

**EIGHT GOALS TO GUIDE OUR WORK**



# **Strategic Plan**

**2006 - 2010**



**OREGON DEPARTMENT OF  
STATE LANDS**

# Oregon Department of State Lands

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## ***Strategic Plan*** **2006 – 2010**

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## **Mission Statement**

*The mission of the Department of State Lands is to ensure a legacy for Oregonians and their public schools through sound stewardship of lands, wetlands, waterways, unclaimed property, estates and the Common School Fund.*

## **Our Vision**

*The Department of State Lands serves Oregonians and the State Land Board by prudently and sustainably managing Common School Fund assets to generate revenue to the Common School Fund and increase distributions to schools. We work responsively and collaboratively with citizens, tribal and local governments and other agencies and organizations. We are regarded as a leader in conserving and protecting wetlands and waterways and meeting trust property responsibilities.*

## **STRONG PUBLIC SUPPORT**

Each program works to achieve strong public support with participation from an engaged and informed public that works closely with the agency.

## **PRUDENTLY MANAGED COMMON SCHOOL FUND AND LANDS**

The agency tries to achieve a sustainable balance, consistent with our trust obligations, between the goals of revenue generation and resource stewardship. We intend to provide stable and increasing revenue for public schools through the Common School Fund. We manage state lands to benefit schools, enhance the economy, sustain a healthy landscape and meet our public trust responsibilities.

## **AN OUTSTANDING STAFF**

Agency staff members are highly trained and respected in their area of expertise, have opportunities to advance, and draw from their diverse backgrounds to work cooperatively with each other and with the public we serve. DSL endeavors to have employees with a high level of professionalism and job satisfaction in achieving the mission of the agency.

## **A HIGH LEVEL OF PROGRAM EFFECTIVENESS**

Agency programs deliver results, with staff using the best fiscal, business and natural resource management practices, and well-developed plans to guide decisions. Through a combination of funding sources, DSL seeks support at a level that allows the agency to efficiently serve customers, meet responsibilities and attain goals. The agency works collaboratively and responsively with local governments, ports, special districts, federal agencies and other public agencies, tribal governments, organizations and citizens.

Specifically:

- We are responsible stewards of the land and water resources we manage for the people of Oregon. We carry out the mandate from the Oregon Constitution to manage lands “with the object of obtaining the greatest benefit for the people of this state, consistent with the conservation of this resource under sound techniques of land management.”
- We maintain the state’s wetland resource base through the Removal-Fill Program and encourage restoration of former wetlands.
- We administer regulations related to actions of landowners and others that impact land and water resources within our jurisdiction in a fair and timely manner. We communicate regularly and educate them on best management practices.
- We protect waterways held in trust for the public for navigation, recreation, fisheries and commerce.
- We meet unclaimed property responsibilities by returning property to the rightful owners and by educating holders of unclaimed property regarding their responsibilities to remit.
- We protect the assets of estates as personal representative while diligently searching for heirs.
- We comply with federal and state constitutions; federal, state and local laws; generally accepted accounting principles; and state policies.
- We communicate clearly and regularly with our customers, our partners and the public so that they understand our policies and programs, and we share our technical knowledge openly.
- We use state-of-the-art technology at appropriate levels to operate agency programs efficiently.

## **Executive Summary**

The Department of State Lands 2006-2010 Strategic Plan identifies key actions to grow Oregon's Common School Fund while maintaining sound stewardship of the state's natural resources. The plan is an update of DSL's 2004-2008 plan, and reflects input from the public, constituents and staff.

With the support of the State Land Board, DSL will use this plan as a guide for prioritizing and implementing programs. The performance measures will be used to assess the effectiveness of our implementation.

The following summarizes the major actions for each program goal contained in the DSL Strategic Plan.

### **Goal 1: Land and Waterway Management**

To manage lands to obtain the greatest benefit for Oregonians consistent with the conservation of the resource while producing revenue for the Common School Fund; and to preserve and protect public trust use of Oregon's waterways to ensure their continued availability from generation to generation for commerce, recreation, navigation and fisheries. The goals will be accomplished through:

- Asset Management Actions
- Land Sales, Exchange and Investment Actions
- General Land Management Actions
- Rangeland Management Actions
- Forest Management Actions
- Navigability and Waterway Public Use Management Actions

### **Goal 2: Wetlands and Waterways Conservation**

To conserve, restore and protect waters of the state, including wetlands, for their contribution to aquatic life and habitats, fisheries, aquatic-based economies, tourism, public recreation, navigation, water quality, floodwater storage and other natural resource functions and values through the Removal-Fill and Wetlands programs. The goals will be accomplished through:

- Statewide Wetlands Inventory Actions
- Permit Compliance, Mitigation Success and Wetland Benchmark Actions
- Wetland and Waterway Rapid Assessment Methodologies Actions
- Streamlining and Program Improvement Actions
- Wetlands and Waterways Information Actions
- Wetlands Planning Actions

### **Goal 3: Unclaimed Property**

To enhance public service and outreach, improve unclaimed property processing efficiencies, increase compliance with reporting laws, and increase receipts to the Common School Fund. The goals will be accomplished through:

- Outreach and Compliance Actions
- Processing Efficiencies

### **Goal 4: Estates**

To efficiently administer escheated estates to protect assets for rightful owners and the Common School Fund. This will be accomplished through:

- Program Evaluation Actions
- Training Actions
- Administration Actions
- Outreach Actions

### **Goal 5: Common School Fund**

To protect and enhance the value of the Common School Fund (both short- and long-term) through close monitoring of investments to maximize distributions to schools. This will be accomplished through:

