



Oregon Board of Optometry
Strategic Plan
July 2025 – June 2030

**Licensing Oregon Optometrists and Serving Patients
Since 1905**



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Executive Summary

Agency Background and Scope

The Oregon Board of Optometry (OBO) is a state agency established in 1905 to oversee optometry services throughout Oregon: licensing optometrists, responding to concerns of optometry patients, promulgating rules within its authority, and interpreting laws and rules that govern the practice of optometry, ensuring they are fairly and effectively administered. The OBO is a semi-independent agency and is comprised of a small staff of two state employees and a five-person Governor-appointed Board of Directors. Together they oversee optometry services in the interest of all stakeholders in Oregon. OBO staff are accountable to the OBO Board of Directors (“the Board”).

Services provided by OBO staff include:

- License application and criminal background check review;
- License issuance and renewal;
- Continuing Education credit recording and submittal system development;
- Administration of the OBO agency and matters related to the operation of the Board in service to applicants, licensees and the public; and
- Processing complaints regarding optometric services and prepare information for the Board’s review and action.

These services foster the professionalism and competency of those in the profession and protect consumers of optometry services within Oregon.

OBO is self-funded, receiving no recurring state or federal funding, and relies upon examination fees, licensure fees, and enforcement penalties for its financial resources.

Agency Oversight

The Oregon Board of Optometry (“the Board”) is an oversight body for the agency comprised of five (5) members appointed by the Governor’s Office for three-year renewable terms. Membership includes four practicing Optometrists and a member of the public. This body is responsible for making informed decisions and policies. OBO staff are accountable to the Board for effective operations in service to the public.

The Board ensures fair treatment in settling disputes and issues that may arise under its jurisdiction, with the overriding value of ensuring the safe and competent practice of Optometry in the state of Oregon.

Strategic Planning Process

In March 2025, the OBO engaged in a strategic planning retreat facilitated by Integrated Success Consulting (a Willamette Valley based organizational development company) to develop a multi-



year plan to best serve stakeholders by leveraging and building upon the strengths of the organization.

Agency fundamentals of mission, vision, and core values were crafted by considering current realities and trends and anticipated shifts as illuminated by the PESTLE analysis and subsequent discussion. The OBO met for a full-day retreat to accomplish the following:

- 1) Articulate agency fundamentals of mission, vision, and core values.
- 2) Craft the agency's first formal Equity Statement.
- 3) Develop a multi-year strategic plan to attain the articulated vision, serving stakeholders while exemplifying core values.
- 4) Identify 2-3 aspirational and realistic Key Strategic Initiatives to accomplish the plan.
- 5) Establish high-level strategic areas of focus in support of each Key Strategic Initiative.

Prior to the strategic planning retreat, feedback was gathered from external stakeholders via online questionnaires. One external stakeholder group responded. Themes that emerged from all responses were shared with strategic planning retreat participants and purposefully considered throughout development of this strategic plan.

Key stakeholders were invited to attend and participate in essential segments of the retreat: understanding key stakeholders' expectations, conducting a SWOT analysis, and articulating aspirations for what OBO at its best would look like from their perspective. Two external stakeholders accepted the invitation and were tremendously engaged, insightful, and impactful throughout. The staff and board of the Oregon Board of Optometry wish to acknowledge their participation and express gratitude for their partnership.

Through a highly engaged and collaborative process during the retreat, the OBO defined their stakeholders along with expectations and needs of each stakeholder. Using this stakeholder lens, the OBO examined the previous mission of the agency, identifying key elements to retain and opportunities to refine and restate the OBO purpose. Together they drafted the agency's first vision statement and identified their core values. Strong consensus emerged regarding protecting consumers while ensuring fair and equitable service and consumer complaint adjudication.

Several common themes emerged that, ultimately, are embedded within the resulting Key Strategic Initiatives. The themes are: (1) using technology in service to all stakeholders; (2) building and enhancing relationships and partnerships; and (3) enhancing OBO's visibility and reputation as a supportive subject-matter expert and partner.

In August 2025, Board members and agency staff reconvened for a work session to refine the Equity Statement, Mission and Vision Statements, Key Strategic Initiatives (Objectives) and High-Level Strategies (Goals), and to articulate the Actions necessary to achieve each Goal. External stakeholders were invited to join us. One participated in refining our strategic initiatives.



One of the Governor’s new requirements is that each agency, commission or board draft an IT strategic plan. Due to its size, OBO has an abbreviated Information Technology plan that’s included in the appendices of this plan.

