	Training plan for use of the OFRS Reporting Tool	Admin Modernization Program	06/30/2022	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Training module on the use of the OFRS Reporting Tool	Admin Modernization Program	06/30/2022	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
MAINTENANCE NEEDS POST-IMPLEMENTATION											
	OFRS Reporting Tool updates, upgrades, and maintenance	Admin Modernization Program	06/30/2023	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Review and update policy/procedures to meet changing needs	Assistant Deputy Director for Admin	06/30/2022	●	Not Started	Deputy Director for Administration	n/a	n/a	n/a		
	Administrative Branch Fiscal Year Operating Plan core duties updated	Assistant Deputy Director for Admin	06/30/2022	●	Not Started	Deputy Director for Administration	n/a	n/a	n/a		
	Position Descriptions updated w/duties	Assistant Deputy Director for Admin	06/30/2022	●	Not Started	Deputy Director for Administration	n/a	n/a	n/a		
BUDGETARY, LEGISLATIVE, OR ADMINISTRATIVE CONSIDERATIONS											
	To be determined as deliverables progress, potential for 25-27 budget development.	TBD	TBD	TBD	TBD	TBD	TBD	TBD			

Status Legend:	
●	Not Started
●	Being Initiated
●	In Review / Underway
●	Approved / Completed

MGO Implementation Management Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #23 - Budgeting Requirements

ET Sponsor: Deputy Director for Administration

Due Date: 06/30/2022

Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating: MGO Recommendation:

Medium The overall objectives of the agency and the Field Protection Districts should be consistent allowing for consistency in budgeting methodologies.

Note: This is dependent upon updated legislation.

(MGO) Action Plan:

As this is dependent upon updated legislation as related to the overall objectives of the agency and the Field Protection Districts, other than identifying the discrepancies there are no additional actions to be taken by ODF.

MGO Observation:

The ODF Administrative Branch biennial budget process and methodology are inconsistent with the Field Protection Districts' annual budget process.

MGO Potential Impact / Risk:

Gaps between the agency wide biennial and Field Protection Districts' annual budgets could lead to over allocation and/ or mismanagement of funds.

ODF Management Response:

Providing for an adequate level of fire protection is defined in law through the local district budgeting process. Aligning these district budget efforts, with the biennial budget authorization in an emergency response operation does not often align as reflected in additions requests to balance base budgets at the biennial level.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Deliverable Review				Supporting Documentation
v	Deliverable Name			Status Indicator	Status		District Business	LT	ET	BOF	
MILESTONES											
	Legislation updated to meet overall budgeting objectives of the agency, statutes to be defined through future legislative concept development (MGO)	Fire Protection Chief/Deputy Director of Administration	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD	TBD	
	Establish ODF Budget Divergence Project w/ cross-agency representation	Fire Protection Chief/Deputy Director of Administration	01/25/2021	●	Complete	Deputy Director for Administration	n/a	n/a	n/a		2021 Protection GF Divergence Project Charter ver3 (draft)
	Phase 1 of Divergence Project - Comparison Analysis of Biennial and Fiscal Budgets (MGO)	Fire Protection Chief/Deputy Director of Administration	04/30/2021	●	Complete	Deputy Director for Administration	n/a	n/a	n/a		Divergence Phase 1 Summary (draft)
	Phase 1 of Divergence Project - Underlying Statutory Policy Review (MGO)	Fire Protection Chief/Deputy Director of Administration	04/30/2021	●	Complete	Deputy Director for Administration	n/a	n/a	n/a		Divergence Phase 1 Summary (draft)
	Phase 2 of Divergence Project - Further Comparison of Actual Expenditures (MGO)	Fire Protection Chief/Deputy Director of Administration	06/30/2022	●	Being Initiated	Deputy Director for Administration	n/a	n/a	n/a		
	Phase 2 of Divergence Project - MGO #12 - Scope of work, timeline, integration w/plan	Fire Protection Chief/Deputy Director of Administration	01/30/2022	●	Being Initiated	Deputy Director for Administration	TBD	TBD	TBD		
	Phase 2 of Divergence Project - MGO #23 - Scope of work, timeline, integration w/plan (MGO)	Fire Protection Chief/Deputy Director of Administration	01/30/2022	●	Being Initiated	Deputy Director for Administration	TBD	TBD	TBD		
	Phase 2 of Divergence Project - MGO #24 - Scope of work, timeline, integration w/plan	Fire Protection Chief/Deputy Director of Administration	01/30/2022	●	Being Initiated	Deputy Director for Administration	TBD	TBD	TBD		
POLICY AND PROCEDURES											
ODF Policy (list topics and define milestones)											
	ODF Policy - Budgetary Development, Tracking, and Reconciliation	Assistant Deputy Director for Admin	06/30/2022	●	Not Started	Deputy Director for Administration	Jul-22	Jul-22	May-22		
ODF Procedures (list topic(s), define each)											
	Actual Cost Computation (ACC) Rate Procedures	Fire Business Coordinator	06/30/2022	●	Not Started	Protection Finance Manager	Jul-22	Jun-22	Jun-22		
	Budget Development Procedures (Biennial/Fiscal)	Assistant Deputy Director for Admin	06/30/2022	●	Not Started	Deputy Director for Administration	Jul-22	Jun-22	Jun-22		
	Budget Tracking Procedures	Assistant Deputy Director for Admin	06/30/2022	●	Not Started	Deputy Director for Administration	Jul-22	Jun-22	Jun-22		
	Budget Reconciliation Procedures	Assistant Deputy Director for Admin	06/30/2022	●	Not Started	Deputy Director for Administration	Jul-22	Jun-22	Jun-22		
	E-Board Coordination Procedures	Assistant Deputy Director for Admin	06/30/2022	●	Not Started	Deputy Director for Administration	Jul-22	Jun-22	Jun-22		
ODF Greenbook (list sections, define action needed)											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
ODF Guidance or Memorandum (list sections)											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a

MGO Implementation Management Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #23 - Budgeting Requirements

ET Sponsor: Deputy Director for Administration

Due Date: 06/30/2022

Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating: MGO Recommendation:

Medium The overall objectives of the agency and the Field Protection Districts should be consistent allowing for consistency in budgeting methodologies.

Note: This is dependent upon updated legislation.

(MGO) Action Plan:

As this is dependent upon updated legislation as related to the overall objectives of the agency and the Field Protection Districts, other than identifying the discrepancies there are no additional actions to be taken by ODF.

MGO Observation:

The ODF Administrative Branch biennial budget process and methodology are inconsistent with the Field Protection Districts' annual budget process.

MGO Potential Impact / Risk:

Gaps between the agency wide biennial and Field Protection Districts' annual budgets could lead to over allocation and/ or mismanagement of funds.

ODF Management Response:

Providing for an adequate level of fire protection is defined in law through the local district budgeting process. Aligning these district budget efforts, with the biennial budget authorization in an emergency response operation does not often align as reflected in additions requests to balance base budgets at the biennial level.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Deliverable Review				Supporting Documentation
v	Deliverable Name			Status Indicator	Status		District Business	LT	ET	BOF	
IT SYSTEM CONSIDERATIONS											
	Technical requirements for Budget Tracker defined	Admin Modernization Program	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Complimentary system data defined, i.e. Sage AR, OregonBuys, SFMS	Admin Modernization Program	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Project formulated for prioritizing within internal application development capacity	Admin Modernization Program	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Application development and testing for Budget Tracker, if feasible	Admin Modernization Program	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Budget Tracker application deployment, if feasible	Admin Modernization Program	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Budget Tracker Interface for OFRS	Admin Modernization Program	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Procedures for Budgeting revised to incorporate new application(s)	Assistant Deputy Director for Admin	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
COMMUNICATION PLANNING											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
TRAINING NEEDS											
	Budget Development, Tracking, and Reconciliation Training	Assistant Deputy Director for Admin	06/30/2022	●	Not Started	Deputy Director for Administration	Jul-22	Jun-22	Jun-22		
MAINTENANCE NEEDS POST-IMPLEMENTATION											
	Review and update policy/procedures to meet changing needs (annually)	Assistant Deputy Director for Admin	06/30/2022	●	Not Started	Deputy Director for Administration	n/a	n/a	n/a		
	Administrative Branch Fiscal Year Operating Plan core duties updated	Assistant Deputy Director for Admin	06/30/2022	●	Not Started	Deputy Director for Administration	n/a	n/a	n/a		
	Position Descriptions updated w/duties	Assistant Deputy Director for Admin	06/30/2022	●	Not Started	Deputy Director for Administration	n/a	n/a	n/a		
BUDGETARY, LEGISLATIVE, OR ADMINISTRATIVE CONSIDERATIONS											
	See first milestone	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a

Status Legend:	
●	Not Started
●	Being Initiated
●	In Review / Underway
●	Approved / Completed

MGO Implementation Management Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #24 - Budgeting Requirements 2

ET Sponsor: Deputy Director for Administration

Due Date: 06/30/2022

Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating: MGO Recommendation:

Medium The ODF Administrative Branch should perform a reconciliation between the ODF agency wide biennial budget and the Field Protection Districts' annual budgets. Discrepancies should be noted and addressed, including communication to the BOF.

(MGO) Action Plan:

Implement procedures related to the reconciliation between the agency biannual budget and the Field Protection Districts annual budgets. This should include an allocation of the agency biannual budget to the respective Field Protection Districts and a reconciliation at an individual Field Protection District level.

MGO Observation:

The ODF agency wide budget to actual process does not include a reconciliation at the Field Protection District level. The sum of the Field Protection Districts budgets (for the two year period) often exceeds the ODF agency wide budget.

MGO Potential Impact / Risk:

Inconsistencies between the ODF agency wide and Field Protection Districts' budgets could lead to potential revenue and cash shortfalls.

ODF Management Response:

Biennial and fiscal budget reconciliation is performed but requires greater scrutiny and sophistication. This issue is identified at the close of each biennium with a base budget shortfall request from the Agency that has been consistent over the decade.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Deliverable Review				Supporting Documentation
√	Deliverable Name			Status Indicator	Status		District Business	LT	ET	BOF	
MILESTONES											
	Establish ODF Budget Divergence Project w/ cross-agency representation	Fire Protection Chief/Deputy Director of Administration	01/25/2021	●	Complete	Deputy Director for Administration	n/a	n/a	n/a		2021 Protection GF Divergence Project Charter ver3 (draft)
	Phase 1 of Divergence Project - Comparison Analysis of Biennial and Fiscal Budgets (MGO)	Fire Protection Chief/Deputy Director of Administration	04/30/2021	●	Complete	Deputy Director for Administration	n/a	n/a	n/a		Divergence Phase 1 Summary (draft)
	Phase 1 of Divergence Project - Underlying Statutory Policy Review (MGO)	Fire Protection Chief/Deputy Director of Administration	04/30/2021	●	Complete	Deputy Director for Administration	n/a	n/a	n/a		Divergence Phase 1 Summary (draft)
	Phase 2 of Divergence Project - Further Comparison of Actual Expenditures (MGO)	Fire Protection Chief/Deputy Director of Administration	06/30/2022	●	Being Initiated	Deputy Director for Administration	n/a	n/a	n/a		
	Phase 2 of Divergence Project - MGO #12 - Scope of work, timeline, integration w/plan	Fire Protection Chief/Deputy Director of Administration	01/30/2022	●	Being Initiated	Deputy Director for Administration	TBD	TBD	TBD		
	Phase 2 of Divergence Project - MGO #23 - Scope of work, timeline, integration w/plan	Fire Protection Chief/Deputy Director of Administration	01/30/2022	●	Being Initiated	Deputy Director for Administration	TBD	TBD	TBD		
	Phase 2 of Divergence Project - MGO #24 - Scope of work, timeline, integration w/plan (MGO)	Fire Protection Chief/Deputy Director of Administration	01/30/2022	●	Being Initiated	Deputy Director for Administration	TBD	TBD	TBD		
POLICY AND PROCEDURES											
ODF Policy (list topics and define milestones)											
	ODF Policy - Budgetary Development, Tracking, and Reconciliation	Assistant Deputy Director for Admin	06/30/2022	●	Not Started	Deputy Director for Administration	Jul-22	Jul-22	May-22		
ODF Procedures (list topic(s), define each)											
	Actual Cost Computation (ACC) Rate Procedures	Fire Business Coordinator	06/30/2022	●	Not Started	Protection Finance Manager	Jul-22	Jun-22	Jun-22		
	Budget Development Procedures (Biennial/Fiscal)	Assistant Deputy Director for Admin	06/30/2022	●	Not Started	Deputy Director for Administration	Jul-22	Jun-22	Jun-22		
	Budget Tracking Procedures	Assistant Deputy Director for Admin	06/30/2022	●	Not Started	Deputy Director for Administration	Jul-22	Jun-22	Jun-22		
	Budget Reconciliation Procedures (MGO)	Assistant Deputy Director for Admin	06/30/2022	●	Not Started	Deputy Director for Administration	Jul-22	Jun-22	Jun-22		
	E-Board Coordination Procedures	Assistant Deputy Director for Admin	06/30/2022	●	Not Started	Deputy Director for Administration	Jul-22	Jun-22	Jun-22		
ODF Greenbook (list sections, define action needed)											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
ODF Guidance or Memorandum (list sections)											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
IT SYSTEM CONSIDERATIONS											
	Technical requirements for Budget Tracker defined	Admin Modernization Program	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Complimentary system data defined, i.e. Sage AR, OregonBuys, SFMS	Admin Modernization Program	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Project formulated for prioritizing within internal application development capacity	Admin Modernization Program	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Application development and testing for Budget Tracker, if feasible (MGO)	Admin Modernization Program	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		

MGO Implementation Management Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #24 - Budgeting Requirements 2

ET Sponsor: Deputy Director for Administration

Due Date: 06/30/2022

Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating: MGO Recommendation:

Medium The ODF Administrative Branch should perform a reconciliation between the ODF agency wide biennial budget and the Field Protection Districts' annual budgets. Discrepancies should be noted and addressed, including communication to the BOF.

(MGO) Action Plan:

Implement procedures related to the reconciliation between the agency biannual budget and the Field Protection Districts annual budgets. This should include an allocation of the agency biannual budget to the respective Field Protection Districts and a reconciliation at an individual Field Protection District level.

MGO Observation:

The ODF agency wide budget to actual process does not include a reconciliation at the Field Protection District level. The sum of the Field Protection Districts budgets (for the two year period) often exceeds the ODF agency wide budget.

MGO Potential Impact / Risk:

Inconsistencies between the ODF agency wide and Field Protection Districts' budgets could lead to potential revenue and cash shortfalls.

ODF Management Response:

Biennial and fiscal budget reconciliation is performed but requires greater scrutiny and sophistication. This issue is identified at the close of each biennium with a base budget shortfall request from the Agency that has been consistent over the decade.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Deliverable Review				Supporting Documentation
√	Deliverable Name			Status Indicator	Status		District Business	LT	ET	BOF	
	Budget Tracker application deployment, if feasible	Admin Modernization Program	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Budget Tracker Interface for OFRS	Admin Modernization Program	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Procedures for Budgeting revised to incorporate new application(s)	Assistant Deputy Director for Admin	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
COMMUNICATION PLANNING											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
TRAINING NEEDS											
	Budget Development, Tracking, and Reconciliation Training	Assistant Deputy Director for Admin	06/30/2022	●	Not Started	Deputy Director for Administration	Jul-22	Jun-22	Jun-22		
MAINTENANCE NEEDS POST-IMPLEMENTATION											
	Review and update policy/procedures to meet changing needs (annually)	Assistant Deputy Director for Admin	06/30/2022	●	Not Started	Deputy Director for Administration	n/a	n/a	n/a		
	Administrative Branch Fiscal Year Operating Plan core duties updated	Assistant Deputy Director for Admin	06/30/2022	●	Not Started	Deputy Director for Administration	n/a	n/a	n/a		
	Position Descriptions updated w/duties	Assistant Deputy Director for Admin	06/30/2022	●	Not Started	Deputy Director for Administration	n/a	n/a	n/a		
BUDGETARY, LEGISLATIVE, OR ADMINISTRATIVE CONSIDERATIONS											
	Legislation may require updating to meet overall budgeting objectives of the agency. Statutes to be defined through future legislative concept development.	Fire Protection Chief/Deputy Director of Administration	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD	TBD	

Status Legend:	
●	Not Started
●	Being Initiated
●	In Review / Underway
●	Approved / Completed

MGO Implementation Management Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #25 - Operating Association Advances

ET Sponsor: Deputy Director for Administration

Due Date: 06/30/2022

Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating: MGO Recommendation:

Low The ODF Administrative Branch should formalize the processes and procedures for advancing funds to operating associations, including but not limited to:
 1. Specifying the supporting documentation required prior to and subsequent to distribution of funds.
 2. Setting a timeline for submission of required documentation.
 3. Defining advance threshold amounts/ limits by job classification.

(MGO) Action Plan:

Based on review of the Operating Association Agreements, an amendment should be added to include requirements for Fund Advancements with specific language regarding the required documentation that must be submitted to ODF prior to and after receiving an advancement of funds, the required timeline for submission, and advance threshold amounts/limits.

MGO Observation:

Based on our review of the respective Fire Protective Association Agreements and discussion with key ODF Administrative Branch personnel, advances to operating associations from the ODF general fund are provided based on limited supporting documentation. Additionally, records of actual expenses incurred by the operating associations are not remitted to ODF on a timely basis resulting in delays in the reconciliation of the initial advance to actual expenditures incurred and determining whether the operating associations need to reimburse ODF.

MGO Potential Impact / Risk:

Providing advances to operating associations based on limited supporting documentation or delays in reconciliations due to lags in the reporting of actual expenditures incurred could result in cash shortages and/or mismanagement of funds.

Note: This is dependent upon participation by the Operating Associations.

ODF Management Response:

ODF agrees with this recommendation. A standardized process exists for these disbursements but it would be beneficial for both parties to fully understand the parameters of funding distribution and reconciliation needs while codifying these roles and standards to ensure the fiduciary responsibilities of ODF regarding the state's General Fund. ODF will work with the operating associations to agree on documented procedures and ensure they are referenced in the association agreements.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Deliverable Review				Supporting Documentation
v	Deliverable Name			Status Indicator	Status		District Business	LT	ET	BOF	
MILESTONES											
	Engagement Plan developed with Associations, Operations and Administrative Finance	Fire Prevention and Policy Manager	11/01/2021	●	Not Started	Fiscal Services Manager	n/a	n/a	n/a		
	Financial reports for Coos Forest Protective Association's accounting system	Program Accountant	12/30/2021	●	Not Started	Fiscal Services Manager	n/a	n/a	n/a		
	Financial reports for Douglas Forest Protective Association's accounting system	Program Accountant	12/30/2021	●	Not Started	Fiscal Services Manager	n/a	n/a	n/a		
	Financial reports for Walker Range Forest Protective Association's accounting system	Program Accountant	12/30/2021	●	Not Started	Fiscal Services Manager	n/a	n/a	n/a		
	Criteria for supporting documentation, timelines, and thresholds for advances (MGO)	Fiscal Services Manager	01/30/2022	●	Not Started	Deputy Director for Administration	n/a	Jun-22	n/a		
	Amendment to Coos Forest Protective Association Forestland Protection Agreement (MGO)	Fire Prevention and Policy Manager	06/01/2022	●	Not Started	Fire Protection Chief	n/a	n/a	n/a		
	Amendment to Douglas Forest Protective Association Forestland Protection Agreement (MGO)	Fire Prevention and Policy Manager	06/01/2022	●	Not Started	Fire Protection Chief	n/a	n/a	n/a		
	Amendment to Walker Range Forest Protective Association Forestland Protection Agreement (MGO)	Fire Prevention and Policy Manager	06/01/2022	●	Not Started	Fire Protection Chief	n/a	n/a	n/a		
POLICY AND PROCEDURES											
ODF Policy (list topics and define milestones)											
	ODF Policy - Advancing Funds to the Operating Associations (new) (MGO)	Fiscal Services Manager	06/30/2022	●	Not Started	Deputy Director for Administration	Jun-22	Jun-22	May-22		
	ODF Policy - Signature Authority policy revised if necessary for advancing thresholds	Fiscal Services Manager	06/30/2022	●	Not Started	Deputy Director for Administration	Jun-22	Jun-22	May-22		
ODF Procedures (list topic(s), define each)											
	Procedures for Advancing Funds to the Operating Associations (MGO)	Fiscal Services Manager	02/28/2022	●	Not Started	Deputy Director for Administration	Jun-22	Jun-22	n/a		
	Procedures for Disbursement of Oregon Forestland Protection Fund	Oregon Forestland Protection Fund Administrator	06/30/2022	●	Not Started	Deputy Director for Administration	Jun-22	Jun-22	n/a		
ODF Greenbook (list sections, define action needed)											
	Chapter 80 - Revise Cost Accounting, Reporting, and Cost Shares, if required	Protection Finance Manager	06/30/2022	●	Not Started	Fire Protection Deputy Chief	Jul-22	n/a	n/a		
ODF Guidance or Memorandum (list sections)											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
IT SYSTEM CONSIDERATIONS											
	OregonBuys Approval Path defined for advances based on thresholds	Fiscal Services Manager	06/30/2022	●	Not Started	Fire Protection Deputy Chief	n/a	n/a	n/a		
COMMUNICATION PLANNING											
	Coordination with Operating Associations on Engagement Plan	Fire Prevention and Policy Manager	11/01/2021	●	Not Started	Fire Protection Deputy Chief	n/a	n/a	n/a		

MGO Implementation Management Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #25 - Operating Association Advances

ET Sponsor: Deputy Director for Administration

Due Date: 06/30/2022

Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating: MGO Recommendation:

Low The ODF Administrative Branch should formalize the processes and procedures for advancing funds to operating associations, including but not limited to:
 1. Specifying the supporting documentation required prior to and subsequent to distribution of funds.
 2. Setting a timeline for submission of required documentation.
 3. Defining advance threshold amounts/ limits by job classification.

