



OBTP OREGON BOARD OF
TAX PRACTITIONERS



Oregon

Tina Kotek, Governor

You can find more information at: <https://www.oregon.gov/OBTP/Pages/index.aspx>

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Diversity, Equity and Inclusion (DEI) and Affirmative Action Plan 2026-2027

Supporting Our State. Building Our Future.

Our **MISSION**

is to protect Oregon
consumers by ensuring that
Oregon tax professionals are
competent and ethical in their
professional activities

ABOUT THE BOARD

The Oregon State Board of Tax Practitioners, created by the 1973 Legislative Assembly, protects Oregon consumers by ensuring that Oregon tax professionals are competent and ethical in their professional activities. All persons in Oregon, who prepare, advise, or assist in the preparation of personal income tax returns for a fee, or represent that they do so, must be licensed.

The Board is comprised of seven volunteer members and two full-time staff – an executive director and a licensing specialist. The executive director serves as the agency's affirmative action representative. Human resource services are provided by the Department of Administrative Services.

POLICY STATEMENT

Introduction

The purpose of this plan is to update and maintain the previously initiated affirmative action program for the Oregon State Board of Tax Practitioners. This plan is in keeping with the directive of the Governor, state and federal laws and regulations, executive orders of the President of the United States of America concerning affirmative action, discrimination/ nondiscrimination guidelines appropriate under the Civil Rights Acts, equal employment opportunity (EEO) policies, and the Americans with Disabilities Act by which our good faith efforts must be directed.

Policy Statement

The Oregon Board of Tax Practitioners will not tolerate discrimination or harassment based on age, color, marital status, mental or physical disability, national origin, race, religion, sex, sexual orientation, or any reason prohibited by state or federal statute. Nor shall the Board do business with any vendor/provider for the State of Oregon who discriminates or harasses in the above-described manner. All personnel actions of the Oregon State Board of Tax Practitioners, and all licensing actions and disciplinary actions concerning licensees, shall be administered according to this policy.

The Board adheres to established nondiscrimination and affirmative action precepts when screening, selecting and appointing Board members.

The Board of Tax Practitioners aggressively seeks to attract qualified applicants from diverse backgrounds including historically and currently under served communities including women, and disabled persons. It actively facilitates their retention and advancement based on merit, ability, and potential.

All staff of the Oregon State Board of Tax Practitioners shall adhere to the Affirmative Action Policy and Plan and to the spirit and letter of equal employment opportunity laws, rules, regulations and affirmative action concepts. The application of this policy is the individual responsibility of the Executive Director and shall be evaluated on his/her performance in achieving this affirmative action policy as well as in other job performance criteria.

The Affirmative Action Plan is posted on the Board's website and intranet; a hard copy is placed in our reception area. The Affirmative Action Policy Statement is posted on the bulletin board where all other required posters are located. Failure to meet our Affirmative Action standards will be subject to disciplinary actions.

All employees shall be advised of the procedure for lodging a discrimination/ harassment complaint, and all employees with concerns of any kind related to affirmative action shall be encouraged to bring them to the attention of the Executive Director.

It is further the policy of the Oregon State Board of Tax Practitioners to establish and maintain this program of DEI and affirmative action to provide for a method of eliminating any effects of past or present discrimination, intended or unintended, which may be indicated by analysis of present employment patterns, practices, or policies.

Duration of Plan

This revision of the Board's DEI/Affirmative Action Plan has been in effect since May 30, 2026 and shall be evaluated annually or as needed when state or federal changes occur.

SUMMARY STATEMENT

Agency Diversity and Inclusion Statement

This policy applies to all Board of Tax Practitioners employees, volunteers, proctors, constituents, and Board Members. This policy applies to all matters related to hiring, firing, transfer, promotion, benefits, compensation, and other terms and conditions of employment, as well as delivery of the Board of Tax Practitioners services.

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.
- Continue working with volunteer groups, checking in quarterly in Oregon (CASH Oregon & VITA) to help bring qualified candidates across.
- All staff and Board Members have reviewed and understand the content and purpose of the (DEI & AA) Plan.

Agency Goals for the Current Biennium

- Working on creating a panel to review the Boards plans.
- Attend trainings for DEI and Affirmative Action - agency personnel, Board Members and DEI/AA Panel.
- Work toward building a diverse and culturally competent agency and community. Items set in place if the agency grows - stepping stones to build that.
- Seeking to become an employer of choice for qualified minority and disabled candidates.
- The (ED) will report progress toward goals to the Board as a discussion item in general session annually.
- Identify potential barriers through collaboration and work to develop strategies and objectives for addressing barriers.
- Actively engage in outreach efforts to recruit qualified persons from diverse backgrounds and underrepresented classes by working more directly with Department of Revenue.

Next Biennium Goals and Action Items

- Continue to work with the (DEI/Affirmative Action) Panel to review progress and set new goals.
- Continue working with programs like Vita and Cash Oregon for outreach.
- Work to implement DEI & Affirmative Action trainings as well as attending them.
- Continue to work towards building a diverse and culturally competent agency and community. Creating stepping stones to set that up if there is Board growth.
- Continue to ensure all staff and Board Members understand the content and purpose of the (DEI & AA) plan.
- Continue to provide an annual progress report on our goals in regard to our (DEI & AA) Plan.
- Work on exams and courses to be able to provide both in more languages.