Contents of This Report

This strategic plan report first focuses on the fundamentals of mission, vision, core values, and commitment to equity; followed by an analysis of stakeholders’ expectations, internal strengths and gaps, external opportunities and obstacles, key strategic initiatives, and a framework of supporting strategies. The report culminates with recommendations related to implementation. An Appendix containing a list of retreat participants is attached.



Foundational Strategic Elements

Mission

During the planning retreat, the OBO examined the core purpose for the agency's existence, the work the organization is tasked with and for whom. In the end, modifications were made to that statement to make it more compelling while retaining its original intent. It now reads:

Our Mission

To protect the people of the state of Oregon with safe and competent practice of Optometry.

Vision

Participants discussed the purpose of a vision statement and then went about the work of creating OBO's first vision statement. The importance of being the standard-bearer for the profession and critical responsibility for addressing patient concerns in Oregon resulted in the following:

Our Vision

To protect the public of Oregon by ensuring the highest standards of optometric practice. We achieve this through efficient licensing, ethical and thorough oversight, and compassionate resolution of patient concerns, making Oregon a national benchmark for excellence in optometric care.



Core Values

Recognizing that core values express what is important to the organization and how individuals carry out its mission and vision retreat participants explored the values that were present when OBO functioned at its best. Ultimately, participants identified their core values, acknowledging them as non-negotiable and actionable.

Our Core Values

Fairness

Approachability

Thoroughness

Proactivity

Integrity



Equity Statement

During OBO's Strategic Planning Retreat on March 14, 2025, participants (OBO agency staff and OBO board members) set some guidelines for OBO's first Equity Statement. Participants were clear that OBO's equity statement should speak to ensuring equitable access and services for all stakeholders: the Public, Patients, Licensing Applicants, Licensees, and agency staff. Participants also agreed that OBO's equity statement should address a broad audience and be inclusive in the communities referenced to avoid an unintended perception of excluding any group or protected class.

There was discussion that the Board is comprised primarily of Optometrists, and that while there is strong gender diversity on the Board itself currently, it is comprised of 3 women and 2 men, racial diversity is limited by the diversity of Optometrists in Oregon. Participants agreed that increasing outreach to high school groups about the profession may help increase racial diversity within the profession long-term. There was also consensus that the ideal equity statement would refer to commitment and actions, and the Strategic Plan would be in harmony with those elements.

Oregon Board of Optometry Equity Statement:

The **Oregon Board of Optometry** (OBO) is committed to ensuring an equitable optometrist licensure process and related patient safety protection system for all people in Oregon. We believe that all Oregonians, regardless of their background or identity, deserve equitable access to OBO services.

Our Commitment:

OBO is committed to addressing societal systemic inequities that have historically marginalized certain groups of people. We commit to actively dismantle such barriers. We commit to ensuring fair access to optometrist licensure and patient protections, including equitable access to complaint processes and fair and equitable resolutions.

We foster a welcoming and respectful workplace and service-oriented space where everyone feels valued and empowered to contribute their unique perspectives.

Our Actions:

- **Diverse agency, Board, and partnerships:** The Board leads with a sense of inclusion. We strive for a staff, board of directors, and community partnerships that reflect the richness of the communities we serve and the profession, helping to ensure all voices and perspectives are heard and inform our work, promoting equitable access to licensure and patient safety. We collaborate with diverse partners to ensure patients are informed of our services and bringing awareness of the profession as a career.



- **Inclusive practices:** We review and develop policies, procedures and systems that ensure and promote equitable access to our services and resources related to professionalism, licensure and patient safety.
- **Accessible resources:** We continuously seek to provide resources and support to applicants, licensees, and patients from historically excluded communities. Particularly, we seek to eliminate barriers related to language, age, ability, resources, and preference of method of communication especially for vulnerable populations.

We are committed to continuous improvement and strive to be a leader in promoting equity in all we do.



