



Due Date to Governor's Office – June 1, 2024

Approved at the Board of Accountancy Meeting on February 15, 2024

**OREGON BOARD OF ACCOUNTANCY
STRATEGIC PLAN – DETAIL IMPLEMENTATION DRAFT**

(Implementation steps are set forth in italics)

VISION STATEMENT

Become a proactive regulator embracing best policy and administrative practices to ensure public protection, responsiveness to changes in CPA practice and sensitivity to pipeline issues facing the profession. To achieve this vision, the Board will deepen its relationship with licensees and candidates for examination through development and implementation of a community engagement plan that will add value for existing licensees and help attract and support a deeper and more diverse pool of candidates pursuing CPA licensure.

GOALS

Develop a draft community engagement plan by June 30, 2024 and request as necessary resources to support plan implementation in the agency's 2025-27 Agency Request Budget. This work will integrate with the Board's DEI Plan and include a position request for an agency deputy director.

- *Request Deputy Director Position in Agency Request Budget for 2025-27*
- *Collaborate with the Department of Administrative Services (DAS) and Legislative Fiscal Office (LFO) to implement if possible and approved Deputy position into the current budget by July 2024*
- *Bring draft Community Engagement Plan (CEP) to the June 6, 2024 Board Meeting*
- *Explore opportunities for collaboration with OSCPA in CEP development.*
- *Update the Board's DEI plan and integrate it with strategic plan goals by June 30, 2024 by:*
 - *Integrating specifics of the Community Engagement Plan*
 - *Describing Equity Impacts of the Pipeline Committee work and related legislative concept to help fund need-based scholarships through disbursement of a excess operating funds*
 - *Emphasizing the diversity impact on the CPA candidate pipeline by offering an additional licensure option not reliant on a fifth year of school*

Build pro-active education and outreach into the Board's licensing and compliance functions.

- *Integrate specific outreach on compliance and licensing topic to schools, candidates, licensees and firms into Board operations and the CEP (outreach activity timing dependent on when resourcing and hiring of Deputy Director position occurs)*
- *Make town-hall type outreach with Q&A opportunity a permanent feature of Board operations.*

Develop and implement communication structures and resources to support effective regulation and community engagement, in a manner sensitive to the differing needs of practitioners and the next generation of applicants for licensure.

- *Revamp and update the Board's web site by June 30, 2024*
- *Develop social media capacity and bring social media plan to the December 2024 Board meeting*
- *Increase use of the mass email and targeted capacity already available to increase compliance through additional deadline reminders and push targeted information relevant to specific groups*

Improve operational efficiency in licensing and compliance through technology and process improvements and resource that work as necessary.

- *Prioritize work with DAS Procurement, DAS Enterprise Information Systems (EIS), DAS CFO, and as necessary LFO to select and implement a database solution, with pathway clarity prior to 2025-27 Agency Request Budget (ARB) consideration at the June 6 Board or a potential special July 2024 Board meeting dedicated to final ARB review and approval.*
 - *Priority given to solutions achievable within the existing budget authorization.*
 - *Align recurring subscription pricing model with recurring budget line item authority.*
 - *Ensure if additional resources are necessary to accomplish IT goals that policy package is built into 2025-27 ARB.*
- *Build on maturation of staff and NASBA March 2024 Conference training for staff by*
 - *developing and implementing an internal plan for process improvements achievable prior to IT solution deployment*
 - *ensuring staff input on system requirements and improvements for IT solution*
- *Potentially contract with WA Board for IT system and licensing process consultation*

Become a leader in the national discussion on creating more flexible options to achieve CPA licensure, without lowering standards and without endangering the profession's key national accomplishments in the arena of substantial equivalency and mobility.

- *Ensure a Board voice / attendance at the NASBA Western Regional and Annual Conferences*
- *Utilize all opportunities for input the NASBA Licensure Task Force provides.*
- *Engage with our state, regional and national regulatory and association partners in the continued development of the Board's 2025 legislative concept creating an additional pathway for licensure that positively impacts the workforce pipeline and minimizes disruption to mobility and substantial equivalency.*