



2025-2027

Governor's Budget

Reference Document

The Oregon Department of Energy's Governor's Budget Document can be found here:

<https://www.oregon.gov/energy/About-Us/Documents/2025-2027-ODOE-GRB.pdf>

Additional details, documents and materials supporting the budget information included in ODOE's PowerPoint presentation can be found here:

ODOE Budget Website:

[State of Oregon: ABOUT US - Budget](#)

ODOE Legislative Reports

[State of Oregon: DATA & REPORTS - Reports to the Legislature](#)

ODOE Biennial Energy Report

[State of Oregon: DATA & REPORTS - Biennial Energy Report](#)

Audit Response Report

2022

- **Small Scale Energy Loan Program for the Year Ended June 30, 2021 (July 2022)**
 - SELP is an enterprise fund of the State of Oregon at the Department of Energy. The Secretary of State's annual audit of the Small-Scale Energy Loan Program (SELP) found, for the year ending June 30, 2021, that the financial statements were presented fairly, in all material respects. A concurrent review of SELP internal controls did not identify any deficiencies that would be considered material weaknesses.

2023

- **Small Scale Energy Loan Program for the Year Ended June 30, 2022 (July 2023)**
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Description of how recent changes to agency budget and/or management flexibility affected agency operations.

Over the past few years, the legislature has sent a great deal of new work to ODOE. HB 3409 and HB 3630 from 2023 established or expanded work at the agency on Building Performance Standards, the Oregon Climate Action Commission, and the development of an Energy Strategy for the state. The agency also saw expansion of our resilience and energy security work, with a new grant program for county resilience planning and an assignment from both the legislature and the federal government to create an Energy Security Plan.

Over the past biennium ODOE has also been successful in bringing in formula and competitive federal grants from the Infrastructure Investment and Jobs Act and the Inflation Reduction Act. Those federal funds will be spent over several years, so they don't all show up in the 2025-27 budget.

The legislature has made several one-time investments General Fund investments for incentive programs administered by ODOE. Over the past five years we've stood up and implemented programs to provide grants and rebates for rooftop solar and storage, heat pumps, efficient rebuilding after wildfires, and community renewable and resilience projects. Most of these programs have seen high demand and we expect that all appropriated money will be reserved in the current biennium.

Description of workforce challenges, including the impact on agency operations and services and additional costs incurred (e.g., overtime, contracted staffing).

Many ODOE programs, particularly in the Energy Development Services division, are staffed with Limited Duration positions which can present recruitment and retention challenges, which in turn present challenges for program continuity and efficiency. There is a POP in ODOE 2025-27 budget that would establish a core of permanent positions within the division.

PRELIM Agency Span of Control as of 12/31/24 @ 11:59:59 PM

	Agency Max Supervisory Ratio	Total # EEs on 12/31/24*	Total # Non-supervisory EEs on 12/31/24	÷	Total # Supervisory EEs on 12/31/24	Total # EEs not assigned a Representation on 12/31/24**	1	:	Adjusted Actual Ratio on 12/31/24	Actual Ratio
Bureau of Labor and Industries	(1:7)	197	174	÷	23	0	1	:	8	7.57
Department of Administrative Services	(1:9)	1050	939	÷	111	0	1	:	8	8.46
Department of Agriculture	(1:8)	625	572	÷	53	0	1	:	11	10.79
Department of Consumer & Business Services	(1:11)	1038	941	÷	97	0	1	:	10	9.70
Department of Corrections	(1:11)	5383	4923	÷	460	0	1	:	11	10.70
Department of Early Learning and Care	(1:9)	371	334	÷	37	0	1	:	9	9.03
Department of Energy	(1:7)	125	111	÷	14	0	1	:	8	7.93
Department of Environmental Quality	(1:9)	954	873	÷	81	0	1	:	11	10.78
Department of Fish and Wildlife	(1:6)	1451	1266	÷	185	0	1	:	7	6.84
Department of Human Services	(1:8.47)	12311	11172	÷	1133	6	1	:	10	9.86
Department of Justice	(1:11.88)	1625	1491	÷	134	0	1	:	11	11.13
Department of Public Safety Standards and Training	(1:17.95)	416	394	÷	20	2	1	:	20	19.70
Department of Revenue	(1:11)	1233	1127	÷	106	0	1	:	11	10.63
Department of State Lands	(1:8)	145	130	÷	15	0	1	:	9	8.67
Department of the State Fire Marshal	N/A	164	142	÷	21	1	1	:	7	6.76
Department of Transportation	(1:11)	5342	4902	÷	440	0	1	:	11	11.14
Department of Veterans Affairs	(1:5.35)	112	94	÷	18	0	1	:	5	5.22
Employment Department	(1:11)	2156	1977	÷	179	0	1	:	11	11.04
Forestry Department	(1:7)	1492	1302	÷	190	0	1	:	7	6.85
Higher Education Coordinating Commission	(1:7)	229	208	÷	21	0	1	:	10	9.90
Land Conservation and Development Department	(1:8.5)	113	101	÷	12	0	1	:	8	8.42
Oregon Business Development Department	(1:8)	224	200	÷	24	0	1	:	8	8.33
Oregon Department of Education	(1:10)	827	744	÷	78	5	1	:	10	9.54
Oregon Department of Emergency Management	(1:11)	152	137	÷	15	0	1	:	9	9.13
Oregon Health Authority	(1:8.6)	6771	6136	÷	634	1	1	:	10	9.68
Oregon Housing and Community Services	(1:7)	504	433	÷	71	0	1	:	6	6.10
Oregon Liquor & Cannabis Commission	(1:11)	430	393	÷	37	0	1	:	11	10.62
Oregon State Department of Police	(1:8)	1494	1352	÷	136	6	1	:	10	9.94
Oregon Youth Authority	(1:9)	1056	952	÷	104	0	1	:	9	9.15
Parks and Recreation Department	(1:8)	904	814	÷	90	0	1	:	9	9.04
Public Employees Retirement System	(1:11)	443	407	÷	36	0	1	:	11	11.31
Public Utility Commission	(1:5)	150	128	÷	22	0	1	:	6	5.82
State of Oregon Military Department	(1:10)	518	471	÷	47	0	1	:	10	10.02
Water Resources Department	(1:8)	252	224	÷	27	1	1	:	8	8.30

* This total number includes positions which were flagged by Workday as NOT having a Repr code assigned. Each position was reviewed and assigned to a supervisory or non supervisory category.

** These numbers are showing up in Workday as not having a Repr code assigned. They were reallocated to a supervisory or non-supervisory category and folded into the Total on column C.