- Monitoring Actions
- Public Outreach Actions

### **Goal 6: Customer Service and Administration**

To continually improve DSL program awareness and delivery, customer and employee satisfaction, and agency support services. These goals will be accomplished through:

- Customer Service Actions
- Communications Actions
- Human Resources Actions
- Fiscal Services Actions
- Information Systems Actions
- Business Continuity and Sustainability Planning Actions

### **Goal 7: South Slough National Estuarine Research Reserve**

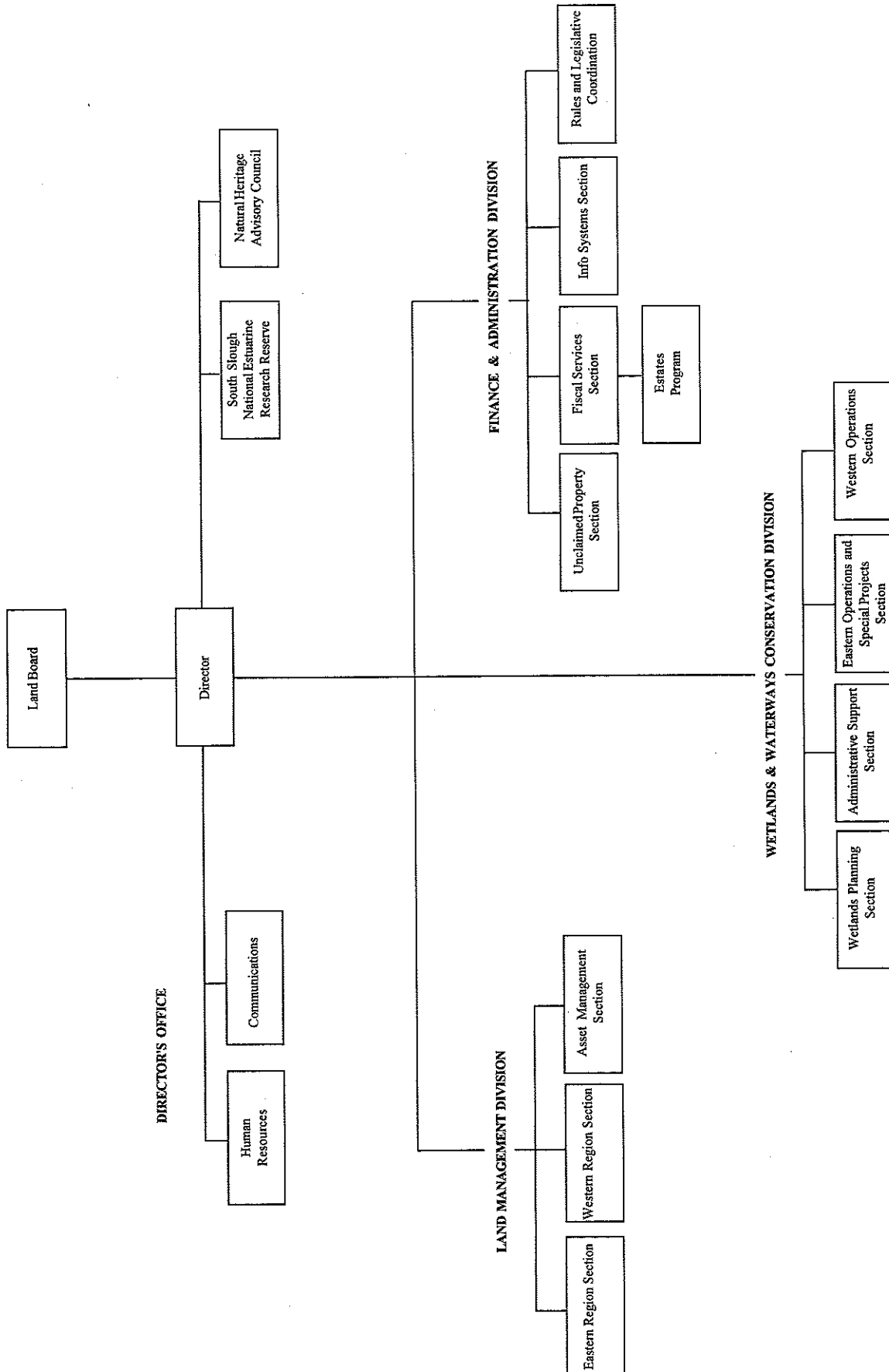
To implement the South Slough Management Plan which supports the mission of the reserve to improve the understanding and stewardship of Pacific Northwest estuaries and coastal watersheds. The plan includes actions related to:

- Research
- Education
- Stewardship
- Administration
- Facilities and Public Access

### **Goal 8: Oregon Natural Heritage Program**

To revise and implement the Oregon Natural Heritage Plan, and complete a review of program delivery, administrative structure and oversight.

# DEPARTMENT OF STATE LANDS





## **Department of State Lands Organizational Structure**

### **Director's Office**

The Director's Office oversees administrative responsibilities for the State Land Board and directs the operations of DSL. The director provides overall leadership to DSL staff, makes recommendations to the Land Board and Legislature, approves policies and plans, and oversees DSL's budget, grants and contracts. The director serves as chair of the South Slough National Estuarine Research Reserve (SSNERR) Management Commission. The director also participates as a member of the Economic Revitalization Team, Department of Administrative Services and Natural Resources Cabinets, and serves on the Ocean Policy Advisory Council as a non-voting member. The Human Resources and Communications programs are housed in the Director's Office.