Note: This is dependent upon participation by the Operating Associations.

(MGO) Action Plan:

Based on review of the Operating Association Agreements, an amendment should be added to include requirements for Fund Advancements with specific language regarding the required documentation that must be submitted to ODF prior to and after receiving an advancement of funds, the required timeline for submission, and advance threshold amounts/limits.

MGO Observation:

Based on our review of the respective Fire Protective Association Agreements and discussion with key ODF Administrative Branch personnel, advances to operating associations from the ODF general fund are provided based on limited supporting documentation. Additionally, records of actual expenses incurred by the operating associations are not remitted to ODF on a timely basis resulting in delays in the reconciliation of the initial advance to actual expenditures incurred and determining whether the operating associations need to reimburse ODF.

MGO Potential Impact / Risk:

Providing advances to operating associations based on limited supporting documentation or delays in reconciliations due to lags in the reporting of actual expenditures incurred could result in cash shortages and/or mismanagement of funds.

ODF Management Response:

ODF agrees with this recommendation. A standardized process exists for these disbursements but it would be beneficial for both parties to fully understand the parameters of funding distribution and reconciliation needs while codifying these roles and standards to ensure the fiduciary responsibilities of ODF regarding the state's General Fund. ODF will work with the operating associations to agree on documented procedures and ensure they are referenced in the association agreements.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Deliverable Review				Supporting Documentation
v	Deliverable Name			Status Indicator	Status		District Business	LT	ET	BOF	
TRAINING NEEDS											
	Training overview of Coos Forest Protective Association's accounting system	Program Accountant	12/30/2021	●	Not Started	Fiscal Services Manager	n/a	n/a	n/a		
	Training overview of Douglas Forest Protective Association's accounting system	Program Accountant	12/30/2021	●	Not Started	Fiscal Services Manager	n/a	n/a	n/a		
	Training overview of Walker Range Forest Protective Association's accounting system	Program Accountant	12/30/2021	●	Not Started	Fiscal Services Manager	n/a	n/a	n/a		
MAINTENANCE NEEDS POST-IMPLEMENTATION											
	Review and maintenance of Advancing Funds Procedures (annually)	Fiscal Services Manager	06/30/2023	●	Not Started	Assistant Deputy Director for Admin	n/a	n/a	n/a		
	Reconciliation of advances to actual expenditures (annually)	Program Accountant	06/30/2023	●	Not Started	Fiscal Services Manager	n/a	n/a	n/a		
BUDGETARY, LEGISLATIVE, OR ADMINISTRATIVE CONSIDERATIONS											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a

Status Legend:	
●	Not Started
●	Being Initiated
●	In Review / Underway
●	Approved / Completed

MGO Implementation Management Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #26 - FEMA Claim Status

ET Sponsor: Fire Protection Chief

Due Date: 12/31/2021

Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating: MGO Recommendation:

Low The ODF Operations and Administrative Branches should establish policies and procedures related to the communication of the status of FEMA incidents and include the status on processing and submission of FEMA claims by incident.

(MGO) Action Plan:

1. Establish a policy/ procedure related to the communication of the status of FEMA incidents and claims and the recording of related accounts receivables.
2. Establish a standardized procedure, including the system or location, to track outstanding FEMA claims and incidents.

MGO Observation:

The ODF Administrative Branch does not consistently receive status reports regarding FEMA incident statuses. Additionally, written processes and procedures related to ongoing reporting of FMAG submissions do not exist.

MGO Potential Impact / Risk:

Inconsistent communication of FEMA incident status to the ODF Administrative Branch could lead to duplicated efforts and/ or the inability to properly project cash flows due to delays in the recording of FEMA accounts receivable balances.

ODF Management Response:

ODF agrees with this recommendation. The ODF FEMA team produces weekly progress reports that are presented to Protection Division leadership and the Deputy State Forester at this time. This process should be expanded to include the Administrative Branch. Monthly reports are coordinated through the Protection Division and Administration and are distributed to agency leadership. While this communication on FEMA incident status and claims activities has improved from prior seasons; further codification of our policies and procedure is still needed to provide clarity around roles, responsibilities, and information needs. Further codification of our policy and procedures surrounding FEMA incidents and claims will address system components. Technology advancements within ODF related to OFRS reporting, the Sage 300 system and accounts receivable processes, as well as advancements within FEMA related to potential use of their Grants Portal system should greatly assist in communicating status of claims and projecting cash flows.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Deliverable Review				Supporting Documentation
v	Deliverable Name			Status Indicator	Status		District Business	LT	ET	BOF	
MILESTONES											
	FEMA Tracker developed (MGO)	Incident Finance / FEMA Unit Manager	Done	●	Complete	Protection Finance Manager	n/a	n/a	n/a		FEMA Weekly Status Report 051721
	Weekly FEMA Tracker is sent to ODF Operations and Administrative Branch	Protection Finance Manager	Done	●	Complete	Deputy Director for Administration	n/a	n/a	n/a		Email 05/17/21
	FEMA Tracker joint review w/ODF Operations and Administrative Branch	Protection Finance Manager	05/24/2021	●	Complete	Deputy Director for Administration	n/a	n/a	n/a		n/a
	Integrate FEMA Claim Status Review into Internal Audit Planning Consideration	Internal Auditor	12/31/2021	●	Not Started	Deputy Director for Administration	n/a	n/a	n/a		
POLICY AND PROCEDURES											
ODF Policy (list topics and define milestones)											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
ODF Procedures (list topic(s), define each)											
	FEMA Tracker Updating and Communication Procedure for FEMA Unit Manager (MGO)	Incident Finance / FEMA Unit Manager	12/31/2021	●	In Review / Underway	Protection Finance Manager	n/a	n/a	n/a		
ODF Greenbook (list sections, define action needed)											
	Chapter 70 - Claims and Incident Cost Recovery Collection (updated) (MGO)	Incident Finance / FEMA Unit Manager	12/31/2021	●	Not Started	Protection Finance Manager	n/a	n/a	n/a		
ODF Guidance or Memorandum (list sections)											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
IT SYSTEM CONSIDERATIONS											
	Technical requirements for FEMA Tracker defined	Admin Modernization Program	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Complimentary system data defined, i.e. FEMA Grants Portal, Sage AR	Admin Modernization Program	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Project formulated for prioritizing within internal application development capacity	Admin Modernization Program	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Application development and testing for FEMA Tracker, if feasible	Admin Modernization Program	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	FEMA Tracker application deployment, if feasible	Admin Modernization Program	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	FEMA Tracker Interface for OFRS	Admin Modernization Program	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
	Procedures for FEMA Tracker revised to incorporate new application(s)	Protection Finance Manager	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
COMMUNICATION PLANNING											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
TRAINING NEEDS											
	Integrate IS-1002: FEMA Grants Portal in training plan for any new staff in ODF FEMA Unit	Incident Finance / FEMA Unit Manager	TBD	●	Not Started	Protection Finance Manager	n/a	n/a	n/a		
	Integrate IS-1027: Fire Management Assistance Grants in training plan for any new staff in ODF FEMA Unit	Incident Finance / FEMA Unit Manager	TBD	●	Not Started	Protection Finance Manager	n/a	n/a	n/a		
MAINTENANCE NEEDS POST-IMPLEMENTATION											
	Review and update policy/procedures to meet changing needs (annually)	Protection Finance Manager	06/30/2022	●	Not Started	Fire Protection Division Chief	n/a	n/a	n/a		
	Protection Fiscal Year Operating Plan core duties updated	Fire Protection Deputy Chief	06/30/2022	●	Not Started	Fire Protection Division Chief	n/a	n/a	n/a		
	Position Descriptions updated w/duties	Fire Protection Deputy Chief	06/30/2022	●	Not Started	Human Resources Analyst	n/a	n/a	n/a		

MGO Implementation Management Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #26 - FEMA Claim Status

ET Sponsor: Fire Protection Chief

Due Date: 12/31/2021

Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating: MGO Recommendation:

Low The ODF Operations and Administrative Branches should establish policies and procedures related to the communication of the status of FEMA incidents and include the status on processing and submission of FEMA claims by incident.

(MGO) Action Plan:

1. Establish a policy/ procedure related to the communication of the status of FEMA incidents and claims and the recording of related accounts receivables.
2. Establish a standardized procedure, including the system or location, to track outstanding FEMA claims and incidents.

MGO Observation:

The ODF Administrative Branch does not consistently receive status reports regarding FEMA incident statuses. Additionally, written processes and procedures related to ongoing reporting of FMAG submissions do not exist.





MGO Potential Impact / Risk:

Inconsistent communication of FEMA incident status to the ODF Administrative Branch could lead to duplicated efforts and/ or the inability to properly project cash flows due to delays in the recording of FEMA accounts receivable balances.

ODF Management Response:

ODF agrees with this recommendation. The ODF FEMA team produces weekly progress reports that are presented to Protection Division leadership and the Deputy State Forester at this time. This process should be expanded to include the Administrative Branch. Monthly reports are coordinated through the Protection Division and Administration and are distributed to agency leadership. While this communication on FEMA incident status and claims activities has improved from prior seasons; further codification of our policies and procedure is still needed to provide clarity around roles, responsibilities, and information needs. Further codification of our policy and procedures surrounding FEMA incidents and claims will address system components. Technology advancements within ODF related to OFRS reporting, the Sage 300 system and accounts receivable processes, as well as advancements within FEMA related to potential use of their Grants Portal system should greatly assist in communicating status of claims and projecting cash flows.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Deliverable Review				Supporting Documentation
v	Deliverable Name			Status Indicator	Status		District Business	LT	ET	BOF	
BUDGETARY, LEGISLATIVE, OR ADMINISTRATIVE CONSIDERATIONS											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a

Status Legend:	
	Not Started
	Being Initiated
	In Review / Underway
	Approved / Completed

MGO Implementation Management Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #27 - OregonBuys

ET Sponsor: Deputy Director for Administration

Due Date: 06/30/2021

Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating: MGO Recommendation:

Low All vendors should be required to register in OregonBuys. If a vendor refuses to register within OregonBuys, then the vendors should be entered into the system by DAS and/or ODF and communication should be provided to the vendor related to the use of OregonBuys. Once all vendors have been input into OregonBuys, all previous purchasing systems should have input access removed.

(MGO) Action Plan:

Add/register all vendors within OregonBuys and disable the Field Protection Districts' and the ODF Administrative Branches' access to the predecessor purchasing systems.

MGO Observation:

Certain vendors are not registered in OregonBuys resulting in Field Protection Districts' continued use of the predecessor purchasing and payment system.

MGO Potential Impact / Risk:

Utilizing the predecessor purchasing system in addition to OregonBuys could result in missed payments and/or incomplete financial information.

ODF Management Response:

ODF agrees with this recommendation. We currently are requiring all purchases to be through OregonBuys. We are aware of a vendor exception process that DAS is establishing but have not currently utilized it as we have been able to have the vendors sign up. A majority of transactions in the old system are transfers to other agencies, one time GNA grant payments, and emergency payments for vendors not in OregonBuys. ODF will define a phased approach to implement this recommendation that will disable the Field Protection Districts access to the predecessor purchasing system to assist in mitigating risk and instead rely on the exception process for vendors that cannot register in OregonBuys. ODF would prefer to retain access to this system within the Administrative Branch to support the phased implementation and assure that emergency payments can still be completed in a timely manner.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Deliverable Review				Supporting Documentation
v	Deliverable Name			Status Indicator	Status		District Business	LT	ET	BOF	
MILESTONES											
	Vendor Registration Handout - Requirement and How To Use OregonBuys (MGO)	Disbursements Manager	04/30/2020	●	Complete	Financial Services Manager	Jul-21	Jun-21	n/a		OregonBuys Vendor Registration
POLICY AND PROCEDURES											
ODF Policy (list topics and define milestones)											
	ODF Directive 0-2-5-100 Purchasing Controls Rescinded	Contract Services Program Manager	09/30/2021	●	In Review / Underway	Deputy Director for Administration	Oct-21	Dec-21	Sep-21		
	ODF Directive 0-4-0-100 Procurement, Agreements, Contracts, and Leases Rescinded	Contract Services Program Manager	09/30/2021	●	In Review / Underway	Deputy Director for Administration	Oct-21	Dec-21	Sep-21		
	ODF Directive 0-2-3-250 Accounting for Disbursement Transactions Rescinded	Financial Services Manager	09/30/2021	●	In Review / Underway	Deputy Director for Administration	Oct-21	Dec-21	Sep-21		
	ODF Directive 0-2-3-205 Internal Controls Over Expenditures Rescinded	Financial Services Manager	09/30/2021	●	In Review / Underway	Deputy Director for Administration	Oct-21	Dec-21	Sep-21		
	ODF Policy - Disbursements and Expenditures (new)	Financial Services Manager	09/30/2021	●	In Review / Underway	Deputy Director for Administration	Oct-21	Dec-21	Sep-21		
	ODF Policy - Procurement (new)	Contract Services Program Manager	09/30/2021	●	In Review / Underway	Deputy Director for Administration	Oct-21	Dec-21	Sep-21		
	ODF Policy - Signature Authority updated for inclusion of OregonBuys	Deputy Director for Administration	09/30/2021	●	In Review / Underway	State Forester	Oct-21	Dec-21	Sep-21		Done.
ODF Procedures (list topic(s), define each)											
	DAS Vendor Exception Process - OregonBuys (MGO) Note: DAS may cancel this solution	DAS	06/30/2021	●	Complete	Assistant Deputy Director for Admin	n/a	n/a	n/a		n/a - DAS cancelled solution
	ODF Short-term Exception Alternative - Vendor can complete registration at ODF Office	Disbursements Manager	04/30/2020	●	Complete	Financial Services Manager	Jun-21	Jun-21	n/a		OregonBuys Vendor Registration
	ODF Vendor Exception Procedures (Alternative solution for lack of DAS process)	Disbursements Manager	09/30/2021	●	Complete	Financial Services Manager	Jun-21	Jun-21	n/a		Forestry Order System Replacement Form, Instructions, Guidance
ODF Greenbook (list sections, define action needed)											
	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
ODF Guidance or Memorandum (list sections)											
	OregonBuys Payment Guidance 1 and 2 Revised	Financial Services Manager	10/01/2022	●	Being Initiated	Assistant Deputy Director for Admin	Jun-21	Jun-21	n/a		
IT SYSTEM CONSIDERATIONS											
	FOS PO System access limited to Admin Branch staff (MGO)	Information Technology	06/30/2021	●	Complete	Chief Information Officer	Jul-21	Jul-21	n/a		Forestry Order System Turned Off July 1, 2021 (Email)
	Excel PO macro form to replace FOS PO System for payment of transfers, one time payments, and vendors that still cannot register in OregonBuys. (Short-term solution)	Disbursements Manager	09/30/2021	●	Complete	Financial Services Manager	Jun-21	Jun-21	n/a		
	Excel Tracking Log for payments utilizing macro form. (Short-term solution)	Disbursements Manager	09/30/2021	●	Complete	Financial Services Manager	Jun-21	Jun-21	n/a		
	FOS PO System removed altogether, after alternative process established	Information Technology	TBD	●	In Review / Underway	Chief Information Officer	TBD	TBD	n/a		
	Sage AP module as replacement system, scope of work, budget and timeline	Financial Services Manager	TBD	●	Not Started	Assistant Deputy Director for Admin	TBD	TBD	n/a		
	Sage AP module updated to integrate with business practices	Financial Services Manager	TBD	●	Not Started	Assistant Deputy Director for Admin	TBD	TBD	n/a		
	Sage AP module replaces PO payment Excel macro form w (Long-term solution)	Financial Services Manager	TBD	●	Not Started	Assistant Deputy Director for Admin	TBD	TBD	n/a		
COMMUNICATION PLANNING											
	FOS replacement draft product (Email to Admin Leadership)	Financial Services Manager	06/04/2021	●	Complete	Administrative Leadership Team	n/a	n/a	n/a		email
	Oregonbuys Payment Guidance draft (Email to Admin Leadership)	Financial Services Manager	06/04/2021	●	Complete	Administrative Leadership Team	n/a	n/a	n/a		email
	Preparation for launch of FOS replacement. (Email to Leadership)	Financial Services Manager	06/09/2021	●	Complete	n/a	n/a	Jun-21	TBD		Forestry Order System Sunset (Email 06/04/2021)
	Launch of FOS replacement Timeline w/Guidance and training information (Email to All Forestry)	Financial Services Manager	06/14/2021	●	Complete	n/a	Jun-21	Jun-21	TBD		Forestry Order System Sunset Information (Email 06/09/2021)
	Final update on launch of FOS replacement with training dates and new form	Financial Services Manager	06/25/2021	●	Complete	n/a	Jun-21	Jun-21	TBD		Forestry Order System Replacement Form Training (Email 06/14/2021)

MGO Implementation Management Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #27 - OregonBuys

ET Sponsor: Deputy Director for Administration

Due Date: 06/30/2021

Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating: MGO Recommendation:

Low All vendors should be required to register in OregonBuys. If a vendor refuses to register within OregonBuys, then the vendors should be entered into the system by DAS and/or ODF and communication should be provided to the vendor related to the use of OregonBuys. Once all vendors have been input into OregonBuys, all previous purchasing systems should have input access removed.

(MGO) Action Plan:

Add/register all vendors within OregonBuys and disable the Field Protection Districts' and the ODF Administrative Branches' access to the predecessor purchasing systems.

MGO Observation:

Certain vendors are not registered in OregonBuys resulting in Field Protection Districts' continued use of the predecessor purchasing and payment system.

MGO Potential Impact / Risk:

Utilizing the predecessor purchasing system in addition to OregonBuys could result in missed payments and/or incomplete financial information.

ODF Management Response:

ODF agrees with this recommendation. We currently are requiring all purchases to be through OregonBuys. We are aware of a vendor exception process that DAS is establishing but have not currently utilized it as we have been able to have the vendors sign up. A majority of transactions in the old system are transfers to other agencies, one time GNA grant payments, and emergency payments for vendors not in OregonBuys. ODF will define a phased approach to implement this recommendation that will disable the Field Protection Districts access to the predecessor purchasing system to assist in mitigating risk and instead rely on the exception process for vendors that cannot register in OregonBuys. ODF would prefer to retain access to this system within the Administrative Branch to support the phased implementation and assure that emergency payments can still be completed in a timely manner.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Deliverable Review				Supporting Documentation
v	Deliverable Name			Status Indicator	Status		District Business	LT	ET	BOF	
TRAINING NEEDS											
	Training instructions for FOS replacement Excel PO form	Disbursements Manager	06/25/2021	●	Complete	Financial Services Manager	Jun-21	Jun-21	TBD		
	Training for Sage AP module if agency uses this product	Disbursements Manager	TBD	●	Not Started	Financial Services Manager	TBD	TBD	TBD		
MAINTENANCE NEEDS POST-IMPLEMENTATION											
	AP Payment Guidance/Procedures reviewed (annually)	Disbursements Manager	10/01/2022	●	Not Started	Financial Services Manager	TBD	TBD	TBD		
	Disbursements, Expenditures, Procurement, Signature Authority policies reviewed	Assistant Deputy Director for Admin	10/01/2023	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		
BUDGETARY, LEGISLATIVE, OR ADMINISTRATIVE CONSIDERATIONS											
	Sage AP Module configuration - budgetary investment plan	Financial Services Manager	TBD	●	Not Started	Assistant Deputy Director for Admin	TBD	TBD	TBD		

Status Legend:	
●	Not Started
●	Being Initiated
●	In Review / Underway
●	Approved / Completed

MGO Implementation Management Plan Template - Deliverable Status Log

MGO Recommendation # and Title: #28 - Encumbrances

ET Sponsor: Deputy Director for Administration

Due Date: 06/30/2023

Last Update: 08/30/2021

Purpose: This document contains key deliverables for implementing recommendations presented in the MGO Report, April 2021.

Rating: MGO Recommendation:

Low Once OregonBuys is utilized as a procurement system, the ODF Administrative Branch should consider recording encumbrances to more accurately project cash flows and budgets.

(MGO) Action Plan:

Once OregonBuys is utilized as a procurement system, ODF should consider recording encumbrances.

MGO Observation:

We noted that the current processes and procedures in place do not provide the necessary information needed to utilize encumbrances. Additionally, the use of encumbrances by ODF is not mandated by the State.

MGO Potential Impact / Risk:

The lack of utilizing encumbrances could result in underestimated budgeted expenses and inaccurate cash flow projections.

ODF Management Response:

ODF agrees to explore this recommendation further with recognition that OregonBuys implementation as a statewide procurement system is beyond ODF's oversight and instead dependent upon the state enterprise readiness and actionable implementation. Once OregonBuys is fully implemented, this process will be investigated. While encumbrances are an extremely valuable tool for projecting cash flow needs, the current process within the current system (SFMA) for recording and managing encumbrances is very time and staff consuming, especially at year-end.