Ratio within Maximum supervisory ratio

Ratio not within Maximum supervisory ratio

No current ratio on file with CHRO

Report Name: **HCM | Span of Control Counts by Company (Company or Supervisory Organization Selection)**

Oregon Department of Energy
Program Prioritization

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
Priority (ranked with highest priority first)	Agency Initials	Program or Activity Initials	Program Unit/Activity Description	Identify Key Performance Measure(s)	Primary Purpose Program- Activity Code	GF	OF DS NL	LF	OF	NL-OF	FF	NL-FF	TOTAL FUNDS	Pos.	FTE	New or Enhanced Program (Y/N)	Included as Reduction Option (Y/N)	Legal Req. Code (C, D, FM, FO, S)	Legal Citation
Agcy	Prgm / Div																		
1	1	ODOE	Nuc	Hanford Oversight & Emergency Response ensures that the federal government carries out its responsibility to clean up Hanford while protecting the Columbia River, and that state and local responders are properly prepared to deal with an emergency in the event of a nuclear accident or energy emergency affecting Oregon.	KPM 2 Fed. Measures	10	\$ 629,870		\$ 783,044		\$ 3,129,021		\$ 4,541,935	7	6.25	Y	Y	S, FM	ORS 469.525-619; CFR Title 10, Part 50.47,
2	1	ODOE	SIT	Energy Facility Siting Program & Energy Facility Siting Council ensures that existing and future energy facilities meet the State's siting standards subject to Energy Facility Siting Council jurisdiction.	KPM 2 & 3	6			\$ 7,373,918		\$ -		\$ 7,373,918	14	14.00	N	Y	S	ORS 469.320-520
3	1	ODOE	P&I	Energy Efficiency & Conservation provides technical assistance, information and education to promote and develop conservation and energy efficiency strategies in the industrial, commercial, and residential sectors. includes SB 1149 Schools and Industrial Self-direct programs.	KPM 1,2, & 4	9	\$ 5,319,142		\$ 5,126,661		\$ 2,944,200		\$ 13,390,003	21	19.00	Y	Y	S	ORS 469.030, ORS 469.097, ORS 469.135, ORS 469.229-261 ORS 276.900-915 ORS 757.612 ORS 470.815
4	2	ODOE	P&I	Energy Technology & Policy develops energy policies and plans that ensure Oregon's future demands for clean, reliable and affordable energy are met. This program provides leadership and technical assistance on renewable energy, clean fuels and transportation, and options to meet Oregon's greenhouse gas emission reduction goals.	KPM 2, 5 & 6 Inter. Measure	9	\$ 4,427,115		\$ 4,456,914		\$ 2,829,991		\$ 11,714,020	16	18.00	Y	Y	S	ORS 469.030, 469.060
5	1	ODOE	EDS	Small Scale Energy Loan Program (SELP) provides loan financing for innovative or traditional conservation and renewable energy projects, which support regional and local community energy needs.	KPM 1 & 2	6	\$ -	\$ 24,036,276	\$ 742,966	\$ 1,095,917	\$ -		\$ 25,875,159	2	2.00	N	Y	C, D	CONST Article XI-J; ORS 470.060
6	2	ODOE	EDS	Federal Incentive Programs provides incentives to eligible entities for installing projects that increase promote grid resiliency and other upcoming federal energy and climate programs.	KPM 1 & 3	6	\$ 3,199,987				\$ 10,497,228		\$ 13,697,215	7	6.50	Y	Y	FO	H.R. 3684 H.R.5376
7	3	ODOE	EDS	Energy Incentives Program (EIP) provides incentives to homeowners, renters, businesses, organizations, nonprofits, Tribes, schools, consumer-owned utilities, and public bodies installing projects that increase energy efficiency, generate renewable energy, encourage community resilience, or support the alternative fuels market.	KPM 1 & 3	6	\$ 25,340,088		\$ 75,026,367		\$ -		\$ 100,366,455	8	8.50	N	Y	S	ORS 469B.270 thru 306 Cons; ORS 469B.250 thru 265 Renew; ORS 469B.320 thru347 and ORS315.336 Tran

Oregon Department of Energy
Program Prioritization

8	4	ODOE	EDS	Energy Efficient Financing Activity Debt Service on funds received during the 2015-17 and 2017-19 biennia for energy efficiency investments.	KPM 2	2			\$ -				\$ -	0	0.00	N	N	D	ORS 469.960 thru 46.96	
NA	NA	ODOE	ADM	Director's Office - agency direction, communication, government relations and internal auditing.	KPM 2	4	\$ 1,176,297		\$ 4,444,946		\$ 3,327,606		\$ 8,948,849	12	12.05	N	Y		ORS 469.030	
NA	NA	ODOE	ADM	Central Services provides resources for shared support services and director's office activities.	KPM 2	4			\$ 13,689,585		\$ -		\$ 13,689,585	34	33.45	N	Y			
NA	NA	ODOE	P&I	Northwest Power and Conservation Council responsible for adopting regional energy conservation and electric power plans	KPM 2	9			\$ 946,582		\$ -		\$ 946,582	2	2.00	N	N	S		
							\$ 40,092,499	\$ 24,036,276	\$ -	\$ 112,590,983	\$ 1,095,917	\$ 22,728,046	\$ -	\$ 200,543,721	123	121.75				

PROGRAM LEGEND

NUC	Nuclear Safety & Energy Emergency Preparedness
EDS	Energy Development Services
P&I	Energy Planning & Innovation
SIT	Energy Facility Siting
ADM	Administrative Services

7. Primary Purpose Program/Activity Exists

- 1 Civil Justice
- 2 Community Development
- 3 Consumer Protection
- 4 Administrative Function
- 5 Criminal Justice
- 6 Economic Development
- 7 Education & Skill Development
- 8 Emergency Services
- 9 Environmental Protection
- 10 Public Health
- 11 Recreation, Heritage, or Cultural
- 12 Social Support

19. Legal Requirement Code

- C Constitutional
- D Debt Service
- FM Federal - Mandatory
- Federal - Optional (once you choose to participate, certain requirements)
- S Statutory

The Department identified the following criteria hierarchy to determine program prioritization:

- * Public Safety - activities ensure Oregon is protected from nuclear waste and that new energy facilities are safely sited.
- * Constitutional Obligations - activities directed by the Oregon Constitution are ranked higher than statutory or federal obligations.
- * Statutory or Federal Obligations - activities directed by statute or recent legislation, mission-centered priorities, federal obligations and areas where programs were scheduled to sunset in statute.
- * Role in achieving the State's energy and climate goals.
- * Fulfills the department's unique responsibility for leading Oregon to a safe, clean, reliable, affordable and sustainable energy future.



OREGON
DEPARTMENT OF
ENERGY

IT Strategic Plan

November 17th, 2023

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Executive Summary

Vision & Mission

Vision: The Oregon Department of Energy's (ODOE) IT team aspires to provide technologically advanced and seamlessly connected tools thereby empowering each of our agency-wide strategic initiatives, while fostering collaboration, efficiency, and innovation.

Mission: To leverage the power of technology to anticipate the evolving needs of our agency. To offer proactive solutions, reliable support, and a commitment to IT excellence, thereby enabling our program staff to shape the energy future of our state.

Guiding Principles

Business Centricity: Always prioritize the end goals for the business vs. IT-specific needs. Ensure that our priorities are in support of the overall business priorities and strategic goals.

Customer Service Focus: Always deliver the highest level of customer service to end users. Each interaction should leave end users feeling like they had a positive experience with our team, even if their issue was not immediately solved.