### **Land Management Division**

The Land Management Division includes all programs and activities that generate revenue for the Common School Fund from trust and statutory lands, including land granted to Oregon upon statehood and the submerged and submersible lands underlying navigable waterways. Property managers issue leases, easements, rights-of-way and licenses for use of state-owned uplands and waterways. The division is also responsible for implementing DSL's Asset Management Plan, which guides the work of the State Land Board in managing state land assets. The division's assistant director manages the Western Region land management staff and DSL's headquarters building, which includes state-agency tenants. The division maintains an Eastern Region office for all land management activities east of the Cascades. It also houses the agency's cartographic and geographic information systems.

### **Wetlands and Waterways Conservation Division**

The Wetlands & Waterways Conservation Division's primary function is to conserve and protect waters of the state, including wetlands, for their contribution to aquatic life and habitats, fisheries, aquatic-based economies, public recreation, navigation, commerce, water quality, floodwater storage and other natural resource functions and values through the Removal-Fill and Wetlands programs. The division is responsible for three core functions: 1) Implementing the removal-fill law by assisting landowners and consultants in obtaining permits for removal-fill activities on Oregon's waterways, wetlands, the Pacific Ocean and other waters of the state. Staff also monitors permits for compliance with conditions. 2) Providing assistance for and review of wetland delineation reports, an important component of the removal-fill permitting process. 3) Assisting with state requirements to replace lost wetlands by helping establish wetland mitigation banks and monitoring the development of wetland mitigation sites. The division's assistant director oversees the Western and Eastern Operations sections and the Wetlands Program, as well as DSL's liaison to the Economic Revitalization Team. The assistant director also represents the agency on the Oregon Plan Core Team.



## **Finance and Administration Division**

This division is responsible for DSL's agency-wide support functions, as well as oversight of DSL-managed funds, audits and properties. It includes the following sections: 1) Unclaimed Property, which holds property such as dormant bank accounts, uncashed checks and abandoned safe deposit box contents in trust until the rightful owner can be found; 2) Information Systems, which provides maintenance, support and protection of DSL's computer information system and supports a variety of database systems; and 3) Fiscal Services which includes the administration of estates that have no known will or heir. The assistant director serves as the agency's legislative coordinator, and oversees Measure 37 claims processing and the administrative rule process.

## **South Slough National Estuarine Research Reserve**

DSL serves as the state-agency partner for the SSNERR, which is comprised of 1,000 acres of open water and tidelands plus 3,800 acres of uplands in the Charleston area near Coos Bay. The Reserve was established in 1974 in partnership with the National Oceanic and Atmospheric Administration. Staff conducts research and monitoring on estuaries in the region, and provides training and education for thousands of schoolchildren, coastal residents and visitors. The SSNERR is a key player in developing local tsunami preparedness. A 6,500-square-foot interpretive center serves as a facility for visitor information, workshops and administrative offices. SSNERR scientists share administrative resources and laboratory facilities with the University of Oregon Institute of Marine Biology.

## **Oregon Natural Heritage Program**

DSL administers the Oregon Natural Heritage Program, which identifies and works to preserve representative examples of the state's natural plant and landscape resources. The program also maintains a comprehensive database on rare, threatened and endangered species, natural vegetation and ecosystem types. An advisory council of scientists, citizens and state agency representatives guides the program. The Natural Heritage Plan, updated in 2003, guides the work of the program.

## **Goals and Actions 2006 – 2010**

### **GOAL 1: Land and Waterway Management**

To manage lands to obtain the greatest benefit for Oregonians consistent with the conservation of the resource while producing revenue for the Common School Fund; and to preserve and protect public trust use of Oregon's waterways to ensure their continued availability from generation to generation for commerce, recreation, navigation and fisheries.

#### **Legislatively Adopted Performance Measures for Goal #1**

- *Percent of DSL lands and waterways with completed resource inventories – target is 60%.*
- *Percent of DSL lands and waterways with completed area management plans or policies – target is 80%.*
- *Change in net operating income for all Common School Fund land assets – target is 3-5 % annual growth.*
- *Change in total annual revenue from real estate assets – target is 3-5 % annual growth.*

#### **A. Asset Management Actions**

1. Compile biennial status report on implementation of the Asset Management Plan and report to the Land Board and the Legislature.

Schedule: Deliver to 2007 Legislature.

2. Revise and implement 1995 Asset Management Plan.

Schedule: Present to Land Board for approval in October 2006. Following Land Board approval, develop work plan covering short-term objectives from the plan to be addressed within the next three to five years. Complete work plan by December 2006.

3. Increase revenue from leases and easements by marketing unleased lands and authorizing new uses. Identify lands with lease potential.

Schedule: Complete lease-potential analysis by December 2007.

4. Actively participate in Bureau of Land Management's planning process. DSL participation will be site and program specific. Current projects focus on the Sandy River, the John Day River, Steens Mountain, Western Oregon and the Upper Deschutes.

Schedule: Varies with each management plan and subject to availability of BLM resources.

5. Annually review revenues and expenditure data by land classification and adopt new strategies per Asset Management Plan. Report regularly to the Land Board.

Schedule: Report in October of each year for preceding fiscal year.

## **B. Land Sales, Exchange and Investment Actions**

1. Following the objectives set forth in the Asset Management Plan, sell lands identified for disposal (generally scattered, isolated and unleased parcels).

Schedule: Ongoing effort subject to availability of staff and budget to sell parcels.

2. Complete transfer of in-lieu lands from the federal government.

Schedule: Complete agreements for transfer by March 2007; obtain title to 1,100 acres by June 2007. The schedule for other properties is dependent on the Bureau of Land Management planning process and funding.