KEY PARTNERS

The Board is working with both of its associations as well as the Board members as well as reaching out to our licensees to create a DEI/Affirmative Action Plan panel. The Board is also working with the volunteer groups in Oregon that work on tax returns (CASH Oregon & VITA) and I am attending their recruitment events to let them know the opportunities that are available to them. We are also working closely with the DEI and Affirmative Action teams as well as other Executive Directors.

TRAINING, EDUCATION AND DEVELOPEMENT PLAN

Employees

New Oregon Board of Tax Practitioners employees are required to read and discuss the agency DEI and Affirmative Action Policy, ask questions and clearly understand the policies. They will receive trainings on complaint procedures and on the practical application of the policies in the workplace. The Oregon Board of Tax Practitioners has a policy manual that clearly identifies its Affirmative Action Policy.

All recruitment announcements and advertisements for the Oregon Board of Tax Practitioners contain the statement, "The Oregon Board of Tax Practitioners is an Equal Opportunity, Affirmative Action employer. Minorities, women and persons with disabilities are encouraged to apply."

Given the small size of the Board, all staff receives cross training in critical job duties. Staff is encouraged to take work related training classes. Since advancement opportunities within the Board are rare staff is encouraged to seek promotional opportunities outside the agency.

Staff receives quarterly Employee Performance Evaluations.

Volunteers

Every Oregon Board of Tax Practitioner volunteer receives the DEI/Affirmative Action Policy and training on complaint procedures each year. Volunteers work closely with staff and learn about workplace expectations, agencies goals and mission, and forms of appropriate conduct expected while interacting with licensees and consumers.

Contract/Vendors

The Oregon Board of Tax Practitioners uses contract service providers to administer exams through a company named PSI Exams. PSI can provide our exams nationwide, in all 50 states. The service providers are accountable through the Department of Higher Education's DEI/Affirmative Action Plan. The Oregon Board of Tax Practitioners uses vendors for supplies and services. The Board does not currently provide DEI/Affirmative Action training to vendors who do not directly interact with the public.

ROLES FOR IMPLEMENTATION

Executive Director

Foster to employees the importance of a diverse, discrimination and harassment free workplace. Participate in cultural diversity trainings, orientations, and be an example of cultural sensitivity. Annually evaluate the DEI and affirmative action and work environment progress. Maintain all records of the agency's affirmative action plan and make them available to all employees and Board Members.

Staff

Will also work to foster the importance of diversity and nondiscrimination with our clients. Participate in cultural diversity trainings, orientations, and be an example of cultural sensitivity. Give input for the annual review of the Board's progress on their DEI/Affirmative Action Plan.

Board Members

Review the DEI and Affirmative Action Plan annually and support the efforts and goals of the Board.

STEPS REQUIRED TO COMPLETE DEVELOPMENT OF THIS PLAN

- Work to create a DEI/Affirmative Action Committee consisting of Board Members, Licensees and Volunteers.
- Gain assistance from other similar Boards/entities in getting the word out to varying groups (for example: Workforce Oregon and Colleges.) relying that becoming a tax practitioner is a career option for everyone.
- Attend DEI and Affirmative Action trainings as well as begin to create internal trainings for staff, Board Members, Volunteers, 80-hour course providers and Key partners.
- Work to gather data in areas throughout Oregon to find out if the knowledge regarding tax returns and becoming a tax professional is reaching everyone and what languages would be beneficial to add to reach more people.
- From this data work on our exams and our courses to be able to provide both of these in more languages. The Board has already implemented the Preparers exam in Spanish.

BARRIERS/CHALLENGES IMPACTING DEVELOPMENT OF THIS PLAN

- The main barrier the Board has is that we are a Board of two FTE's without a spare budget to work with to implement many of the changes the Board would like.
- Implementation of new languages may cost quite a bit and the Board may not be able to afford the changes needed.
- The Board would like to gather more data and spread the word regarding tax practitioners being a good job pathway but with limited staff, resources and money this becomes more challenging.

KEY STRATEGIES AND FOCUS AREAS

The key strategies and focus for Board of Tax Practitioners are to address how we can become more available and known to the community. To inform the public that filing their taxes is important as well as making the public aware that the Board's main priority is to assist those who have had trouble with a tax professional. Getting the word out that becoming a tax professional is a job path for everyone. The Board of Tax looks to be as inclusive as possible by allowing more remote supervision, an apprenticeship program going forward and working closely with Oregon's volunteer groups creating flow through. As well as educating all staff, Board Members, educators and key partners on the Board's goals surrounding DEI and Affirmative Action.

TIMELINES

The majority of this will be an ongoing monthly and yearly review and action plan the Board does have a timeline for the following action items.

- Currently working on outreach to gain assistance from other Boards to help get the word out to colleges and other agencies. I believe that several partnerships will have been created by the close of 2027.
- Implementation of more languages in our exams and classes. This one will be a more ongoing processes depending on desirability, what languages and how much money it would take for implementation.
- We will continue to gather data annually. This allows the board to track data and progress.