Deliverable Identification		Owner	Estimated Completion Date	Deliverable Status		Approver(s)	Deliverable Review				Supporting Documentation
√	Deliverable Name			Status Indicator	Status		District Business	LT	ET	BOF	
	OregonBuys eProcurement side of the system launched for ODF use	Contract Services Program Manager	07/01/2021	●	Complete	DAS	Jul-21	Jul-21	n/a		
	Analysis of feasibility / need to record encumbrances within OregonBuys (MGO)	Financial Services Manager/ Contract Services Program Manager	12/30/2022	●	Not Started	Assistant Deputy Director for Admin	TBD	TBD	TBD		
POLICY AND PROCEDURES											
ODF Policy (list topics and define milestones)											
	Review and update expenditure policies, if encumbrances are feasible	Financial Services Manager	06/30/2023	●	Not Started	Assistant Deputy Director for Admin	TBD	TBD	TBD		
	Review and update procurement policies, if encumbrances are feasible	Contract Services Program Manager	06/30/2023	●	Not Started	Assistant Deputy Director for Admin	TBD	TBD	TBD		
ODF Procedures (list topic(s), define each)											
	Review and update expenditure procedures, if encumbrances are feasible	Financial Services Manager	06/30/2023	●	Not Started	Assistant Deputy Director for Admin	TBD	TBD	TBD		
	Review and update procurement procedures, if encumbrances are feasible	Contract Services Program Manager	06/30/2023	●	Not Started	Assistant Deputy Director for Admin	TBD	TBD	TBD		
ODF Greenbook (list sections, define action needed)											
	Review and update incident procedures, if encumbrances are feasible	Incident Finance / FEMA Manager	06/30/2023	●	Not Started	Protection Finance Manager	TBD	TBD	TBD		
ODF Guidance or Memorandum (list sections)											
	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD
IT SYSTEM CONSIDERATIONS											
	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD
COMMUNICATION PLANNING											
	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD
TRAINING NEEDS											
	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD
MAINTENANCE NEEDS POST-IMPLEMENTATION											
	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD
BUDGETARY, LEGISLATIVE, OR ADMINISTRATIVE CONSIDERATIONS											
	Consider temporary or LD Business Analyst capacity to support OregonBuys Encumbrance process development	Financial Services Program Manager/ Contract Services Program Manager	TBD	●	Not Started	Deputy Director for Administration	TBD	TBD	TBD		

Status Legend:	
●	Not Started
●	Being Initiated
●	In Review / Underway
●	Approved / Completed

STAFF REPORT

Agenda Item No.:	5
Topic:	Forest Trust Land Advisory Committee
Presentation Title:	FTLAC Testimony to the Board of Forestry
Date of Presentation:	September 8, 2021
Contact Information:	David Yamamoto, Tillamook County Commissioner John Sweet, Coos County Commissioner

On behalf of the Forest Trust Land Advisory Committee (FTLAC), comments and additional information provided on State Forest Lands business.

STAFF REPORT

Agenda Item No.:	6
Work Plan:	Administrative Work Plan
Topic:	Executive Session
Date of Presentation:	September 8, 2021
Contact Information:	Oregon Department of Justice

SUMMARY

The Board will meet in Executive Session for the purpose of conferring with legal counsel regarding the Board’s rights and duties related to current litigation or litigation likely to be filed pursuant to ORS 192.660(2)(h).

The Oregon Department of Forestry
DRAFT Climate Change and Carbon Plan



2021

Purpose:

Make forestry in Oregon a leader in climate change mitigation and adaptation. The Oregon Department of Forestry will be a leader in promoting climate-smart forest policies and actions that achieve our vision by operationalizing goals, implementing actions, and measuring progress to achieving climate goals.

Vision:

Oregon's Board of Forestry and Department of Forestry are national leaders in climate-smart and socially equitable forest policies that promote climate health, resilient forests and watersheds, community wellbeing, and a viable forest products industry.

Principles:

- Climate change is a serious threat. We have less than a decade to alter behaviors if we want to avoid catastrophic impacts. We must be innovative, creative, and proactive in working towards solutions, not simply react to the results of climate change.
- Black, Indigenous, and People of Color (BIPOC) communities have been and continue to be some of the most climate-impacted communities. Forest policies will be shaped through the lens of social justice and equity. Actions will prioritize benefits to historically and currently underserved communities as they adapt to a changing climate.
- Oregon's forest sector offers opportunities for significant sequestration and storage both in the forest and in harvested wood products. As well as opportunities to promote clean water and air, while preserving forest resilience in the form of flood control, biodiversity, thermal refugia, etc.
- As changing climates affect forests, incorporation of the best available science and practices will be key to adaptive management and planning across ownership type, size, and goals.

Table of Contents

Definitions	3
Climate Change and Carbon Plan Foundations	5
Opportunities:	8
Barriers:	9
What Is Climate-Smart Forestry?	12
Accountability Measures:	15
Revision Timeline:	16
Climate-Smart Forestry Goals	17
Climate-Smart Forestry in Silviculture.....	17
Fire Management, Response and Fire / Smoke Adapted Communities	18
State Forests Management.....	20
Forestlands Climate Resilience and Ecological Function Restoration.....	21
Urban and Community Forests.....	23
Reforestation and Afforestation.....	23
Maintain and Conserve Forests.....	25
Research and Monitoring.....	25
Supporting Actions	28
Future Work Needs	40
Supplemental Information	42
References	44

Definitions

Adaptation:	Long-term, transformative actions implemented to adapt to life in a changed climate.
Climate-Smart Forestry:	A specific extension of sustainable forest management that works to manage forests in ways specific to the impacts and mitigation efforts surrounding climate change ⁱ .
Mitigation:	Reducing heat trapping greenhouse gases in the atmosphere by reducing sources (e.g., the burning of fossil fuels for electricity, heat, or transport) of and sequestering these gases.
IPCC:	Intergovernmental Panel on Climate Change
FECR:	Forest Ecosystem Carbon Report
HWP:	Harvested Wood Product(s)
CO ₂ e	Carbon dioxide equivalent.
Carbon Offset:	An action or project (such as the planting of trees or extending rotations) that counterbalances the emission of carbon dioxide or other greenhouse gases from anthropogenic sources.
Greenhouse Gas:	Atmospheric gasses that trap heat and cause an increase in the temperature of Earth.
Sequestration:	Enhancing the “sinks” that accumulate and store greenhouse gases such as carbon dioxide (e.g., the oceans, forests, and soil).
Carbon Storage:	Long-term storage of carbon dioxide in woody biomass, forest soils, harvest wood products, or landfills, among other places that follows the sequestration process of carbon dioxide removal from the atmosphere.
Carbon Finance:	A market-based mechanism to pay for sequestration and storage of carbon dioxide.
Smoke Intrusions:	See the ODF Smoke Management Directive

Climate-Informed Silviculture: Silvicultural systems and prescriptions that specifically take into consideration climate-smart forest principles and practices and is works to adapt the forest for climate change and mitigate the amount of greenhouse gasses in the atmosphere. Potentially could include:

- Alternative tree species,
- Alternative planting spacings and densities,
- Utilization of multiple species (bet hedging)
- Use and planning for longer rotations
- Among others

Greatest Permanent Value: Healthy, productive, and sustainable forest ecosystems that over time and across the landscape provide a full range of social, economic, and environmental benefits to the people of Oregon. See ORS 530.050 and OAR 629-035-0020.

Sibling Agencies: Government agencies within the executive branch of Oregon state government. Examples: Oregon Department of Agriculture, Oregon Department of Environmental Quality.

Partner Agencies: Government agencies outside of the state of Oregon government. Examples: WA Department of Natural Resources, USDA Forest Service, Natural Resource Conservation Service.

Natural and Working Lands: Includes forests, rangelands, farms, urban green spaces, and wetlands.,

Climate Change and Carbon Plan Foundations

Problem Statement:

Climate change is threatening Oregon’s forest and forest products industry, through increased severity and incidence of wildfire, drought, and greater susceptibility to insects and diseases. Climate change is an existential problem that differentially affects vulnerable populations, including people of color and lower income Oregonians.

Without substantial behavior changes and mitigation efforts to limit global warming to less than 1.5°C (2.7°F) by 2030, the region and the world is likely to experience high levels of ecosystem degradation and species extinctionsⁱⁱ. Regionally, effects of climate change are already present, as there is a distinct upward trend in size and severity of wildfire in the state since the 1980’s, a trend expected to continue in the near and long termⁱⁱⁱ. Most recently, these events were prominently experienced in the September 2020 fires and the difficulties in fire containment and record-breaking heat waves in 2021. Even with mitigation efforts across sectors and societies, the impacts of the warming and previous CO₂ emissions may be irreversible for decades to centuries^{iv}.

Beyond the visibility, severity, and high costs (ecological, social, economic) of wildfire, other climate driven disturbances such as drought, extreme events (ice storms, wind events, etc.), insects, and diseases will become increasingly persistent, damaging, and

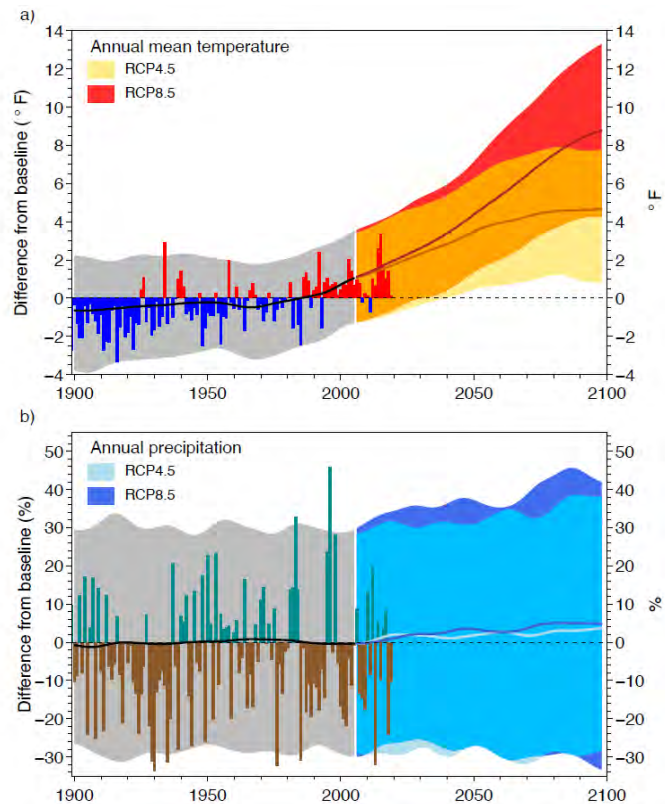


Figure 1. Observed, simulated, and projected changes in Oregon’s mean annual (a) temperature and (b) precipitation relative to 1970–1999 (baseline) under RCP 4.5 and RCP 8.5 future scenarios. Colored bars are observed values (1900–2019) from the National Centers for Environmental Information. The thicker solid lines are the mean values of simulations from 35 climate models for the 1900–2005 period, which were based on observed climate forcings (black line), and the 2006–2099 period for the two future scenarios (orange [RCP 4.5] and red [RCP 8.5] lines in the top panel, light blue [RCP 4.5] and darker blue [RCP 8.5] lines in the bottom panel). Shading indicates the range in annual temperatures or precipitation from all models. The mean and range were smoothed to emphasize long-term variability. (OCCRI 2021)

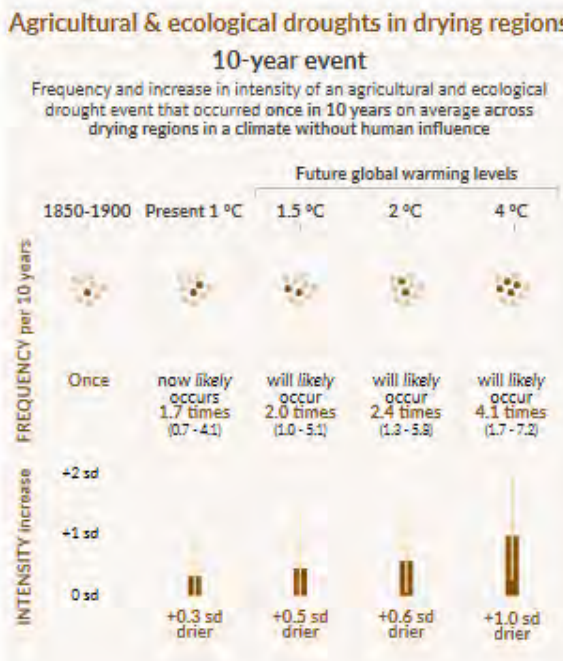
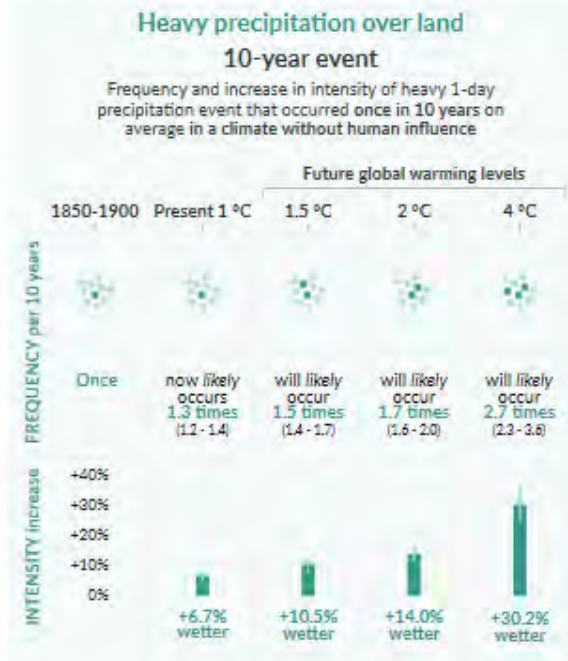
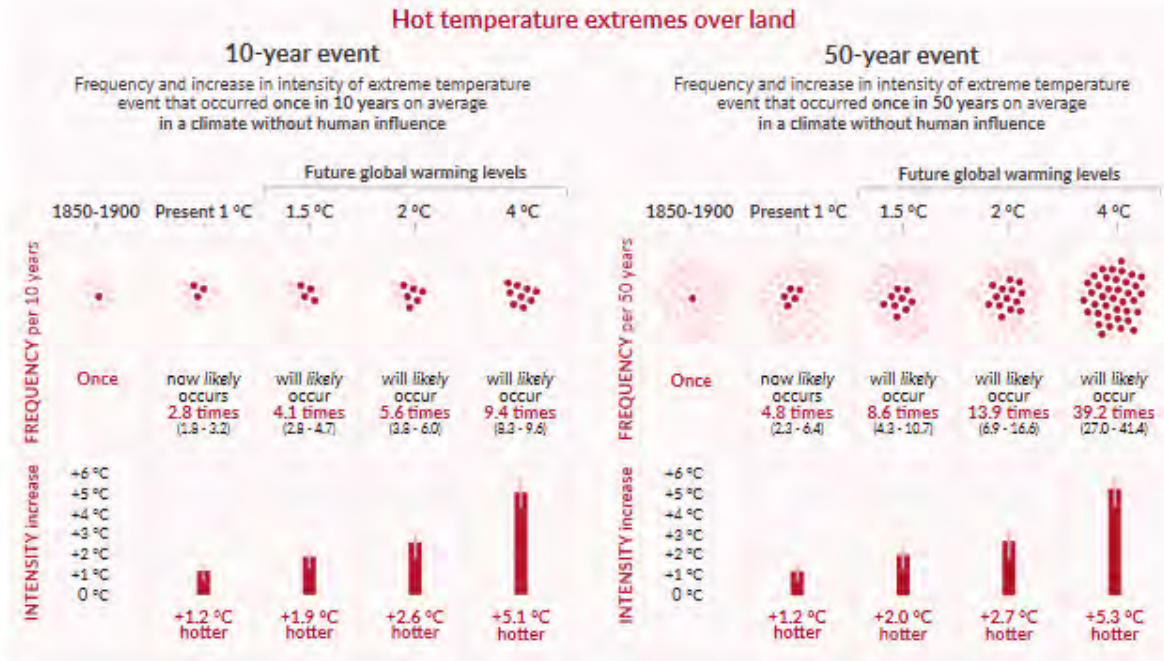
difficult to manage and mitigate^v. Additional systemic ecosystem events will be precipitated as well, for example, models indicate increasing stream temperatures, reducing potential habitat for threatened and endangered fish species^{vi}. Over time, forest managers will face a growing number of issues when looking out over the horizon of a stand rotation and face a growing set of risks and concerns, known and unknown. Crossing climatic thresholds may cause sudden and unexpected shifts in natural systems with a ripple effect throughout the region, nation, and world. Once crossed, these tipping points may lead to ecosystems unable to return to pre-threshold states even with reductions in atmospheric carbon levels. To address these issues, the Department is committed to utilizing national and international climate and carbon science and organizational directives to inform, mitigate, and adapt to our changing world through policy implementation and management decisions.

The changing landscape means that the state and the forestry sector will need to work not only on mitigation but on adaptation to a changing climate. A business-as-usual approach will not accomplish the needed adaptations, mitigations, and transformations. Increasing impacts on natural systems will force the human element to adapt in ways that are not fully understood at this time. Efforts to build climate resilient systems will need to be explored and implemented as the Department works to further increase resiliency efforts. All of this will have to be undertaken with the backdrop of equity and the fact that climate change impacts those least able to adapt and engage first.

In March of 2020, Governor Brown signed Executive Order 20-04. This EO highlighted that the state is experiencing an increase in frequency and severity of wildfires that endanger public health and safety and damage rural economies. It also points agencies including ODF to “prepare and plan for the impacts of climate change and to take actions to encourage carbon sequestration and storage.”

In August of 2021, the Intergovernmental Panel on Climate Change released its Physical Science Basis of its sixth assessment report. It states: “it is unequivocal that human influence has warmed the atmosphere, ocean and land. Widespread and rapid changes in the atmosphere, ocean, cryosphere and biosphere have occurred.” Additionally, “Evidence of observed changes in extremes such as heatwaves, heavy precipitation, droughts, and tropical cyclones, and, in particular, their attribution to human influence, has strengthened since AR5.” Overall, it paints a grim picture, but there is hope and the report proposes some potential opportunities to reduce greenhouse gases, including on natural and working lands.

Projected changes in extremes are larger in frequency and intensity with every additional increment of global warming



IPCC, 2021: Summary for Policymakers. In: *Climate Change 2021: The Physical Science Basis. Contribution of Working Group I to the Sixth Assessment Report of the Intergovernmental Panel on Climate Change* [Masson-Delmotte, V., P. Zhai, A. Pirani, S. L. Connors, C. Péan, S. Berger, N. Caud, Y. Chen, L. Goldfarb, M. I. Gomis, M. Huang, K. Leitzell, E. Lonnoy, J.B.R. Matthews, T. K. Maycock, T. Waterfield, O. Yelekçi, R. Yu and B. Zhou (eds.)]. Cambridge University Press. In Press.

Opportunities:

Oregon's forests, from urban centers to far reaching wilderness, as well as its forest products industry are part of the climate mitigation and adaptation solution. Forests play a significant role in climate mitigation by sequestering and storing carbon and providing biogenic alternatives to carbon intense materials. Beyond carbon mitigation, urban forest canopies provide essential social and climate change services by mitigating climate change effects, such as heat islands, and actively decreasing energy use.

Oregon has a long history of innovation in forestry, including first-in-the-nation forest protection laws. Climate change consideration is no different. The Oregon Department of Forestry has been engaged in climate change and global warming related work for over 30 years through different roles and efforts. While this history provides a foundation of support for the Department's increasing focus on climate action, climate change effects are occurring nonetheless as the earth passes through climatic thresholds and tipping points. The state's forests are experiencing increasing impacts from heat and drought-induced mortality to increasing wildfire severity. Recognizing the threats regionally and globally, Oregon's forests and harvested wood product sector have been identified as playing an important role in the mitigation of climate change; however, there is also a need to implement adaptation measures^{vii} to ensure that the state's forests are healthy, productive, and capable of producing mitigation benefits.

The Department has worked with the Oregon Global Warming Commission (OGWC) to establish a goal for natural working lands (i.e., forests, agriculture, tidal wetlands, etc.) as outlined in Executive Order 20-04. The OGWC recommendation is an additional 5 MMTCO₂e can be sequestered on an annual basis by 2030 and an additional 9.5 MMTCO₂e annually by 2050. The bulk of this additional sequestration would come from the forest sector. The report and recommendation also highlighted areas for further investment and improvement including inventories and emissions calculations.

The Department has several potential opportunities to address both climate mitigation and adaptation measures in the near-term. In the time the Department has been involved with working on climate change issues, it has made significant progress in some areas, but all members of the forest sector need to take additional, bold steps as we enter a critical phase in climate mitigation and adaptation. Some measures are already in place, including working to reduce emissions through building efficiency,

retiring inefficient vehicles with electric and fuel-efficient vehicles, allowing and promoting remote work where appropriate, and maintaining healthy and functioning ecosystems. The Department is working to incorporate climate change factors into its high-level planning and to also ensure that climate impacted communities are included in all planning processes.

Statutory analysis by the Oregon Department of Justice^{viii} indicates that the Board of Forestry has broad authority over all forest policy in the state, including arenas with carbon and climate change implications. Department staff have been working with national workgroups to identify barriers and remedies for these barriers to comprehensive adoption of climate smart forestry, improve adoption of carbon finance as mitigation tools, and to identify how state forestry agencies can best engage ns advance the carbon finance field.

Federal initiatives are increasingly acknowledging and incorporating climate change and may expand the availability of programs and resources that focus on climate and climate-smart forest practices. These opportunities are being assessed as this plan is being developed. Where appropriate the Department will work with partners at all levels to integrate and leverage federal resources into regional work and opportunities. This may include technical assistance, financial assistance or cost share, or in-kind work from all parties involved.

