

# OREGON BOARD OF ACCOUNTANCY



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## Diversity & Inclusion /Affirmative Action Plan

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Kimberly Fast, Executive Director  
3218 Pringle Road SE, Suite 110  
Salem, OR 97302-6307  
Ph.: 503-378-2280

**2019-2021**

## DESCRIPTION OF AGENCY

### A. **Mission and Objectives**

The mission of the Oregon Board of Accountancy is to protect Oregon consumers by ensuring only qualified licensees practice public accountancy in accordance with established professional standards and promulgated rules. The Board is responsible for licensing and regulating Certified Public Accountants (CPAs) and Public Accountants (PAs) in Oregon.

The Board of Accountancy assures that approximately 9,000 CPAs, PAs, municipal auditors and public accounting firms registered to practice in Oregon demonstrate and maintain professional competency to serve the needs of their clients and other users of their services. The Board is authorized by ORS chapter 673 to establish and enforce standards and regulations and license qualified applicants to practice public accountancy in Oregon.

### B. **Name of Agency Director/Administrator**

Kimberly Fast, Executive Director  
3218 Pringle Road SE, Suite 110  
Salem, OR 97302-6307  
Ph.: 503-378-2280  
E-mail: Kimberly.fast@oregon.gov

### C. **Name of Governor's Policy Advisor**

Unassigned as of Submission  
Office of the Governor  
State Capitol Building, Room 160  
900 Court Street NE  
Salem, OR 97301  
Ph.: 503.378.3132

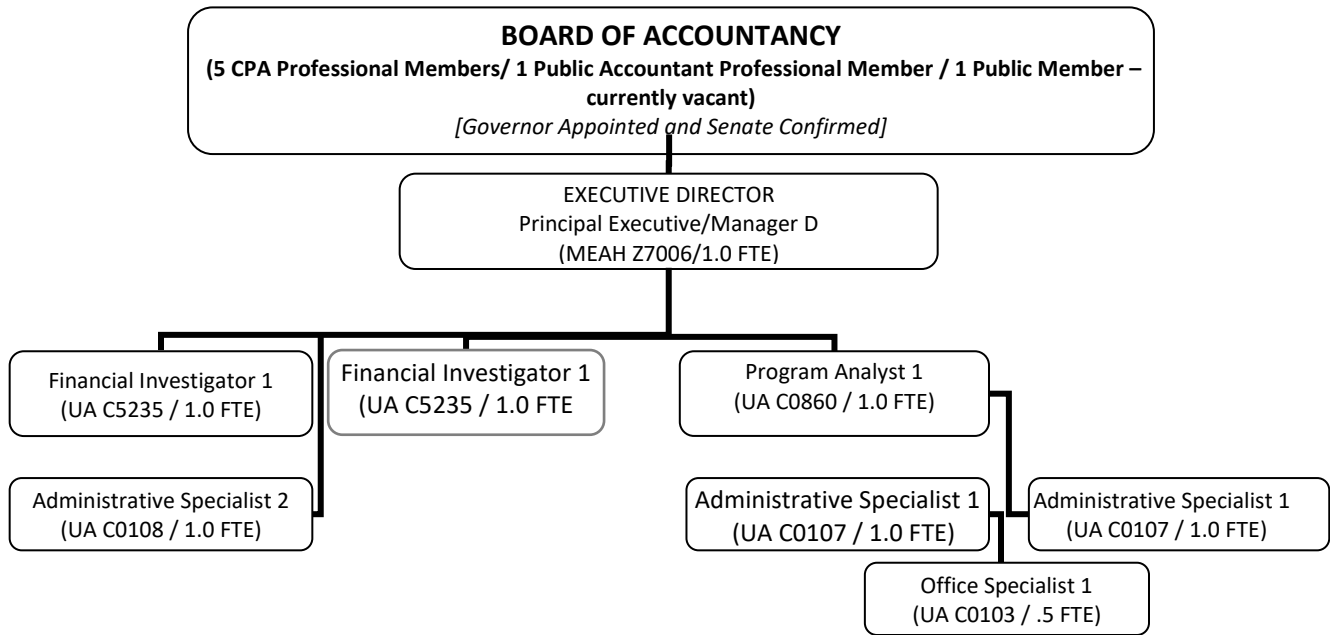
### D. **Name of Affirmative Action Representative**