Assessing the Environment and Expectations

PESTLE Analysis

An analysis of external factors that could affect OBO and how they conduct business was prepared prior to the March strategic planning retreat. Specific factors included Political, Economic, Social, Technological, Legal and Environmental. Board members and agency staff received the data prior to retreat so that an informed discussion could ensue. Participants discussed what resonated with them most and what changes or additions they would incorporate related to their shared insights. The discussion and analysis informed the development of the Strategic Plan. The refined PESTLE analysis is as follows:

| Factors | Descriptions* | Initial Insights |
|----------------------|--|--|
| Political | State or federal policy, rules, new laws, and upcoming elections. | The Board serves at the pleasure of the Governor, members must be confirmed by the Oregon Senate. Authority of the Board is granted by the Oregon Legislature. There is national pressure to make licenses portable and ensure quick licensing for new applicants. ODs are looking to expand scope of practice to “as taught” but it’s being met with resistance from the medical community throughout the U.S. Oregon is a liberal state, which means some licensees don’t want to live in this political environment, while for others it is a draw. There is general uncertainties due to the national political environment. |
| Economic | The broad economic climate we are in, such as inflation rates, interest rates, economic growth, and property prices. | Optometry practices are being bought by private equity firms. While beneficial to owners selling, it is unclear what the long-term patient impacts will be. Optometry insurance and Medicare reimbursement rates are stagnant and there is pressure from the profession to increase reimbursement rates, seeking parity in Medicaid. Economic growth in Oregon and an aging population may lead to more licensees in the area. Licensing fees are high in Oregon but the trade-off is high end customer service specific to the profession. Oregon property prices are high, which can dissuade people from moving here. Oregon’s economy is a high producer of many agricultural products and has a renowned wine industry. As of third quarter 2024, Oregon ranks in the top 10 states for low electricity, natural gas and worker’s compensation costs, making Oregon attractive for optometrists to set up practices. Oregon also ranks in the top 10 for industry R&D investment. |
| Social | The population growth rates, cultural aspects, age distribution, and changing social behaviors. | Oregon’s population has declined for two years in a row (2022 and 2023 per The Oregonian). Per the 2020 Oregon census, Oregon’s median age is comparable to the national average (40.5 in Oregon vs 39.0 in U.S.). Oregon’s population is slightly older than the national average (19.3% Oregon vs. 17.3% U.S. 65 years and older). Oregon’s median household income is comparable to the U.S. as a whole (\$75,657 Oregon vs. \$74,755 U.S.) There is a growing gap between conservative, rural areas and the larger liberal, urban areas. Oregon is struggling with growing numbers of homeless citizens and addiction. |
| Technological | The availability of technology and rate of technological changes for you and to your customer. | Oregon is a technology centric state due to the number of large IT supply companies located here (e.g. HP, Intel, etc.). OBO is a small Board, so we contract with DAS IT for desktop and network services. That ensures that we have high quality data security and IT protection. OBO contracts with Thentia for our online licensing and |



| | | |
|----------------------|--|--|
| | | application systems. They provide a high-quality product at a reasonable cost. Oregon legalized telehealth in 2017 which proved helpful during the COVID pandemic. We recognize there is pressure on ODs to keep pace with advancing technology in their own practices, which increases costs to those practices. |
| Legal | The laws directly connected to us and our area of activity. | ORS 683.010 to 683.990 (Optometry) and ORS 676.110 to 676.230 (Health Professions Generally) Semi-independent State agencies: ORS 182.454 to 182.472 ORS 183.341 (Attorney General’s Model Rules of Procedure) OAR Chapter 852 (Board of Optometry) |
| Environmental | The surrounding environment, weather, natural disasters, geographical position, climate changes, and sustainability. | Oregon’s beauty is an attractor for licensees — the Pacific Ocean coast on the west side, the Cascade Mountain range, the desert-like landscape in central and eastern Oregon. Climate change is affecting the State—summers are hotter, and fire danger has increased throughout the State. Despite the rainy winter climate, there is increasing water deficiency issues in the State. The state is beautiful but there are more natural issues occurring that make the State a bit more environmentally precarious than it was in the past. |

NOTE: Key external stakeholders joined OBO’s strategic planning retreat to share their insights about Stakeholders; OBO’s organizational internal Strengths and Weaknesses and external Opportunities and Threats; and share their vision for OBO at its best.

Stakeholders

We worked from a shared definition of “Stakeholders” as individuals, groups, or other entities that are affected by OBO’s work, have influence or power related to our success, or otherwise have an interest in the deliverables of our work.

Through conversation with participating stakeholders during our 2025 strategic planning retreat, the industry segment of “Profession and Business Associations” was expanded to specifically include example associations and organizations. “Expectations” of that segment was developed fully via retreat conversations with participating stakeholders. “Governor’s Office” was called out separately, along with articulation of their “Role” and “Expectations”. Insights are provided in the following table.



