

**Occupational and Professional Licensing**  
District of Columbia Board of Accountancy  
1100 4th Street, SW Suite 400  
Washington, DC 20024



**Meeting Minutes**  
**February 02, 2024**

***\*\*This meeting is governed by the Open Meetings Act. Please address any questions or complaints arising under this meeting to the Office of Open Government at [opengovoffice@dc.gov](mailto:opengovoffice@dc.gov)***

The District of Columbia Board of Accountancy (Board) held its regularly scheduled meeting on Friday, February 2, 2024. This was a virtual meeting.

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The meeting was called to order at 9:03 a.m. by Board Chair, Robert Todero, and attendance taken.

**Board Members Present:** Robert Todero, Dr. Joseph Drew, Bridgett Gagne, and (Antonia Browning Smiley -Joined 9:46 a.m. due to technical issues. She was unable to vote. Expelled before executive session by host as unidentified number. Unable to re-join because of technical difficulties).

**Board Members Absent:** Angela Avant

**Staff Present:** Leon Lewis, Program Manager; Angela Meggett-Strudwick, Board Administrator; Kevin Cyrus, Education Coordinator. (Jacqueline Noisette, Chief Licensing Officer, joined late by phone at 9:23 a.m., due to technical difficulties).

**Legal Counsel:** Justin Orrison, Office of the General Counsel

**Public Consumers Present:** Kari Bedell, Greater Washington Society of CPAs (GWCPAs), (Paul Thrasher, GWCPAs was unable to join because of technical difficulties), Stephen (Steve) Pavlik, Acting Program Manager, Department of Licensing and Consumer Protection (DLCP), Consumer Protection Unit (CPU)

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**Agenda Item: Comments from the Public:**

Kari Bedell of GWSCPA's had no comment from the public. Chairman Todero inquired if the society has heard any feedback from the society members on the 120 v. 150 credit hours. Ms. Bedell stated that their governing board of 24 members are in support of the 120 hours but have not taken any action. They've developed a survey to distribute to their members regarding the 120 v. 150 credit hours and the possible risks to mobility and substantial equivalency. GWSCPA's will share the survey results with the board once it is complete.

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**Agenda Item: New Business**

*Complaint Intake Process* – Steve Pavlik, Acting Program Manager for DLCP CPU, presented a proposed complaint process and the subsequent investigation. As follows: All board complaints would go through the CPU intake process and be assigned to an investigator. Investigators will also engage with the board and attend board meetings where the complaint or investigation was being discussed. Additionally, the Office of Professional Licensing (OPL) and the CPU will meet regularly to discuss any ~~cases~~ and complaints.

Mr. Lewis explained to the board that this new system is a way to centralize and streamline the complaint intake process. It will be a centralized tracking system as well as expediting the investigation. This will speed up the investigation and make sure the investigators are in touch with the boards. All complaints will initially go through the CPU and collaborate with the boards on the process. Steve Pavlik confirmed that the CPU would collaborate with the board and general counsel when a complaint is received.

Attorney Advisor, Justin Orrison offered further clarification of the complaint intake process to ensure the board that the first point of contact would still be reviewed by the board before it's determined if there's merit in moving forward with an investigation. The process is still under review and CPU will circle back with the OPL team to finalize the process, which will be reported to them moving forward.

*42nd Annual Conference for Executive Directors and Board Staff*– All board staff and general counsel plan to attend; Leon Lewis, Program Manager, Angela Meggett-Strudwick, Board Administrator, and Justin Orrison, General Counsel.

*Updates* – Leon Lewis informed the board that DLCP is in a full telework posture over the next several months because of the construction project to renovate the building. The second floor will remain open to serve the public.

Mr. Lewis informed the board during Old Business that he is in communication with NASBA about using a unique ID to identify licensees instead of using a social security number to identify.

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**Agenda Item: Acceptance of Draft Minutes**

Upon motion duly made at 9:38 a.m. by board member Dr. Joseph Drew, and properly seconded by board member Bridgett Gagne, the Board unanimously voted to approve the November 30, 2023, draft board meeting minutes after adding Mr. Alfonzo Alexander, President of the Center for the Public Trust, to the public attendance section.

