



**Due Date to Governor's Office – June 1, 2025**  
**Preliminary Approval Granted by the Board of Accountancy on June 5, 2025**  
**Final consideration by the Board on September 25, 2025**

**OREGON BOARD OF ACCOUNTANCY**  
**STRATEGIC PLAN 2025-26 – WITH DETAIL IMPLEMENTATION GOALS**  
*(Implementation steps for 2025 – 2026 are set forth in italics)*

**VISION STATEMENT (NOTE: unchanged from 2024 Strategic Plan)**

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**

**(NEW GOAL and building on accomplished 2024 plan goal to establish new personnel structure):**

Develop a draft community engagement plan by December 15, 2025 based on the resources provided in HB 5001, the agency's 2025-27 Legislatively Approved Budget, and the pipeline work related to accounting scholarships as provided for SB 796 (2025) and HB 5001. This work will integrate with the Board's DEI Plan and implements the Board's successful request in the 2025 legislative session for a personnel restructure to create an agency deputy director position.

- *Complete transition to Deputy Director structure including adjustments to the Board's Delegated Authority document by September 30, 2025, to support community engagement by the Director.*
- *Bring a draft Community Engagement Plan (CEP) to the December 5, 2025, Board Meeting that will reflect collaboration with CPA profession societies and higher education partners.*
- *Maintain integration of the Board's DEI plan with strategic plan goals.*
- *Integrate CEP plan goals with strategic plan goals by December 31, 2025.*
- *Implement SB 796 and HB 5001 funded accounting scholarships through completion of grant agreement by September 30, 2025, and funds transfer to the Grantee by November 1, 2025*
- *Ensure grant agreement requires tracking of Equity Impacts of the need-based scholarships*
- *Hold at least one town hall in Fall 2025 to ensure direct community engagement during the development of major Board rules package implementing new CPA licensure pathways.*

**(GOAL CARRIED OVER FROM 2024 PLAN):** Build pro-active education and outreach into the Board's licensing and compliance functions.

- *Integrate specific outreach on compliance and licensing topics 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.*

**(NEW)** Implement SB 797 (2025) establishing new licensure pathways and update our licensing processing systems.

- *Develop comprehensive rules package for Board consideration by December 1, 2025, meeting the highest standards for local, regional and national partner engagement.*
- *Adopt rules and implement new SB 797 licensing options by February 1, 2026.*

**(GOAL CARRIED OVER FROM 2024 PLAN):** 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.

- *Continue to develop and regularize social media presence, and bring an updated draft social media plan to the December 2025 Board meeting*
- *Continue 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*
- *Solicit input from higher education faculty and students on effective outreach to accounting students*

**(GOAL CARRIED OVER FROM 2024 PLAN):** Improve operational efficiency in licensing and compliance through IT and process improvements and resource that work as necessary.

- *Partner with DAS Procurement, DAS Enterprise Information Systems (EIS) and DAS CFO to support the Board's IT needs.*
- *Establish a user-friendly on-line renewal option through Tyler Technologies that allows renewal processing through minimal data entry by licensees, using the Board's existing database.*
- *Complete work by November 1, 2025, with our database IT support vendor and the state-approved payment processor Tyler Technologies to manually integrate the online renewal option with the Board's database. Explore expansion of this version to firms and whether it can be offered to firms in time for the 2025 year-end firm renewal cycle.*
- *Prioritize moving the Board's database to the cloud in compliance with applicable State of Oregon IT requirements, with a completion goal of October 1, 2025.*
- *Upgrade the Board's FileMaker database to the most recent version to ensure its stability, by December 1, 2025.*
- *Document current IT infrastructure by April 1, 2026, and begin development of specifications for a replacement system.*
- *Submit a detailed IT Strategic Plan in consultation with DAS EIS to the Board by June 1, 2026. As appropriate that plan may include proposals for IT investments that require a budget-level policy option package for inclusion in the Board's Draft 2027-29 Agency Request Budget.*

**(GOAL CARRIED OVER AND ADAPTED FROM 2024 PLAN):** Continue the Board's active engagement in the national regulatory environment.

- *Ensure a Board voice / attendance at the NASBA Western Regional and Annual Conferences.*
- *Engage with our regional and national partners to minimize disruptions in CPA mobility as jurisdictions add additional pathways to licensure.*
- *Prioritize Board contributions to the national regulatory response to private equity ownership of CPA firms.*