Julie Nadeau  
3218 Pringle Road SE, Suite 110  
Salem, OR 97302-6307  
Ph.: 503-378-2270  
E-mail: Julie.nadeau@oregon.gov

### E. **Name of Diversity & Inclusion Representative**

Kimberly Fast, Executive Director  
3218 Pringle Road SE, Suite 110  
Salem, OR 97302-6307  
Ph.: 503-378-2280  
E-Mail: Kimberly.fast@oregon.gov

# ORGANIZATIONAL CHART



## AFFIRMATIVE ACTION POLICY

It is the policy of the State of Oregon that employment without discrimination is recognized as and declared to be a civil right. The State of Oregon is committed to achieving a workforce that represents the diversity of Oregon community and is a leader in providing its citizens fair and equal employment opportunity.

Accordingly, the Oregon Board of Accountancy shall:

1. Maintain a policy of equal treatment and equality of opportunity in employment for all applicants and employees in its employment decisions, which include, but are not limited to: hiring, promotion, demotion, transfer, retention, termination, layoff, training, compensation, benefits, and performance evaluations.
2. Apply all terms, conditions, benefits, and privileges of employment with the agency to all applicants and employees regardless of race, color, religion, age, sex, sexual orientation, marital status, national origin, political affiliation, FMLA/OFLA leave status, military leave status, disability, or any other reason prohibited by the law or policy of the state or federal government.
3. Adopt and disseminate the Oregon Board of Accountancy Affirmative Action Plan, which describes the affirmative action being taken by the agency to ensure equity of employment in a work environment that is free from discrimination.

## **AGENCY AFFIRMATIVE ACTION POLICY STATEMENT**

The Oregon Board of Accountancy is committed to achieving a work force that represents the diversity of Oregon's population and to providing fair and equal employment opportunities. The Oregon Board of Accountancy is committed to an affirmative action program that provides equal opportunities for all persons regardless of race, color, religion, sex, sexual orientation, national origin, marital status, age or disability. The Oregon Board of Accountancy provides an environment for each applicant and employee that is free from sexual harassment, as well as harassment and intimidation on account of an individual's race, color, religion, gender, sexual orientation, national origin, age, marital status or disability. The Oregon Board of Accountancy employment practices are consistent with the State's Affirmative Action Plan Guidelines and with state and federal laws, which preclude discrimination.

The impact of the Affirmative Action Plan can be fully realized only to the extent that its provisions are known by those who must apply it and those who benefit from it. With this in mind, the following describes methods used to disseminate the information both internally and externally. The responsibility for dissemination of the agency's Affirmative Action Plan Policy Statement and Affirmative Action Plan has been delegated to the Affirmative Action Representative. Such communication is both internal and external, will include but is not limited to:

A statement from the Executive Director to all employees communicating the existence of the plan in order to:

- Be aware of the plan and can avail themselves of its benefit; and
- Be aware of individual responsibility for effective implementation of the plan.
- Conduct special meetings with management and supervisory personnel in which the Executive Director shall explain the intent of the Affirmative Action Plan and clearly communicate the Executive Director's personal commitment to and support of equal employment opportunity;
- Distribute the plan to all managerial and/or supervisory staff who have the authority to recruit, hire, train, and/or promote;
- Review with each manager and/or supervisor their responsibility for achieving the agency's affirmative action goals and objectives and provide other relevant affirmation action information throughout the year.
- Management will periodically review hiring and promotion patterns and job descriptions and identify and remove any barriers to equal employment opportunities. Ensure freedom from stereotyping persons with protected class status that could limit access to jobs for which they are qualified.
- Include the Affirmative Action Policy Statement, Affirmative Action Plan and Grievance Procedure as part of each new employee's orientation;
- Post the agency's Affirmative Action Policy Statement and Grievance Procedure on the employee's bulletin board; and

