

2024 - 2026 IT Strategic Plan

Agency: 226 Board of Accountancy

Date: 12/29/2023

Current IT State

In this section, describe the high-level strategy the agency will use to manage existing operational IT investments over the next year to 5 years. This section should align with identified Business Requirements for Existing Technology (BReTs). At minimum, please address the following questions in your description of your agency's strategy for managing existing operational IT investments:

Are there existing IT investments that will require additional funding over the next year to 5 years, such as license renewals, re-competition of current IT contracts, or system enhancements required by the Agency Strategic Plan?

If there are systems that will no longer support the agency's business needs, either through poor performance or excessive cost, how does IT leadership in the agency plan to address the issues?

If the agency does not have the staff or funding to meet increasing demand for IT services, how will IT leadership fulfill the requests?

VBOA will have a new licensing system some time in 2024 (pending board approval). Our IT licensing system contract with System Automation has a 3% escalation clause for each year. There are no existing legacy systems that will no longer support the agency's business needs, either through poor performance or excessive cost. Currently, the agency has the staff and funding needed to meet the demands for IT service. VBOA is focused on the innovative use of technology to provide faster, more convenient service to its clients as well as to reduce operational costs. All IT investments require Executive level approval prior to execution to ensure that each investment aligns with the agency mission, goals, and objectives.

Factors Impacting the Current IT

In this section, the agency will describe the changes in their business environment that will require or mandate changes to the agency's current IT investments. These are requirements and mandates from external sources, such as other agencies or business partners, the agency's customer base, product and service providers, or new federal or state legislation or regulations. The agency must identify the business value of the change, any important deadlines that must be met, and the consequences if the deadlines are not met. In your discussion, be sure to note whether the proposed enhancements are funded or not. If the agency's existing current IT investments will not need enhancement due to requirements or mandates from external sources in the foreseeable future, the agency should enter the following text rather than leave the Factors Impacting the Current IT section blank

For each mandated change, summarize your agency's response from your Agency Strategic Plan, and is it the opinion of agency IT leadership that the IT portion of the response is adequately funded?

Do the mandated changes effect IT in other Commonwealth agencies, or in other states? If so, how?

The agency continues to use the licensing system MyLicense Office and the hosted environment System Automation. VBOA's website continues to use WordPress and the hosted environment Site Vision. These efforts complement the user experience and allows the agency to manage content. VBOA is exploring an upgrade to our licensing system with a new implementation that will enhance how productive our workflows are. VBOA will continue to evaluate and implement security standards established by the Commonwealth of Virginia.

Proposed IT Solutions

In this section, describe the high-level strategy the agency will use to initiate new IT investments over the next year to 5 years in support of the agency strategic objectives documented in your Agency Strategic Plan. The agency does not need to consider specific technologies at this time, however, the strategy should identify how the IT implementation will provide business value to the organization. This section should align with identified Business Requirements for New Technology (BRnTs). At minimum, please address the following questions in your description of your agency's strategy for initiating new IT investments:

What are the most important solutions, based on the priority assigned to the requirements by the business sponsors in your agency, and what is the approach to achieving these priority solutions?

If any new IT initiatives will be started in the upcoming budget biennium, is it the opinion of agency IT leadership that it is adequately funded?

Does the agency's current IT staff have the appropriate skill set needed to support future agency technologies? If not, what skill sets need to be acquired?

If the agency will be engaged in multiple new IT initiatives, how will agency IT staff and agency subject matter experts be used across the initiatives?

VBOA is considering alternate licensing systems which would replace MyLicense Office. VBOA continues to monitor its options, and hopes to have our board vote on approving a new licensing system in 2024's calendar year with the project starting shortly after approval. This is the most important solution, as a new licensing system that is more user friendly not only for customers, but for our staff, would enhance our workflows, minimize customer headaches, and enable us to plan to expand the suite of licensing services for our licensees (certain licensing systems integrate better with add-ons such as CE Broker which helps licensees track their CPE more easily).

It is the opinion of BOA that funding will be adequate to implement this new licensing system in the 2024 calendar year (likely occurring across the two fiscal years that encompass the calendar year).

The agency has enough IT competence amongst its employee base to adequately ensure the project implementation would go smoothly, and any other future technologies we will be poised to take advantage of in the years to come.

We are not expecting multiple IT initiatives in a way that would cause any issues in terms of assigning SME's across initiatives.

Business Requirements For Technology

Agency:	226 Board of Accountancy
Date:	12/29/2023
BReT IT Security Audit Services	
BRT Type:	Business Requirement for Existing Technology
Requested Start:	
Mandate:	Yes
Mission Critical:	Yes
Description:	
<p>To meet Commonwealth Security requirements, the Virginia Board of Accountancy has engaged into a Memorandum of Understanding (MOU) with VITA's Shared Services for IT Security Audit Services as required by Chapter 780, Item 435. Per this MOU VITA will provide an audit of VBOA's systems that will meet the requirement of VITA for performing an audit of a system.</p>	
BReT Project Management Services	
BRT Type:	Business Requirement for Existing Technology
Requested Start:	
Mandate:	Yes
Mission Critical:	Yes
Description:	
<p>The Virginia Board of Accountancy (VBOA) has utilized a VITA state contract to obtain project management support through a staff augmentation contract to assist with the upgrade of our licensing software system. The project manager will act as the single point-of-contact with the existing vendor to ensure VBOA and the vendor meet the project plan deliverables and deadlines.</p>	
BReT Security Services - Information Security Offi	
BRT Type:	Business Requirement for Existing Technology
Requested Start:	
Mandate:	Yes
Mission Critical:	Yes
Description:	

To meet Commonwealth Security requirements, the Virginia Board of Accountancy has engaged VITA's Shared Security Services and entered into a Memorandum of Understanding (MOU) as required by Chapter 780, Item 435. Per this MOU VITA will perform and document Business Impact Analysis (BIA's) and System Security Plans/Risk Assessments for VBOA systems.