Accountability: Take ownership of the body of work and the outcomes therein. Celebrate success, learn from failure, always be responsible for the services and solutions we provide.

Documentation and Standardization: Documentation should exist for all bodies of work that identifies where, what, and how work is accomplished. Processes should be standardized to ensure IT excellence and smooth transition when there is employee turnover.

Strategic Goals for 3-5 Years

Drive Operational Efficiency and Deliver Data-Driven Insight: Modernize ODOE's data infrastructure by establishing an agency-wide data warehouse, enforcing a data governance framework, and automating key data ingestion and visualization processes.

Optimize Applications and Processes to Enhance Customer Experience and Increase Operational Agility: Address vulnerabilities and end-of-life status in existing applications and transition from low-code solutions to robust, documented, and scalable solutions.

Key Initiatives

Improved Help Desk End User Experience: Addressing the lack of documentation to improve service efficiency and our succession planning posture.

Improved Stability in End User Software Licensing: Streamlining and documenting vendor interactions to ensure no business impact to agency's software licenses.

IT Service Management Improvement: Upgrade the Help Desk tool to improve service to our internal customers and ensure a more data-driven approach to gathering operational metrics.

Enhanced Data Quality Assurance: Each data set should go through a series of validation steps to ensure that only high-quality data is stored and served from our data warehouse.

Improved Access and Availability of Data: Our data customers should have easy access to all the data they need to do their jobs on a day-to-day basis.

Metrics & Targets

While Service Level Agreements (SLAs) have been set, they are pending effective implementation through a new ODOE IT Service Management system. Key metrics include average response and resolution times, ticket volume and type, and customer satisfaction.

Each of the strategic goals and key initiatives listed in the IT Strategic Plan has its own metrics. Please see the document for further information.

Conclusion

ODOE's IT Strategy is designed to be adaptable, forward-thinking, and business-centric, ensuring that the agency remains at the forefront of technology-driven solutions. This plan is not just about improving IT infrastructure but ensuring that IT becomes the backbone of ODOE's drive to shape the energy future of the state.

Agency Drivers

Vision

The vision of the Oregon Department of Energy (ODOE) is a safe, equitable, clean, and sustainable future.

Mission

The Oregon Department of Energy helps Oregonians make informed decisions and maintain a resilient and affordable energy system. We advance solutions to shape an equitable clean energy transition, protect the environment and public health, and responsibly balance energy needs and impacts for current and future generations.

Our Values

- We listen and aspire to be inclusive and equitable in our work.
- We are ethical and conduct our work with integrity.
- We are accountable and fiscally responsible in our work and the decisions of our agency.
- We are innovative and focus on problem-solving to address the challenges and opportunities in Oregon's energy sector.
- We conduct our agency practices and processes in a transparent and fair way.

ODOE currently has five high-level strategic imperatives, each with objectives and metrics tied to it.

What We Do

In addition to updated mission, vision, and values, ODOE also clarified our "position." On behalf of Oregonians across the state, we achieve our mission by providing:

- A Central Repository of Energy Data, Information, and Analysis: We research, collect, and analyze data and information to inform state energy planning, regulation, program administration, and policy development.
- A Venue for Problem-Solving Oregon's Energy Challenges: We convene constructive conversations about Oregon's energy challenges and opportunities that consider a diverse range of perspectives, foster collaboration and innovative solutions, and facilitate the sharing of best practices with consumers and stakeholders.
- Energy Education and Technical Assistance: We provide technical assistance, educational resources, and advice to support policy makers, local governments, industry, energy stakeholders, and the general public in solving energy challenges and meeting Oregon's energy, economic, and climate goals.
- Regulation and Oversight: We manage the responsible siting of energy facilities in the state, regulate the transport and disposal of radioactive materials, and represent Oregon's interests at the Hanford Nuclear Site.
- Energy Programs and Activities: We manage and administer statutorily authorized energy programs to save energy, support the state's decarbonization efforts, make communities more resilient, and position Oregon to lead by example.

Key Strategic Imperatives

Expand and Improve Stakeholder Engagement

- Increase diversity of agency stakeholder groups, rulemaking, oversight, and advisory boards.
- Year-over-year increase in agency engagement with organizations representing historically and currently underserved populations and communities.
- Year-over-year increase in the external use of agency produced reports, studies, and presentations.

Build Practices and Processes to Achieve More Inclusive and Equitable Outcomes

- Year-over-year increase in percent of agency job applicants identifying as Black, Indigenous, and People of color.
- Year-over-year increase in the percent of historically and currently underserved populations and communities participating in ODOE programs and services.
- Increase agency Diversity, Equity, and Inclusion awareness and fluency.

Assess and Enhance Organizational Data Capabilities

- 100% of specified agency products (e.g., produced reports, studies, and analyses) use standardized agency data methodologies or tools.
- Year-over-year increase of collection, review, and analysis of data.
- Year-over-year increase in data sharing relationships.

Assess and Modernize Agency Programs and Activities

- 100% of ODOE programs and activities align with ODOE mission and position statements.
- Complete assessment of ODOE work in the context of the state's energy ecosystem to identify redundancies and gaps.

Optimize Organizational Efficiency and Impact

- Increase average Gallup Q12 engagement score to at least 4.0 (out of 5.0)
- Increase “Efficient and effective processes & procedures” (Whole Systems Model) survey score to at least 3.5.
- Increase in Key Performance Measure customer satisfaction score to at least 95%.

Current IT Landscape

Governance

In early 2023, under DAS’s guidance, ODOE decided to reform the governing bodies that oversee the IT functions in the agency. At the time, there were three governing bodies:

1. The IT Steering Committee
2. IT Governance
3. Data Governance

Agency leadership decided that in order to right size our governance structure, we would condense down to one governing body, chaired by the Director, and that all subsequent governance work could be funneled up through workgroups. The IT Governance Committee is tasked with:

- Ensuring that the agency’s IT work is providing value to the agency and is aligned with the agency’s mission, goals, and values.
- Ensuring that IT provides excellent customer service to the agency.
- Increasing awareness of IT projects and initiatives across the agency.
- Reviewing and approving agency-wide IT policies and procedures.
- Reviewing and approving agency-wide IT improvements.
- Reviewing and prioritizing major IT initiatives.

The first workgroup that was established was the Data Workgroup. This group is tasked with:

- Identifying data sets of interest throughout the agency or external to the agency.
- Validating data quality in new or existing data sets.
- Identifying critical data set metadata, processes, and procedures.
- Identify how critical data sets are presented (charts & graphs, widgets, tabular data, data sources, etc.)

Application Inventory

The ODOE IT team supports a wide range of line of business applications. In total, we support roughly 35 customer-facing SaaS applications, 3 custom built in-house applications, roughly 30 custom Dynamics implementations, 25+ (and growing) IT-facing applications.

