



Occupational and Professional Licensing BOARD OF ACCOUNTANCY

Meeting Minutes February 3, 2023

The District of Columbia Board of Accountancy (Board) held its regularly scheduled meeting on Friday, February 3, 2023. This was a call in/virtual meeting.

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The meeting was called to order at 9:07 a.m. by Board Chair, Robert Todero, and attendance taken.

Board Members Present: Robert Todero, Dr. Joseph Drew, and Antonia Browning Smiley

Board Members Absent: Angela Avant, Bridgett Gagne

Staff Present: Meggett-Strudwick, Board Administrator; Leon Lewis, Program Coordinator; Kendra Covington, Program Support Specialist; and Kevin Cyrus, Education Coordinator, Stacey Price, Board Administrator

Legal Counsel: J. Patrick White, Office of the General Counsel

Public Consumers Present: Paul Thrasher, Greater Washington Society of CPAs (GWCPAs); Kari Bedell, Greater Washington Society of CPAs (GWCPAs); Paula Carlson, CPA; Kimberly Messenger, CPA, Paralegal, Jermaine Wilcox, CPA

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Agenda Item: Comments from the Public:

Kari Bedell reiterated that the (GWSCPA) is happy to help the board with any outreach efforts to local universities. Ms. Bedell also informed the board that she has asked the mayor's office for a proclamation of CPA Day for February 27th, 2023, because that is the date of their 100th anniversary, and has received confirmation. GWSCPA is planning a celebration later this month. There will be additional publicizing of CPA Day via social media and possibly something in person later this spring.



Ms. Pamela Carlson questioned why the District of Columbia no longer participates with NASBA's CPE audit service. She received a notification from NASBA informing her that DC no longer participates in their CPE compliance program effective March 1, 2023. Mr. Lewis assured Ms. Carlson that the District of Columbia has been working with NASBA to find a resolution, but at the present time we are unable to supply the data because the District of Columbia does not supply social security numbers as NASBA requires to participate in this program. Mr. Lewis suggested that the licensees keep a record of all the CPEs taken for the reporting period. Mr. Lewis assured the public that we will continue to work with NASBA to find a resolution.

Ms. Kimberly Messenger joined the meeting to see if the board would address the NASBA letter regarding the retention of 150 hours or an alternative 120 hours in the CPAs pathway to licensure. Chairman Todero shared information from a meeting with NASBA where this issue was addressed. Some states are considering changes due to the barriers of entrance for CPAs, but NASBA and the AICPA are committed to continuing the 150 hours. States who take this alternative position may be at risk because it may affect their substantial equivalency status and they would not be allowed to be licensed or practice in other jurisdictions. The DC Board plans to stay current of any new developments in this area. Kari Bedell stated that the GWSCPA's board is still in conversation about the alternate pathway position that some jurisdictions have taken, but they haven't taken any official position yet.

Agenda Item: Acceptance of Draft Minutes

Upon motion duly made at 9:49 a.m. by board member Dr. Joseph Drew, and properly seconded by board member Antonia Browning Smiley, the Board unanimously voted to approve the January 6, 2023, draft board meeting minutes, as amended during the meeting.

Agenda Item: Correspondence:

- *NASBA, AICPA Issue Proposed Revisions to CPE Provider Standards*

Summary:

The revised Standards would clarify how to award CPE credit when multiple presenters are actively involved in running one CPE program session. They would also provide clarity on how to communicate and document the required attendance and monitoring mechanisms for this program. It also clarifies how the Group Live and Group Internet-Based programs are determined by the viewers interaction and engagement with the instructor. It addresses each delivery method with web-enabled, two-way video participation within these programs.

- *Draft 8-Point Plan To Address The CPA Pipeline Executive Summary*

Summary:

“This document is a draft plan designed to attract students and ensure that the pipeline of students is strong enough to meet market needs which requires a “collective effort to address systemic hurdles to entry, including attractiveness, cost, time, and reward”.

Mr. Lewis summarized the 8-Point Plan draft by highlighting some of the strategies and programs NASBA and AICPA plan to develop and employ to attract students and ensure a steady influx of students in the pipeline to support the industry needs.

Chairman Todero asked the board to review the 8-Point Plan correspondence material so that it can be discussed at the March 3, 2023, meeting so that the board can thereby provide a board response by March 31st.