Barriers:

While Oregon's forests and forest sector have many opportunities to adapt to and mitigate climate change, there are also barriers that may slow the adoption of Climate-smart forestry in the state. These are both human and ecosystem imposed, some have simpler fixes, others are very complex.

Natural barriers to moving to climate-smart forestry include a rapidly changing climate and events causing tree and forest damage and mortality at a speed and magnitude that exceeds management and forests ability to adapt. With higher emissions scenarios, the proportion of atmospheric CO₂ that working and other resource lands and oceans can sequester decreases, representing a barrier to utilizing forests as a long-term solution without additional behavior changes across societies and economies. Additionally, the wide array of ecotypes that are represented in Oregon entail different forest management strategies and concerns.

The proportion of CO₂ emissions taken up by land and ocean carbon sinks is smaller in scenarios with higher cumulative CO₂ emissions

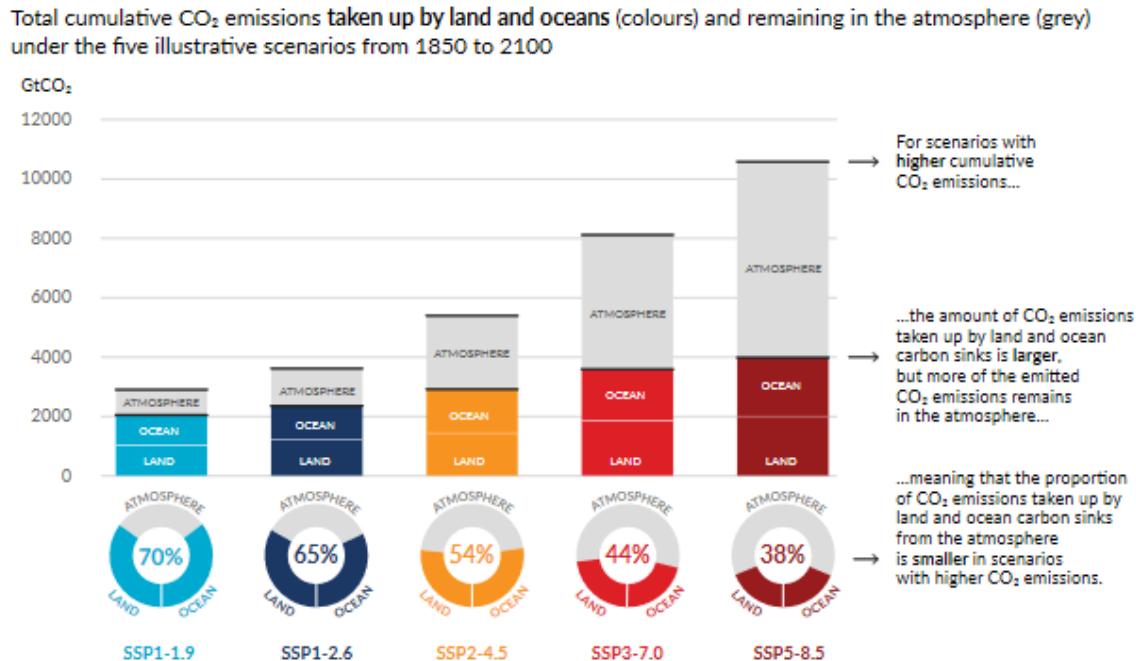


Figure SPM.7: Cumulative anthropogenic CO₂ emissions taken up by land and ocean sinks by 2100 under the five illustrative scenarios.

The cumulative anthropogenic (human-caused) carbon dioxide (CO₂) emissions taken up by the land and ocean sinks under the five illustrative scenarios (SSP1-1.9, SSP1-2.6, SSP2-4.5, SSP3-7.0 and SSP5-8.5) are simulated from 1850 to 2100 by CMIP6 climate models in the concentration-driven simulations. Land and ocean carbon sinks respond to past, current and future emissions, therefore cumulative sinks from 1850 to 2100 are presented here. During the historical period (1850-2019) the observed land and ocean sink took up 1430 GtCO₂ (59% of the emissions).

The **bar chart** illustrates the projected amount of cumulative anthropogenic CO₂ emissions (GtCO₂) between 1850 and 2100 remaining in the atmosphere (grey part) and taken up by the land and ocean (coloured part) in the year 2100. The **doughnut chart** illustrates the proportion of the cumulative anthropogenic CO₂ emissions taken up by the land and ocean sinks and remaining in the atmosphere in the year 2100. Values in % indicate the proportion of the cumulative anthropogenic CO₂ emissions taken up by the combined land and ocean sinks in the year 2100. The overall anthropogenic carbon emissions are calculated by adding the net global land use emissions from CMIP6 scenario database to the other sectoral emissions calculated from climate model runs with prescribed CO₂ concentrations³³. Land and ocean CO₂ uptake since 1850 is calculated from the net biome productivity on land, corrected for CO₂ losses due to land-use change by adding the land-use change emissions, and net ocean CO₂ flux.

IPCC, 2021: Summary for Policymakers. In: *Climate Change 2021: The Physical Science Basis. Contribution of Working Group I to the Sixth Assessment Report of the Intergovernmental Panel on Climate Change* [Masson-Delmotte, V., P. Zhai, A. Pirani, S. L. Connors, C. Péan, S. Berger, N. Caud, Y. Chen, L. Goldfarb, M. I. Gomis, M. Huang, K. Leitzell, E. Lonnoy, J.B.R. Matthews, T. K. Maycock, T. Waterfield, O. Yelekçi, R. Yu and B. Zhou (eds.)]. Cambridge University Press. In Press.

Human and social barriers are much broader and include topics like prevention of economic harm to impacted communities, various rules and statutes, and public perceptions. Below is a list (not exhaustive and in no particular order) of potential barriers both agency specific and general that may hinder advancement and adoption of climate-smart forest practices:

Potential Barrier:	Resolution or means to address issue:
Limited staffing capacity	Pursue additional positions and capacity through Policy Option Packages
Public perceptions	Provide transparent processes and increase engagement opportunities
Concerns over leakage and substitution effects	Contribute to research, data collection, and improve understanding of leakage dynamics and promote production and utilization that limits leakage
Concerns about the impacts of Measure 49 claims	Change in federal statutes and rules, financial resources
Conflicting statutes (e.g., ORS 526 and ORS 477)	Legislative
Agency and Board requirements under ORS 527.714	Full accounting of costs/benefits including future projections; Legislative revision of statute
Lack of trust in agency leadership and management	Improve communication and transparency
Pressures to produce revenue (internally and externally; county payments)	Extend economic valuation to services, carbon, and alternative production capital
Timber tax system/lack of flexibility to provide tax incentives	Legislative
Lack of valuation of ecosystem services	Additional capacity and resources to contribute and support valuation work
Lack of nursery capacity and supply of future climate appropriate seedlings	Support (financial and other expert) to expand capacity and supply needed seedling diversity, coordination with consulting and extension foresters
Lack of suitable markets for some products	Additional capacity and capital
Lack of authority over some forestland owners/managers (e.g., Federal)	Work within bounds of Shared Stewardship and GNA agreements
Lack of adequate forest workforce to complete actions/achieve goals	Stable capital, education, and partnership with stakeholders

What Is Climate-Smart Forestry?

Climate-smart forestry is active forest management that prepares the forest for a changing climate while working to reduce greenhouse gas in the atmosphere and supporting forest dependent communities.

Within the Climate Change and Carbon Plan (CCCP), the active management component of climate-smart forestry is anchored in sustainable forest management (SFM), which is a cornerstone of the Forestry Plan for Oregon, the Board of Forestry's strategic plan (see sidebar). Climate-smart forestry evolved from climate-smart agriculture ideas in the early 2010s and is distinct from climate-smart restoration, though some of the principles are similar and overlap.

The holistic view of this plan is that there is a need for all types of management, including no management across the forest landscape. As a policy guiding document, this plan looks to promote, establish, and maintain forests across the state that accomplish the three tenants of climate-smart forestry.

Adaptation of forest ecosystems, from wildland to urban, will require active measures and seeks to build resilience to the effects of climate change. Adaptation includes using different tree species or genetics, changes to the structure of the forest stand and landscape, and utilizing a mix of management approaches (mixed species, uneven ages, different structures) to ensure that forests are able to maintain growth and function

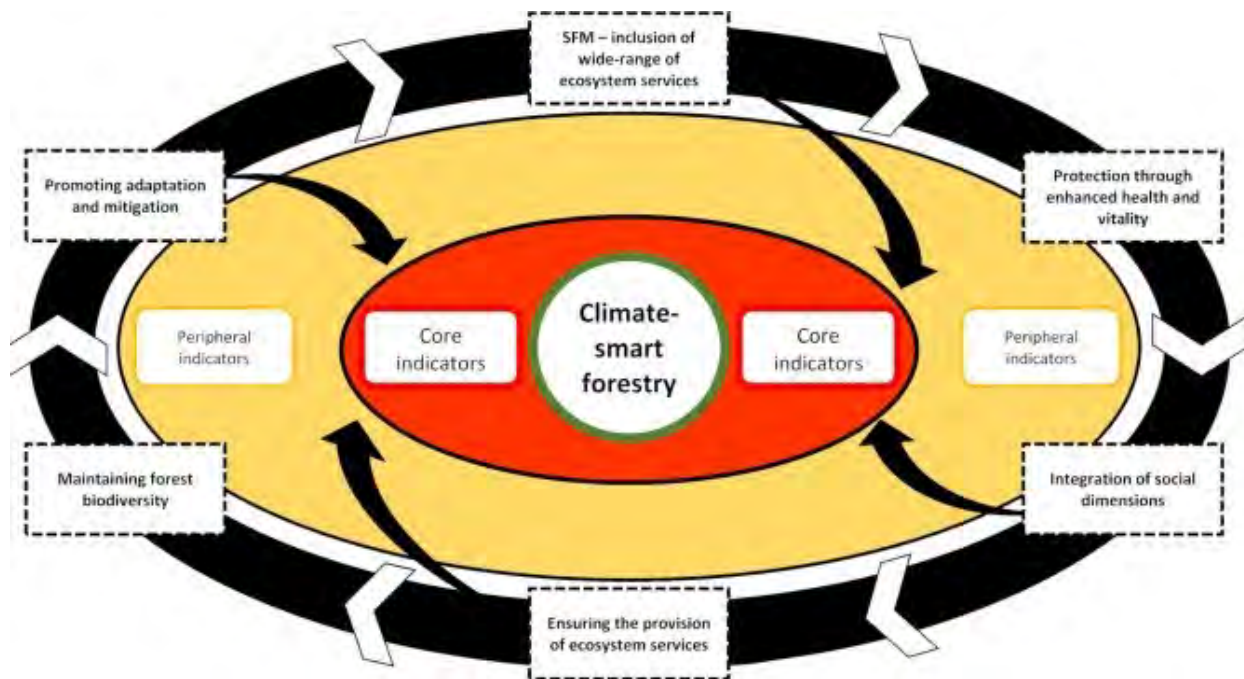
Forestry Plan for Oregon 2011: What is sustainable forest management?

It is important that Oregonians agree about what sustainable forest management means and how to evaluate our forests' performance in meeting sustainability goals. In this context, the Board of Forestry defines "sustainable forest management" as meaning:

Forest resources across the landscape are used, developed, and protected at a rate and in a manner that enables people to meet their current environmental, economic, and social needs, and also provides that future generations can meet their own needs [based on Oregon Revised Statute 184.421].

On a statewide basis, sustainable forest management will provide:

- Healthy and diverse forest ecosystems that produce abundant timber and other forest products;
- Habitat to support healthy populations of native plants and animals;
- Productive soil, clean water, clean air, open space, and recreational opportunities;
- Healthy communities that contribute to a healthy state economy; and
- Accountability and trust between all parties, where human well-being and equity are goals of the process as well as outcomes of the decisions.



From Euan Bowditch, Giovanni Santopoli, Franz Binder, Miren del Río, Nicola La Porta, Tatiana Kluvankova, Jerzy Lesinski, Renzo Motta, Maciej Pach, Pietro Panzacchi, Hans Pretzsch, Christian Temperli, Giustino Tonon, Melanie Smith, Violeta Velikova, Andrew Weatherall, Roberto Tognetti, *What is Climate-Smart Forestry? A definition from a multinational collaborative process focused on mountain regions of Europe*, *Ecosystem Services*, Volume 43, 2020, <https://doi.org/10.1016/j.ecoser.2020.101113>

at a landscape level. Adaptation means that forest managers are looking forward at future climate rather than relying historic norms and practices. It will require that bold steps are taken to ensure that forests remain forests and do not shift to an alternative vegetation type due to climate induced mortality events, increasing insect and disease pressure, and increasing destructive wildfire season.

Along with changes in societal behaviors, forests have an innate ability to provide **mitigation** benefits to the global carbon balance. Natural working lands contain an inherent ability to sequester carbon from the atmosphere. Increasing sequestration will play an important role as societies seek to establish behavioral changes and work to reduce the concentration of carbon dioxide in the air. Forests sequester and store very high levels of carbon in the above-ground biomass and in the soils. Leaving trees in place until sequestration is maximized, followed by harvest will likely provide the greatest mitigation benefit. Realizing this benefit at a landscape level will require multiple approaches that are yet to be substantially developed or realized across ownerships. Beyond realizing greater sequestration potential, larger timber will yield greater efficiency in processing and a wider array of durable products with long-lived potential, increasing and extending the carbon storage capability of products.

Moreover, wood products can continue carbon storage in lower embodied carbon wood products and displace high-carbon cost materials and fuels. However, more work supporting and advancing long-lived wood products, development, and utilization needs to be done to ensure that the harvested fiber is sequestered long-term. For example, increasing the utilization of longer-lived products like mass timber can help displace high carbon cost materials, but reducing the emissions from the harvest and manufacturing of wood products will need to be addressed, both of which are proportionally reduced through longer lived and larger timber. Reduction of emissions and decarbonization is important as harvested wood products represent an annual net source of CO₂ to the atmosphere when the emissions (with and without energy capture) are included^{ix}. Additional methods and technologies will need to be explored to meet these mitigation needs.

The **social and economic dimension** of climate-smart forestry will require careful coordination and communication to ensure all voices are heard and incorporated. Natural resource dependent, disproportionately climate impacted, and traditionally underserved communities are important parts of Oregon's culture and economy and are at great risk from climate change impacts. Ensuring they are included in the planning and decision-making process and are not left behind as the forest sector works to adjust and transition to a changing environment and landscape is key. The cultural significance of forests (wildland, community, and urban) and forest products, timber and beyond, is highly important. Utilization of the state's forests for harvest of traditional foods, recreation, tourism, and wood fiber extraction all support a diverse set of communities including Tribes, natural resource dependent jobs and people, and those that are at a disproportionate risk from the effects of climate change. The work done to adapt to and mitigate climate change will need to heed these voices.

Accountability Measures:

Agency Leadership: Department leadership will prioritize climate change in their planning to align with Executive Order 20-04. The statewide executive level and local district leadership levels will be impacted by the goals and actions laid out in this plan. They will need to be aware of how it interfaces with the multitude of other planning processes and documents, including the agency strategic plan, the forest action plan, annual operating plans, and forest management plans as examples. Executive Order 20-04 states that:

Agency Decisions: To the full extent allowed by law, agencies shall consider and integrate climate change, climate change impacts, and the state's GHG emissions reduction goals into their planning, budgets, investments, and policy making decisions. While carrying out that directive, agencies are directed to:

- (1) *Prioritize actions that reduce GHG emissions in a cost-effective manner;*
- (2) *Prioritize actions that will help vulnerable populations and impacted communities adapt to climate change impacts; and*
- (3) *Consult with the Environmental Justice Task Force when evaluating climate change mitigation and adaptation priorities and actions.*

As such, leadership will work to incorporate this plan into operational and budgetary planning processes. Encouraging and considering opportunities and ideas that are new and bold will be a positive step towards reaching the goals of this plan and of the Executive Order. Additionally, Department leadership will ensure staff have access to trainings and workshops focused on using climate-smart forestry in their day-to-day work.

Board Accountability: Like the Department leadership, the board may undertake rule making related to climate change and that process may be impacted by the EO 20-04:

GHG Reduction Goals. *Agencies shall exercise any and all authority and discretion vested in them by law to help facilitate Oregon's achievement of the GHG emissions reduction goals set forth in paragraph 2 of this Executive Order.*

Expedited Agency Processes. To the full extent allowed by law, agencies shall prioritize and expedite any process and procedures, including but not limited to rulemaking and agency dockets, that could accelerate reductions in GHG emissions.

Board work plans and Department policy direction should reflect the scope of the problem at hand. Expectations, decorum, and guidance should be in line with the Best Practices laid out by the Governor's Office, and by the Board's own guiding documents.

Staff Level: Staff will be required to implement the operational specifics related to this plan, EO 20-04, and any Board policies and rules established under these. Staff should also be empowered by agency leadership to look for ways to enhance the mitigation and adaptation measures that the Department lays out. As has been stated, this is a moment for bold direction and ideas and contributions can come from all operational facets of Department operations. Not all of these come from the top and staff play a key role in finding solutions.

Revision Timeline:

Like all plans, there is a need for periodic re-assessment and revision. This plan is intended to capture needs at the time of drafting; future updates will be required. It is important that this plan be revisited and updated on a target of a five-year interval to ensure that the research and monitoring portions are consistent with current science and climate impacts and projections as well as being able to capture the work that is accomplished through time.

To achieve adaptive management and the goals in this plan, agency staff will periodically bring progress assessments to the Board. These assessments will inform the revision and public and stakeholder engagement as the Departments works on updating the plan in-line with the timeline.

Climate-Smart Forestry Goals

Climate-Smart Forestry in Silviculture

Goal: Establish a just and equitable transition to climate-informed silviculture and climate-smart forestry that optimizes climate mitigation and adaptation, while maintaining a sustainable flow of wood products to ensure long-term resource benefits and viability of the forest products industry and flow of long-lived forest products.

Many of the Department's environmentally focused programs and projects rely on the use of regulatory programs and voluntary measures to mitigate past degradation and to head off future problems. Climate change offers an opportunity to pursue additional voluntary measures that will benefit forests, the broader environment and ecosystems, citizens of Oregon, the region, and the globe. Encouraging climate-informed forest silviculture practices will help State forests, family forests, small non-industrial ownerships, and industrial forestlands contribute to meeting the challenges of forest climate mitigation and adaptation. Mechanisms to encourage various forest owners to participate in climate-informed and climate-smart forestry will be discussed later in this document, but examples include formal recognition, promotion, and focus on climate-smart forest practices instituted by landowners and managers, economic incentives to increase sequestration through easement tools, and Department support for forest carbon offset and finance programs.

This goal takes the principles used in sustainable forest management and includes forward looking projections to manage forests in a climate and ecologically sustainable manner. As will be mentioned in later goals, monitoring, research, and reassessment will be a key part of the adaptive nature of climate-informed silviculture.

Climate-Informed Silviculture:

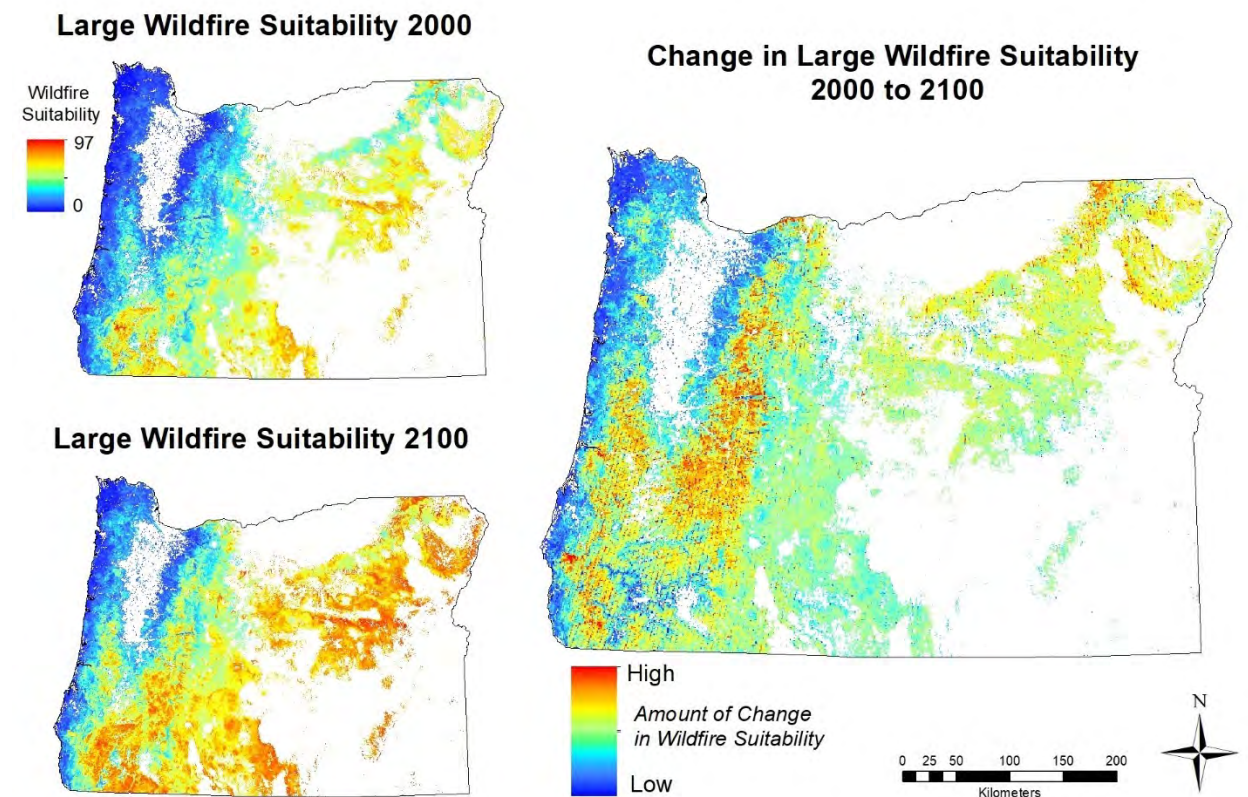
Silvicultural systems and prescriptions that specifically take into consideration climate-smart forest principles and practices and is works to adapt the forest for climate change and mitigate the amount of greenhouse gasses in the atmosphere. Potentially could include:

- Alternative tree species,
- Alternative planting spacings and densities,
- Utilization of multiple species (bet hedging)
- Use and planning for longer rotations
- Among others

Fire Management, Response and Fire / Smoke Adapted Communities

Goal: Modernize Oregon’s complete and coordinated wildfire protection system to respond to the increased severity of wildfire. Promote fire and smoke adapted communities in the wildland-urban interface and beyond, to mitigate the impacts of climate-induced increases in wildfire severity.