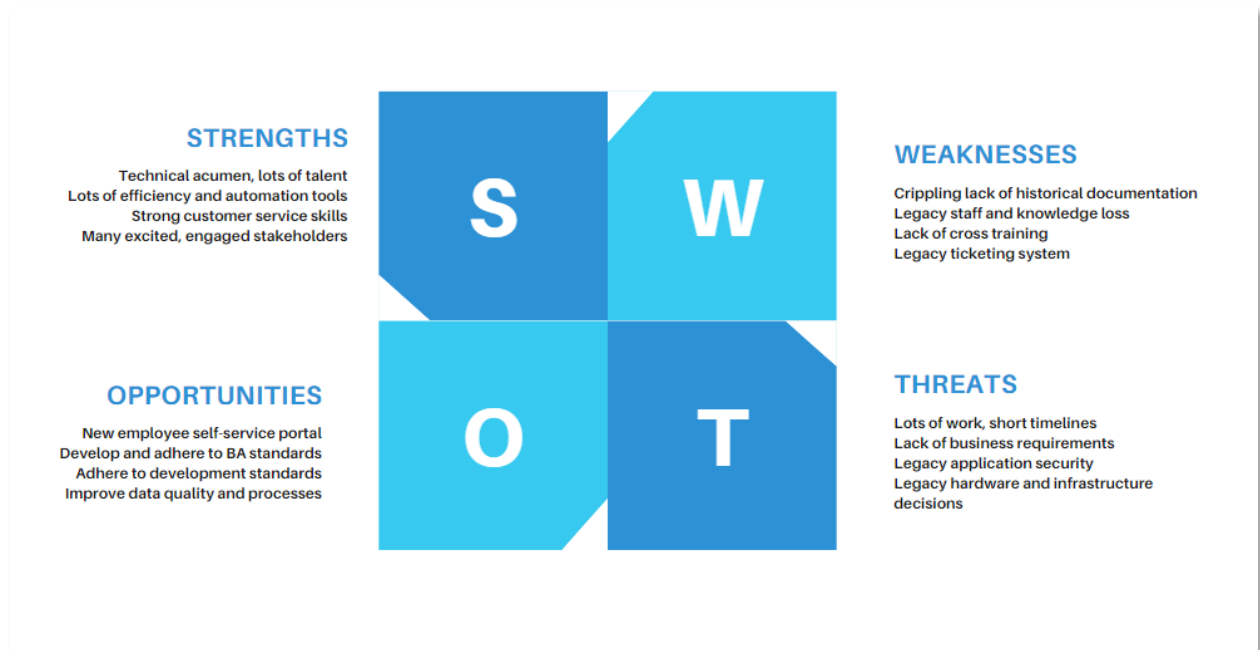
Service Catalog

We are working to define the level of service for each of the above applications. It will be defined on our Employee Self-Service Portal and a rough outline has been included as an [appendix](#).

The core of the services we offer to the agency are as follows:

- Helpdesk Support

- Low Code / No Code Development
- Custom Web Application Development
- Cloud / On-Premises Database Services
- Business Analysis
- GIS
- Data Visualization
- Public Records Requests



IT Context

IT Vision & Mission

ODOE's IT Vision Statement: A technologically advanced and seamlessly connected agency where IT empowers every energy initiative, while fostering collaboration, efficiency, and innovation.

ODOE's IT Mission Statement: To leverage the power of technology to anticipate the evolving needs of our agency. To offer proactive solutions, reliable support, and a commitment to IT excellence, thereby enabling our program staff to shape the energy future of our state.

Guiding Principals

- **Business Centricity** – Always prioritize the end goals for the business vs. IT-specific needs. Ensure that our priorities are in support of the overall business priorities and strategic goals.
- **Customer Service Focused** – Always deliver the highest level of customer service to end users. Each interaction should leave end users feeling like they had a positive experience with our team, even if their issue was not immediately solved.
- **Accountability** – Take ownership of the body of work and the outcomes therein. Celebrate success, learn from failure, always be responsible for the services and solutions we provide.

- **Documentation and Standardization** – Documentation should exist for all bodies of work that identifies where, what, and how work is accomplished.

Goals

The biggest strategic goals for the IT team on a three-to-five-year time horizon are as follows:

- Drive Operational Efficiency and Deliver Data-Driven Insight
- Optimize Applications and Processes to Enhance Customer Experience and Increase Operational Agility

Drive Operational Efficiency and Deliver Data-Driven Insight

Description

ODOE has historically struggled to quickly produce data visualizations and analysis for the Biennial Energy Report (BER), Biennial Zero Emissions Vehicles report (BiZev), and other reports. Each time a new biennium is upon us, data sets and visualizations are manually cleaned or re-created. The IT team can utilize existing technology to streamline the data lifecycle and provide robust data pipelines for analysis and visualization to ODOE staff.

This goal aims to establish:

- An agency-wide data warehouse that makes reporting significantly easier for the business.
- Data governance framework for ingesting new data sets so that all our data is cataloged and easy to maintain.
- Automation of key data ingestion processes and visualizations for the BER and BiZEV reports, saving significant amounts of staff time.
- Automated visualizations for critical operational and agency program performance metrics.
- Introduction of operational data pipelines so that we can measure internal staff performance.
- Documented IT procedures for maintaining existing and establishing new pipelines to ensure quick turnaround and ease of maintenance.
- User guides and training resources for consumers of the data so that users are empowered to use the solutions we provide them without any confusion or UX friction.

Metrics

For all data sets that are utilized for agency-standard reports (BER - Energy by the Numbers, BiZEV, dashboards), 70% of those data sets are available via the data warehouse and have data quality assurance implementations in place.

Initiatives

[Enhanced Data Quality Assurance](#)

[Improved Access and Availability of Data](#)

Related Agency Strategic Imperative: [Assess and Enhance Organizational Data Capabilities](#).

Optimize Applications and Processes to Enhance Customer Experience and Increase Operational Agility

Description

ODOE's applications and the processes for building these applications need to be improved to support rapidly changing business requirements, data sharing, and a dynamic security environment.

ODOE has two fully custom .NET applications and one Java application that are in need of a rebuild. Two out of three of these applications are at end of life. These applications will need to be replaced.

ODOE also has several SharePoint/Power Platform/Dynamics applications that need to be converted to real applications as business requirements for these products have been significantly professionalized.

The Application Modernization project aims to:

- Replace the .NET and Java based applications with modern, documented, extendable solutions. It will also make access to, and maintenance of, the data generated by the applications significantly easier for stakeholders.
- Update or replace low code solutions with modern, documented, extendable solutions. The currently implemented low-code solutions are buggy, difficult to troubleshoot, and generally, impact customer satisfaction. In a short time, at very low cost, we can replace existing implementations and make our customers happy while also improving our own workload.
- Establish development principles for low-code platforms moving forward so that the IT team can significantly shorten the time it takes to turn around a Dynamics portal web form on behalf of a program.