3. Complete sale or exchange of trust lands/minerals within the Steens Mountain National Conservation Area to the Bureau of Land Management.

Schedule: Subject to federal funding for implementation of the SMNCA.

## **C. General Land Management Actions (leases, easements and other authorizations)**

1. Compile report on land management activities relating to leases; report to the Land Board. The report shall contain a summary of agency efforts to support the Governor's Executive Order on Sustainability.

Schedule: Deliver to Land Board in February of even-numbered years.

2. Review and update lease rates and adjust to obtain fair market value as appropriate and applicable, based on Asset Management Plan.

Schedule: Complete review by October 2007. Initiate needed rule changes to adjust rates.

3. Continue process to determine state ownership on waterways and pursue authorizations where none exist. Resolve filled lands claims on a case-by-case basis.

*Performance Measure:* To be determined after July 2006; 500 new authorizations were completed between July 1, 2005 and April 30, 2006.

4. Revise and update rules relating to special uses (including hydroelectric facilities, ocean wave electricity generation installations, wind farms) and sand and gravel activities (derived from state-owned submerged and submersible land).

Schedule: Land Board adoption of final rules by June 2007.

5. Revise and update rules governing easements, land sales and exchanges.

Schedule: Present for Land Board adoption of final rules by December 2007.

6. Identify, investigate and resolve upland trespass cases (e.g. unauthorized removal of sand and gravel, unauthorized roads).

*Performance Measure:* Investigate at least five trespass cases per year.

7. Actively participate in actions related to the cleanup of the Portland Harbor under the federal Superfund process. Develop site histories and boundary information.

Schedule: Develop site histories and boundaries by October 2007. Prepare for Environmental Protection Agency Record of Decision on December 2008. Continue negotiations on cost allocations.

8. Form a partnership with the Oregon Parks and Recreation Department, Oregon Department of Fish and Wildlife, Oregon Department of Forestry and others to coordinate policies and information campaigns related to all-terrain vehicle use of public lands.

Schedule: Complete by 2008 (subject to state agency funding); ongoing quarterly meetings.

9. Produce land and waterway brochure for distribution to constituents and general public; information will focus on waterway leases, registrations and other authorizations necessary to obtain from DSL for waters of the state.

Schedule: Complete by October 2006.

#### **D. Rangeland Management Actions**

1. Develop Area Management Plans for the Stockade and Owyhee Blocks in SE Oregon. Inventory resources; identify revenue generation opportunities; identify management issues; apply Asset Management Plan strategies; establish land management objectives; apply land classifications based on resources, zoning and market capacity; and develop land management strategies to implement objectives.

Schedule: Begin Area Management Plans by October 2007.

2. Conduct rangeland resource condition inventory on all lands under lease for grazing/forage production. Modify grazing/forage management plans as required. Involve lessees in process.

Schedule: Complete 30,000 acres per year during the next 10 years, depending on ability to obtain three new seasonal positions in the 2007-09 budget.

3. Conduct annual review of Bureau of Land Management and DSL rangeland fire suppression agreement.

Schedule: Conduct review by April 15 each year.

#### **E. Forest Management Actions**

1. Implement and monitor the Land Board and Oregon Department of Forestry agreement for management of Common School Forestlands.

Schedule: Conduct regular meetings to track actions.

2. Revise the Elliott State Forest Management Plan and Habitat Conservation Plan.

Schedule: Work on plans has been completed. Proceed with approval process with State Land Board and Board of Forestry—obtain approvals from both by October 2007.

3. Explore revenue generation from forestland for the purpose of carbon mitigation, particularly on lands that are not harvestable or that have long rotation cycles.

Schedule: Explore the concept in coordination with the State of Washington's Department of Natural Resources, the Oregon Department of Energy and the Oregon Department of Forestry by June 2007.

#### **F. Navigability/Waterway Public Use Management Actions**

1. Conduct navigability studies as directed by the Land Board. There are six study requests pending before the Land Board.

Schedule: Complete study for the Rogue River by July 2008. Conduct additional studies as directed by Land Board.

2. Work in cooperation with the Oregon Parks and Recreation Department, State Marine Board, public interest groups and other interested parties to implement a waterway recreation plan that includes public education and information programs designed to reduce public and waterfront owner conflicts. A particular area of emphasis will be the Willamette River.

Schedule: Complete by December 2007.

3. Participate in the development of the Bureau of Land Management's recreation plan for the navigable portion of the Sandy River.

Schedule: Complete by December 2007.

## **GOAL 2: Wetlands and Waterways**

To conserve, restore and protect waters of the state\*, including wetlands, for their contribution to aquatic life and habitats, fisheries, aquatic-based economies, tourism, public recreation, navigation, water quality, floodwater storage and other natural resource functions and values through the Removal-Fill and Wetlands programs.

*\* Waters of the state include natural waterways including bays and estuaries; constantly flowing streams (navigable and non-navigable); some intermittent streams; wetlands, lakes and other bodies of water; the Pacific Ocean within three miles of shore; certain ditches; and artificially created wetlands, ponds and channels. (ORS 196.800).*

### **Legislatively Adopted Performance Measures for Goal #2**

- *Percent change in wetland acreage due to permit actions – target is 0.*
- *Percent of removal-fill violations reported during fiscal year that are resolved within one year – target is 50%.*
- *Rate of compliance with removal-fill permit conditions – target is 80%.*
- *Percent payment-to-provide money received in Mitigation Bank Fund obligated and committed with one year – target is 100%.*
- *Percent of permit decisions made within 120 days after initial receipt of an application – target is 100%.*
- *Percent of local participants who rank DSL's involvement in the Economic Revitalization Team process as good or excellent – target is 85%.*

### **A. Statewide Wetlands Inventory Actions**

1. Improve availability and usefulness of the Statewide Wetlands Inventory and assist local governments with development of Local Wetlands Inventories.