Stakeholders: Roles and Expectations

| Stakeholder | Role | Expectations/Needs of Us |
|---|--|---|
| Consumers / Customers | Protected party; potential claimants | Protection; complaint review for resolution; timely response; honesty; ensure minimum competency is met prior to licensing and throughout licensee's careers |
| Applicants & Licensees | OBO services customers; rule/regulations complaint party; fee payer; covering consumers, OBO and community; OBO brand representative | Access to education and exams; streamline processes; consumer protection; OBO brand is meaningful; consumer confidence in the license |
| Educational Institutions | Education, awareness, and professionalism in the industry | Engagement; minimum competency; education |
| Government Entities | State legislators propose legislation/rules; government policy advisors providing guidance; enforcer and advisor to ensure justice | Implement laws, regulations, and adopt rules; respond and provide information to queries for guidance when appropriate. Work with OOPA on legislation to address changing patient needs, medications and health care systems and environments. |
| Other Boards and Agencies | Work together; enact laws impacting OBO. Examples, Oregon Health Authority | Transparency and collaboration; support and enforce laws and rules (ex: medical boards). Gather and report data about licensee base as requested. |
| Profession and Business Associations | OOPA and other organizations that represent individuals and businesses that practice optometry throughout Oregon. Other examples: ARBO, NBRA, PECCA, Vision Source, VSP, and various private equity firms. | Sharing of information and data with OOPA, as appropriate. Communicating value of OOPA membership to licensees. Input on mandatory practices. Information sharing with private equity firms who may be unaware of limitations related to practices they have purchased. |
| Governor's Office | Governor Kotek's office has rolled out new directives related to strategic planning, customer service, succession plan, Affirmative Action and DEI planning. | Provide data, reports and input as requested; follow existing and new rules and regulations; meet new and expanding agency requirements. |

SWOT Analysis

A SWOT Analysis is a common strategic planning tool for assessing the internal (Strengths and Weaknesses) and external (Opportunities and Threats) environment. By taking stock of the strengths and opportunities, the OBO's internal gaps and external obstacles may be mitigated or



overcome. In the retreat discussions, some terminology was modified to create a strengths-oriented perspective.

Strengths & Weaknesses

Participants – external stakeholders, board members, and agency staff -- brainstormed internal strengths and then the weaknesses (gaps or areas that needed improvement) to successfully carry out the organization’s Mission and Vision. Once brainstormed lists were complete, each participant selected three strengths and three areas for improvement that they believed to be most impactful to the OBO’s success. Those characteristics perceived as most impactful are found at the top of each list.

| Strengths | Weaknesses (Gaps or Areas for Improvement) |
|--|--|
| 1 - Accessibility | 1 – Limited resources (self-funded, small staff) |
| 2 – Strong Board (prepared, thoughtful discussions, good decisions) | 2 – Institutional knowledge capture (Board member and staff turnover) |
| 3 – Technology investment (how-to videos, portal landing page, updated website) | 2 – Outreach regarding laws and ethics |
| 4 – Communication with licensees and complainants (respectful, solution-oriented) | 3 – Rulemaking ability (to provide education) |
| 4 - Knowledgeable support and guidance given to stakeholders | 4 – Licensing system functionality |
| Professional group outreach by staff | Continuing Education reporting portal clarity |
| Small, focused Board | |
| Efficient | |
| Responsive | |



Opportunities & Threats (Obstacles)

Working in small groups before reporting to the entire group for input, participants brainstormed external opportunities and obstacles (or threats) to successfully executing the OBO’s Mission and Vision. By far, the Opportunity that stood out as having the greatest energy to improve and leverage was (1) obtaining reliable language translation capacity to enhance patient services and make them more accessible, and (2) enhancing OBO’s partnerships with OOPA, Pacific University, and other associations and businesses. Keeping up with expanding legislative and gubernatorial expectations as a small agency was a recurring concern (obstacle).

| Opportunities | Threats (Obstacles) |
|--|--|
| Enhance public outreach and complaint communication via language translation services | Legislative changes increasing demands on small staff (ex: application process/timing; criminal background; license portability) |
| Scope expansion and partnership with OOPA and Pacific University (optometrist pipeline) | Oregon Health Authority regulatory enforcement (influencing OBO workload) |
| Connect with OD practices’ paraprofessionals to enhance information sharing | U.S. economics / Medicare pressure (ex: potential increasing number of complaints and decreasing # of licensures) |
| Develop relationships with other businesses and associations (ex: PECCA, vision insurance companies, and private equity firms acquiring OD practices) | Optometry school graduates relocating outside of Oregon |
| Utilize Artificial Intelligence as a tool (ex: categorizing case precedent database, translating OBO generated resources, etc.) | Uncontrollable expenses. Agency bears the cost of compliance with government mandates and required use of other state agencies for essential operational functions" |