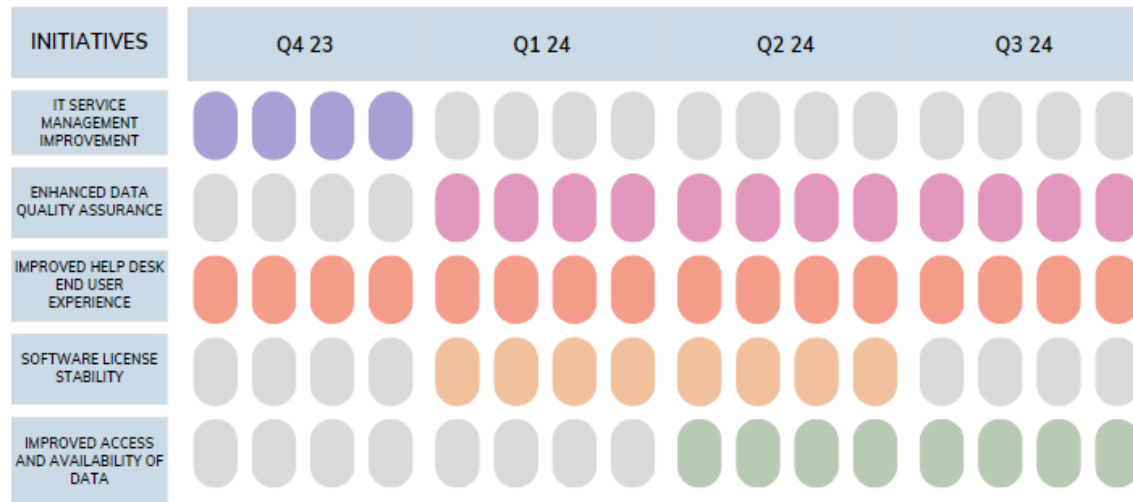
Related Agency Strategic Imperative: [Optimize Organizational Efficiency and Impact.](#)

Metrics

Improve IT CSAT (Customer Satisfaction Score) to 90% or higher.

IT Roadmap

OREGON DEPARTMENT OF ENERGY IT ROADMAP



IT Strategy Communications Plan

The communication plan around ODOE's IT Strategic Plan will involve several major steps:

- Create an executive summary deck for leadership.
- Create a customer-appropriate summary for ODOE's intranet.
- Present executive summary to ODOE's leadership team.
- Present customer-appropriate summary at an upcoming All Staff meeting or attach as an addendum to All Staff meeting notes.

Attached are screenshots of the IT Strategy Executive Summary deck.

IT Strategic Plan Maintenance Approach

The strategic plan should be re-evaluated when the following scenarios occur:

- Annual cadence, at a minimum.
- A change of governor.
- A shift in legislative direction.
- Executive leadership shift in direction.
- IT-related legislative concepts and POPs.

Below is the RACI chart that outlines IT Strategic Plan update responsibilities.

Section	CIO	System Administrator	Senior Engineer	Business Analyst	IT Governance	R	Responsible
Executive Summary	AR	I	I	C	I	A	Accountable
Agency Drivers	A	I	I	I	R	C	Consulted
Current IT Landscape	AR*	R*	R*	C	I	I	Informed
IT Context	AR*	R*	R*	C	C		* Indicates partial responsibility
IT Strategic Initiatives	AR	C	C	C	C		
Metrics & Targets	AR	C	C	C	I		
IT Roadmap	AR	C	C	C	R		
IT Communications Plan	A	I	I	R	I		
Maintenance Approach	AR	I	I	C	I		
IT Governance Charter	AR	I	I	I	C		
Data Workgroup Summary	AR	I	I	I	C		
Virtual Server Inventory	A	R	I	I	I		
Application Inventory	AR	C	C	C	I		
SHI Spend	AR	I	I	I	I		
Service Catalog	AR	C	C	C	I		
Development Standards	A	I	R	C	I		
Business Requirements Standards	A	I	C	R	I		
SWOT Analysis	AR*	C	C	C	CI		
Executive Interview Selections	AR	I	I	I	C		
Network Architecture Diagrams	A	R	C	I	I		
Development Infrastructure Diagrams	A	C	R	C	I		
IT Team Org Chart	AR	I	I	I	I		
Hardware Inventory	A	R	I	I	I		

Appendix 1: IT Governance Charter

Purpose and Scope

IT Governance is the collection of tools, processes, and methodologies that enable an organization to align business strategy and goals within the IT department. The ODOE IT Governance Committee is composed of division administrators with additional positions held by the Agency Director (chair) and Director of Human Resources. The IT Governance Committee provides oversight for agency IT projects, standards, methodologies, and expenditures.

The overall purpose of the Oregon Department of Energy’s (ODOE) IT Governance Committee is to:

- Ensure that the agency’s IT work is providing value to the agency and is tightly aligned with the agency’s mission, goals, and values.
- Ensure that IT provides excellent customer service to the agency.
- Increase awareness of IT projects and initiatives across the agency.
- Review and approve agency-wide IT policies and procedures.
- Review and approve agency-wide IT improvements.

Membership

Membership consists of the agency Director, who will serve as the chair of the committee, as well as agency Division Administrators, the agency’s Chief Information Officer, and the agency’s Director of Human Resources.

- ODOE Agency Director (Chair)
- ODOE Chief Information Officer

- ODOE Associate Director, Human Resources
- Assistant Director, Energy Planning and Innovation Division
- Assistant Director, Central Services and Energy Development Services Division Administrator
- Assistant Director, Energy Facility Siting Division
- Assistant Director, Nuclear Safety and Emergency Preparedness Division
- Communications Director
- ASCIO, EIS (Non-voting member)

Policies

- The IT Governance Committee will be chaired by the Director of the agency. In the absence of the agency Director, the Chief Information Officer will chair the IT Government Committee.
- The IT Governance Committee meetings will be facilitated by the Chief Information Officer. In the absence of the Chief Information Officer, the Agency Director will facilitate the meetings.
- The committee should meet monthly for the first three months of its inception. This will help to establish a consistent methodology and approach to governance.
- After the initial three-month period, the group will meet quarterly or as needed.
- If a member of the committee cannot attend, they may not designate a proxy.
- Quorum for group decision making will be a simple majority of 50% of attendees plus one.

Desired Outcomes

- Provide an executive forum for decision making as it relates to IT Governance.
- Keep pace with industry and government IT standards, where possible.
- Reduce the time and cost of IT projects, where possible.
- Increase agency-wide visibility of IT projects and expenditure.
- Assist in communicating IT goals, progress, and changes.

Workgroup Organization

While the membership composition of the IT Governance committee is static, both static and dynamic work groups will be instantiated to support business initiatives. Dynamic workgroups will be small (5 or less participants) and, typically, time bound.

Workgroups will funnel work up to the IT Governance Committee in the form of standardized processes, methodologies, or reports. The IT Governance committee should review and, if necessary, approve (or deny) any proposals. Workgroups can be created by the Committee or the CIO.

Static Work Groups

- Data Workgroup – This group replaces the Data Governance Committee. The composition should be made up of front-line supervisors or data champions selected by a front-line supervisor with at least one representative per division or section in the agency. Workgroup

- participants are expected to create standards, guidelines, and procedures for the agency about how they should handle data. This may be the one example of a workgroup that is not time bound but continuous (i.e., static).
- GIS Workgroup – This group would be a newly instantiated group with the purpose of identifying, prioritizing, and planning any GIS work across the agency. This group would likely be time bound or called to meet on an “as needed” basis.