Schedule: Ongoing outreach to constituents and partners; complete local inventories within agreed-upon timelines established with each local government.

## **B. Permit Compliance, Mitigation Success and Wetland Benchmark Actions**

1. Implement adaptive management strategies that include review of permit actions, evaluation of mitigation success and adoption of actions to increase permit compliance, mitigation success and resource protection.

*Performance Measure:* Meet statutory deadline of 120 days for completeness determination and removal-fill permit decision – 100% compliance.

*Performance Measure:* Percentage of agency permit applications accepted after being returned one or fewer times as unacceptable before processing – 2006/2007 – 70%; 2007/2008 – 80%.

*Performance Measure:* Average number of days to issue completed permits after completed application is received - 65.

2. Develop permit program compliance and outcome monitoring strategy to provide benchmark data and a process to analyze information to improve program effectiveness.

Schedule: Develop monitoring strategy by June 2007.

3. Implement monitoring strategy developed in Action 2; compile and analyze results from initial monitoring period; develop adaptive management recommendations.

Schedule: Begin in June 2008 and provide status reports on biennial basis (even years).

4. Revise and complete a study of compensatory mitigation success to (a) better assess effectiveness of different types of compensatory mitigation (b) identify problems in need of correction; (c) create process for improving wetland benchmark gain/loss data collection and analysis; and (d) develop specific information for improving compensatory mitigation permit conditions and success.

Schedule: Complete by June 2008.

5. Resolve issues with the U.S. Army Corps of Engineers related to payment-to-provide option for wetland mitigation.

Schedule: Complete by January 2007.



6. Provide technical assistance to the Oregon Department of Transportation related to the economic stimulus package to expedite highway and bridge projects.

*Performance Measure:* Meet 14-day review of wetland delineation reports, meet 25-day completeness review and meet statutory deadlines for permit decisions.

### **C. Wetland and Waterway Rapid Assessment Methodologies Actions**

Develop statewide wetland and waterway rapid assessment methodologies for use in the Removal-Fill Permit Program.

1. Develop an Oregon Wetland Rapid Assessment Protocol for use in removal-fill permitting for wetlands.

Schedule: Complete by December 2008.

2. Develop an Oregon Waterway Rapid Assessment Protocol for use in removal-fill permitting for waterways.

Schedule: Complete by June 2010.

### **D. Streamlining and Program Improvement Actions**

Streamline the state removal-fill permit regulatory program in conjunction with the Governor's Executive Order on Regulatory Streamlining and 2005 legislative budget note.

1. Implement and monitor Statewide Programmatic General Permit from Corps of Engineers to eliminate federal/state duplication of permits.
2. Continue to monitor and review SPGP implementation including consideration of comments from SPGP applicants and stakeholders to improve the process.
3. Monitor SPGP permitted activities to determine compliance with state and federal laws and program goals.
4. Work towards SPGP phase-two implementation by January 2008.

Schedule: Implement identified improvements to SPGP (phase one) by December 31, 2006. Prepare report concerning SPGP phase one effectiveness and design changes for phase two by January 2008.

5. Pursue other actions that will improve the consistency, efficiency and effectiveness of permitting including participation in the Water Related Permit Process Improvement Team.

- Work with constituents to improve and revise program rules on a regular basis.
- Use technology to speed permit application processing including Web-based applications for electronic filing, payment of fees and tracking applications.
- Develop and update materials that increase DSL staff consistency and help applicants understand the application filing and evaluation process.
- Work with other agencies on Water-related Permit Process Improvement Team to coordinate agency processes and improve customer service.

Schedule: Ongoing, with implementation by January 2008.

6. Identify ways to improve the timeliness of wetland determination/delineation concurrences. Continue to seek legislative approval for a wetland determination fee to fund two FTEs to address the volume of such requests, which has risen 250% since 1993 with no additional staff. Continue to seek stakeholder support for this initiative.

Schedule: Ongoing through legislative approval process, with implementation by January 1, 2008 with additional staff in place.

#### **E. Wetlands and Waterways Information Actions**

Update and implement program to provide information on wetland and waterway functions, benefits of wetlands protection, and permit requirements and procedures to the general public and to constituents/permittees.

1. Hold informational/training meetings for private wetland consultants and city and county staff members.

Schedule: Ongoing; hold at least two sessions per year.

2. Annually contact organizations, such as local and state agencies, realtors, developers, economic development groups, homebuilders, contractors and natural resource conservation groups, to explore needs and opportunities for information and training sessions.

Schedule: Ongoing; contact statewide organizations by January each year to determine scheduled events or to create opportunities where information can be provided.

*Performance Measure:* Increase number of people reached annually by at least 3%.

3. Develop standard operating procedures manual that guides staff actions in removal-fill and wetlands programs to increase consistency and help train new

staff. Post on website to help the public and customers understand agency procedures.

Schedule: Complete by June 2007.

4. Work with stakeholders to build support for removal-fill permit fee increase and wetland determination review fee by 2007 Legislature.

Schedule: Complete by June 2007.

5. Continue to work with the Removal-Fill Technical Advisory Committee, including regular forums for wetland consultants, administrative rule changes, increased on-line access for application review and commenting, developing a Removal-Fill Program procedures manual.

Schedule: Ongoing; complete all work items before January 1, 2007.