- Post the agency's Affirmative Action Policy Statement, Affirmative Action Plan, and Grievance Procedure on agency's website.
- Distribute the agency's Affirmative Action Policy Statement, Affirmative Action Plan and Grievance Procedure to any employee upon request.
- All recruitment announcements, applications for employment, and newspaper will contain the phrase, "An Equal Opportunity Employer;"
- The Oregon Board of Accountancy Affirmative Action Plan is posted on the agency's Internet site and made available to the public upon request.
- Provide copies of the agency's Affirmative Action Policy Statement, Affirmative Action Plan and Grievance Procedure to any person, including job applicants, upon request;
- Notify all bidders, contractors, subcontractors and suppliers of the agency's affirmative action policy. Notices shall include a statement that the agency will not knowingly do business with any bidder, contractor, subcontractor, or supplier of materials that discriminates against members of any protected class.

## **DIVERSITY AND INCLUSION STATEMENT**

The Board of Accountancy is committed to establishing, monitoring and maintain a work environment where all employees are given opportunities to develop, treated with respect and integrity and feel part of the Boards goals and mission. This is accomplished by promoting a diverse staff where everyone feels supported and valued.

The Board of Accountancy is an equal-opportunity employer that is committed to a pro-active role in recruitment and selection process. Further, the Board provides an environment that is inclusive of all staff talents, knowledge, experiences and personalities that provide an inclusive and diverse staff to achieve the Board's mission and goals.

To achieve workforce diversity, the Oregon Board of Accountancy is positioning itself with a strong commitment to its agency's affirmative action program. This includes strong leadership support and commitment to provide necessary resources.

Continued support from leadership creates an environment of inclusion and opportunities for staff.

- Continued management involvement in planning and conducting affirmative action/equal employment opportunity activities.
- Assign adequate resources to the affirmative action/equal employment opportunity activities.
- Evaluate training resources in intercultural communication to address the communication style across cultures and generational differences within the Board of Accountancy.

## **HUMAN RESOURCE SERVICES**

The Oregon Board of Accountancy's Human Resource Services are provided by the Department of Administrative Services, Chief Human Resource Office (CHOR). The Board of Accountancy works closely with our assigned human resource business partner on all recruitments, promotions, and

personnel issues that arise. The Board will also work closely with CHOR for succession planning goals and objectives.

## **TRAINING, EDUCATION AND PROFESSIONAL DEVELOPMENT**

The Board of Accountancy recognizes that its employees are its greatest resources. Investing in employee development and enhancing employee knowledge, skills and abilities is one of the agency's highest priorities.

Continued professional development and training opportunities ensures that employees are provided with the skills needed to excel in their work, and therefore be retained in the agency. The Oregon Board of Accountancy uses a variety of approaches to establish a climate that supports continuous learning and development through the following:

- Establish clear paths for acquiring the skills, knowledge and experience that employees need for their continuing learning and career development.
- Establish developmental opportunities for employees, such as detail assignments and leadership training to give everyone interested in a chance to participate in assignments that prepare them for high-level positions.
- Use a variety of ways to provide training and developmental experience for employees such as:
  - Webinars and other interactive online training
  - Internal and external training courses
  - Establish individual needs and training requests during the yearly evaluations

Investing in training opportunities for all employees reflects the value and support the Board places on our employees.

## **COMMUNITY ENGAGEMENT EFFORTS**

The Oregon Board of Accountancy's greatest strength is the quality of and diversity of our employees and Board members. The Board is committed to fostering collaborative working relationships with our local organizations to various initiatives, such as:

- Contact with local groups representing protected classes.
- Affirmation to such groups that the agency is an equal employment opportunity employer
- Sharing promotional opportunities as they arise, to all employees in particular, those who are members of the protected classes.