Dynamic Work Groups

- Task-specific Workgroups – These groups will be created based on initiatives approved by the IT Governance Committee instantiated by the CIO for the purpose of identifying, prioritizing, and planning specific IT initiatives across the agency. Membership will be by invitation and with the advance approval of the supervisor. This group would likely be time bound or called to meet on an “as needed” basis.

Workgroup Decision Making

Workgroups should have some autonomy to work independently. Workgroups should be focused on high-level strategic goals such as:

- Creating standards and guidelines
- Creating documentation
- Creating processes and procedures
- Bringing these artifacts to the IT Governance committee for review

For instance, the Data Workgroup should be focused on creating a suite of data standardization rules. The Data Workgroup should put together recommendations for how phone numbers, addresses, and other types of data should be stored across the agency, while the IT Governance committee should review and approve the whole package of data standardization tools.

Appendix 2: Service Catalog

Application Development Services

- Dynamics Application Development and Administration
- SharePoint Application Development and Administration
- Teams Integration
- Native Web Application Development
- Languages Supported
 - HTML
 - CSS
 - JavaScript
 - SQL/T-SQL
 - C# and .NET

Help Desk (Tier I and Tier II)

- Tier I Help Desk Support
 - Application Support
 - PC Support
 - Phone Support
- SMS Alerts (Everbridge)
- General Technology Troubleshooting
- Workday Ticket Support and Learning Administration
- Meeting Support

Infrastructure Services

- Network Administration
 - Switches
 - Firewalls
 - Wireless Access Points
- Server Administration
- M365 Administration
- Tier II Helpdesk
- Device Management (Auto push updates, auto install apps, etc.)
- Windows 10 and Windows 11 administration.
- Records Requests & E-Discovery
- Identity Management (Active Directory)
- Security
- System Monitoring

Data Services

- SQL Server Management
 - DB Creation
 - Data Normalization
 - Query Writing
- API Integration
- Dashboard Creation and Support
 - PowerBI
 - Tableau

Agency Summary

10% Reduction Options (ORS 291.216)

Activity or Program (WHICH PROGRAM OR ACTIVITY WILL NOT BE UNDERTAKEN)	Describe Reduction (DESCRIBE THE EFFECTS OF THIS REDUCTION. IDENTIFY REVENUE SOURCE FOR OF, FF. INCLUDE POSITIONS AND FTE FOR 2025-27 AND 2027-29)	Amount and Fund Type						Rank and Justification (RANK THE ACTIVITIES OR PROGRAMS NOT UNDERTAKEN IN ORDER OF LOWEST COST FOR BENEFIT OBTAINED)
		GF	OF	FF	Total Funds	Pos.	FTE	
Energy Planning & Innovation	Reduce Temporary Appointments 100%		\$ 54,566		\$ 54,566	-	-	1. Other staff will need to pick up workload in the case of a gap in staffing or to meet unexpected workflow needs. The agency may not be able to absorb unexpected workflow without neglecting other duties.
Energy Development Services	Reduce Temporary Appointments 6%		\$ 14,694		\$ 14,694	-	-	2. Other staff will need to pick up workload in the case of a gap in staffing or to meet unexpected workflow needs. The agency may not be able to absorb unexpected workflow without neglecting other duties.

Agency Summary

Energy Facility Siting	Reduce Instate Travel 35%		\$ 41,503		\$ 41,503	-	-	3. Reduction may impact statutory requirements to ensure all facilities are in compliance as well as holding certain public meetings and hearings within the vicinity of projects.
Administrative Services	Reduce Employee Recruitment & Development 12%		\$ 3,308		\$ 3,308	-	-	4. Reduces options to publicize employment opportunities on various and diverse job boards.
Nuclear Safety & Energy Security	Reduce Office Expenses 65%		\$ 2,323	\$ 4,130	\$ 6,453	-	-	5. Reduction may impact ability to ensure sufficient resources are available to support the Division.
Energy Planning & Innovation	Reduce Attorney General Legal Fees 10%	\$ 1,849	\$ 19,881	\$ 2,509	\$ 24,239	-	-	6. Reduction will limit ability to consult Department of Justice on legal issues affecting programs and put at risk a legal response in case of lawsuit.
Energy Facility Siting	Reduce Office Expenses 40%		\$ 13,984		\$ 13,984	-	-	7. Reduction may impact ability to ensure sufficient resources are available to support the Division.
Energy Facility Siting	Reduce IT Expendable Property 35%		\$ 12,206		\$ 12,206	-	-	8. Reduction may impact ability to provide or replace IT equipment to support agency staff.

Agency Summary

Energy Facility Siting	Reduce Employee Training 30%		\$ 8,146		\$ 8,146	-	-	9. Reduction may impact training associated with compliance activities.
Administrative Services	Reduce Dues and Subscriptions 12%		\$ 9,597		\$ 9,597	-	-	10. Reduces capacity to stay updated through industry trade publications, access new energy information and data, and potential outreach opportunities, a critical component of helping Oregonians make informed decisions and being a repository for energy information.
Administrative Services	Reduce Professional Services 41%	\$ 42,720	\$ 32,841	\$ 19,810	\$ 95,371	-	-	11. Reduces capacity to contract for technical expertise.
Administrative Services	Reduce Out-of-state Travel 60%		\$ 34,089		\$ 34,089	-	-	12. Reduction in travel and training may impact the ability to provide staff training and impact collaboration and outreach related to agency programs.
Energy Planning & Innovation	Reduce Professional Services 2%		\$ 65,363		\$ 65,363	-	-	13. Reduces capacity to contract for technical expertise.
Administrative Services	Reduce Agency Program Related S&S 5%		\$ 11,694		\$ 11,694	-	-	14. Reduces ability to ensure sufficient resources are available to support the Department.

Agency Summary

Administrative Services	Reduce Other Services and Supplies 11%		\$ 29,811	\$ 270,319	\$ 300,130	-	-	15. Reduction may impact ability to ensure sufficient resources are available to support the Division.
Energy Development Services	Reduce Agency Program Related S&S 25%	\$ 88,670	\$ 7,679		\$ 96,349	-	-	16. Reduces ability to ensure sufficient resources are available to support the Department.
Energy Facility Siting	Reduce Other Services and Supplies 35%		\$ 7,420		\$ 7,420	-	-	17. Reduction may impact ability to review energy facility siting applications in a timely manner.
Energy Facility Siting	Reduce Agency Program Related S&S 45%		\$ 44,555		\$ 44,555	-	-	18. Reduces ability to ensure sufficient resources are available to support the Department.
Energy Planning & Innovation	Reduce Agency Program Related S&S 24%	\$ 28,000		\$ 375,361	\$ 403,361	-	-	19. Reduces ability to ensure sufficient resources are available to support the Department.
Administrative Services	Reduce Office Expenses 53%	\$ 886	\$ 64,609		\$ 65,495	-	-	20. Reduction may impact ability to ensure sufficient resources are available to support the Division.
Nuclear Safety & Energy Security	Reduce Other Services and Supplies 40%		\$ 7,034		\$ 7,034	-	-	21. Reduction may impact ability to ensure sufficient resources are available to support the Division.
Nuclear Safety & Energy Security	Reduce Out-of-state Travel 26%		\$ 10,134	\$ 18,842	\$ 28,976	-	-	22. Reduction may impact emergency preparedness planning.