## **F. Wetlands Planning Actions**

Provide wetlands planning technical assistance to local governments, state agencies, and the Economic Revitalization Team.

1. Develop an expedited process for identifying and avoiding, minimizing or mitigating for losses of wetlands and other waters for certified industrial sites.

Schedule: Ongoing

2. Provide technical and planning assistance to cities and counties engaged in wetland planning under Statewide Planning Goals 5 and 17, wetland conservation plans, and related special area plans (such as transportation or stormwater management plans where wetlands and waterways are an important element).

Schedule: Ongoing assistance upon request of local governments or state agencies.

3. Coordinate and develop Wetland and Habitat Conservation Plan for vernal pool wetlands in White City area in cooperation with various local, federal and state agencies.

Schedule: Complete by July 2007.

### **GOAL 3: Unclaimed Property**

To enhance public service and outreach, improve unclaimed property processing efficiencies, increase compliance with reporting laws, and increase receipts to the Common School Fund.

#### ***Legislatively Adopted Performance Measure for Goal #3***

- *Percent annual increase in amount of unclaimed property reported and remitted annually – target is 3%.*

#### **A. Outreach and Compliance Actions**

Conduct outreach, educational seminars and audits to increase businesses' and organizations' awareness of and compliance with Oregon's unclaimed property laws.

1. Conduct holder workshops, both at business conferences and events, and as stand-alone training opportunities.

*Performance Measure:* Increase number of people served at such events by 10 percent each year.

*Performance Measure:* At least 80 percent of workshop attendees rate presentations as "excellent" or "very good."

Schedule: Annual trainings.

2. Work with software provider to explore establishing holder listserv (umbrella e-mail list) to be created from holder database.

Schedule: Ongoing.

3. Include unclaimed property information in holder newsletters and information provided by state agencies to people establishing new businesses.

*Performance Measure:* Contact and provide materials to at least five new outlets for information each year.

Schedule: Ongoing.

4. Develop a self-audit pilot project to determine effectiveness of this approach for holders of unclaimed property.

Schedule: Evaluate effectiveness by July 2006.

5. Maintain customer satisfaction rating of 90% on surveys provided following a holder compliance audit.

*Performance Measure:* Obtain 90 percent rating for responses of “good” to “excellent” on surveys.

6. Meet with Unclaimed Property Outreach Advisory Committee with primary purpose to improve communication with section’s constituents.

Schedule: Meet at least twice each year.

7. Inform the public about opportunities for reclaiming unclaimed property and increase number of persons claiming property by increasing outreach activities with a focus on fairs, malls, churches, charitable organizations, and Internet opportunities.

*Performance Measure:* Increase claims by 5% annually.

## **B. Improve Processing Efficiencies**

1. Implement procedures for expediting report processing and safe deposit contents inventory.

- Require holders with more than 15 properties to report electronically.

Schedule: Implement by July 2007.

- Implement procedures for expediting report processing and safe deposit contents inventory.

*Performance Measure:* All reports balanced and values ready for claim by owners by May 31 of each year.

2. Process claims in a timely manner.

*Performance Measure:* Maintain 30-day response time for payment of simple claims.

3. Achieve Unclaimed Property Section fiscal controls through the addition of resources targeted to provide processing efficiencies, provide dual controls and maintain high standards of accuracy.

Schedule: Ongoing.

4. Develop bilingual claim forms and information brochures.

Schedule: Complete by July 2007.

## **GOAL 4: Estates**

To efficiently administer escheated estates to protect assets for rightful owners and the Common School Fund.

### ***Legislatively Adopted Performance Measure for Goal #4***

- *Increase in net revenue from escheated estates – target is 3%.*

#### **A. Estates Program Evaluation Actions**

1. Streamline the evaluation process for locating heirs and wills, and determining if an estate is going to be administered by DSL.
2. Evaluate and update procedures for the Estates Program.
3. Establish uniform Attorney General representation for the Estates Program.
4. Evaluate the cost effectiveness of certain activities to determine the most return at the least cost.

Schedule: Complete evaluation by June 2007.

#### **B. Staff Training Actions**

Train new staff in estate procedures, legal requirements, investigative techniques, safety, heir searching, internal controls and estate handling.

Schedule: Complete by December 2006; update training as needed.

#### **C. Administration Actions**

1. Design and implement a comprehensive system for tracking estates and estate assets from the date of notification to closure.

Schedule: Complete by June 2007.

2. Develop a regular report for the estates program to the Land Board.

Schedule: Complete by October 2007.

3. Develop a mechanism to safeguard estates against identity theft and fraud, including a plan to address occurrences when they happen.

Schedule: Complete by December 2007.

#### **D. Outreach Actions**

1. Conduct outreach and educational seminars to medical examiners, nursing homes, hospitals, landlords, law enforcement, attorneys and mortuaries.

Schedule: Conduct four seminars by December 2007.

2. Produce estates brochure for distribution to key constituents and general public. Post information on DSL website.

Schedule: Complete by October 2006.

#### **GOAL 5: Common School Fund**

To protect and enhance the value of the Common School Fund (both short- and long-term) through close monitoring of investments to maximize distributions to schools.

##### ***Legislatively Adopted Performance Measures for Goal #5***

- *Percent annual increase in revenues from all sources – target is 1.5%.*
- *Percent of program revenue streams used to cover administrative and operational costs of revenue-generating programs – target is 38%.*

#### **A. Monitoring Actions**

1. Meet quarterly with State Treasurer's Office staff, provide annual report to Land Board, and annually address Oregon Investment Council.
2. Review State Land Board's distribution policy on a biennial basis and recommend any changes to the Land Board in April of odd-numbered years.
3. Participate in Western States Land Commissioners Association committee to develop uniform methodology for determining rate of return on investments for various classes of trust land investments throughout the Western states.