## **AFFIRMATIVE ACTION 2017-19 OBJECTIVES:**

To a significant extent, Board membership is determined by application submitted to the Governor's office. For 2017-19, the Board of Accountancy will actively work with its partners to increase the diversity of the Board membership to encourage applicants of diverse backgrounds to seek positions on the Board. This will be accomplished through work with the Board's associations, notices on the Board's website and efforts to coordinate with the Governor's office. In addition, the Board's Director will continue to build on the successes from 2017-19 by making hiring of culturally diverse staff a priority consideration in any recruitment process. In day to day interactions with the general public and the Board of Accountancy licensees, the Board and Board staff will endeavor to continue to treat

all persons with respect and to provide equal treatment, regardless of race, religion, national origin, gender, age, marital status, sexual orientation or identity or disability. All Board of Accountancy activities will be fully accessible to persons with disabilities.

## AFFIRMATIVE ACTION 2019-21 OBJECTIVES

The OBOA’s goal for 2019-21 has been to continue to maintain OBOA's commitment to affirmative action and equal opportunity, and to recruit staff and Board members who reflect the Board's commitment to diversity and inclusion. The Board has 7 volunteer Board members appointed by the Governor and confirmed by the Senate, and 7.5 staff.

The OBOA has worked to promote selection of women and minorities to the Board and staff. OBOA’s 7-member board has seen improvement in gender balance; the Board is now composed of 3 women and 3 men (currently one vacant public member position). At the staff level, OBOA has shifted and women are now the majority (5 women / 2 men / 1 vacant position). During the 2015-17 biennium, the Board hired an Asian-American CPA of Vietnamese heritage in December 2015 and in May 2018 the Board hired an African-American staff member. At the Board level, the Governor’s Office appointed an Asian-American (Chinese) heritage in 2018.

### Updated AA 19-21 Objectives – Staff/Board member

<b>Board Members</b>	<b>Race</b>	<b>Staff</b>	<b>Race</b>
Board Members	Race	Staff	Race
7 members		8 staff	
4 males – 57%	All White – 100%	2 males – 25%	1 Asian-American 12%
2 females – 29%		6 females – 75%	1 Hispanic – 12%
1 vacancy			6 white – 75%

In day-to-day interactions with the general public and with our 8,000 licensees, OBOA staff has endeavored to treat all persons with respect and to provide equal treatment, regardless of race, religion, national origin, gender, age, marital status, sexual preference or identity, or disability. In this regard, OBOA has received no complaints of discriminatory treatment from members of the public or Board licensees. The OBOA is scrupulous to assure that all Board activities are fully accessible to persons with disabilities.

The Oregon Board of Accountancy remains committed to its policy on Affirmative Action and Equal Opportunity and to a rigorous and active affirmative action program. My personal commitment to these ideas is represented in the Affirmative Action Plan. Likewise, the Plan represents the Oregon Board of Accountancy’s commitment to equal opportunity and affirmative action in employment and public service consistent with all applicable federal and state laws, including, but not limited to: Executive Order 11246; Title VII of the Civil Rights Act of 1964; Sections 503 and 504 of the Rehabilitation Act of 1974; the Vietnam Era Veterans Readjustment Assistance Act; and the Americans with Disabilities Act. This Affirmative Action Plan has my complete authorization and commitment.

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Signature  
Kimberly Fast, Executive Director

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Date

If you have any questions regarding the agency's Affirmative Action Plan please contact the Affirmative Action Representative listed below.

Julie Nadeau  
Affirmative Action Representative  
OREGON BOARD OF ACCOUNTANCY  
3218 Pringle Road SE, Suite 110  
Salem, OR 97302-6307  
Ph.: 503-378-2270  
e-mail: [Julie.nadeau@oregon.gov](mailto:Julie.nadeau@oregon.gov)