Rising concentrations of greenhouse gases are resulting in climatic conditions where natural systems and natural working lands are experiencing wildfire severity and extent not observed in the accessible human historic record. The severity and duration of drought conditions has caused extreme reductions in fuel moisture and increasing temperatures are making forest fuels more receptive to fire. Additionally, large-scale fire suppression over the last century combined with forest changes from management strategies and objectives, have resulted in higher levels of fuel in forests. These issues are present in, and not limited to, managed natural forests and planted stands. Taken



A predictive model for the environmental suitability for large wildfires was calibrated on fires that occurred during the climate normal of 1971-2000 and then projected into the future based on climate predictions through 2100. The change in large wildfire suitability was derived by subtracting the cell values in the suitability map for 2000 from the map for 2100. Areas in red depict the greatest amount of increase in suitability for large wildfires. Maps of large wildfire suitability were published in Davis, R., Yang, Z., Yost, A., Belongie, C., Cohen, W. 2017. The normal fire environment—modeling environmental suitability for large forest wildfires using past, present, and future climate normals. Forest Ecology and Management 390: 173-186

together these present an increasing risk to the viability and health of forests, dependent and interconnected ecosystems, health and economic, and built infrastructure throughout Oregon.

Adapting to climate-induced changes in the “normal” fire environment will be an ongoing challenge for fire organizations. Meeting that challenge will require a well-coordinated effort with emphasis on prevention, adaptation, and recovery across agencies, communities, landowners, industry, and natural systems stakeholders.

Natural resource agencies and stakeholders working together to increase forest resiliency through restoration and resilience activities like thinning and prescribed fire will be essential to adapt and maintain functioning forest ecosystems in a changing fire environment.

Some forest ecosystems within the state have fire return events that are stand replacing in nature. Various climate scenarios and research^x indicate an expected increase in these stand replacing events and a decrease in the return intervals (time between fires) in these systems due to the changes in the environmental conditions. Where ecological function restoration efforts would not be feasible for natural or social reasons, Department work should focus on strengthening community infrastructure resistance to fire through cooperative strategies. These include providing guidance and resources to homeowners for home hardening work, communities working on evacuation and shelter-in-place strategies, and other risk mitigation and adaptation work largely undertaken by partner and sibling agencies. The Department does realize that these strategies can be implemented across the board, but will prioritize these actions in those areas where fire and climate resiliency work is not an option.

While much of the work that the Department is committed to occurs in the local fire environment, other communities are indirectly affected, largely by smoke impacts. While there may not be any way to address this issue directly during a wildfire, the Department should continue working with local and sibling agencies (e.g., Oregon Health Authority) to establish ways for these impacted populations to avoid smoke impacts as well as research and monitoring to assess other resource and health effects. Additional restoration burning will produce varying levels of smoke. Current efforts should continue to be used to prevent smoke intrusions.

State Forests Management

Goal: Lead by example and demonstrate climate-smart forest management on State Forests to achieve adaptation, mitigation, and the achievement of forest resource goals.

Oregon’s forests, particularly those in the western Cascade Mountains and the Oregon Coast Range, have the potential for some of the highest rates of carbon sequestration and storage in the world. Therefore, Oregon’s forest productivity has potential for significant climate mitigation benefits. Climate-informed management of the lands under the Department’s control can provide broad public benefits and provide a model for others regionally and nationally on how to achieve broad long-term, climate-positive public benefits (including clean water, recreation, fish and wildlife habitat, and carbon storage) while continuing to meaningfully contribute as a carbon positive and viable economic driver to rural and resource-dependent economies. Policies put in place by the Board of Forestry and Department leadership will pave the way for on-the-ground, climate-smart forestry practices.

Greatest Permanent Value

As provided in [ORS 530.050 \(Management of lands acquired\)](#), “greatest permanent value” means healthy, productive, and sustainable forest ecosystems that over time and across the landscape provide a full range of social, economic, and environmental benefits to the people of Oregon. These benefits include, but are not limited to:

- (a) Sustainable and predictable production of forest products that generate revenues for the benefit of the state, counties, and local taxing districts;
- (b) Properly functioning aquatic habitats for salmonids, and other native fish and aquatic life;
- (c) Habitats for native wildlife;
- (d) Productive soil, and clean air and water;
- (e) Protection against floods and erosion; and
- (f) Recreation.

The Department will lead by example and demonstrate climate-smart forest management on State Forests to achieve Greatest Permanent Value. This concept will be incorporated into the revision of the Western Oregon State Forests Management Plan (FMP), which “will be implemented to adapt to climate change and mitigate its impacts on the management of state forest lands. The FMP will also contribute to climate change mitigation and sequester carbon” (Board of Forestry approved guiding principle 11 for FMP revision).

Part of the carbon equation includes using long-lived harvested wood products. Climate-smart forestry used to manage State Forests will provide a sustainable source

of wood fiber. Coupled with this climate-smart focus, the Department will work with its own resources (beyond the State Forests Division) and with partner agencies, organizations, and entities to support and encourage the use of wood as a long-term mechanism for the storage of carbon. This includes using wood fiber in place of more resource-intensive and high carbon cost manufactured products like steel and cement, among others, where it is reasonable and prudent.

Forestlands Climate Resilience and Ecological Function Restoration

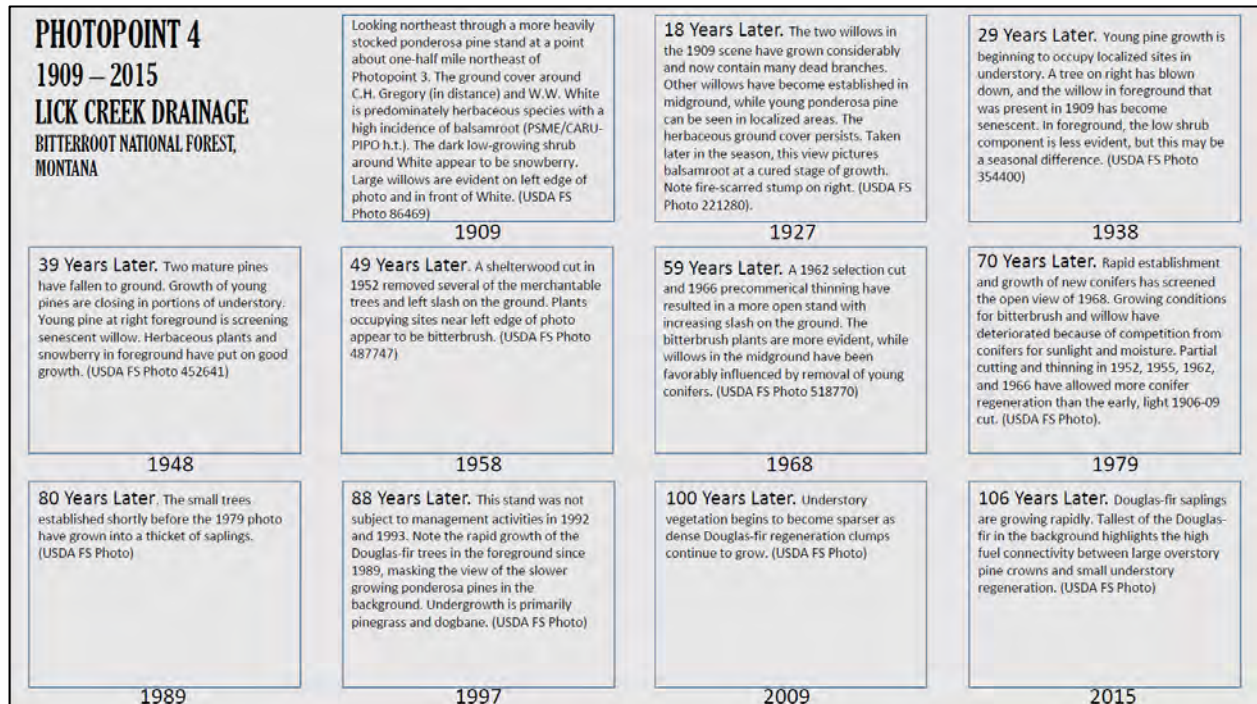
Goal: Accelerate the pace, scale, and quality of climate appropriate forest restoration to increase the resilience to increased wildfire, drought, and biotic disturbance severity and incidence. Support implementation of the recommendations of the Governor's Council on Wildfire Response.

A century of fire suppression, climate change, and other factors have created landscape scale forest health issues that threaten to derail the potential of Oregon's forests as a climate change mitigation tool. With the exclusion of fire from natural ecosystems, there has been an increase in over stocked forests that are more prone to fire, damaging insects, and forest diseases. The combined impacts of climate change, including higher temperatures, drought stress, and increasing vapor pressure deficits, result in increased susceptibility to insect and disease infestations in individual trees and entire stands. Forests under stress from these pests and pathogens create conditions favorable for the rapid spread of fire and greater challenges for managing fire across the landscape. Site appropriate fuels reduction and fire risk mitigation work will vary widely across the state. It is important that work to reduce wildland fire risk take into account the historical, current, and future predicted local fire behavior and frequency.

Adding to the issues above are invasive species that are either present or could be introduced. These insects, diseases, and invasive plants all disrupt the natural and managed forests of the state and threaten the viability of native ecosystems due to their impact on species from the specific to the broad. An example of this is the impact that sudden oak death has had and continues to have on tanoak in southwest Oregon. The removal of this keystone species could result in both ecological and cultural disruption.

Working with Tribes, impacted communities, and stakeholders, the Department will prioritize landscapes for resilience work and implement projects and programs that will increase the resilience of communities to catastrophic fire and natural resource damage. The Department will largely under take these prioritization and planning efforts in separate processes where the Legislature has provided enhanced capacity to do so (e.g., a 20-year Forest Restoration Plan). These other planning efforts will take into account

the impacts of future climate change on the ecological and the fire environments and prescribe treatments accordingly.



Hood, Sharon M.; Lutes, Duncan C.; Crotteau, Justin S.; Keyes, Christopher R.; Sala, Anna; Harrington, Michael G.; Munger, Gregory T. 2018. Lick Creek historic photographic series: a century of change in a ponderosa pine forest in western Montana, US. Fort Collins, CO: Forest Service Research Data Archive. Updated 04 June 2019. <https://doi.org/10.2737/RDS-2018-0023>

Urban and Community Forests

GOAL: Increase the extent and resilience of urban and community forests to maximize the climate mitigation and health benefits of urban forests canopy.

Urban forests represent a different set of issues than those found in wildland forests. These often impact populations that have historically been discriminated against, marginalized, and underrepresented in decision making that affects them. For example, previous practices of blockbusting, redlining, and discrimination in lending such as exclusion from FHA loans prior to the Fair Housing Act of 1968 (Public Law 90-284 82 Stat 73) led to segregation in metropolitan areas. Under funding and other discriminatory civic policies left those marginalized communities with substantially fewer trees and less urban tree canopy. Those discriminatory practices continue to impact human health, property values, and quality of life to this day.

Through climate-aware urban forestry, the Department will work with local jurisdictions and disproportionately impacted communities to address the inequitable impacts of increased extreme heat events on vulnerable human populations, especially lower-income communities and communities of color. This may include working with local governments and community-based organizations to empower local communities to improve the natural ecosystem around them through design and implementation of urban forestry plans and actions.

Urban areas not only experience extreme heat events, but greater impacts from winter storms and extreme rain events due to the altered nature of streams as they flow through towns and cities. The Department will work to enhance the function of existing riparian areas and work with the appropriate level of government to increase riparian function and green infrastructure in urban areas to improve water quality and aquatic habitat.

Reforestation and Afforestation

Goal: Facilitate and encourage the reforestation of areas burned by wildfire and afforestation of low-productivity lands that are understocked or not in forest use.

Our forests face increasingly detrimental temperature, drought, and biotic changes. Climate predictions paint a picture of even more dramatic shifts. One of the most visible and dramatic effects of these changes is the increase in wildfire size and severity. These destructive forces have the potential to roll back climate gains through the re-

emission of forest carbon to the atmosphere and cataclysmic disruption to sensitive ecosystems. To help recover the carbon lost in these destructive events, the Department will work to build and integrate internal and external programs to facilitate and encourage the reforestation of burned lands, where appropriate, and guided by the best available science on species selection and future climate benefits. This includes full utilization of federal incentive programs through the Department's Federal partner agencies and use of the Good Neighbor Authority and Shared Stewardship agreements to work with Federal land managers to achieve the goals of the Department, state and its partners.

There may be instances where the most current knowledge of plant communities and climate envelopes indicate that there should be alternative management on affected lands. This may include the use of alternative, non-traditional tree species, alternative seed sources, or a shift from traditional forest management to a long-term ecologically-sustainable ecosystem. Foresters, the near-forest community, and society in general will need to be provided educational opportunities to see the vision of climate-smart forestry where past forest types may no longer be the most suitable approach. The ODF seed orchard will provide a valuable resource in providing seed for appropriate, resilient, and climate-adapted planting stock including seed used for assisted migration.

Recent studies have indicated that planting trees on currently non-forested lands (forestation generally; including reforestation and afforestation) may result in large climate benefits and key mitigation impacts^{xi}. While Oregon's strong land use laws have largely prevented the conversion of the state's wildland forests, there remains opportunity to plant trees in areas that are currently in a low-productive use and non-forest use. This may include some agricultural lands, lands determined as low productivity forestlands, areas in rural and municipal jurisdiction, and areas where current forest management practices result in low productivity due to either biotic or abiotic factors. Afforesting and managing future-climate appropriate tree species in planted stands or towards complex forest structure and habitat can have beneficial results by sequestering and storing carbon on the landscape^{xii}. Future work will be needed with sibling and partner agencies to identify lands that are available and to follow through on the best carbon management of these lands.

Maintain and Conserve Forests

Goal: Support a strong, but flexible, Land Use Planning System as a cornerstone of maintaining Oregon's forests on private lands.

Since the inception of Oregon's pioneering and nation leading land use laws, the state has lost less than three percent of existing wildland forest. This retention is significant from both a carbon potential and ecosystem perspective. Beyond limiting the conversion of forestlands, afforestation is a significant opportunity to advance forest carbon, ecosystem, and economic values and will be an objective of the Department. The Department will continue to work with its sibling agencies to support and maintain this land use system through risk identification, technical support, and striving to maintain the current scope of law, and where possible and in line with previously highlighted efforts to not only maintain, but increase the amount of forestland protected by these land use laws.

Conservation and resilient restoration of the forest resource is another key area where the Department can work cooperatively with other agencies, nongovernmental organizations, tribes, and private individuals and companies to find ways to conserve valuable forested areas. This will be key as areas of climate refugia become increasingly threatened and are identified for additional protection. Conservation and preservation of these key areas will be important in maintaining healthy habitat for forest dwelling species, ameliorating the impacts of climate change on forest abiotic factors such as stream temperature, sediment transfer, and water quality.

Research and Monitoring

Goal: Maintain a research and monitoring program to track the status and trends of ecological, economic, and social indicators and the effects of climate change and to track progress related to this plan.

Governments, organizations, scientists, and researchers across the planet are deeply involved in research to understand the climatic effects of rising greenhouse gas concentrations in the atmosphere and the effects on forests and other ecosystems. The Department is committed to using this research and understanding to fully implement climate-smart forestry as laid out in this plan. Some of the major questions currently being explored include:

- To what extent will forest ecosystems change in response to rising atmospheric CO₂?
- What processes in forest ecosystems are sensitive to climate change, and the related physical and chemical changes?
- How will future physical and chemical climate changes influence the structure, function, and productivity of forests and other ecosystems?
- What factors influence whether forests are a net source or sink of carbon relative to the atmosphere?
- What are the implications for forest management and how must forest management activities be altered to sustain forest productivity, health, and diversity?
- What are the most effective practices and policies for increasing carbon sequestration and storage in Oregon's forests in the near-term?
- What are the most effective practices and policies for improving climate resilience in Oregon's forests in the near term?
- What are the risks and benefits of utilization of alternative seed zones or species when considering assisted migration or switching species.

A region's climate is a major controlling factor on the productivity and health of forest ecosystems, the composition of trees and other species, and the dynamics of wildfire. Long-term changes in climate that will continue to occur with rising concentrations of greenhouse gases will continue to affect the health, productivity, and wildfire regimes of Oregon's forest ecosystems. Understanding the impacts of climate change on the benefits we value and expect from Oregon's forests requires a robust, long-term research and monitoring system that provides reliable information reported on a regular basis.

The goal of research and monitoring is to regularly collect information upon which reliable analyses can be conducted so that we can maintain and improve our ability to track the status and trends of the natural resources under our stewardship, project the dynamics of forests health and function, and assess and adequately respond to anticipated outcomes of our management decisions. Understanding the status and trends of natural resources is fundamental to our ability to adaptively manage them with informed responses to current and future conditions. In essence, the goal of research and monitoring is to collect, analyze and deliver information that is relevant to policy and management operations. Monitoring the effectiveness of actions is essential

to inform and adjust management in a changing world. Reliable information and analysis from research and monitoring will be fundamental to our ability to adapt to climate change, maintain ecosystem resilience, and continue production of ecosystem services.









Monitoring changes and trends in forests and forestry is a long-term prospect that must be supported through time, thus embedding the monitoring process is crucial. While there must be a long-term objective to the monitoring, it is also essential that results are delivered within a reasonable timeframe to support imminent decisions and provide feedback for adjusting methods. Addressing social, environmental as well as economic issues in forests and forestry requires that a large number of relevant variables are included in the monitoring and assessment design relating to biophysical as well as socio-cultural dimensions. Actively providing results to the policy dialogue and the debate on implications and responses is an integral part of the monitoring and assessment process.


The Department has established active research and policy relationships with federal, academic, and stakeholder partners and neighboring states to assess and account for forest carbon and impacts of climate change. The Pacific Temperate Forest Memorandum of Understanding^{xiii} (Oregon, California, Washington, and British Columbia) formalizes this relationship and involves active research participation and support around regional forest carbon and climate change. The policy and research efforts vary but relate directly to the relationship between carbon, climate and Oregon's forests and natural working lands.

Supporting the suite of carbon and climate goals referenced in this plan requires that there be robust monitoring followed by adaptation measures where issues are identified. The complexity of the natural and managed systems inherent in 21st century forestry requires that efforts to constantly increase the knowledge base will be needed in the both the near-term and the long-term.

Supporting Actions

Note on Supporting Actions: Supporting actions are linked to multiple **Goals** (listed above). Depending on the action, impacts can and will extend to several goals, they are not limited to a one-to-one goal relationship. These **supporting actions** will be incorporated into agency planning, which includes documents and processes like Board Work Plans, Forest Management Plan, Implementation Plans, and Annual Operating Plans, among others. Many of these other plans and processes lay out, in short time segments (e.g., biennium), what the Department’s work will be. Icons indicate which goal(s) each action is linked to.

	Climate-Smart Forestry in Silviculture
	Fire Management, Response and Fire / Smoke Adapted Communities
	State Forests Management
	Forestlands Climate Resilience and Ecological Function Restoration
	Urban and Community Forests
	Reforestation and Afforestation
	Maintain and Conserve Forests
	Research and Monitoring

Integration of Statewide Climate Plans and Frameworks, Increase Cross Agency Collaboration: 

Agencies within Oregon state government have been coordinating and working on a variety of climate change adaptation, mitigation, and related planning processes. This includes, but is not limited to, the Statewide Climate Adaptation Framework, the Natural Hazards Mitigation Plan, and the 100-Year Water Vision. The Department should be informed by and align its policies and operations with these plans and processes that have been collaboratively developed and thoroughly vetted through various agencies and government levels as they provide a clear and readily usable guide or framework on how to build adaptation and mitigation into the agency. Additionally, the Oregon Global Warming Commission has been directed to develop goals related to climate change and natural and working lands. These goals should be

utilized to guide the Department as it works to implement programs aimed at greenhouse gas emissions reductions and carbon sequestration projects.

Integrate Climate Change in FPA Rule Revision Processes:    

Incorporating climate change into rule development and revision – Thorough analysis of the FPA for climate change sufficiency: Through the analysis of existing rules and policies and guided by the robust, reviewed scientific literature, the Department will identify where there are gaps in protection, adaptation, mitigation, resilience, and restoration actions related to climate change that fall under the FPA. This has begun with analysis of the statutory authority the Board has in developing FPA rules and will be continue by an agency analysis of individual rules. Where resource degradation is identified, the board may opt to undertake its rule making authority to change or enhance the FPA rules.