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**Agenda Items: 2024 NASBA Conferences/Meetings & Events Calendar**

**Upcoming Events**

[42nd Annual Conference for Executive Directors and Board Staff](#)

March 25 – 27, 2024, Nashville, TN

[29th Annual Conference for Board of Accountancy Legal Counsel](#)

March 25 – 27, 2024, Nashville, TN

Chairman Todero confirmed that all board staff and legal counsel would attend the 42<sup>nd</sup> Annual ED & 29<sup>th</sup> Annual Conference for Legal Counsel that was voted on in an earlier meeting. Everyone plans to attend once approval is confirmed.

[Eastern Regional Meeting](#)

June 2024, Louisville, KY

[117th NASBA Annual Meeting](#)

October 27 - 30, 2024 | Orlando, FL

**“Reserve the date”**

March 25 – 27, 2024, Nashville, TN, 42<sup>nd</sup> Annual Conference for Executive Directors and Board Staff

**Proposed 2024 Board Meeting Dates** – The scheduled board meeting dates and upcoming conferences as listed.

January (Recess)	February 2	March (Recess)	April (Recess)
May 3	June (Recess)	July 12	August (Recess)
September 6	October (Recess)	November (Recess)	December 6

Board agreed to recess in March because of scheduling challenges and keep the next meeting date for May 3, 2024.

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**Agenda Item: Report - Applications for Licensure**

Upon motion duly made at 9:51 a.m. by board member Dr. Joseph Drew, and properly seconded by board member Bridgett Gagne, the Board unanimously voted to approve the list of accountancy applications for licensure, attached hereto and made a part of the February 2, 2024, minutes.

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**Agenda Item: Old Business**

*Accountancy Board Outreach Efforts* – Angela Meggett-Strudwick reported on the staff’s effort to reach out to universities for the board to hold several more board meetings on campuses in 2024. Nothing confirmed yet but updates to come.

Dr. Drew gave a summary report on the success of the UDC Campus Board Meeting. The board was pleased with the way the meeting was held. However, moving forward we will try to make sure more students are able to attend by working with the Dean of the school for mandatory attendance incentives.

Chairman Todero spoke with Tiffany Crowe, DLCP Director, about collaborating with the agency with outreach efforts to reach students in high school. He wants the accountancy board to work more closely with the director’s office in its outreach efforts to engage a younger audience.

*BOA Newsletter Update* – Angela Meggett-Strudwick updated the board on the progress of the newsletter. Drafts of the newsletter were shared with the board and staff and feedback was requested regarding the format and content. The newsletter is in its final stage before distributing publicly. Board staff is editing the final draft to be finalized this month.

*Legislative Progress Update* – Justin Orrison updated the board on the progress of the proposed rule-making the board adopted for the UAA Model Rule 57. DLCP’s new Legislative Director, April Randall, is helping the board’s legislation move forward. He has a meeting with her on February 13, 2024, to review the work required for the next step. They are hoping to move it to the comment stage by May or June 2024.

**EXECUTIVE SESSION**

Upon motion duly made by board member Dr. Joseph Drew, and properly seconded by board member Bridgett Gagne, the board unanimously agreed by roll call to enter closed session at 10:05 a.m. pursuant to the authority of D.C. Official Code Section 2-575(b) (4) (A) to seek the advice of counsel, D.C. Official Code Section 2-575(b) (9) to discuss disciplinary matters, and D.C. Official Code Section 2-775(b)(13) to deliberate upon a decision in an adjudication action or proceeding.

**Agenda Item: Technical Review:**

- *Disciplinary Review*

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**Agenda Item: Legal Matters:**

- *CPU Referral*

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The following actions were taken due to the discussion during the closed session:

Upon motion duly made at 11:24 a.m. by board member Dr. Joseph Drew, and properly seconded by board member Bridgett Gagne, the board voted to accept the following legal recommendations:

1. In the matter of Cherry Bekaert & Holland LLP\_CPC708482 – no action but send a letter inquiring about the licensing status of the firm.
2. In the matter of James Walker CPA903988 – refer the licensee to the Consumer Protection Unit for further investigation.

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**Adjourn**

Upon motion duly made at 11:25 a.m. by board member Bridgett Gagne, and properly seconded by board member Dr. Joseph Drew, the Board unanimously voted to adjourn.

The next scheduled meeting of the Board of Accountancy will be May 3, 2024, call in/virtual.

Respectfully submitted,

A handwritten signature in black ink, appearing to read 'Robert Todero', is written over a horizontal line.

Robert Todero, Chair

June 5, 2024

Date

Recorder: Angela Meggett-Strudwick, Board Administrator