Agency Summary

Administrative Services	Reduce IT Expendable Property 38%		\$ 138,637		\$ 138,637	-	-	23. Reduction may impact ability to provide or replace IT equipment to support agency staff.
Energy Facility Siting	Reduce Differentials 100%		\$ 3,031		\$ 3,031	-	-	24. Reduction may impact ability to compensate for lead worker or work out of class.
Nuclear Safety & Energy Security	Reduce Professional Services 27%		\$ 36,098	\$ 270,962	\$ 307,060	-	-	25. Reduces capacity to contract for technical expertise.
Administrative Services	Reduce Accountant 3 position 100%		\$ 354,166		\$ 354,166	1	1.00	26. Reduction may impact ability to provide timely accounting services and controls.
Administrative Services	Reduce Publicity & Publications 7%		\$ 3,126		\$ 3,126	-	-	27. Reduces ability to provide energy education and program information to the public.
Energy Development Services	Reduce Attorney General Legal Fees 50%	\$ 35,035			\$ 35,035	-	-	28. Reduction will limit ability to consult Department of Justice on legal issues affecting programs and put at risk a legal response in case of lawsuit.

Agency Summary

Energy Facility Siting	Reduce Professional Services 30%		\$ 344,565		\$ 344,565	-	-	29. Reduction would limit the use of expert consultants to evaluate siting projects which could impact application review timeliness.
Administrative Services	Reduce IT Professional Services 71%		\$ 313,008		\$ 313,008	-	-	30. Reduces ability to ensure sufficient IT resources are available to support the Department.
Energy Planning & Innovation	Reduce Differential by 100%		\$ 49,549		\$ 49,549	-	-	31. Reduction may impact ability to compensate for lead worker or work out of class.
Administrative Services	Reduce Procurement & Contract Specialist 2 position by 100%		\$ 235,940		\$ 235,940	1	1.00	32. Reduction may impact ability to provide timely procurement and contracting services and controls.
Administrative Services	Reduce Instate Travel 24%	\$ 704	\$ 8,664	\$ 8,731	\$ 18,099	-	-	33. Reduction in travel and training may impact ability to provide staff training and impact collaboration and outreach related to agency programs.

Agency Summary

Administrative Services	Reduce Attorney General Legal Fees 52%		\$ 153,463		\$ 153,463	-	-	34. Reduction will limit ability to consult Department of Justice on legal issues affecting programs and put at risk a legal response in case of lawsuit.
Nuclear Safety & Energy Security	Reduce Agency Program Related S&S 30%	\$ 8,563	\$ 9,992	\$ 2,824	\$ 21,379	-	-	35. GF reduction will impact ability to ensure sufficient resources are available to the division for radioactive material transportation monitoring. OF/FF reduction may impact ability to ensure sufficient resources are available to support the Division.
Energy Facility Siting	Reduce Attorney General Fees 10%		\$ 90,111		\$ 90,111	-	-	36. Reduction will limit ability to consult Department of Justice on legal issues affecting programs and put at risk a legal response in case of lawsuit.
Nuclear Safety & Energy Security	Reduce Instate Travel 20%	\$ 334	\$ 2,335	\$ 8,461	\$ 11,130	-	-	37. Reduction may impact emergency preparedness planning.

Agency Summary

Energy Facility Siting	Reduce Distribution to Fish and Wildlife 50%		\$ 44,987		\$ 44,987	-	-	38. Reduction may impact statutory requirements to compensate reviewing agencies for their role in the state siting process.
Energy Facility Siting	Reduce Distribution to Counties 45%		\$ 42,498		\$ 42,498	-	-	39. Reduction may impact statutory requirements to compensate reviewing agencies for their role in the state siting process.
Energy Facility Siting	Reduce Other Special Payments 45%		\$ 65,486		\$ 65,486	-	-	40. Reduction may impact statutory requirements to compensate reviewing agencies for their role in the state siting process.
Nuclear Safety & Energy Security	Reduce Distribution to Counties 30%		\$ 10,696	\$ 7,746	\$ 18,442	-	-	41. Reduction will reduce collaboration with counties on emergency drills.
Energy Planning & Innovation	Reduce Other Special Payments 30%	\$ 842,192	\$ 864,382	\$ 188,513	\$ 1,895,087	-	-	42. Reduces ability to ensure sufficient resources are available to support the Department's incentive distributions.
Energy Development Services	Reduce Other Special Payments 12%		\$ 453,850	\$ 1,061,034	\$ 1,514,884	-	-	43. Reduces ability to ensure sufficient resources are available to support the Department's incentive distributions.

Agency Summary

Energy Development Services	Reduce Other Services and Supplies 79%	\$ 51,647			\$ 51,647	-	-	44. Reduction may impact ability to ensure sufficient resources are available to operationalize the indirect cost rate.
Administrative Services	Reduce Accountant 1 position by 50%		\$ 132,795		\$ 132,795	-	0.50	45. Reduction will impact ability to provide timely accounting services and controls.
Administrative Services	Reduce Procurement & Contract Specialist 1 position by 100%		\$ 202,604		\$ 202,604	1	1.00	46. Reduction will impact ability to provide timely procurement and contracting services and controls.
Total		\$ 1,100,600	\$ 4,055,420	\$ 2,239,242	\$ 7,395,262	3	3.50	

Oregon Department of Energy (ODOE)

2025-27 Biennium

Long-term vacancies as of December 31, 2024

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21
Agency	SCR	DCR	Pos No	Position Class Comp	Position Title	Pos Type	GF Fund Split	LF Fund Split	OF Fund Split	FF Fund Split	FTE	2025-27 GF PS Total	2025-27 LF PS Total	2025-27 OF PS Total	2025-27 FF PS Total	2025-27 Total Bien PS BUDGET	Vacant Date	Position eliminated in GRB? Y/N	Reason for vacancy	
33000	200-00	200-04	0032008	UA C1002 AP	Loan Specialist 2	PF	0.00	0.00	1.00	0.00	1.00	0	0	206,010	0	206,010	4/25/2022	N	Vacancy Savings	
33000	200-00	200-06	0009006	UA C0104 AP	Office Specialist 2	PF	0.00	0.00	1.00	0.00	1.00	0	0	136,836	0	136,836	11/22/2019	N	Vacancy Savings	
											-					-				
											-					-				
					TOTAL		0.00	0.00	2.00	0.00	2.00	0	0	342,846	0	342,846				