Climate-Smart Forestry Incentives on Private Forestlands:    

Incentivizing climate-smart forestry – one leg of the three-legged stool of the Department’s interaction with forestland owners and managers is voluntary measures. Through agency identification and facilitation of means to incentivize the adoption of climate-smart forestry practices, those that choose to participate, will receive assistance (primarily monetary) they need to realize and implement actions on the landscape and in forestland decisions beginning with species selection, diversity, management, and harvest regimes.

Providing public recognition of those that are innovative and impactful in stewardship towards mitigating global warming and adapting to climate change. Recognition of operators and organizations that innovative and work to implement climate-smart forestry practices, harvest, and utilization in a manner that advances climate aware, climate-smart, and ecosystem conscious outcomes. To date, there has not been specific recognition of forest conservation, innovation, and long-term stewardship in Oregon. The Department will institute annual recognition that highlights landowners, organizations, or managers that are innovative and working towards stewardship and/or addressing the impacts of climate change in their practices. For example, this

could include actions that support resilience, habitat, carbon storage, sequestration, or protection and/or increase of forestlands, the incorporation of climate justice practices into land management decisions, or other stewardship action on climate change.

Forest Management Plan and State Forests Carbon Storage: 

Incorporate climate change into the Forest Management Plan (FMP) process – Board of Forestry lands and state lands overseen by the State Forests division are managed under an FMP. Integration of these supporting actions will take place through the State Forests management planning processes including the FMP. In line with Executive Order 20-04, this plan should integrate climate mitigation and adaptation practices including those listed below:

- Slowly extend harvest rotations to increase storage while maintaining wood fiber flow to the forest industry^{xiv}.
- Identify areas particularly susceptible to the deleterious effects of climate change and work to conserve them. This includes climate-sensitive habitats, areas of high conservation value, and areas of cultural significance that may become threatened by climate change. This should be done with input from tribal and community-based organizations.
- Explore aspects of community forests and operationalize these interests and facets to the extent practical. Support local non-private forest ownership to meet the goals of the community. Public-private partnerships may provide communities with a greater ability to successfully manage the forests that surround and support them.
- Restore insect and disease impacted areas to productive forests through removal of susceptible species and use of site appropriate species. An example of such areas would be stands in the Coast Range impacted by Swiss needle cast that have greatly slowed or ceased measurable growth. These stands should be managed to restore ecosystem services, including carbon sequestration, through use of appropriate alternative species and stand management.
- Identify areas that have high carbon storage potential, especially for those that can provide benefits for threatened and endangered species habitat, water

quality, and educational and recreation opportunities for Oregonians. Establish priorities for these areas that include long-term carbon storage.

- Identify and operationalize carbon storage in harvest operations. Establish a mechanism to maintain forest carbon on the site when stands are harvested by increasing soil carbon with woody debris, utilization of biochar creation to dispose of slash instead of pile burning, and additional alternatives to burning biomass in the forest.

Internal Carbon Pricing Process – Many global organizations have begun to integrate an internal carbon price in their decision making. The internal carbon price represents the price of carbon that would result in a change to their business practices. For forestry, it could be a variety of measures from selling carbon offsets to adjusting harvest to capitalize on changing long-lived product ratios. The Department, and specifically the State Forest Division, should work towards determining an internal carbon price for the lands and forests that it manages. Having this information incorporated into future forest management planning and decisions will allow the State Forest Division to implement carbon-smart forestry on Board of Forestry and Common School Fund forestlands throughout the state.

Managing the Fire Environment: (Prescribed Burning, Predefined Incident Objectives, Post-Fire Restoration): 

Operationalize Shared Stewardship to accelerate the pace, scale, and quality of Federal Forest Restoration to increase resilience to increased wildfire severity and restore ecological function. Incorporate resource and community severity and risk assessments in directing restoration and resiliency action and investments. Support implementation of the Governor’s Council on Wildfire Response recommendations.

Implement a prescribed fire program within the Department and work with outside agencies to gain the needed experience and tools for conducting safe, successful burns in degraded landscapes. Capacity and direction to establish this work was provided by the Legislature in the 2021 legislative session.


Continue and increase landowner assistance and incentives to reduce the impact of wildfires on private forestlands, particularly those in the smaller ownership classes

utilizing both State and Federal funds. Financial and some staffing capacity to provide this assistance was provided by the Legislature in the 2021 legislative session through Senate Bill 762.

Work with landowners and managers, large and small, to create resilient landscapes. Work with the same landowners and managers to identify areas that can have alternative priorities for fire suppression. The results would be pre-identified actions that may take place based on the burning environment at the specific time and the anticipated impact the fire would have. The ultimate aim would be appropriately returning fire to natural systems.

Working with state, federal, and nonprofit resources, the agency can work with affected landowners to restore ecosystem function and carbon sequestering trees to fire affected areas. While we do not want to lose ground to uncontrolled wildfires, replanting post-fire will help minimize the carbon impact of the fire. This issue, like fire, crosses boundaries and addressing forest restoration is needed across all land ownerships.

As with climate-smart forestry, the agency should work to develop fire-smart management when undertaking projects related to fire mitigation, restoration, or community hardening. These can include, but are not limited to, planting an appropriate species selection, alternative spacing, and incorporation of fire breaks and control points when planning projects.

Community Resilience and Adaptation: 

Working closely with partner agencies (DLCD, OSFM, OEM, OHA, etc.), the Department has the potential to create a more resilient fire landscape. ODF recognizes that it does not have the statutory authority, guidance, or financial resources to work in the built environment, but more frequently the wildfire and forest environment and the urban and built environment occupy the same locations. This requires increased cooperation across agencies and stakeholders. Pursuing additional cooperative relationships with other agencies will strengthen the Department's ability to implement the goals of this plan and provide benefit to the partners as well.

Afforestation of Low Productivity Lands:



Consideration of native and culturally significant species can play an important role in afforestation activities. Many of the species that were historically present within respective ranges are expected to be more drought tolerant than the higher elevation conifers that have replaced them. Species like Oregon white oak and the Willamette Valley ponderosa pine variant are more drought tolerant and may be better options for reforestation or afforestation where there has recently been drought and heat-induced mortality of other species. Encouraging a mix of species both in the over story and the under story will play a role in enhancing forest resiliency to climate change in coming decades.

The Department will explore the various resources that are available to support and advance afforestation efforts throughout the state where such actions would be supported. Working closely with the ODF seed orchard and seed bank to identify proper species and seed zone plantings will also be key, otherwise there is the risk of exacerbating the unwanted biotic and abiotic effects on the afforested areas.

The Department will work closely with industry, particularly the forest nursery industry, to ensure that there is an ample supply of seedling trees for these initiatives and that well suited and adapted trees go in the right places.

There may be a place for the use of genetically improved trees to increase the uptake of carbon by the trees or to ensure that they are resilient in the anticipated climate envelopes that they will be planted in. Genetic improvement of tree species has been taking place for centuries, largely to achieve greater fiber yields and increasing desirable form.

Further use of native, resilient species, like the Willamette Valley ponderosa pine variant, will help to lessen the risk of mortality to maladapted species in the lower elevations of western Oregon. Similar examples exist for other ecoregions of the state.

Afforestation of low productivity lands in the urban environment needs to be done in conjunction with urban planners, the local communities, and organizations that represent climate-impacted communities, especially Black, indigenous, and people of color (BIPOC) communities. It is important to ensure that they have ample input.

Maintenance and Expansion of the Urban Tree Canopy: 🏠

The Department looks to establish a grant program of \$2 million per year to empower local communities to invest in urban canopy that meets their needs. This will need long-term legislative support that the Department will work to build in future legislative sessions.

The Department will seek to increase its ability, support its footprint in urban and community spaces by increasing staff and capacity, creating liaison positions to support local communities (beyond the municipal paradigm) and to work with those communities so that the urban tree canopy receives appropriate monitoring, care, and remains healthy, and also to facilitate expansion so that the inherent benefits therein can be extended.

Forest Carbon Finance and Markets: 🌲👤🌱🛑

While ODF has the statutory authority to implement a forest carbon offset program (ORS 526.780 to 526.789), it has not had the staffing capacity or demand to progress into rulemaking and program development. Principles guiding the establishment of a carbon finance program within the Department will be developed and will largely focus on the areas that the Department has historically succeeded in. These include providing education and technical assistance to partner organizations, landowners, forest managers, the public, and stakeholders. These efforts will focus on the availability of both governmental regulatory programs (e.g., California market) and non-governmental voluntary carbon markets. Much of this will focus on the need for projects to have accountability, durability, and additionally.

There has been significant growth in the voluntary markets for carbon projects in recent years and large corporate entities have been providing funding to offset their carbon footprints to a variety of different private and non-governmental organizations. The Department may be able to facilitate the utilization of these programs by supporting and coordinating these interests by bundling, aggregating, or creating a clearinghouse of options for landowners to become involved while facilitating these opportunities.

Additional programs to establish Carbon Easements through financial payments may become available through the Department's Federal partners. In this case, the

Department may look to its established relationships with these partners to help landowners be successful in establishing and maintaining these easements. As previously noted, these are not projects that a manager can walk away from, there will need to be some amount of work done to maintain the health and function of these forest lands, even to maximize their carbon storage potential.

With the direction provided to the Department of Environmental Quality (DEQ) and the Environmental Quality Commission (EQC) by EO 20-04 regarding programs to cap and reduce GHG emissions in several sectors, ODF will coordinate with their rulemaking processes regarding any development of forest carbon offsets that are linked to those new programs. The Department will communicate with DEQ and seek inclusion in this program development work over the next 18 months as it relates to forest carbon. Staffing capacity will likely continue to be an issue for the Department and may provide a barrier to the development of the forest carbon finance program.

Mid-term Timber Harvest Deferral: 

Recent studies (Graves 2018) have highlighted the carbon benefits of deferring harvest in the mid-term. Working with partners to incentivize landowners to defer harvest voluntarily can lead to greater sequestration and storage over the next 30 to 50 years (e.g., 2050-2070), a period when our natural and working lands will be leaned on heavily until technologies and other sectors can catch up and work to reduce atmospheric carbon. This mechanism would rely on easements, active management for resilient landscapes, and efforts to increase the resiliency of enrolled programs through thinning and appropriate forest management practices.

Monitoring: 

Past, Present, and Future Forest Carbon Research:

The Department has been and continues to be involved with assessing the storage and flux of carbon both in the forest and in post-harvest activities. This work forms the backbone of the forest carbon accounting framework and is cooperatively done across government levels and across state boundaries. These reports and research are

intended to be periodically updated with new measurements and monitoring efforts to ensure that there is appropriate accounting onto the future.

Examples of these efforts include:

- Forest Carbon Sequestration and Flux – The Department has worked cooperatively with the USDA Forest Service Pacific Northwest Research Station (PNWRS), research institutions, and stakeholders to produce the Forest Ecosystem Carbon Report (FECR) that quantifies the amount of carbon that is currently stored in Oregon’s forests. The report is intentionally consistent with forest carbon reporting in California and Washington to facilitate regional analysis and comparison. This methodology has helped establish a baseline for the storage and flux of carbon in forest ecosystems across the Pacific coast region. This approach is a critical aspect to understanding and informing carbon and climate policy within and beyond Oregon. Forest ecosystem carbon reporting in Oregon will be iterative, utilizing ongoing federal Forest Inventory Analysis (FIA) data collection across all forestland ownerships and will continue to be dynamic and current with updates expected as field plots are remeasured.
- Wood Product Carbon Flux – the Department with the PNWRS and State partners to produce a report on the storage and flux of carbon in harvested wood products (HWP). This report provides estimates of carbon in products currently in use, in landfills, and emitted from burning and decay (by ownership) based on timber harvests in Oregon since 1906. This report was completed in spring 2021 along with an assessment of sawmill energy usage and production in Oregon. The Department included a stakeholder committee during the production of both the Forest Ecosystems Carbon Report and the Harvested Wood Products Carbon Report. This research and reporting provide a vital linkage with the flow of carbon out of forest pools to utilization. Work like the FECR and the HWP is being conducted in a manner comparable to neighboring state partners, providing a necessary mechanism for tracking carbon flows and utilization regionally.
- Scenario Planning and Management Projections – The Department is currently collaborating with the PNWRS, and the other signatories of the Pacific Temperate Forest MOU in a co-production effort to model the benefits and consequences of alternative forest management scenarios for carbon mitigation.

There is ongoing, broad-level stakeholder involvement, with outreach to those most impacted. This work is part of a long-term initiative within the PNWRS that includes numerous staff from various natural resource agencies and organizations. With completion of this work, the Department will be able to present projected impacts of various forest management scenarios and the implications for forest carbon. It is anticipated that this work will be completed within the next few years with a variety of intermediate products along the way.

Additional monitoring work that is ongoing or anticipated in the future include:

- Accounting of forestry related carbon impacts. To make management decisions related to reducing emissions, the emissions of the possible actions need to be established. This would include estimates ranging from post-harvest pile burning, broadcast burning for restoration and climate change resilience efforts, the emissions from operations, and fleet emissions including during fire suppression activities. Having a full accounting, and identifying where there is room for improvement, will help the Department and the sector recognize the areas to focus on. It will also show where there is space to work with sibling agencies to reduce emissions (e.g., DEQ for smoke management or ODOT for transportation).
- Quantify carbon stocks, fluxes and use in Oregon's forest carbon pools using the standards of the Intergovernmental Panel on Climate Change (IPCC), the United Nations body for assessing the science related to climate change.
- Continue to produce the Oregon Forest Ecosystem Carbon Inventory Report on a biennial basis.
- Continue to produce the Oregon Harvested Wood Products Carbon Report on a five-year cycle.
- Continue to produce the Forests, Farms, and People: Land Use Change on Non-Federal Land in Oregon and on a five-year cycle.
- Continue implementing an urban forestry inventory to quantify the climate benefits of Oregon's urban and community forests.

- Continue to actively participate and implement the Memorandum of Understanding on Pacific Coast Temperate Forests, sharing and exploring advances in forest-related science and data collection to better understand how forests are responding to changes in climatic conditions.
- Monitor effectiveness and implementation of new climate-centered forest practices policies (statutes, rules, and voluntary measures).
- Look at decomposition rates in different management scenarios/methods and disturbance types vs utilization mechanisms.
- Assess regeneration in post-fire for areas impacted at different fire return intervals, severities, and locations to consider the impacts of a changing climate.

Incorporation of Climate Change and Climate Change Impact in Agency Planning

Processes: 

Climate change needs to be a foundational consideration in all agency planning processes. From the top levels (Forestry Plan for Oregon, Agency Strategic Plan, Forest Action Plan) to the day-to-day plans (Annual Operating Plans, Implementation Plans, etc.), climate change should inform the work that is prioritized. Resources should be specifically dedicated to adaptation, mitigation, and resilience work. Leadership and management at all levels of the organization need to work to institutionalize the climate tools at their disposal, from species selection to fire planning, and ensure that their staff are equipped to appropriately implement climate-smart principles and practices throughout the agency.

Encourage Low Carbon Impact Materials in Oregon: 

Work to encourage utilization of low carbon impact materials and processes by working with sibling agencies, through incentives and support within and between other sectors, and by providing carbon impact accounting for harvested wood products. Having the embedded carbon footprint available will support utilization of long-lived, low

embodied carbon and allow consumers to make educated and informed decisions about the products that they choose to utilize.

Future Work Needs

Below are a selection of the multiple needs for the Department to work on at different time scales (not in any priority rank). These needs are generally administrative or planning related as opposed to the more resource focused Supporting Actions. Work to address many of these needs has already begun and others are in the planning stage or have been identified for further work. The timeline for each varies, but the length of time needed is generally less than the supporting actions listed previously. Overlap does exist between short and long-term needs.

Near Term: (begin or complete within one biennium)

- Incorporate DEI in decisions made at the agency and Board of Forestry.
- Request Department of Justice assessment of Measure 49 impact on implementation of climate goals.
- To the extent practicable, utilize alternative species or seed zones to adapt to a changing climate envelope and the impacts of that on mitigation efforts.
- Clearly and concisely prioritize landscapes for restoration and resiliency treatments that may include protection of climate refugia (SB 762 and 20-Year Plan).
- Integrate climate change in the complete and coordinated fire response strategy.
- Align budget requests and priorities to cope with a changing climate. Build Requests to increase staffing capacity to meet the needs presented with additional climate focus.
- Purchase electric vehicles and install electric charging infrastructure at all ODF locations.
- Wholesale Department Carbon Footprint and Monitoring for facilities and vehicle fleet.

- Incorporate more remote work for personnel where appropriate.

Long Term: (continues beyond one biennium)

- Incorporate DEI in decisions made at the agency and Board of Forestry.
- Consider utilizing alternative species or seed zones to adapt to a changing climate envelope and the impacts of that on mitigation efforts.
- Clearly and concisely prioritization of landscapes for restoration and resiliency treatments that may include protection of climate refugia.
- Consideration of climate change in the complete and coordinated fire response strategy.
- Align budget requests and priorities to cope with a changing climate.

Supplemental Information

Urban and Community Forestry

- Oregon's climate adaptation framework identified Risk #1 Increase in average annual air temperatures and likelihood of extreme heat events. “Heat waves will result in increased deaths and illness among vulnerable human populations. The elderly, infants, chronically ill, low-income communities, and outdoor workers are the main groups threatened by heat waves.”
- Vivek Shandas and others of Portland State University have shown that lower income areas of the Portland Metropolitan area have lower air quality because of lack of urban trees.
- Hoffman and others showed 94% of 108 studied urban areas display consistent city-scale patterns of elevated land surface temperatures in formerly redlined areas relative to their non-redlined neighbors by as much as 7 C, with an average difference of 2.6 C.

Forestry Plan for Oregon

USFS Climate Adaptation Partnerships:

- [Blue Mountains](#)
- [Columbia River Gorge National Scenic Area, Mount Hood National Forest, and Willamette National Forest](#)
- [Oregon Coast](#)
- [South Central Oregon](#)
- [Southwestern Oregon](#)

IPCC Sixth Assessment Report: The Physical Science Basis

Oregon Climate Change Research Institute 5th assessment

Forest Ecosystem Carbon Report

Harvested Wood Products Report and Sawmill Energy Report

Oregon Department of Justice Statutory Authority Analysis on the Board of Forestry's Authorities around Climate Change

Statewide Climate Adaptation Framework

- [Equity Blueprint](#)

[Natural Hazard Mitigation Plan](#)

[100-Year Water Vision](#)

References

- ⁱ Gert-Jan Nabuurs, Pieter Johannes Verkerk, Mart-Jan Schelhaas, José Ramón González Olabarria, Antoni Trasobares and Emil Cienciala. 2018. Climate-Smart Forestry: mitigation impacts in three European regions. From Science to Policy 6. European Forest Institute.
- ⁱⁱ IPCC, 2018: Global Warming of 1.5°C. An IPCC Special Report on the impacts of global warming of 1.5°C above pre-industrial levels and related global greenhouse gas emission pathways, in the context of strengthening the global response to the threat of climate change, sustainable development, and efforts to eradicate poverty [Masson-Delmotte, V., P. Zhai, H.-O. Pörtner, D. Roberts, J. Skea, P.R. Shukla, A. Pirani, W. Moufouma-Okia, C. Péan, R. Pidcock, S. Connors, J.B.R. Matthews, Y. Chen, X. Zhou, M.I. Gomis, E. Lonnoy, T. Maycock, M. Tignor, and T. Waterfield (eds.)]. 2019.
- ⁱⁱⁱ Dalton, M., and E. Fleishman, editors. 2021. Fifth Oregon Climate Assessment. Oregon Climate Change Research Institute, Oregon State University, Corvallis, Oregon. <https://blogs.oregonstate.edu/occri/oregon-climate-assessments>
- ^{iv} IPCC, 2021: Summary for Policymakers. In: Climate Change 2021: The Physical Science Basis. Contribution of Working Group I to the Sixth Assessment Report of the Intergovernmental Panel on Climate Change [Masson-Delmotte, V., P. Zhai, A. Pirani, S. L. Connors, C. Péan, S. Berger, N. Caud, Y. Chen, L. Goldfarb, M. I. Gomis, M. Huang, K. Leitzell, E. Lonnoy, J.B.R. Matthews, T. K. Maycock, T. Waterfield, O. Yelekçi, R. Yu and B. Zhou (eds.)]. Cambridge University Press. In Press.
- Halofsky, Jessica E.; Peterson, David L.; Gravenmier, Rebecca A., eds. 2020. Climate change vulnerability and adaptation in the Columbia River Gorge, Mount Hood National Forest, and Willamette National Forest. Gen. Tech. Rep. PNW-GTR-xxx. Portland, OR: U.S. Department of Agriculture, Forest Service, Pacific Northwest Research Station. In Press
- ^v Ibid
- ^{vi} Halofsky, Jessica E.; Peterson, David L.; Gravenmier, Rebecca A., eds. 2020. Climate change vulnerability and adaptation in the Columbia River Gorge, Mount Hood National Forest, and Willamette National Forest. Gen. Tech. Rep. PNW-GTR-xxx. Portland, OR: U.S. Department of Agriculture, Forest Service, Pacific Northwest Research Station. In Press
- ^{vii} 2021 STATE AGENCY CLIMATE CHANGE ADAPTATION FRAMEWORK, https://www.oregon.gov/lcd/CL/Documents/2021_CLIMATE_CHANGE_ADAPTATION_FRAMEWORKandBIueprint.pdf
- ^{viii} DOJ Statutory Analysis around Climate Change <https://www.oregon.gov/odf/board/bof/20201104-bof-agenda.pdf>
- ^{ix} Morgan, T.A., Donahue, T.S., Dillon, T., Yost, A.C., Groom, J. 2020. Oregon Harvested Wood Products Carbon Inventory 1906-2018. Technical report completed by the Bureau of Business and Economic Research at University of Montana. Available at: <https://www.oregon.gov/odf/Documents/forestbenefits/oregon-harvested-wood-products-carbon-inventory-report-1906-2018.pdf>
- ^x Raymond Davis, Zhiqiang Yang, Andrew Yost, Cole Belongie, Warren Cohen, The normal fire environment— Modeling environmental suitability for large forest wildfires using past, present, and future climate normals, Forest Ecology and Management, Volume 390, 2017, Pages 173-186, <https://doi.org/10.1016/j.foreco.2017.01.027>
- ^{xi} Cook-Patton, Susan C., et al. "Lower cost and more feasible options to restore forest cover in the contiguous United States for climate mitigation." One Earth 3.6 (2020): 739-752

^{xii} Graves, Rose A., et al. "Potential greenhouse gas reductions from Natural Climate Solutions in Oregon, USA." PloS one 15.4 (2020): e0230424.