Aspirations

At the conclusion of external stakeholders' segment of OBO's strategic planning retreat, they were asked to share their hopes (aspirations) for what OBO would be known for five years from now, from their perspective. The following is what these external stakeholders conveyed:

- Scope expansion for Oregon optometrists and rules to guide decision-making for patient complaints (ex: rules writing, education, tracking; same scope as Alaska's optometry board).
- Financial resources to reduce fees to ODs (currently, the OBO has the highest fees in the nation).
- Exemplary licensee (customer) survey results—annual licensee survey
- Establish an ad hoc committee that includes leaders of OOPA as partners

These aspirations helped inform the creation of OBO's strategic plan.



Key Strategic Initiatives

As the group prepared to develop Key Strategic Initiatives, Board members and staff discussed what they heard from participating stakeholders, and what that meant for their work going forward. Participants did a “gallery walk” to view all the work produced and insights gathered. Participants brainstormed strategic initiatives that would support their aspirations. Through an interactive process, the brainstormed list was explored and prioritized. Honoring the work of the prior strategic plan, participants were invited to review the prior strategic initiatives developed in 2019, considering whether any should be moved into the new plan in some manner.

Drafts were crafted during the March 2025 retreat and ultimately refined during the follow up work session. Ultimately two (2) Key Strategic Initiatives were identified as critical to achieving OBO’s Vision:

Key Strategic Initiatives

1. Adopt Technology to Increase OBO Efficiency, Consistency and Public Information Accessibility.
2. Enhance Understanding of Governing Requirements and Licensee Relationships with the Board.



Initiative Goal Metrics & High-Level Supporting Strategies

In developing high level strategies to support each Key Strategic Initiative, participants considered stakeholders, timeframes, needed resources, financial impacts, potential obstacles, and associated mitigating measures. Participants also considered the potential impact on the OBO's goal of promoting racial equity.

Strategic Initiative #1

Adopt Technology to Increase OBO Efficiency, Consistency and Public Information Accessibility.

Metric: By June 2030, appropriate technology is in place, communicated, and utilized, resulting in complaint precedent readily available to Board members, 25% decrease in time for ODs to record Continuing Education credits, and new utilization of Artificial Intelligence by staff enhancing effective communication and allowing for communication to the public in multiple languages, increasing outreach to the public to build awareness of OBO.

High Level Strategies:

- Develop and create complaint history database enhancing analysis and ensuring consistent Board decisions.
- Streamline Continuing Education credit reporting process for ODs, while maintaining reporting integrity.
- Utilize Artificial Intelligence to simplify development of presentations and making them available in Spanish and potentially other languages in support of patient safety.
- Increase outreach to the public to build awareness of OBO.

Racial Equity Impact Assessment:

- Potential Unintended Consequences – None identified.
- Potential Benefits – Ensures consistency in outcomes based on facts regardless of complainant or ODs race, or other protected class or identity; Enhances communication and information sharing with Spanish-language speakers and potentially overcoming other language barriers.



Strategic Initiative #2

Enhance Understanding of Governing Requirements and Licensee Relationships with the Board.

Metric: By 2028, OBO's annual survey of licensees will achieve an average rating of "fully meets expectations" or higher with OBO engagement, information sharing, and licensees feeling well informed on timely and important practice related topics.

High Level Strategies:

- Discover which communication options would be most readily and regularly used by doctors.
- Create an inventory of materials pertinent to licensee practices and compliance.
- Identify professional groups to engage to improve information sharing and connection.
- Identify professional groups to engage to improve information sharing and connection.

Racial Equity Impact Assessment:

- Potential Unintended Consequences – None identified.
- Potential Benefits – Increases information sharing with all stakeholders while enhancing outreach and building rapport across diverse communities.



