

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



Meeting Minutes
November 30, 2023

*****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***

The District of Columbia Board of Accountancy (Board) held its regularly scheduled meeting on Thursday, November 30, 2023, at the University of the District of Columbia. This was an in person/virtual meeting.

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The meeting was called to order at 2:17 p.m. by Board Chair, Robert Todero, and attendance taken.

Board Members Present: Robert Todero, Dr. Joseph Drew, and Bridgett Gagne

Board Members Absent: Angela Avant & Antonia Browning Smiley

Staff Present: Angela Meggett-Strudwick, Board Administrator; Leon Lewis, Program Manager; Kevin Cyrus, Education Coordinator; Kendra Covington, Program Support Specialist; and Tiffany Crowe, DLCP Director

Legal Counsel: Marc Nielsen, Office of the General Counsel

Public Consumers Present: Kari Bedell, Greater Washington Society of CPAs (GWCPAs) attended virtually, Paul Thrasher, (GWCPAs) and Attorney Advisor, Anthony Scerbo, D.C. Office of Open Government (OOG)

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Agenda Item: Comments from the Public:

Kari Bedell of GWSCPA's informed the students that they are a professional membership society for CPAs and other financial professionals in the Washington D.C. area available to students and professionals in their careers. The Society has student membership resources that will help support their career development and is there for them now and as they prepare for their exams and start their work life in the DMV area. She made the students aware of a scholarship program offered by the Society, and that if you are a junior or above you are eligible to apply for a scholarship with them. The scholarship program opens in January 2024. The Society gives about \$30,000 a year in awards, and she strongly encouraged the students to apply. They are available to only DC metro area students pursuing a degree in accounting. Ms. Bedell invited the students to visit the website at GWSCPA.org or call or email her at any time.

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Agenda Item: New Business

116th NASBA Annual Meeting Summary Report– Board member Dr. Joseph Drew, Antonia Browning Smiley, Bridgett Gagne, Angela Avant, and board staff Angela Meggett-Strudwick attended the annual conference in NY, NY.

Dr. Joseph Drew gave a summary of the topics discussed during the annual meeting conference, which included CPA Evolution & the CPA Exam: Implementation on the Horizon, A Case Study in the Ethical Use of AI Today, and Accounting+ Rebranding the profession for the next generation of diverse accountants. Bridgett Gagne, CPA, spoke further to the students about the limitless possibilities a career in accounting holds. She stated that most people are afraid of the profession because they aren't good at math, but she assured the students this should never be a roadblock because they don't need to be good at math to succeed in the profession. They have many tools to help them do their job efficiently.

DC Board of Accountancy Licensing Process – Angela Meggett-Strudwick gave a brief presentation of the DC licensing process for the students attending the board meeting.

Education Requirements – Kevin Cyrus spoke briefly about Continuing Education (CE) requirements and how it affects the application renewal process and the licensee's responsibility to provide the board with proof if they are ever audited. Chairman Todero stressed the importance of compliance and their responsibility to maintain the CEs per the jurisdiction's regulations.

NASBA Center for the Public Trust Presentation – Alfonzo Alexander, President of the Center for the Public Trust presented Ethical Leadership: The True Sustainable Leadership. The presentation covered the importance of new professionals understanding ethical dilemmas because they can come often and early in their careers. He also stressed the importance of having a mentor and establishing what line you will not cross early in your career. He completed his presentation with the message of performing with integrity and excellent performance and how many doors can be opened to great careers. Lastly, the students were introduced to, "The StudentCPT Programs" available to help them network and build ethical leadership skills.

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Agenda Item: Acceptance of Draft Minutes

Upon motion duly made at 3:47 p.m. by board member Bridgett Gagne, and properly seconded by board member Dr. Joseph Drew, the Board unanimously voted to approve the October 27, 2023, draft board meeting minutes after correcting the next meeting date.

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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](#)

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29th Annual Conference for Board of Accountancy Legal Counsel

March 25 – 27, 2024, Nashville, TN

Eastern Regional Meeting

June 2024, Louisville, KY

117th NASBA Annual Meeting

Location & Date (TBA)

“Reserve the date”

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

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

December 2023 (Recess)	January (Recess)	February 2	March 8	April (Recess)
May 3	June (Recess)	July 12	August (Recess)	
September 6	October (Recess)	November (Recess)		December 6

Upon motion duly made at 3:53 p.m. by board member Dr. Joseph Drew, and properly seconded by board member Bridgett Gagne, the Board unanimously voted to approve the proposed 2024 meeting date.

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Agenda Item: Report - Applications for Licensure

Upon motion duly made at 3:54 p.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 November 30, 2023, 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. We will also

BOA Newsletter Update – Angela Meggett-Strudwick updated the board on the progress of the newsletter. She will send out a draft in December 2023. The pictures taken during the November 30, 2023, board meeting will be included in the upcoming newsletter. The newsletter is scheduled to be distributed electronically during the first quarter of FY 2023-2024.

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Credit Relief Initiative (CRI) Discussion – In response to significant health, economic, education, and travel disruptions resulting in CPA Examination candidate hardships, the Board of Accountancy will extend credit periods through June 30, 2025, for CPA Examination credits that expired from January 30, 2020 (1) through May 11, 2023(2), which have not been subsequently replaced by new credits for the same sections.

(1) The United States Department of Health and Human Services declared a national Public Health Emergency.

(2) The United States Department of Health and Human Services announced the expiration of the national Public Health Emergency.

Upon motion duly made at 3:58 p.m. by board member Bridgett Gagne, and properly seconded by board member Dr. Joseph Drew, the Board unanimously voted to adopt the en masse for all candidates to which it applies.

Updates – Leon Lewis introduced the newly appointed DLCP Director, Tiffany Crowe, to the board. Tiffany Crowe addressed the Board’s concerns for travel and outreach efforts and assured her support to work together with the Board to accomplish their goals to increase the industry pipeline. The Director agreed with the Board’s idea to focus on outreach efforts at high schools moving forward. The Board was delighted to have the opportunity to speak directly with the Director and Ms. Crowe assured the Board that they would have more opportunities to meet with her in the future.

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Adjourn

Upon motion duly made at 3:58 p.m. by board member Dr. Joseph Drew, and properly seconded by board member Bridgett Gagne, the Board unanimously voted to adjourn at 3:58 p.m.

The next scheduled meeting of the Board of Accountancy will be February 2, 2024, call in/virtual.

Respectfully submitted,

Robert Todero, Chair

Date

Recorder: Angela Meggett-Strudwick, Board Administrator