

# OREGON BOARD OF ACCOUNTANCY

## Information Technology Strategic Plan: 2027 - 2030

### FOUNDATION

#### OUR MISSION

Protect Oregon consumers by ensuring only qualified licensees practice public accountancy in accordance with established professional standards and promulgated rules.

#### OUR VISION

Proactive regulator that embraces best policy and administrative practices to ensure public protection, respond to changes in CPA practice, and support a diverse and resilient pipeline of future licensees.

#### OUR CORE VALUES

We value public protection as our foremost responsibility, ensuring consumers receive services from competent and ethical professionals.

We value responsiveness and modernization, continually adapting our regulatory practices to meet changes in the profession and the needs of applicants.

We value equity and accessibility, removing barriers and supporting diverse pathways into the CPA profession.

We value transparency and accountability, providing clear information, open processes, and timely communication to all stakeholders.

We value efficiency and operational excellence, improving processes and technology to strengthen licensing and compliance systems.

We value collaboration and community engagement, partnering with educators, organizations, and licensees to strengthen the CPA pipeline.



### STRATEGIC PRIORITIES

#### GOALS

1. Develop and implement a comprehensive community engagement plan that strengthens relationships with licensees, candidates, and education partners.
2. Build proactive education and outreach into licensing and compliance operations to improve clarity, support, and regulatory outcomes.
3. Modernize communication systems, including the website, social media, and targeted messaging, to enhance transparency and increase compliance.
4. Improve operational efficiency by advancing technology, integrating systems, and streamlining internal processes in licensing and compliance.
5. Lead conversations nationally on flexible licensure pathways that maintain high standards while supporting workforce development and mobility.
6. Align strategic, budgetary, and DEI initiatives to advance equity, support candidates, and strengthen the profession's long-term sustainability.

#### GUIDING PRINCIPLES

##### User Focused - Ease of Use:

Technology solutions will be designed to optimize the user's experience while maximizing sharing and reuse of technologies.

##### Focused IT Investments:

Management of IT investments (e.g. allocation of IT resources, funding of projects) will align with the strategic objectives and the governance process.

##### Fiscally Responsible Investments:

Where possible participate in multi-organization IT initiatives to take advantage of economies of scale, and strive for return on investment, and predictability in technology costs.

##### Modernize the Experience:

Running outdated applications causes many problems and challenges, and may not align with business goals. Modernization is focused on improving the employee and customer experience.

##### Strategic Adopting of New Technologies:

The adoption of technology will rely on following the lead of other agencies for "systems of record", and will consider early adoption for "systems of innovation and differentiation".

### ACTION PLAN

#### KEY INITIATIVES

##### Integrated Licensing & Case Management System:

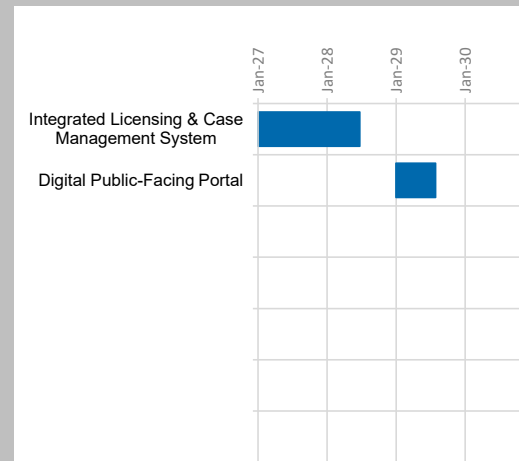
Implement a unified end to end licensing and case management platform that automates workflows, eliminates manual data re entry, and accelerates accurate,

##### Digital Public Facing Portal:

Deploy a modern self service portal that enables applicants, licensees, firms, and the public to easily access information, submit requests, and complete transactions

### ROADMAP

#### 5-YEAR PLAN



### PERFORMANCE

#### ALIGNED KEY INDICATORS

##### CUSTOMER SATISFACTION:

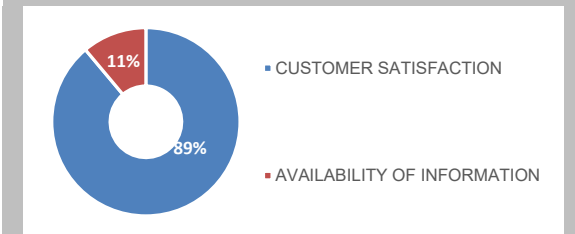
+10–15% increase in satisfaction scores due to reduced delays and error rates.

##### Availability of Information:

Boost to 90+% satisfaction rating.

### INVESTMENT PORTFOLIO

#### INVESTMENT LEVEL BY OBJECTIVE



#### COST PROJECTIONS