^{xiii} Memorandum of Understanding Pacific Coast Temperate Forests.
https://www.oregon.gov/odf/board/bofarchives/20191106/1.1_BOFMIN_20191106_02_MOU%20Pacific%20Coast%20Temperate%20Forests.pdf

^{xiv} Graves, Rose A., et al. "Potential greenhouse gas reductions from Natural Climate Solutions in Oregon, USA." PloS one 15.4 (2020): e0230424.



EXECUTIVE ORDER NO. 20-04

**DIRECTING STATE AGENCIES TO TAKE ACTIONS TO REDUCE AND
REGULATE GREENHOUSE GAS EMISSIONS**

WHEREAS, climate change and ocean acidification caused by greenhouse gas (GHG) emissions are having significant detrimental effects on public health and on Oregon's economic vitality, natural resources, and environment; and

WHEREAS, climate change has a disproportionate effect on the physical, mental, financial, and cultural wellbeing of impacted communities, such as Native American tribes, communities of color, rural communities, coastal communities, lower-income households, and other communities traditionally underrepresented in public processes, who typically have fewer resources for adapting to climate change and are therefore the most vulnerable to displacement, adverse health effects, job loss, property damage, and other effects of climate change; and

WHEREAS, climate change is contributing to an increase in the frequency and severity of wildfires in Oregon, endangering public health and safety and damaging rural economies; and

WHEREAS, the world's leading climate scientists, including those in the Oregon Climate Change Research Institute, predict that these serious impacts of climate change will worsen if prompt action is not taken to curb emissions; and

WHEREAS, the Intergovernmental Panel on Climate Change has identified limiting global warming to 2 degrees Celsius or less as necessary to avoid potentially catastrophic climate change impacts, and remaining below this threshold requires accelerated reductions in GHG emissions to levels at least 80 percent below 1990 levels by 2050; and

WHEREAS, Oregon, as a member of the U.S. Climate Alliance, has committed to implementing policies to advance the emissions reduction goals of the international Paris Agreement; and

WHEREAS, GHG emissions present a significant threat to Oregon's public health, economy, safety, and environment; and





EXECUTIVE ORDER NO. 20-04

PAGE TWO

WHEREAS, the transition from fossil fuels to cleaner energy resources can significantly reduce emissions and increase energy security and the resilience of Oregon communities in the face of climate change; and

WHEREAS, emissions from the transportation sector are the single largest source of GHG emissions in Oregon; and

WHEREAS, actions to reduce GHG emissions in Oregon's transportation sector will provide substantial public health co-benefits by reducing air pollutants from the combustion of gasoline and diesel fuel that are harmful to human health; and

WHEREAS, the rapid transition from internal combustion engines to zero-emission vehicles will play a key role in reducing emissions from the transportation sector and advancing the state's GHG emissions reduction goals; and

WHEREAS, zero-emission vehicles provide multiple benefits to Oregonians, including lower operating, maintenance, and fuel costs, and lower emissions of GHGs and other pollutants; and

WHEREAS, the Legislature established ambitious goals for the adoption of zero-emission vehicles in Senate Bill 1044 (2019); and

WHEREAS, rapid actions and investments by Oregon's utility sector to reduce GHG emissions and improve the resilience of the energy system in the face of climate change and wildfire risk can reduce risks for utility customers; and

WHEREAS, transitioning the traditional natural gas supply to renewable natural gas can significantly reduce GHG emissions; and

WHEREAS, energy efficiency standards in the built environment can reduce operating costs, save renters and homeowners money on their utility bills, improve the comfort and habitability of dwellings, and reduce GHG emissions; and

WHEREAS, product energy efficiency standards reduce costs for consumers, save energy, and reduce GHG emissions; and





EXECUTIVE ORDER NO. 20-04

PAGE THREE

WHEREAS, in the absence of effective federal engagement on these issues, it is the responsibility of individual states to take immediate actions to address climate change and ocean acidification; and

WHEREAS, after thorough hearings within the Oregon Legislature, a majority of both chambers support addressing climate change, and the failure of the Oregon Legislature to attain quorum has thwarted legislative action to achieve science-based GHG emissions reduction goals; and

WHEREAS, given the urgency and severity of the risks from climate change and ocean acidification, and the failure of the Legislature to address these immediate harms, the executive branch has a responsibility to the electorate, and a scientific, economic, and moral imperative to reduce GHG emissions and to reduce the worst risks of climate change and ocean acidification for future generations, to the greatest extent possible within existing laws; and

WHEREAS, existing laws grant authority to state agencies to take actions to regulate and encourage a reduction of GHG emissions in a variety of circumstances; and

WHEREAS, the Legislature through the Emergency Board took action on March 9, 2020, to provide permanent funding to the executive branch to pursue executive action on reducing GHG emissions; and

WHEREAS, considering climate change in agency planning and decision making will help inform decisions regarding climate change risks and avoid higher mitigation and adaptation costs in the future; and

WHEREAS, all agencies with jurisdiction over the sources of GHG emissions will need to continue to develop and implement programs that reduce emissions to reach the state's GHG goals; and

WHEREAS, all agencies with jurisdiction over natural and working landscapes in Oregon will need to prepare and plan for the impacts of climate change and take actions to encourage carbon sequestration and storage; and





EXECUTIVE ORDER NO. 20-04
PAGE FOUR

WHEREAS, the Legislature previously established the goal of achieving GHG levels “at least 75 percent below 1990 levels” by 2050, and our State has an urgent, moral obligation to set and achieve more ambitious GHG reduction goals.

NOW, THEREFORE, IT IS HEREBY DIRECTED AND ORDERED:

1. **State Agencies.** The following state commissions and state agencies are subject to the directives set forth in this Executive Order:
 - A. Business Oregon;
 - B. Department of Administrative Services (DAS);
 - C. Department of Consumer and Business Services Building Codes Division (BCD);
 - D. Department of Land Conservation and Development (DLCD) and Land Conservation and Development Commission (LCDC);
 - E. Environmental Justice Task Force;
 - F. Environmental Quality Commission (EQC) and Department of Environmental Quality (DEQ);
 - G. Oregon Department of Agriculture (ODA);
 - H. Oregon Department of Energy (ODOE);
 - I. Oregon Department of Fish and Wildlife (ODFW);
 - J. Oregon Department of Forestry (ODF);
 - K. Oregon Department of Transportation (ODOT) and Oregon Transportation Commission (OTC);
 - L. Oregon Global Warming Commission;
 - M. Oregon Health Authority (OHA);
 - N. Oregon Water Resources Department (OWRD);
 - O. Oregon Watershed Enhancement Board (OWEB); and
 - P. Public Utility Commission of Oregon (PUC).





EXECUTIVE ORDER NO. 20-04

PAGE FIVE

2. **GHG Emissions Reduction Goals.** Consistent with the minimum GHG reduction goals set forth in ORS 468A.205(1)(c), this Executive Order establishes science-based GHG emissions reduction goals, and calls for the State of Oregon to reduce its GHG emissions (1) at least 45 percent below 1990 emissions levels by 2035; and (2) at least 80 percent below 1990 emissions levels by 2050.

3. **General Directives to State Agencies.** From the date of this Executive Order, the state commissions and state agencies listed in paragraph 1 are directed to take the following actions:
 - A. **GHG Reduction Goals.** Agencies shall exercise any and all authority and discretion vested in them by law to help facilitate Oregon's achievement of the GHG emissions reduction goals set forth in paragraph 2 of this Executive Order.
 - B. **Expedited Agency Processes.** To the full extent allowed by law, agencies shall prioritize and expedite any processes and procedures, including but not limited to rulemaking processes and agency dockets, that could accelerate reductions in GHG emissions.
 - C. **Agency Decisions.** To the full extent allowed by law, agencies shall consider and integrate climate change, climate change impacts, and the state's GHG emissions reduction goals into their planning, budgets, investments, and policy making decisions. While carrying out that directive, agencies are directed to:
 - (1) Prioritize actions that reduce GHG emissions in a cost-effective manner;
 - (2) Prioritize actions that will help vulnerable populations and impacted communities adapt to climate change impacts; and
 - (3) Consult with the Environmental Justice Task Force when evaluating climate change mitigation and adaptation priorities and actions.
 - D. **Report on Proposed Actions.** The following agencies are directed to report to the Governor by May 15, 2020, on proposed actions within their statutory authority to reduce GHG emissions and mitigate climate change impacts: DEQ, DLCD, ODA, ODOE, ODFW, ODF, ODOT, OWRD, OWEB, and PUC.





EXECUTIVE ORDER NO. 20-04

PAGE SIX

E. Participation in Interagency Workgroup on Climate Impacts to Impacted Communities. The Governor's Office will convene an interagency workgroup on climate impacts to impacted communities to develop strategies to guide state climate actions, with participation by the following agencies and commissions: DEQ, DLCD, ODA, ODF, ODFW, ODOE, ODOT, OHA, OWEB, OWRD, PUC, Environmental Justice Task Force, Oregon Global Warming Commission, Oregon Parks and Recreation Department, and Oregon Sustainability Board.

4. Directives to the Environmental Quality Commission and the Department of Environmental Quality. In addition to the general directives set forth in paragraph 3, the EQC and DEQ are directed to take the following actions:

- A. Oregon's Clean Fuel Standards. Pursuant to its authority under ORS 468A.265 *et seq.* and other applicable laws, the EQC and DEQ shall take actions necessary to amend the low carbon fuel standards, and the schedule to phase in implementation of those standards, with the goal of reducing the average amount of GHG emissions per unit of fuel energy by 20 percent below 2015 levels by 2030, and 25 percent below 2015 levels by 2035.
- B. Clean Fuel Credits for Electrification. The EQC and DEQ are directed to advance methods accelerating the generation and aggregation of clean fuels credits by utilities that can advance the transportation electrification goals set forth in Senate Bill 1044 (2019).
- C. Sector-specific GHG Cap and Reduce Program. Pursuant to its authority under ORS 468A.005 *et seq.* and other applicable laws, the EQC and DEQ shall take actions necessary to:
- (1) Cap and reduce GHG emissions from large stationary sources of GHG emissions, consistent with the science-based emissions reduction goals set forth in paragraph 2 of this Executive Order;
 - (2) Cap and reduce GHG emissions from transportation fuels, including gasoline and diesel fuel, consistent with the science-based emissions reduction goals set forth in paragraph 2 of this Executive Order; and





EXECUTIVE ORDER NO. 20-04

PAGE SEVEN

- (3) Cap and reduce GHG emissions from all other liquid and gaseous fuels, including natural gas, consistent with the science-based emissions reduction goals set forth in paragraph 2 of this Executive Order.
 - D. Regulation of Landfill Methane Emissions. The EQC and DEQ shall take actions necessary to reduce methane gas emissions from landfills, as defined in ORS 459.005(14), that are aligned with the most stringent standards and requirements for reducing methane gas emissions from landfills adopted among the states having a boundary with Oregon.
 - E. Reduction of Food Waste. The EQC and DEQ are directed to take actions necessary to prevent and recover food waste, with the goal of reducing food waste by 50 percent by 2030, to reduce GHG emissions resulting from such waste, including but not limited to engaging with states and other jurisdictions, industry, food retailers, and brand manufacturers to develop and implement strategies to prevent and recover food waste.
 - F. Timeline and Implementation.
 - (1) No later than May 15, 2020, DEQ shall submit a report to the Governor regarding an estimated timeline for rulemaking necessary for implementing the directives of paragraph 4(A)–(B) and paragraph 4(D)–(E), above.
 - (2) DEQ shall submit a preliminary report to the Governor by May 15, 2020, regarding program options to cap and reduce emissions from large stationary sources, transportation fuels, and other liquid and gaseous fuels that can commence no later than January 1, 2022. A final report shall be due by June 30, 2020.
 - (3) Reports submitted pursuant to paragraph 4 of this Executive Order also should detail DEQ’s plans to engage impacted communities during the rulemaking process, in a manner consistent with ORS chapter 183.
5. Directives to the Public Utility Commission of Oregon. In addition to the general directives set forth in paragraph 3, the PUC is directed to consider the following factors and values, consistent with state law:





EXECUTIVE ORDER NO. 20-04
PAGE EIGHT

- A. Statement of Public Interest. It is in the interest of utility customers and the public generally for the utility sector to take actions that result in rapid reductions of GHG emissions, at reasonable costs, to levels consistent with the GHG emissions reduction goals set forth in paragraph 2 of this Executive Order, including transitioning to clean energy resources and expanding low carbon transportation choices for Oregonians.
- B. Regulatory Considerations. Executive Order 00-06, which ensures that the PUC maintains its independence in decision making, is reaffirmed. The directives in this Executive Order are consistent with Executive Order 00-06. When carrying out its regulatory functions, the PUC is directed to:
- (1) Determine whether utility portfolios and customer programs reduce risks and costs to utility customers by making rapid progress towards reducing GHG emissions consistent with Oregon's reduction goals;
 - (2) Encourage electric companies to support transportation electrification infrastructure that supports GHG reductions, helps achieve the transportation electrification goals set forth in Senate Bill 1044 (2019), and is reasonably expected to result in long-term benefit to customers;
 - (3) Prioritize proceedings and activities, to the extent consistent with other legal requirements, that advance decarbonization in the utility sector, and exercise its broad statutory authority to reduce GHG emissions, mitigate energy burden experienced by utility customers, and ensure system reliability and resource adequacy;
 - (4) Evaluate electric companies' risk-based wildfire protection plans and planned activities to protect public safety, reduce risks to utility customers, and promote energy system resilience in the face of increased wildfire frequency and severity, and in consideration of the recommendations made by the Governor's Council on Wildfire Response 2019 Report and Recommendations;





EXECUTIVE ORDER NO. 20-04

PAGE NINE

- (5) Convening periodic workshops for purposes of assisting electric companies, consumer-owned utilities, and operators of electrical distribution systems to develop and share best practices for mitigating wildfire risk; and
 - (6) In cooperation with Oregon Housing and Community Services, establish a public process to address and mitigate differential energy burdens and other inequities of affordability and environmental justice, including rate design and other programs to mitigate energy burden.
6. **Directives to the Department of Consumer and Business Services Building Codes Division.** In addition to the general directives set forth in paragraph 3, BCD is directed to take the following actions:
 - A. **Energy Efficiency Goal for New Construction.** BCD, through its advisory boards and committees, and in cooperation with ODOE, is directed to adopt building energy efficiency goals for 2030 for new residential and commercial construction. That goal shall represent at least a 60 percent reduction in new building annual site consumption of energy, excluding electricity used for transportation or appliances, from the 2006 Oregon residential and commercial codes.
 - B. **Code Progress and Updates.** BCD, through its advisory boards and committees, and in cooperation with ODOE, is directed to evaluate and report on Oregon's current progress toward achieving the goal for new residential and commercial buildings, pursuant to paragraph 6(A) of this Executive Order, and options for achieving steady progress toward the goal over the next three code cycles (2023, 2026, and 2029). Pursuant to its authority under ORS 455.500, BCD also is directed to update the Reach Code on the same timeline. No later than September 15, 2020, BCD should submit a report to the Governor on current progress and options for achieving the goals over the next three code cycles. The report should be updated every three years thereafter.
 - C. **Baseline Metrics and Reductions.** BCD, in cooperation with ODOE, is directed to agree on metrics, based on best practice and academic research, to inform the baseline and reductions associated with the code updates set forth in paragraph 6(B).





EXECUTIVE ORDER NO. 20-04

PAGE TEN

7. **Directives to the Oregon Department of Energy.** In addition to the general directives set forth in paragraph 3, ODOE is directed to take the following actions:
- A. **Energy Efficiency Standards.** ODOE is directed to pursue emissions reductions by establishing and updating energy efficiency standards for products at least to levels equivalent to the most stringent standards among West Coast jurisdictions, including grid-connected appliances that can be utilized to manage end-use flexible electrical loads. ODOE also is directed to periodically evaluate and update those standards, as practicable, to remain at least equivalent to the most stringent standards among West Coast jurisdictions.
 - B. **Rulemaking.** ODOE is directed to take actions necessary to establish and update energy efficiency standards for products sold or installed in Oregon that include but are not limited to the following:
 - (1) High CRI fluorescent lamps;
 - (2) Computers and computer monitors;
 - (3) Faucets;
 - (4) Shower heads;
 - (5) Commercial fryers;
 - (6) Commercial dishwashers;
 - (7) Commercial steam cookers;
 - (8) Residential ventilating fans;
 - (9) Electric storage water heaters; and
 - (10) Portable electric spas.
 - C. **Timeline.** Any rulemaking necessary to implement the directives set forth in paragraph 7(B) should be completed by September 1, 2020.
 - D. **Third-Party Validation for Cost Savings.** ODOE, in cooperation with BCD, is directed to contract with a third party consulting firm to assess cost implications, including long-term energy cost savings, of the energy efficiency and building code actions set forth in paragraph 6(A)–(B) of this Executive Order.





EXECUTIVE ORDER NO. 20-04

PAGE ELEVEN

8. **Directives to the Department of Administrative Services.** In addition to the general directives set forth in paragraph 3, DAS is directed to take the following actions:
- A. **Procurement Model for Zero-Emission Vehicles.** DAS is directed to develop a statewide policy and plan for state agencies to follow for procuring zero-emission vehicles, which local governments and special government bodies may use as a model program for furthering adoption of zero-emission vehicles for their fleets. The model program shall provide for a rate of procurement of zero-emission vehicles consistent with the findings and goals set forth in ORS 283.398 and the provisions of ORS 283.327. The model program may provide for DAS to participate in, sponsor, conduct, or administer cooperative procurements in accordance with ORS 279A.200 to ORS 279A.225, under which DAS, local governments, and special government bodies may procure zero-emission vehicles.
 - B. **GHG Implications of Contracting.** DAS is directed to review existing state procurement laws and practices to identify potential improvements that can reduce GHG emissions, consistent with the GHG reduction goals set forth in paragraph 2 of this Executive Order. DAS shall provide a report to the Governor no later than September 15, 2020, detailing options.
 - C. **GHG Reduction Goals and Electrification Goals.** DAS is directed to support the state in meeting the GHG reduction goals set forth in paragraph 2 of this Executive Order, and the zero-emission vehicle adoption goals set forth in Senate Bill 1044 (2019), through the rapid conversion of state fleets to zero-emission vehicles, and the expansion of electric vehicle charging infrastructure for public buildings. DAS shall provide a report to the Governor no later than September 15, 2020, detailing its plan.
9. **Directives to the Oregon Transportation Commission, Oregon Department of Transportation, Land Conservation and Development Commission, Environmental Quality Commission, and Oregon Department of Energy.**





EXECUTIVE ORDER NO. 20-04

PAGE TWELVE

- A. In a letter from the Governor, dated September 23, 2019, the OTC, LCDC, EQC, and ODOE were directed to prioritize implementation of the Statewide Transportation Strategy, adopted by the OTC. Those agencies are further directed to include the following elements in their implementation of the Statewide Transportation Strategy:
- (1) Establishment of GHG emissions reduction performance metrics; and
 - (2) Amendments to the Transportation Planning Rule that direct changes to the transportation plans of metropolitan planning areas to meet GHG reduction goals.
- B. ODOT and DLCD are directed to identify and implement means to provide financial and technical assistance to metropolitan planning areas for amendment to transportation and land use plans that meet the state GHG reduction goals, or more stringent goals adopted by a metropolitan planning area.
- C. Implementation of the directives set forth in paragraph 9(A)–(B) shall be at the highest level within the agencies, with regular and direct reporting to the Governor. The first report shall be made to the Governor no later than June 30, 2020.
10. **Directives to the Oregon Department of Transportation.** In addition to the general directives set forth in paragraph 3, ODOT is directed to take the following actions:
- A. In consultation with DEQ, ODOE, other appropriate state agencies, and public utilities, ODOT is directed to conduct a statewide transportation electrification infrastructure needs analysis, with particular focus on rural areas of the state, across use types and vehicle classes, to facilitate the transportation electrification goals set forth in Senate Bill 1044 (2019). The study should be completed no later than June 30, 2021.
 - B. ODOT is directed to develop and apply a process for evaluating the GHG emissions implications of transportation projects as part of its regular capital planning and Statewide Transportation Improvement Program planning processes. ODOT shall provide a report on the process to the Governor no later than June 30, 2021.