Actions Supporting Strategic Objectives

During the August 2025 work session of OBO board members and agency staff, specific actions were identified to advance OBO toward accomplishing each high-level supporting strategy. This table provides transparency to specific projects designed to attain specific strategic objectives.

| Initiatives/Strategies/Projects and Actions | |
|---|---|
| I. | Adopt Technology to Increase OBO Efficiency, Consistency and Public Information Accessibility. |
| 1. | Develop and create complaint history database enhancing analysis and ensuring consistent Board decisions. |
| | a. Update database with violation categories |
| | b. Review case data quarterly (new case activity) |
| | c. Run case violations stats & data for specific case review |
| 2. | Streamline Continuing Education credit reporting process for ODs, while maintaining reporting integrity. |
| | a. Monitor CE audit stats |
| | b. Increase audit percentage to better assess accuracy of reporting |
| | c. Monitor annual licensee survey results |
| | d. Develop a standardized licensee survey for license renewal |
| | e. Special survey on licensee interest in CE attestation vs keeping current reporting system. |
| 3. | Utilize Artificial Intelligence (AI) to simplify development of presentations and making them available in Spanish and potentially other languages in support of patient safety. |
| | a. Develop a standardized OBO law/ethics training using AI |
| | b. Develop a Spanish website page with an overview of the complaint process |
| | c. Use AI to screen complaints to determine if the complaint is within OBO's jurisdiction. |
| 4. | Increase outreach to the public to build awareness of OBO. |
| | a. Research options related to requiring OBO information be readily accessible in OD offices or OD processes. |
| | b. Survey licensees for preferences. |
| | c. Put selected option into practice. |



| | | |
|-----|---|--|
| II. | Enhance Understanding of Governing Requirements and Licensee Relationships with the Board. | |
| | 1. | Discover which communication options would be most readily and regularly used by doctors. |
| | a. | Survey licensees, review results and develop an appropriate course of action |
| | b. | Investigate Constant Contact or other emailing software |
| | c. | Find out what 3 rd party survey options are available |
| | d. | Develop measurable and effective channels of two-way communications |
| | 2. | Create inventory of materials pertinent to licensee practices and compliance. |
| | a. | Identify topics of interest and recruit OD's to write content |
| | b. | Design meaningful visuals and identify topics to appeal to ODs, improving relevance |
| | c. | Post the materials on the Board's website on a regular basis |
| | c. | Capturing measurable use of website |
| | 3. | Identify professional groups to engage to improve information sharing and connection. |
| | a. | Identify pertinent groups (OOPA, PUCA) for newsletter content |
| | b. | Contact institutions, business groups, community partners |
| | c. | Identify willing participants in a pipeline of communication |
| | d. | Compile a directory of points of contact for dissemination of information |

Financial Impacts

The financial impact of each initiative, high level strategy and action was considered as part of the developing Strategic Initiatives. The primary cost will be in agency staff and board member time and effort. Additional costs include software such as a newsletter email program, a survey tool, and an AI platform. Increased expenses are anticipated to be minimal.

Potentially, additional continuing education credit audits will result in slightly increased civil penalties for licensees for the first few years. This, however, this possible revenue is not the goal of changing reporting of continuing education credits, but rather a natural short-term result.



Potential Priorities

Throughout the March 2025 strategic planning retreat, a list of potential priorities emerged, including during the time when external stakeholders were participating with OBO staff and board members. Not all the ideas on this list were fully explored, rather it is a repository to reference in further build out and implementation of this plan and/or possible future initiatives. These ideas were considered during the development of supporting strategies. NOTE: The order of ideas on this list is not indicative of importance nor priority. “Potential Priorities” identified were:

-
1. Enhance communication / connection with agencies, organizations and legislature - proactively.
 2. Collect data and conduct strategic analysis of Optometry school graduate geographic placement (possible resources: Employment Dept; Pacific University).
 3. Monitor Optometry school graduate licensing exam scores and number of tries.
 4. Provide Spanish language translation services to communicate with the public, optometry patients, and complainants. (Possible resources: State of Oregon, Google Translate or other apps, and Thentia.)



Planning, Implementation, Performance Monitoring, and Accountability

With the successful conclusion of one-day strategic planning that was both deep and wide in focus, the OBO invested in a subsequent partial day work session to develop a specific action plan. The OBO developed methods to ensure the plan is successfully executed and provides for monitoring performance, accountability, and transparency to their work.

Three overarching categories of implementation activities are: Planning, Roles, and Monitoring.

Planning:

For effective implementation, it is essential that specific actions be identified to advance OBO toward accomplishing each high-level supporting strategy. Determining who is accountable for each action step and establishing a timeline for completion ensures progress and visibility.