- *UAA_Rule_5.7_Proposed_Amendments_Approved_by_NASBA_Board_for_Exposure_FINAL10112022, (To be reviewed in the February 3rd meeting when Patrick White returns),*

Patrick White, GC, summarized the UAA Rule 5.7 proposed amendments and shared with the board how closely aligned the District of Columbia’s regulations are with the proposed changes. He also made a comparison of jurisdictions, including the District of Columbia, Maryland and Virginia and how their regulations compare with the District of Columbia’s.

Agenda Items: 2022/2023 NASBA Conferences/Meetings Calendar Meetings & Events

Upcoming Events

28th Annual Conference for Board of Accountancy Legal Counsel

Feb. 27 – March 1, 2023, Tucson, AZ

41st Annual Conference for Executive Directors and Board Staff

Feb. 27 – March 1, 2023, Tucson, AZ

Eastern Regional Meeting

May 31 – Jun 2, 2023, Savannah GA

116th NASBA Annual Meeting

Oct. 29 – Nov. 1, 2023, New York, NY

“Reserve the date”



February 27 – March 1, 2023

April 6, 2023 (GW Outreach)

May 31 – Jun 2, 2023

Proposed 2023 Board Meeting Dates – The scheduled board meeting dates and upcoming conferences as listed.

January 06	February 03	March 03	April (Recess)
May 05	June 02	July 07	August 04
September 01	October 06	November 03	December 01

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Agenda Item: Report - Applications for Licensure

Upon motion duly made at 10:25 a.m. by board member Dr. Joseph Drew, and seconded by board member Antonia Browning Smiley, the board unanimously voted to approve the February 3, 2023, list of accountancy applications for licensure, attached hereto and made a part of the February 3, 2023, minutes.

Agenda Item: Old Business

- *Accountancy Board Outreach Efforts*

Chairman Todero and board staff discussed outreach efforts to include incorporating CPAs who are earlier in their careers to accompany them on outreach events in universities. Mr. Lewis provided an update on the board staffs plans for high school outreach. He has assigned Kathy Thomas to lead the high school outreach efforts in the District of Columbia and will have more to report on in the coming months.

- *Board Legislative Committee*

Patrick White

- *BOA Newsletter- Pictures (Board Luncheon)*



Board pictures are on hold until further notice. TBA

- *International Candidates*

District of Columbia board members, Chairman Todero and Dr. Drew, and board staff, Leon Lewis and Angela Meggett-Strudwick, along with general council, Patrick White, attended a meeting with NASBA’s legal team to review regulations or processes that may present a problem to international candidates. It was determined that the District of Columbia didn’t have any regulatory impediments for foreign applicants. However, the application may deter the applicant from applying due to the existence of a social security number field. An applicant may believe that it is a requirement, which it is not. Board staff is addressing the removal of the field with the IT team.

Agenda Item: New Business

None

Agenda Item: Technical Review and Reinstatement Application/s:

TECHNICAL REVIEW APPLICATION		
NAME	APPROVED	INCOMPLETE / DEFERRED
KATTELL & COMPANY, PLLC	X	
KPMG LLP	X	
PKF O'CONNOR DAVIES, LLP	X	
RSM US, LLP	X	
KATHERINE IANDOLI	X	

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Agenda Item: Legal Matters: None

There were no legal matters to discuss currently.

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EXECUTIVE SESSION



Upon motion duly made by Chairman Todero, and properly seconded by board member, Dr. Joseph Drew, the board unanimously agreed to enter closed session at 10:37 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.

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

Upon motion duly made at 11:27 a.m. by board member Dr. Joseph Drew, and properly seconded by board member Antonia Browning Smiley, the board agreed to approve the firm technical applications above. No actions taken.

Upon motion duly made at 11:28 a.m. by board member, Antonia Browning Smiley, and properly seconded by board member, Dr. Joseph Drew, the board voted to approve the technical review application below.

1. Katherine Iandoli- Technical CPA application approved. No action taken.

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Adjourn

Upon motion duly made by board member Antonia Browning Smiley, and seconded by board member Dr. Joseph Drew, the Board voted to adjourn at 11:28 am.

The next scheduled meeting of the Board of Accountancy will be March 3, 2023, in person.

Respectfully submitted,



Robert Todero, Chair

April 10, 2023

Date

Recorder: Angela Meggett-Strudwick, Board Administrator