



Oregon

Tina Kotek, Governor

You can find more information at:

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

Or you can reach out to me directly:

Laura Ayars- Executive Director of the Oregon Board of Tax Practitioners laura.ayars@tax.oregon.gov or 971-701-1139

Oregon Board of Tax Practitioners Strategic Plan

2027–2029

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.

AGENCY UPDATES AND PROGRESS

- 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.

VALUES



Public Trust: To protect the public by ensuring our licensed personnel are competent and ethical by abiding to the statutes and rules.



Diversity, Equity and Inclusion: To promote diversity, equity and inclusion within our licensee base.



Flexibility: To facilitate a more inclusive approach by allowing remote work and out-of-state licensure for Tax Practitioners.



Confidentiality: Protect the privacy and security of data entrusted to us.



Transparency: Operate openly and honestly to maintain public trust and confidence.

GOALS AND OBJECTIVES

- › Increase overall license enrollment by 5% by June 30, 2027, considering the needs of the aging workforce.
- › Continue working with with VITA, Cash-Oregon and other volunteer associations partnering with them to streamline a process for volunteers if they want to become licensed or registered.
- › Streamline the licensing process for out-of-state applicants while ensuring compliance with state regulations and consumer protection standards.
- › By the end of 2027, perform an assessment of our mission critical software which will include business need, long-term viability and risk.

STRATEGIES AND INITIATIVES

- › Partner with community organizations and educational institutions to promote tax preparer training programs and outreach initiative, reaching underrepresented populations.
- › Offer flexible training options, such as online courses and virtual workshops, to accommodate an intergenerational workforce with differing needs.
- › Work with DOR and IRS to create a streamlined process for clients calling in regarding licensure or registration with the Board.
- › Acknowledge the experience of out-of-state practitioners and streamline their path to licensure.



GOAL 1: EXCEPTIONAL SERVICE

Strive to continuously enhance our customers' experience.

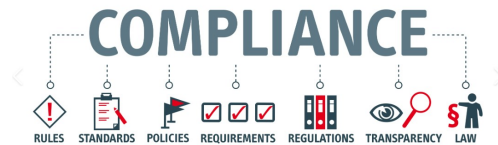
1. Evaluate customer and licensee needs and implement solutions to equitably meet those needs.
2. Champion a culture to achieve a positive customer experience.
3. Educate our customers and licensees on using the website and locating information to help improve their experience.



GOAL 2: EFFECTIVE COMPLIANCE

Fairly administer the law to ensure practitioners and businesses are properly licensed.

1. Identify noncompliant practitioners and businesses and work to bring them into compliance while also bring awareness.
2. Improve data, information and knowledge sharing with the tax community and government partners.
3. Improve timeliness in compliance programs.



GOAL 3: STRONG ORGANIZATION

Value, challenge, empower and invest in employees to be experts in their field and achieve their full potential.

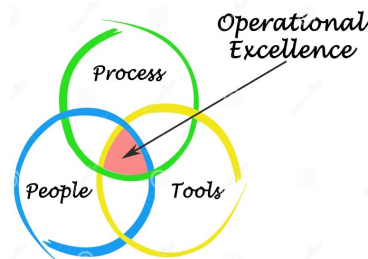
1. Continue to cultivate and enhance employee engagement and interests by engaging, challenging and empowering them.
2. Work to increase employee job satisfaction by continuing to enhance culture, focus on diversity, equity and inclusion while celebrating employee achievements.
3. Support and value input and ideas from everyone in the organization.



GOAL 4: OPERATIONAL EXCELLENCE

Optimize our processes, products, services and resources to better serve our customers and licensees.

1. Continue to monitor the board's budget while looking for opportunities to implement new processes.
2. Validate and utilize data, as authorized, to make decisions and improve business operations.
3. Modernize our database and online presence to support and improve business and administrative activities.
4. Standardize and modernize our hardware and software to optimize operations.
5. Mitigate emerging and evolving threats to manage risks and protect customer privacy and security.
6. 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.



MEASURING SUCCESS: HOW WE WILL MONITOR THE PLANS SUCCESS

How the Board will Monitor, Measure and Report to the Public the success of the plan put forth.

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