Typically, strategic initiatives are cascaded down to the staff, assuring buy-in and contribution throughout the organization. In this case, the number of staff of the agency is quite small: 2 people. Both members of the staff participated in the strategic planning session, however, one of those individuals has since retired. Their replacement was brought into the discussion by participating in the subsequent Work Session. Now everyone understands the “big picture” and why it matters.

Roles for Implementation:

The **Executive Director** serves as the internal point person who shepherds the process, ensures resources are aligned with the strategic intent of the OBO, develops an effective communication plan, and oversees the use of appropriate technology and tools to build, maintain, track, and organize momentum.

Having a **Board member** serve as the “champion” for each Key Strategic Initiative helps keep each Initiative on track. The “champion” may lead periodic check-ins with the staff person charged with executing the Initiative to review progress and discuss successes, obstacles, and measures to mitigate obstacles.

Each Key Strategic Initiative has an assigned “**lead**” (staff) who is responsible for oversight of the initiative, including coordinating all efforts and reporting action steps progress. OBO staff may develop specific action plans, ensuring everyone is clear about their commitments and how to raise concerns about obstacles as they arise.



Monitoring and Evaluating:

The following outlines the elements of OBO's process for performance monitoring, accountability, and ensuring transparency:

- Create a plan for communicating this strategic plan to external stakeholders, including related professional associations, government agencies, any related non-profits serving racially diverse groups, licensees, the public, and any other stakeholders. Feedback from and partnerships with external stakeholders will be valuable in the execution of the strategic plan.
 - Periodic check-in conversations with key stakeholders will be conducted to assess progress and inquire about what is working well and what challenges have surfaced. The annual licensee survey will be one tool to assess effectiveness with licensees. OBO will periodically touch base with OOPA's new Executive Director as well as their legislative liaison on any potential legislative issues.
- Hold those responsible for specific deliverables accountable. To assess progress on strategic initiatives, assigned "champions" (or "leads") will hold regular strategy meetings involving individuals with action-step accountability.
- Conduct strategic check-in meetings that provide opportunities for coaching and improvement of specific areas that impact deliverables. Check-ins for this agency include:
 - Executive Director and Board, particularly initiative "champions"
 - Standing agenda item as part of OBO all staff meetings
 - A regular agenda item as part of the OBO's Board meetings, which provides public transparency as such meetings are accessible to the public and recordings of the meetings are posted on the agency's website.
- Utilize the Strategic Initiative Tracker tool provided by Integrated Success Consulting, to update the Board on progress and challenges, and seek guidance or assistance required at quarterly Board meetings.



Appendix



2025 Strategic Plan Development Participants

Board Members

Patrick Ayers, OD, President
Doctor of Optometry

Ann Woods, OD, Vice President
Doctor of Optometry

Laurie Goolsby, Public Member

Ami Halvorson, OD
Doctor of Optometry

Greg Kautz, OD
Doctor of Optometry

Agency Staff

Shelley Hanson
Executive Director

Melissa Auman
Administrative Coordinator—Retired March 2025

Gabby Baune
Administrative Coordinator

Special Guest

Kristen Williams
Oregon Assistant Attorney General

Invited Stakeholders

Geoff Knapp, E.D.
Oregon Optometric Physicians Association

Craig Bowen, OD
Oregon Optometric Physicians Association, President



Oregon Board of Optometry's

IT Strategic Plan as of June 1, 2025

AGENCY DRIVERS

The Oregon Board of Optometry's revised mission statement as of the March 14, 2025 strategic planning retreat is now:

"To protect the people of the state of Oregon with safe, competent and proper practice of Optometry."

Our vision statement was included earlier in the strategic planning document but focuses on consumer protection. The Board's secondary purpose is to ensure timely services for applicants, licensees and consumers. Several IT tools are being used to provide concierge customer service. OBO's small, two-person staff, works to provide timely customer service. Our customer service response time is always less than 24 business hours. We're diligent about using MS Outlook auto replies and changing voice mail messages for longer absences. We ensure that one of the two staff is nearly always available for assistance and support.