Schedule: Submit proposal to WSLCA in July 2006; the discussions will determine schedule.

#### **B. Public Outreach Actions**

Engage education community through the Common School Fund Beneficiaries Advisory Committee to support efforts to preserve and enhance the Common School Fund.

Schedule: Meet with members at least twice annually.

## **GOAL 6: Customer Service and Administration**

To continually improve DSL program awareness and delivery, customer and employee satisfaction, and agency support services.

### **A. Customer Service Actions**

#### ***Legislatively Adopted Performance Measure for Goal #6***

- *Percent of customers rating their satisfaction with the agency's customer service as "good" or "excellent": overall customer service, timeliness, accuracy, helpfulness, expertise and availability of information – goal is 90% and above.*

Continually monitor and increase customer satisfaction with DSL staff outreach and program delivery. Actions completed in the 2003-05 biennium include implementing new technologies to increase staff productivity, evaluating field operations to improve service delivery, upgrading file management, adding customer service to employee hiring standards, and improving employee training. In addition, DSL regularly surveys frequent customers and workshop attendees; in 2005, the agency completed an employee survey. The agency has an ongoing commitment to customer service that should be reflected in staff hiring, training, monitoring and evaluation.

### **B. Communications Actions**

Complete and implement an agency Communications Plan that outlines strategies for:

1. Increasing public awareness and understanding of DSL programs and regulatory functions among its external audiences.
2. Building awareness among the public, specifically the education community, about the Common School Fund.
3. Creating more informative and participatory internal communications among DSL employees.
4. Supporting DSL divisions in their communications needs.
5. Streamlining constituent outreach efforts.
6. Standardizing DSL communications agency-wide.
7. Creating an agency crisis communications plan as part of DSL's business continuity planning.
8. Developing credible ways to measure communications effectiveness over time.

Schedule: Ongoing.

### **C. Human Resources Actions**

To create a safe and healthy work environment for DSL employees by providing training opportunities that meet agency and individual needs, hiring and maintaining a diverse work force, and continually improving human resource services for the agency.



1. Training: Develop and implement an agency training plan and program that provides employees and managers opportunities for continuous professional improvement.

*Performance Measure:* Meet or exceed the statewide benchmark of 20 hours of training per year for at least 50% of permanent DSL employees.

2. Performance Evaluation: Provide employees consistent feedback on their performance on an on-going and annual basis.

*Performance Measure:* Reduce agency turnover rate through better employee understanding of work expectations, resulting in more efficient and accurate work products.

3. Policies and Procedures: Provide new and current employees with up-to-date agency policies and procedures.

*Performance Measure:* Train all new employees on DSL policies and procedures related to Human Resources. When new policies or procedures are created or a policy or procedure is revised or updated, copies of the revised procedure will be distributed to all employees and the changes explained.

4. Safety: Provide agency employees with a safe and healthy work environment through a viable safety program and employee training.

*Performance Measure:* Oregon Risk Management assessment remains level or decreases based on employee injury rate.

5. Recruitment: Diversify DSL's workforce to better reflect Oregon demographics.

*Performance Measure:* Agency workforce is more diverse by 2010.

6. Employee Recognition: Implement employee recognition program and routinely survey staff to measure job satisfaction and identify communication issues.

*Performance Measure:* Continue to reduce employee turnover and absences, and improve employees' overall job performance and satisfaction.

#### **D. Fiscal Services Actions**

Increase agency accountability, efficiency and customer service by:

1. Establishing awareness through all management and key staff on internal controls, purchasing guidelines, state budgeting and spending rules. Include fiscal guidelines in orientation for new managers.

Schedule: Ongoing.

2. Completing the transition to revenue-stream-based accounting.

Schedule: Complete by July 2007.

3. Developing a system to track revenue and expenditures by land classification and individual parcel.

Schedule: Complete by July 2008.

4. Developing a deposit interface with the bank lockbox, State Financial Management System and the DSL CASH accounting system.

Schedule: Complete by December 2007.

5. Providing a mechanism to accept credit card payments that will provide a base for future e-commerce applications such as on-line permit submittal, lease payment and renewals.

Schedule: Complete by June 2007.

6. Establishing an administrative overhead rate to assess on all grants for indirect costs of accounting and related services.

Schedule: Complete by June 2007.

#### **E. Information Systems Actions**

To maintain DSL information systems, continually improve support services to staff, and implement new technologies to improve service delivery to customers and realize fiscal savings for the agency by migrating to electronic systems.

1. Implement credit-card payment system; conduct study to determine time commitment; work with Department of Administrative Services to set up framework.

Schedule: Complete by June 2008.

2. Set up web-based dock registration procedure.

Schedule: Complete by June 2008.

3. Implement agency-wide document imaging initiative – acquire software and hardware, and determine contract and staff support for scanning documents and implementing program agency-wide.

Schedule: Complete by December 2008.

4. Establish agency document-naming conventions to standardize procedures and provide for easier recovery of documents within agency programs. IS team will need to work with all staff to implement the new system.

Schedule: Complete by December 2007.

5. Launch a web-enabled Geographic Information System (GIS) to assist agency staff and the public with accessing spatial data from the DSL website.

Schedule: Complete by June 2008.

6. Revise Information Resource Management Plan. The emphasis of the new plan will be on updating hardware, streamlining internal file management systems, providing more web-based services and increasing the efficiency of the Department's corporate database (Land Administration System) by more closely connecting the LAS to GIS systems.