BRet System Automation Maintenance Fees

BRT Type:	Business Requirement for Existing Technology
Requested Start:	
Mandate:	
Mission Critical:	Yes
Description:	
System Automation (SA) contract VA-040901-SA includes maintenance fees for the MyLicense Office System for the Board of Accountancy. This contract also includes 4 other participating agencies. This contract covers Software Licenses, Annual Maintenance and Software Support Services.	

BReT System Automation System Maintenance and Supp

BRT Type:	Business Requirement for Existing Technology
Requested Start:	
Mandate:	
Mission Critical:	Yes
Description:	
The Virginia Board of Accountancy (VBOA) has utilized a VITA contract VA-040901-SA with our existing system vendor to provide system maintenance and support for our current system (MyLicense Office). This service was previously provided by the Department of Health Professions and transferred to a new VBOA IT position; however, the position was vacated and VBOA elected to utilize contract services to provide these services.	

BRT BOA Licensing System

BRT Type:	Business Requirement for New Technology
Requested Start:	12/31/2023
Mandate:	
Mission Critical:	Yes
Description:	

Replacing current licensing system with new implementation from the same provider (System Automation).

IT Strategic Plan Budget Tables

Agency:	226 Board of Accountancy			
Date:	12/29/2023			
Current IT Services				
	Costs Year 1		Costs Year 2	
Category	GF	NGF	GF	NGF
Projected Service Fees		\$73,396.00		\$75,598.00
VITA Infrastructure Changes				
Estimated VITA Infrastructure	\$0.00	\$73,396.00	\$0.00	\$75,598.00
Specialized Infrastructure				
Agency IT Staff		\$72,000.00		\$76,000.00
Non-agency IT Staff				
Cloud Computing Service		\$61,488.00		\$63,333.00
Other Application Costs		\$76,380.00		\$78,672.00
Total:	\$0.00	\$283,264.00	\$0.00	\$293,603.00
Proposed IT Investments				
	Costs Year 1		Costs Year 2	
Category	GF	NGF	GF	NGF
Major IT Projects:				
Non-Major IT Projects:		\$499,393.00		\$499,393.00
Agency-Level IT Projects:				

Major Stand Alone IT Procurements:					
Non-Major Stand Alone IT Procurements:					
Agency-Level Stand Alone IT Procurements:					
Procurement Adjustment for Staffing:					
Total:	\$0.00	\$499,393.00	\$0.00	\$499,393.00	
Projected Total IT Budget					
		Costs Year 1		Costs Year 2	
Category	GF	NGF	GF	NGF	
Current IT Services	\$0.00	\$283,264.00	\$0.00	\$293,603.00	
Proposed IT Investments	\$0.00	\$499,393.00	\$0.00	\$499,393.00	
Total	\$0.00	\$782,657.00	\$0.00	\$792,996.00	

Commonwealth Projects >= \$250,000.00

Agency:	226 Board of Accountancy		
Date:	12/29/2023		
BOA Licensing System			
Category 4	Project Initiation Approval		
<p>The Virginia Board of Accountancy has utilized the services of System Automation and their software MyLicenseOffice (MLO) for several years for the CPA licensing and exam database. During this time, they have deployed several versions and we have migrated to their hosted cloud service. However even in the new environment there are too many workarounds needed in processes and the newly implemented module, Enforcement, is not flexible for our needs and has very limited reporting capabilities. In addition, there are security weaknesses from a user perspective.</p> <p>Certified Public Accountants and Firms use the interface to renew their licenses. The interface is not user friendly, and many glitches occur during our renewal period. In addition, the exam candidate and re-exam processes are convoluted and often require agency intervention to correct incorrect information. Their (System Automation) new software, Evoke, is a low code, easily configured software with a robust reporting function. Evoke should have a seamless user experience that requires less intervention in the back end.</p> <p>Evoke is a SaaS solution that will host an end-to-end licensing and licensing record for all licensees and applicants.</p> <p>Evoke also has a highly customizable dashboard for staff end users and licensed users to keep communications in one place and trackable.</p> <p>The Board of Accountancy intends to use Evoke as their SaaS solution. Evoke has already been approved through the ECOS process.</p>			
Project Start Date	6/1/2024	Project End Date	7/31/2024
Estimated Costs:	Total	General Fund	Non-General Fund
Project Cost	\$250,000.00		\$795,000.00

Estimated first year of biennium:	\$0.00	\$0.00	\$0.00
Estimated second year of biennium:	\$0.00	\$0.00	\$0.00

Project Related Procurements

There are no procurements for this project

Commonwealth Procurements >= \$250,000.00

Agency:	226 Board of Accountancy
Date:	12/29/2023
Stand Alone Procurements:	
Procurement Name:	BOA Cloud Procurement
Procurement Date	12/6/2025
Procurement Description:	<p>Thentia Cloud Procurement and support for three years. Licensing system for CPAs. Replacing the existing system.</p> <p>This software is in place or being implemented in at least 3 other state boards of accountancy. We believe a condensed implementation will be possible if we leverage that knowledge. The CPA exam and the registration processes will significantly change 1/1/2024 and we would like to design and implement a more adaptable system by this time.</p>