CURRENT IT LANDSCAPE

OBO currently uses the Thentia 2.0 cloud-based system as our primary licensing tool. There are portals for:

- 1) Applicants
- 2) Licensees—they can do the following in the portal:
 - a. Update personal contact information
 - b. Update places of practice
 - c. Renew their license
 - d. Report their continuing education
 - e. Update their CPR certification
 - f. Request license verifications
 - g. Request license copies
 - h. Pay invoices
 - i. Print receipts
- 3) File complaints
- 4) License verifications/license lists
- 5) Apply for CE course approval

OBO was an early adopter of the Thentia online licensing systems and late 2024, early 2025 migrated to the new 2.0 online system. OBO staff are working with the Thentia team to



troubleshoot a few operational issues, but the system is functional. Staff's next step is to document all system processes to ensure continuity of operations with staffing changes.

As a web-based system Thentia's system allowed OBO staff to remote work during COVID and afterwards. The newer version of the system is highly configurable by system administrators (OBO staff). After we get through the bulk of the migration issues, catch up with work that wasn't being supported after the migration and complete training with the new OBO staff member, the two staff will take additional training to be able to support the portals and staff workbench.

OBO also currently uses the MS365 office suite as a DAS IT client. DAS IT also manages the replacement life cycle of OBO's hardware and software. OBO is semi-independent agency and can use external vendors for various functions. Contracting with DAS IT has proven cost effective and efficient for the Board. DAS IT maintains data and system security and has shared tools that may be used by OBO for various tasks and projects. DAS IT consistently provides timely desktop support, system support and hardware pricing.

OBO has the statutory authority to do background checks for applicants and licensees. OBO uses Webleds as its access points for LEDS/CJIS data. Webleds batch is a software system that can be used to check a large number of individuals at one time. There have been problems getting the correct data from the Thentia system, so that is one of the issues we are currently troubleshooting with Webleds batch. Once the details are worked out, OBO will recommence the biennial all license background checks.

OBO will continue to replace system hardware per DAS IT's replacement schedule. OBO budgets every biennium to replace the necessary equipment. OBO will also budget and plan for any new software needed. At this time, no new systems are anticipated.

Quickbooks is used by OBO for its financial records. The desktop system is losing ongoing support and users are being pushed to move to the online system. OBO will work with DAS IT on that transition, if it's needed. If DAS determines that it's not acceptable to move to the Quickbooks online version, we will work with DAS and the other small licensing boards that are currently using Quickbooks, to determine a new system that will meet our needs. At this point, there is no plan to make changes in the next 1-2 years.

IT CONTEXT

OBO uses software as tools to meet agency statutory requirements and provide convenient and easy to use systems for customers through online portals.

OBO balances our limited resources with software that meets our needs. We also focus on software that DAS IT supports due to potential system issues. Webleds, the online licensing system (Thentia) and Quickbooks financial management system are the three independent, specialized software systems used by OBO. OBO is signing a three-year contract extension with Thentia in 2025. Webleds is a long-standing LEDS interface. Quickbooks is the one system that may need replacement in the next 2-3 years.



OBO also uses several systems to do background checks of applicants:

- The National Practitioner Database -- the national database of any health care discipline or malpractice reporting
- eCourts – access to Oregon court records. OBO checks both civil and criminal records for applicants
- Online license verifications—most state optometry boards across the U.S. are offering online license verifications. When an applicant has held a license in another state, the applicant is required to provide a license verification for every state in which they have been licensed. During COVID, OBO updated its rules to allow online verifications instead of paper verifications due to the delays in processing. This has been a beneficial change for OBO’s applicants.

IT STRATEGIC INITIATIVES

The one set of new tools that OBO hasn’t attempted yet, is use of any AI tools. OBO will explore DAS approved AI tools in the next 2-3 years to see which may be appropriate for the work we do, while balancing system and data security.

With limited staff and resources, OBO doesn’t anticipate any large IT initiative or projects in the next 2-3 years.

METRICS & TARGETS

- Work with Thentia to maintain system up time at 99%+. This hasn’t been an issue to date. We’ll also want to ensure that our data is secure and has a backup through Thentia. When the system was adopted in 2019, Thentia completed an Oregon cloud workbook to ensure that our data was secure and had redundant back up.
- Maintain a 95% one business day response time to emails and online queries.
- Process license applications within two (2) business days of receiving a complete license application.
- Get on schedule to do the biennial all licensee background checks through Webleds by December 31, 2025.

IT ROADMAP

There are no systems planned in the next 2-3 years, so our roadmap is short. If there is an identified need for a new IT system, OBO will use the tools to develop a plan for the system identification and implementation. Our hope is that Thentia, our main user interface, will continue to be refined and remain cost competitive so that we don’t have to make any system adjustment there.