



Oregon

Tina Kotek, Governor

You can find more information at:

<https://www.oregon.gov/OBTP/Pages/index.aspx>

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Oregon Board of Tax Practitioners IT-Strategic Plan

2026–2027

Supporting Our State. Building Our Future.

Our **MISSION** is to protect Oregon consumers by ensuring that Oregon tax practitioners are competent and ethical in their professional activities.

IT Mission

To provide innovative technology solutions on a sustainable infrastructure, supported by superior customer service, in alignment with the Agency's public safety goals.

Vision

IT is an essential partner integral to the success of the agency, by delivering innovative technology solutions while demonstrating a strong customer-oriented mindset.

Guiding Principles

- We will be guided by our strategic plan and the agency IT strategic plan.
- We deliver best experience to our customers.
- We seek innovative ways to use technology.
- We will manage and govern data agency wide.
- We will efficiently manage projects.

Diversity, Equity & Inclusion

IT is aligned with agency prioritization of ...

- Diversity – a range of human differences
- Inclusion – of all voices and visions where people feel comfortable being themselves
- Equity – in policy and practice, providing everyone what they need to be successful

Current IT Landscape

- The Board currently has three major IT Categories: Telecommunications, Data Processing and IT Professional Services.
- The mission critical applications are maintained by both the Board and DAS-IT
- The Board works with DAS-IT directly regarding the maturity level and budget for IT implementation and strategies.
- Current user feedback has been positive and the Board works to update and maintain its website for transparency.

Initiatives

- Maintain and update the Board's website working towards making it the clearest and most accessible possible.
- Evaluate customer and licensee needs and implement solutions to equitably meet those needs.
- Champion a culture to achieve a positive customer experience.
- Educate our customers and licensees on using the website and locating information to help improve their experience.
- Improve data, information and knowledge sharing with the tax community and government partners.
- Improve timeliness in compliance programs.

Metrics and Targets

- Work to make the website as accessible as possible and monitor success by reaching out to licensees and clients regarding their on-line experience.
- Monitor licensing numbers and look to see if those numbers have increased with the more streamlined out of state process.
- Run an annual questionnaire to collect data on what the current licensee base looks like and if there are any changes upon implementation.
- Track the Board's progress and accountability through this same survey by asking our licensees to rate the Board's progress and staff.
- Create a committee comprised of licensees to evaluate the Board's plan moving forward.



IT Roadmap

- Continue to monitor the boards budget while looking for opportunities to implement new processes.
- Validate and utilize data, as authorized, to make decisions and improve business operations.
- Modernize our database and online presence to support and improve business and administrative activities.
- Standardize and modernize our hardware and software to optimize operations.
- Mitigate emerging and evolving threats to manage risks and protect customer privacy and security.
- Continue to advance equity by working with licensees to identify our under-served communities. Working to make sure that these communities have access to qualified tax professionals.

IT Communication

- IT communications will be maintained throughout all processes with the DAS-IT and the Boards ASCIO.
- Communications on IT strategies and plans will run through the Boards panel which includes both internal and external stakeholders.
- The IT Strategic plan posted on the Boards website on the main page.
- All communications on this plan will be reviewed by the ASCIO, the panel, The IT Strategic planning office and the Governors office.
- Improve data, information and knowledge sharing with the tax community and government partners.

IT Continuous Lifecycle

- The Board will work with DAS-IT, ASCIO and its vendors to look at the life cycles of current and proposed programs to create a timeline for refreshing any systems that will need to be renewed or updated.
- Work to create a refresh template of mission critical programs.

Executive Summary

- The Board created a new licensee program through legislature, with the passing of HB 2338. This program will bring in a more diverse base of candidates because it allows interested participants to enter the program without the requirement of an 80-Hour course or College credits and a Board exam. These applicants are akin to an apprenticeship program and will be learning hands on from their supervisors.
- The Board held a Rule Making and updated the remote rule requirements which now allow for more remote time (it moved from 50% in person to 25% in person supervision, the rest can be covered remotely). This should assist disabled candidates and caregivers in applying or staying in this industry.
- All staff and Board Members have reviewed and understand the content and purpose of the (DEI & AA) Plan.

Strategic Objectives

- Evaluate customer and licensee needs and implement solutions to equitably meet those needs.
- Champion a culture to achieve a positive customer experience.
- Educate our customers and licensees on using the website and locating information to help improve their experience.
- Identify non-compliant practitioners and businesses and work to bring them into compliance while also bring awareness.
- Improve timeliness in compliance programs.
- Continue to cultivate and enhance employee engagement and interests by engaging, challenging and empowering.
- Work to increase employee job satisfaction by continuing to enhance culture, focus on diversity, equity and inclusion while celebrating employee achievements.
- Support and value input and ideas from everyone in the organization.

Next Steps

- The Board will continue to monitor its licensing numbers and look to see if those numbers have increase once remote rules and a more streamlined out of state process is implemented.
- Run an annual questionnaire to collect data on what the current licensee base looks like and if there are any changes upon implementation.
- Track the boards progress and accountability through this same survey by asking our licensees to rate the Boards progress and staff.
- Create a committee comprised of licensees to evaluate the Boards plan moving forward.