Schedule: Complete by July 2007.

#### **F. Business Continuity Planning Actions**

Develop the DSL Business Continuity Plan, working with the Department of Administrative Services BCP templates, and DSL-specific teams. The purpose of the plan will be to establish resources for continuing business functions in emergency or crisis situations, as mandated by DAS.

Schedule: Complete plan by December 2009.

#### **G. Sustainability Planning Actions**

Implement DSL's 2007-09 Sustainability Plan, focusing on the agency's program areas (Land Management, Facilities Management, Financial Management, Environmental Protection and Heightened Sustainability Awareness), coordination with other agencies, conducting training, and communications.

Schedule: Ongoing.

## **GOAL 7: South Slough National Estuarine Research Reserve**

To implement the South Slough Management Plan which supports the mission of the reserve to improve the understanding and stewardship of Pacific Northwest estuaries and coastal watersheds.

### ***Legislatively Adopted Performance Measures for Goal #7***

- *Increase number of “education contact units” per year – target is 2%.*
- *Maintain or increase number of research, monitoring or stewardship projects conducted each year – target is to increase by one per year.*
- *Percent annual increase in South Slough operations funded from sources other than Common School Fund, including leverage from grants – target is 3-4%.*

Specifically, the plan includes:

#### **A. Research**

1. Conduct and coordinate research that increases understanding of ecological dynamics in the different regions of South Slough, Coos Bay, and other Pacific Northwest estuaries.
2. Assess and monitor the status of estuarine habitats and biotic indicators in order to track short-term variability and long-term changes in estuarine habitats and communities.
3. Provide technical assistance and advisory services that contribute to efficient and effective management of estuaries in the Lower Columbia biogeographic province.

Schedule: Ongoing.

#### **B. Education**

1. Provide a variety of high quality educational experiences focused on Pacific Northwest estuaries and coastal watersheds.
2. Promote awareness about coastal environments and the Reserve through public programs, interpretive exhibits, and informational materials.
3. Develop and strengthen partnerships and engage the local community in the Reserve’s education efforts.

Schedule: Ongoing.

### **C. Stewardship**

1. Manage and restore the habitats and ecosystem processes associated with the Reserve using an adaptive management approach.
2. Provide for a diversity of high quality estuarine and coastal habitats representative of the Lower Columbia biogeographic province.
3. Collaborate with local, regional, and national agencies and organizations to address natural resource management issues affecting estuaries and coastal watersheds.

Schedule: Ongoing.

### **D. Administration**

1. Manage and support an administrative framework that maximizes interagency cooperation and allows the Reserve to take full advantage of funding opportunities.
2. Facilitate the development and implementation of clear policy direction and guidance in the management of the Reserve.

Schedule: Ongoing.

### **E. Facilities and Public Access**

1. Revise 1991 Facilities Master Plan.

Schedule: Complete by December 2006.

2. Develop and maintain facilities necessary to the programs and operations of the Reserve and that support the needs of visitors and staff.
3. Serve as a model for developing, maintaining, and operating facilities that minimize ecological impacts through siting, design, and construction methods and the use of innovative technologies.

Schedule: Ongoing.

**Goal 8: Oregon Natural Heritage Program**

To update the Oregon Natural Heritage Plan, which is required to be updated every five years by administrative rule. The plan includes an inventory of Oregon's natural heritage elements, primarily the native ecosystem and geological types, and special species. The plan guides the work of the Natural Heritage Council and program, and is the basis for interagency, state and federal coordination.

Schedule: Complete plan update by February 2009.

To complete a program review and provide DSL and the 2009 Legislature with recommendations for continuing the program, administrative structure and oversight.

Schedule: Complete review by December 2007.

## Appendix

### Department of State Lands Major Plans

In addition to the Strategic Plan, the following plans provide guidance for DSL staff and the State Land Board:

- **Asset Management Plan** – guides DSL activities related to managing land assets, waterways and minerals to benefit the Common School Fund.
- **Communications Plan** – guides communications activities with DSL’s varied external customers, including the media, and internally with staff.
- **Elliott State Forest Plan and Habitat Conservation Plan** – outlines strategies for managing the Elliott State Forest and scattered tracts of state forestland managed for DSL by the Oregon Department of Forestry.
- **Lower Willamette River Management Plan** – provides policy direction and guidance for DSL's regulatory and proprietary interests from Kelly Point to just above the Sellwood Bridge in Portland.
- **Oregon Natural Heritage Plan** – guides the work of the Natural Heritage Council and program, and includes an inventory of Oregon’s natural heritage elements, including the native ecosystem, geological types and special species.
- **Oregon Wetland Conservation Strategy** – provides direction and establishes priorities for conserving, restoring and protecting Oregon’s wetlands.
- **Recommendations for a Nonregulatory Wetland Restoration Program for Oregon** – outlines 10 recommendations and implementation actions for a voluntary wetlands restoration policy and program for Oregon.
- **South Slough National Estuarine Research Reserve Management Plan** – provides direction for the reserve in their mission to improve the understanding and stewardship of Pacific Northwest estuaries and coastal watersheds.
- **State Agency Coordination Plan** – ensures DSL’s and other state agencies’ rules and programs affecting land use comply with the Statewide Planning Goals and are compatible with acknowledged city and county comprehensive plans and land-use regulations.

- ***Sustainability Plan*** – provides agency-wide direction for managing DSL land, natural-resource and fiscal assets in a sustainable manner.

Copies of the plans are available on the DSL website: [www.oregonstatelands.us](http://www.oregonstatelands.us), or by contacting the department:

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775 Summer St. NE  
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