Oregon Department of Energy (ODOE)
2025-27 Biennium

Contact Person (Name & Phone #): Monty Schindler - 503-480-5036

Updated Other Funds Ending Balances for the 2023-25 and 2025-27 Bienna											
(a)	(b)	(c)	(d)	(e)	(f)		(g)		(h)	(i)	(j)
Other Fund Type	Program Area (SCR)	Treasury Fund #/Name	Category/Description	Constitutional and/or statutory reference	2023-25 Ending Balance		2025-27 Ending Balance		In CSL	Revised	Comments
					In LAB	Revised	In CSL	Revised			
Limited	100 - Energy Planning & Innovation	00401 Oregon State General Fund	Other, Public Purpose Charge - Industrial	ORS 757.612, 469.040, OAR 330-140-0140	21,594	24,125	1,255	32,167			Fee based on a percentage of the project.
Limited	100 - Energy Planning & Innovation	00401 Oregon State General Fund	Other, Public Purpose Charge - Schools	ORS 757.612(3)(c)	742,152	695,478	331,968	295,478			Administrative cost recovery for services provided for school districts
Limited	100 - Energy Planning & Innovation	00401 Oregon State General Fund	Other, State Energy Efficient Design	ORS 276.900-915	1,122	14,053	1,122	14,053			Fee for service. Very little/no activity anticipated. There is a small operating balance.
Limited	100 - Energy Planning & Innovation	00401 Oregon State General Fund: Energy Efficient Tech Info & Training Fund - OF	Energy Efficient Technologies Information & Training Fund	ORS 469.772	0	0	0	0			No ending balance expected in fund. Available funding based on General Fund deposits to program fund.
Limited	200 - Energy Development Services	00401 Oregon State General Fund	Operations: Energy Incentive Program (EIP)	ORS 469B.164, 469B.294, 469B.335	(435,793)	0	0	0			Fee based cost recovery program that sunset January 1, 2018 and did not generate enough revenue to cover expenses. Planning to clear deficit in AY25.
Limited	200 - Energy Development Services	01433 Renewable Energy Development Fund	Grant Fund: Renewable Energy Development Program	ORS 469B.253, 469B.256, 469B.259	1,748,551	1,312,758	1,748,551	1,312,758			Separate treasury fund, grants are obligated to projects, but funds are not distributed until projects are completed. Balance changes are due to timing/completion of projects. Reserves are held to adequately cover the agency's response to accidents in transporting radioactive waste in the State.
Limited	300 - Nuclear Safety	00401 Oregon State General Fund	Other, Radioactive Waste Transport Fee	ORS 469.605, 469.611	191,537	51,844	91,503	91,503			Cost recovery, billed by hourly rate for agency staff and actual expenditures incurred.
Limited	400 - Energy Facility Siting	00401 Oregon State General Fund	Other, Energy Facility Siting Fees	ORS 469.421(1) and (6)	1,561,350	2,790,947	27,978	2,838,719			Assessment. Target minimum ending balance is \$4.6M which represents 6 months of budgeted expenditures. Balance in excess of target balance will be applied as credit to next biennial assessment.
Limited	500 - Admin Services	00401 Oregon State General Fund	Other, Energy Supplier Assessment (ESA)	ORS 469.421	805,003	6,328,963	535,610	4,655,606			SELP Non-Limited and Non-Limited Debt Service funds are constitutionally dedicated and cannot be used for any purposes other than indenture and constitutional bond requirements until all bonds are paid off and no longer outstanding. Variance in the ending balance is attributed to the changes in activity.
Non-Limited and Non-Limited Debt Service	200 - Energy Development Services	00493: Small Scale Local Energy Loan Fund	Loan Program, Small Scale Energy Loan Program	Oregon Constitution XI, ORS 470.090 & .091	6,012,911	8,281,006	8,707,213	5,166,964			Funding from SELP fees, SELP is no longer generating significant fees.
Limited	200 - Energy Development Services	00494: Small Scale Local Energy Proj Admin & Bd	Operations Small Scale Energy Loan Program	Oregon Constitution XI, ORS 470.090 & .091	23,105	8,011	0	0			Energy Incentive program. Available funding based on General Fund deposits to program fund.
Limited	200 - Energy Development Services	00401 Oregon State General Fund: Rooftop Solar Incentives - OF	Grant Fund: Rooftop Solar Incentive Grant Program	ORS 469.040 & Oregon Laws 2019 chapter 655 (House Bill 2618)	0	384,816	0	0			Energy Incentive program. Available funding based on General Fund deposits to program fund.
Limited	200 - Energy Development Services	00401 Oregon State General Fund: Community Renewable Investment Fund - OF	Grant Fund: Community Renewable Investment Grant Program	Oregon Law 2021 Ch. 508, HB 2021 S. 33	31,978,625	60,147,758	45,143,659	45,143,659			Energy Incentive program. Available funding based on General Fund deposits to program fund.
Limited	200 - Energy Development Services	00401 Oregon State General Fund: Heat Pump Deployment Fund - OF	Grant Fund: Heat Pump Deployment Grant Program	ORS 469.040, ORS 469.255 & ORS 469.261	0	241,040	0	0			Energy Incentive program. Available funding based on General Fund deposits to program fund.
Limited	200 - Energy Development Services	00401 Oregon State General Fund: Residential Heat Pump Fund - OF	Grant Fund: Residential Heat Pump Rebate & Grant Program	ORS 469.040, ORS 469.255 & ORS 469.261	0	739,061	0	0			Energy Incentive program. Available funding based on General Fund deposits to program fund.

Objective: Provide updated Other Funds ending balance information for potential use in the development of the 2025-27 legislatively adopted budget.

Instructions:

Column (a): Select one of the following: Limited, Nonlimited, Capital Improvement, Capital Construction, Debt Service, or Debt Service Nonlimited.

Column (b): Select the appropriate Summary Cross Reference number and name from those included in the 2023-25 legislatively approved budget. If this changed from previous structures, please note the change in Comments (Column (j)).

Column (c): Select the appropriate, statutorily established Treasury Fund name and account number where fund balance resides. If the official fund or account name is different than the commonly used reference, please include the working title of the fund or account in Column (j).

Column (d): Select one of the following: Operations, Trust Fund, Grant Fund, Investment Pool, Loan Program, or Other. If "Other", please specify. If "Operations", in Comments (Column (j)), specify the number of months the reserve covers, the methodology used to determine the reserve amount, and the minimum need for cash flow purposes.

Column (e): List the Constitutional, Federal, or Statutory references that establishes or limits the use of the funds.

Columns (f) and (h): Use the appropriate, audited amount from the 2023-25 legislatively approved budget and the 2025-27 current service level at Governor's Budget.

Columns (g) and (i): Provide updated ending balances based on revised expenditure patterns or revenue trends. The revised column (i) should assume 2025-27 current service level expenditures, considering the updated 2023-25 ending balance and any updated 2025-27 revenue projections. Do not include adjustments for reduction options that have been submitted. Provide a description of revisions in Comments (Column (j)).

Column (j): Please note any reasons for significant changes in balances previously reported during the 2023 session.

Additional Materials: If the revised ending balances (Columns (g) or (i)) reflect a variance greater than 5% or \$50,000 from the amounts included in the LAB (Columns (f) or (h)), attach supporting memo or spreadsheet to detail the revised forecast.