EXECUTIVE ORDER NO. 20-04

PAGE THIRTEEN

11. **Directives to Oregon Health Authority.** In addition to the general directives set forth in paragraph 3, OHA is directed to take the following actions:
 - A. OHA is directed to deliver a report to the Governor, the Oregon Global Warming Commission, and the Environmental Justice Task Force no later than September 1, 2020, on the public health impacts of climate change in Oregon, with particular emphasis on the risks faced by vulnerable communities, including Oregon's nine federally recognized Native American tribes, communities of color, low income communities, and rural communities. OHA is directed to update the report annually.
 - B. OHA is directed to study the impacts of climate change on youth depression and mental health in Oregon and deliver a report to the Governor no later than June 30, 2021.
 - C. OHA and the Oregon Occupational Safety and Health Administration (OSHA) are directed to jointly develop a proposal for standards to protect workplace employees from exposure to wildfire smoke and excessive heat. The proposal should be completed no later than June 30, 2021.

12. **Directives to Oregon Global Warming Commission.** In addition to the general directives set forth in paragraph 3, the Global Warming Commission is directed to take the following actions:
 - A. In coordination with ODA, ODF, and OWEB, the Oregon Global Warming Commission is directed to submit a proposal to the Governor for consideration of adoption of state goals for carbon sequestration and storage by Oregon's natural and working landscapes, including forests, wetlands, and agricultural lands, based on best available science. The proposal shall be submitted no later than June 30, 2021.
 - B. Consistent with its reporting requirements in House Bill 3543 (2007), the Oregon Global Warming Commission shall also include reporting on progress toward the GHG reduction goals set forth in paragraph 2 of this Executive Order, and the zero-emission vehicle adoption goals set forth in SB 1044 (2019).





EXECUTIVE ORDER NO. 20-04
PAGE FOURTEEN

13. **Effectiveness.** This Executive Order will remain in effect unless and until it is superseded by statute or another Executive Order.

Done at Salem, Oregon, this 10th day of March, 2020.

A handwritten signature in blue ink that reads "Kate Brown".

Kate Brown
GOVERNOR



ATTEST:

A handwritten signature in blue ink that reads "Bev Clarno".

Bev Clarno
SECRETARY OF STATE



KATE BROWN
GOVERNOR



SENT VIA ELECTRONIC DELIVERY

July 20, 2020

Peter Daugherty
State Forester
Oregon Department of Forestry

Dear State Forester Daugherty,

Thank you for submitting the Oregon Department of Forestry's report on *Proposed Actions for Executive Order 20-04*. Recognizing the enormous risks of climate change, especially for vulnerable communities, and the significant economic opportunities inherent to transitioning to a low-carbon economy, Governor Brown issued Executive Order 20-04 directing state agencies to exercise any and all actions within their statutory authority to reduce emissions and help achieve new statewide science-based emissions reduction goals. We have reviewed the Department of Forestry's proposed executive order implementation plan, and in consultation with Governor Brown, provide the following guidance to ensure the agency's plans align with the Governor's expectations.

Climate change is significantly impacting Oregon's forest resources, through the increased severity and incidence of wildfire, drought, and changes in forest growth. Oregon's forests also play a significant role in mitigating climate change, by sequestering and storing carbon. The Department of Forestry's proposed plan outlines important research the Department will pursue to further quantify the carbon sequestration and storage potential of Oregon's forests and forest products. This data is important to inform the proposal of new state goals for carbon sequestration and storage, as directed by Executive Order 20-04. This data may also support implementation of climate-smart strategies the Department outlined, including forest conservation, reforestation, afforestation and expansion of the urban tree canopy, and fuels reduction on federal lands.

Oregon's forest resources are one of the state's greatest assets in the fight against climate change. Governor Brown expects the Oregon Department of Forestry to become a regional leader in climate-smart forestry to ensure the health of our climate and the long-term vitality of our forest products industry. To accomplish this, and in alignment with Executive Order 20-04, the Department should prioritize the goal of improving carbon sequestration and storage and reducing greenhouse gas emissions. This goal should be prominent in the agency's vision, culture, and presentation, and specific actions should be identified to more fully and ambitiously integrate climate change considerations into the agency's management plans and actions.

The urgency of climate change demands a departure from business-as-usual for the Department of Forestry and all state agencies.

The Governor envisions that the Department will lead on climate-smart forestry both through its own work and in bringing leadership opportunities to the Board of Forestry. Leadership can be gained through innovation, creativity, and regular review and adoption of best climate-smart forestry practices globally. Specific goals need to be identified and systems for tracking and reporting outcomes and incentivizing climate-smart forestry practices and new markets for climate-smart wood products can be adopted. Greater energy efficiency and efforts to decarbonize the forestry sector can yield additional benefits not currently anticipated in the Department's proposed action plan.

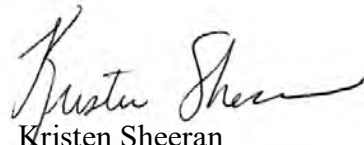
The Governor requests that the agency prepare a Climate Change Plan for Board of Forestry review that builds on the agency's executive order implementation report and reflects a broader strategy for establishing Oregon's leadership in climate-smart forestry and greater accountability toward achievement of goals.

We look forward to continued collaboration with the Department of Forestry in pursuit of the state's climate goals and Executive Order 20-04.

Sincerely,



Jason Miner
Natural Resources Policy Director
Governor Kate Brown



Kristen Sheeran
Energy and Climate Policy Advisor
Governor Kate Brown

JM:kl

cc: Board of Forestry (BOF) Members
Tom Imeson, BOF Chair
Nils Christoffersen, BOF Member
Joe Justice, BOF Member
Jim Kelly, BOF Member
Brenda McComb, BOF Member
Mike Rose, BOF Member
Cindy Williams, BOF Member

Summary of Comments Received on Climate Change and Carbon Plan

In total, there were 122 comments received. These were read and key themes and/or topics were gleaned from each comment. This categorization helped to inform the revision of the initial public draft into a follow up draft. Below is a summary of the comments that were received and at the end of this document is a tally of all the themes and topics that were presented.

The following comments were present in a minimum of ten percent of the comments:

Comment Subject	Number of Comments
Preserve Old Growth Forests and Stands: <ul style="list-style-type: none">The preservation of virgin old growth and second growth stands that exhibit old growth characteristics provides long-term storage in the forests. Harvest of these areas results in ecological function loss and emissions in the near term.	76
Require extended Harvest Rotations (e.g. 80+ years): <ul style="list-style-type: none">A number of studies show that lengthened periods between harvest allows trees and forests to sequester more carbon from the atmosphere and reach their maximum sequestration at cumulative mean annual increment (CMAI).	68
Include the emissions from harvest, transportation, and milling in the forest sector carbon accounting: <ul style="list-style-type: none">Emissions accounting is a complex endeavor. Various methods are used to obtain the best available estimate. In Oregon, forest emissions are not accounted for in the statewide accounting, however, the transportation, energy production, and manufacturing sectors do capture estimates associated with timber harvest. Further refinement of these estimates and their relation to forestry is being investigated.	57
Identify Areas of High Carbon Storage: <ul style="list-style-type: none">Areas with high levels of stored carbon are consequential from a climate change perspective as well as being significant in terms of the ecological co-benefits that they provide. Among these identified areas are refugia for climate sensitive ecosystems and species.	48
Recognize that Biomass Energy Generation is not a Carbon Neutral Energy Source: <ul style="list-style-type: none">Linking this to other comments on the emissions accounting in the forestry sector. There are various costs and benefits associate with utilization of biomass from either harvest or forest and community resilience efforts. The costs are lessened when there is carbon capture technology integrated into the energy generation system. Emerging technologies may assist in further reducing the costs of biomass energy generation.	44
Promote Tree Species Diversity: <ul style="list-style-type: none">Much like investing, it is often a better strategy to diversify a portfolio. With increasing impacts from climate change and a more variable and extreme weather profile, it is practical to have a diverse species mix that may provide growth and yield into the future. Some species may be more susceptible to damage induced by future climates, others less so, having a diversity of species helps to hedge against abiotic and biotic impacts at a landscape scale.	44

Increase Green Tree Retention:	42
<ul style="list-style-type: none"> Retaining portions of the existing stand when harvest occurs keeps some of the carbon in the forest. It can be used as a means to reach the recommendation from the Oregon Global Warming Commission of an approximately ten percent per year increase in sequestration over the next nine years. 	
Work to Enhance Fire Resistant Communities:	42
<ul style="list-style-type: none"> As the catastrophic fires of September 2020 demonstrated, no part of the state is immune from the effects of climate change induced increases in fire size and severity. Capacity to delve into this risk reduction has been provided to the Department through SB 760 in the 2021 legislative session with on the ground actions and through the development of a statewide 20-year plan to address risk reduction and to follow on to the Governor’s Council on Wildfire Response. 	
Utilize Native Seed Sources and Species:	37
<ul style="list-style-type: none"> While there is a need for diversification of the species across the landscape, there is also a need to use the most appropriate seed and planting stock within the parameters of the projected climate, management objectives, and long-term viability. There has been research over decades to determine the climate suitability of different seed sources and this can play a key role in determining what genetics to deploy across the state’s forests. More recently, there has been scientific literature that local may not be best and that there is a need to further investigate and utilize options like assisted migration. 	
Incentivize Conservation Measures:	26
<ul style="list-style-type: none"> Incentivizing conservation of forest carbon and increasing sequestration through carbon finance mechanisms provide the Department and forest landowners to look to voluntary measures over regulation to achieve desired outcomes in the climate mitigation and adaptation, as well as resource protection and ecosystem health at the landscape level. 	
General Comment:	20
<ul style="list-style-type: none"> There were comments that were received that were not able to be categorized into the various resource and climate considerations that other comments contained. 	
Eliminate/Restrict Clearcutting:	15
<ul style="list-style-type: none"> Multiple comments included an interest in reduction of clearcut harvesting as a means to increase sequestration in the forest. 	
Increase clarity and reduce overlap in plan's language:	12
<ul style="list-style-type: none"> The Department received recommendations on clarifying language in the plan, reducing overlapping language between goals and actions, and general awareness of language and wording in the plan. These comments were considered individually as the plan was revised and where appropriate the comments were incorporated into the plan’s language. 	

Many additional comments were submitted including increasing utilization of harvest wood product carbon storage, revision of the Forest Practices Act, and ensuring support for the forest workforce. Below is a full listing and count for the number of comments that included the topic.

Preserve Old Growth Forests and Stands	76	Include more on ecosystem services	2
Require extended Harvest Rotations (e.g. 80+ years)	68	Increase use of prescribed fire	2
Include the emissions from harvest, transportation, and milling in the forest sector carbon accounting	57	Focus more on long-lived products as a climate solution	2
Identify Areas of High Carbon Storage	48	Revise FPA to incorporate climate mitigation and adaptation	2
Recognize that Biomass Energy Generation is not a Carbon Neutral Energy Source	44	Develop C Markets	2
Promote Tree Species Diversity	44	Encourage utilization of new technologies	2
Increase Green Tree Retention	42	Eliminate post disturbance salvage logging	2
Work to Enhance Fire Resistant Communities	42	increase wildfire fuels reduction treatments	2
Utilize Native Seed Sources and Species	37	Increase salvage logging for multiple benefits	2
Incentivize Conservation Measures	26	Consider economic concerns and impacts on rural economies	2
General Comment	20	Include the staff capacity needs to accomplish the goals of the plan	2
Eliminate/Restrict Clearcutting	15	Provide educational opportunities around forest carbon	2
Increase clarity and reduce overlap in plan's language	12	Increase utilization of biochar	1
Incorporate a tangible goal and set a timeline for accomplishments	9	Increase urban afforestation	1
Reduce logging on the landscape	8	Incorporation of renewable fuels as a decarbonization tool	1
Acknowledge multiple benefits from forests	8	Utilize managed wildfire for fuel reduction and habitat restoration	1
Increase Riparian Buffers to Store More Carbon	7	Increase penalties for starting fires	1
Stengthen BIPOC/EJ Focus include SCC	7	Include lifecycle analysis as a part of the CCCP	1
Promote afforestation	5	Utilize mastication instead of burning woody residue	1
Promote or require forest certification	5	Further landuse laws to maintain forests as forests	1
Protect cold water streches and watersheds	4	Use climate programs to develop restoration andresilience jobs in the forests	1
Reforestation of fire damaged stands	4	Promote long-lived wood products in and out of the state	1
Recognize climate change actions as Greatest Permanent Value	3	Post fire salvage logging is a net negative for forest carbon	1
Focus on natural resource dependant communities	3	Consider that younger forests sequester more carbon than older forests	1
Eliminate aerial spraying/pesticides	3	Work to minimize leakage in the forestry sector by maintaining harvest in Oregon	1
Promote and protect soil health and soil carbon	3	Increase the amount of management and harvest on federal lands	1
Include comprehensive research and monitoring	3	Identify the decision makers in and out of the agency	1
Develop an Accurate Database of Climate Adaptation and Mitigation Actions and Activities	2	Include barriers to achieving the goals and progress	1
Preserve Old Growth Forests and Stands	-14.24603	Work to identify where atatutory changes are needed	1
		Decarbonize forest operations	1



ODF Climate Change and Carbon Plan

Stakeholder Sessions Assessment Interview Summary

Oregon Consensus | July 2021

Acknowledgements

Oregon Consensus greatly appreciates all those who generously gave their time to inform this assessment.

Authors

Amy Delahanty, Project Manager, Oregon Consensus, Portland State University

Contact

Oregon Consensus
National Policy Consensus Center
Hatfield School of Government
Portland State University
Urban Center, Room 720
506 SW Mill Street
Portland, OR 97207-0751

(503) 725-9077, npccdesk@pdx.edu
www.orsolutions.org

Editing and layout: Cat McGinnis, Communications
Project Manager, National Policy Consensus Center,
Portland State University

Cover photo: Blue sky, IStock.com



CONTENTS

1. INTRODUCTION AND PURPOSE	4
2. METHODS	4
3. ASSESSMENT QUESTIONS AND SUMMARY OF RESPONSES	5
3.1. What’s the appropriate role for ODF to help reduce greenhouse gases, alongside other state agencies? How can they be most effective?	5
3.2. What carbon and climate change specific actions are you willing to take or do you want to see? What could the agency do to support those actions? Are they currently reflected in the plan?.....	5
3.3. Anything missing? New frontiers? Tools or approaches?	6
4. CONCLUSION	7

1. INTRODUCTION AND PURPOSE

In spring 2021, The Oregon Department of Forestry (ODF) engaged Oregon Consensus to conduct a series of stakeholder assessment sessions designed to gain feedback on its draft Climate Change and Carbon Plan (CCCP). The plan was developed in response to the Governor's Executive Order 20-04, mandating state agencies to develop a plan for reducing greenhouse gases. Along with input from tribes, counties, Board of Forestry members, and the general public, feedback from these parties will be considered and will help inform a revised draft, anticipated to be presented at a pre-decisional workshop in September 2021 between board members and the department's executive leadership. The CCCP is anticipated to be finalized by the Board of Forestry by the end of 2021.

2. METHODS

In early to mid-July, Oregon Consensus staff conducted four stakeholder sessions with members representing a cross-section of various perspectives engaged in ODF's carbon and climate change plan policies. They were members of organizations advocating for diversity, equity and inclusive public policy decision making; urban forestry programs; forest products industry; and conservation interests. The engagement was intended to provide feedback for the department to consider in their current consideration of the draft CCCP, as well as to begin to build trust and long-term relationships within underrepresented communities. In total, thirty-eight people attended the stakeholder sessions. A parallel general public comment opportunity for written comments on the draft plan was made available via ODF's web page and managed internally. This public comment period ran from Thursday, May 27 through Sunday, July 4, 2021.

The Oregon Consensus team asked interview questions that were intended to help inform ODF and to refine or further develop the CCCP, including actions and approaches that ODF should play a critical role in supporting or taking to reduce overall greenhouse gas emissions.

ABOUT OREGON CONSENSUS

Oregon Consensus helps people seek agreement on issues that matter to Oregonians

Oregon Consensus is a dispute resolution program that helps people seek agreement about public issues. Agreement seeking is often the best way to resolve these issues. It produces solutions that more people support—solutions that a single party is unlikely to achieve alone.

Oregon Consensus process

Dispute resolution usually begins with a situation assessment in which Oregon Consensus interviews stakeholders and other entities to help identify what people know and feel about the issues being addressed. If the situation assessment suggests that a collaborative approach would be useful, Oregon Consensus can design a plan for bringing people together, and provide a skilled, impartial facilitator/project manager. Project managers do not take sides or make any decisions for the group. They are integral to the group's collaborative efforts inside and outside of meetings.

This summary provides a brief synthesis of information gathered across the sessions, reflected in key highlights for the department's consideration. This is not intended to provide a comprehensive description of all topics and ideas discussed, or questions raised during the sessions. Supporting documents for the CCCP and ODF's process can be found at: <https://www.oregon.gov/odf/forestbenefits/Pages/climate-change.aspx>

3. ASSESSMENT QUESTIONS AND SUMMARY OF RESPONSES

3.1. What's the appropriate role for ODF to help reduce greenhouse gases, alongside other state agencies? How can they be most effective?

- ODF should serve as a leader and convener to promote collective learning, support connections, and leverage partnerships. This includes being a leader in promoting climate-smart forestry, and educating and disseminating key information on current best practices to private landowners and urban foresters.
- ODF should connect landowners and urban foresters to information about carbon markets and carbon crediting (e.g., what they would need to do to make it work) to bring awareness and bridge connections to highlight opportunities and current incentives.
- ODF should be a champion and cheerleader for the forest products industry, and promote increased use of wood in the built environment. This includes promoting workforce development, use of carbon storage in wood products, and highlighting case examples of what has gone well.
- ODF should build partnerships with other entities, agencies, and academic partners to assist in the workload, create a shared accountability, and leverage resources. ODF doesn't have to lead on every initiative or strategy. Examples of this include the department coordinating with entities working on addressing related efforts (e.g., energy distribution, fireproofing housing, and affordable housing) and building partnerships with organizations so they can help serve as messengers to spread the word about particular assistance grants in their communities.
- Use tools and incentives to monetize carbon, which will encourage longer rotations and help change the standard business model.
- Discourage the state from extending harvest rotations to sequester carbon. It comes at the price of the vibrant economies in rural Oregon.

3.2. What carbon and climate change specific actions are you willing to take or do you want to see? What could the agency do to support those actions? Are they currently reflected in the plan?

- Build inclusive decision making by routinely engaging underrepresented and rural communities in carbon and climate change discussions and actions, and particularly in post-fire response actions.
- Make information available in multiple languages that also accommodates people of all ages and abilities. Often conversations about reforestation, and research and monitoring are highly technical and hard to follow for the average community member.
- Promote the idea that working forests are a key component for storing carbon in wood products, as well as managing forest on the ground.
- Address prescribed burn liability and soil conservation.
- Continue to provide technical and grant support in urban forestry. This includes assistance for forest health, providing management scenarios assessment, and ongoing maintenance for trees.
- Help ensure local (quality) nursery stock is available for local communities and urban forestry programs.
- Ensure actions recognize the interdependence of the supply chain. Furthermore, aim actions at maintaining rural jobs and fostering workforce development.
- Do not implement carbon markets at the state level, and rather be consistent with a federal plan at the landscape level.
- Increase the pace and scale of restoration on public lands.
- Establish additional protections for mature and old growth trees.
- Include public funding for research and development (e.g., research innovative approaches to increase carbon benefits in forests life cycle analysis in forest products, and how to make long-lived wood products better).
- Connect notions of ecological restoration to fire resilience and preparedness. Use the triple bottom line model to enhance ecosystem production, while simultaneously providing training opportunities for future generations.
- Increase public funding for programs focusing on increased carbon benefits that already exist.

3.3. Anything missing? New frontiers? Tools or approaches?

- Include more specificity with regards to metrics, goals, accountability measures, and implementation timelines as part of this plan.
- Be clear about the ecological nuances of climate smart forestry across the landscape in Oregon.
- Include analysis of biomass and its potential negative impacts to vulnerable populations.

- Operationalize and embed meaningful community engagement in the collaborative planning process.
- Add additional goals around environmental justice, state agency collaboration, and individual private lands. Be inclusive of rural and low income communities.
- Create different goals for publicly owned state forest lands and privately owned forest lands.
- Designate managed fires zones that don't pose a threat to critical infrastructure or communities.
- Identify barriers (regulatory, social, economic) that may hinder the implementation of the CCCP as footnotes, or in a section of the document.
- Include lessons learned from Black, Indigenous, and other people of color. Specifically, address how the department will work to integrate these tribal climate mitigation and adaptation practices with regards to carbon sequestration and storage.
- Prompt salvage and reforestation following a catastrophic fire.
- Create a statewide plan for biocycle actions (e.g., biochar).
- Focus on restoration of critical habitats and watershed health.
- Include accounting for emissions from the forestry sector within the greenhouse gas reporting program.

4. CONCLUSION

In summary, there was a shared desire expressed among different stakeholders to assist and help shape the future of ODF's policy and operations related to carbon and climate change. ODF has opportunities to work in alignment with other agencies to contribute to greenhouse gas reductions. ODF and the Board of Forestry will benefit from ongoing engagement, advice, and support from stakeholders as they finalize the plan and move into implementation. Oregon Consensus wishes to thank all who participated in the sessions for sharing their time and thoughtful responses at this stage of the process.