



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

**Meeting Minutes
July 14, 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 Friday, July 14, 2023. This was a call in/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 (9:06 a.m.)

Board Members Absent: Angela Avant

Staff Present: Meggett-Strudwick, Board Administrator; and Leon Lewis, Program Manager

Legal Counsel: Justin Orrison, Office of the General Counsel

Public Consumers Present: Paul Thrasher, Greater Washington Society of CPAs (GWCPAs); Kari Bedell, Greater Washington Society of CPAs (GWCPAs).

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Agenda Item: Comments from the Public:

Kari Bedell of GWSCPA informed the board that the GWSCPA supports a thirty (30) month or more extension of the exam window. Paul Thrasher agreed with Kari Bedell's statements on behalf of the public comments. Kari Bedell inquired how the DC Board of Accountancy plans to announce their decision to the public regarding the exam window extension currently under consideration.



Agenda Item: Acceptance of Draft Minutes

Upon motion duly made at 9:09 a.m. by board member Bridgett Gagne, and properly seconded by board member Dr. Joseph Drew, the Board unanimously voted to approve the May 19, 2023, draft board meeting minutes.

Agenda Item: Correspondence:

- None

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

Upcoming Events

[116th NASBA Annual Meeting](#)

Oct. 29 – Nov. 1, 2023, New York, NY

“Reserve the date”

August 25, 2023 (AU Outreach)

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

August (Recess) September (TBA) October 06 November (Recess) December 01

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Agenda Item: Report - Applications for Licensure

Upon motion duly made at 9:39 a.m. by board member Dr. Joseph Drew, and seconded by board member Bridgett Gagne, the board unanimously voted to approve the July 14, 2023, list of accountancy applications for licensure, attached hereto and made a part of the July 14, 2023, minutes.

Agenda Item: Old Business



Board Calendar – 2023 meeting dates / Conferences / Meetings – No changes were made to meeting dates. The October meeting date will be confirmed once a confirmation date is agreed upon with George Washington University School of Business for an on campus board meeting.

Upon motion duly made at 9:32 a.m. by board member Bridgett Gagne, and properly seconded by board member Antonia Browning Smiley, the Board unanimously voted to approve all Board Members and Board Staff to attend the 116th NASBA Annual Meeting in New York, NY Oct. 29- Nov. 1, 2023

Accountancy Board Outreach Efforts – Accountancy Board requested contacting UDC to extend a request for conducting a board meeting on campus this fall. Board Administrator will contact the university and report in September’s board meeting.

Board Legislative Committee – Angela Strudwick, Leon Lewis, and General Counsel, Justin Orrison met in June to outline the requirements for the board expansion. Chairman Todero spoke with General Counsel as well to confirm the guidelines for the board expansion. Justin Orrison, GC, will present a draft for board discussion during the executive session.

BOA Newsletter- Pictures – Deferred (TBA)

International Candidates – Leon Lewis confirmed that the DLCP applications should not be a deterrent for the international candidate because the applications no longer require a social security number.

Eastern Regional NASBA Meeting- Angela Meggett-Strudwick, Board Administrator, reported to the Board on topics discussed during the conference. Board member Bridgett Gagne updated the Board on the pipeline initiative taskforce. She indicated the taskforce put together a toolkit for Boards to use. Leon Lewis reported on NASBA; s plan to move away from using SS numbers and replacing the requirement with a unique ID. Antonia Browning Smiley and Dr. Joseph Drew reported on their experiences as well.

Kari Bedell indicated the GWSCPA’s is supportive of a bigger conversation about potential new pathways to the 150 credit hours instead of closing the door to the possibility that there is another pathway that would include 120 hours. She indicated they thought Minnesota had a well thought out proposal in their jurisdiction for 120+additional hours of experience. GWSCPA is mindful of the potential challenges with substantial equivalency related to the alternative pathway but they would like to leave the door open for new pathways.

EXECUTIVE SESSION

Upon motion duly made by board member Antonia Browning Smiley, and properly seconded by board member, Bridgett Gagne, the board unanimously agreed by roll call to enter closed session at 09:50 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 and Reinstatement Application/s:

None

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Agenda Item: Legal Matters:

- UAA Model Rule 5-7 new legislation
- Accountancy Board Expansion
- Work experience rule change

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

- Upon motion duly made at 11:12 a.m. by board member Dr. Joseph Drew, and properly seconded by board member Antonia Browning Smiley, the board voted three to one (3 to 1) to adopt proposed language for board expansion of two (2) junior members defining experience as a minimum of five (5) years not to exceed twelve (12) years before the initial term. Board member Bridgett Gagne abstained indicating she feels less experience is appropriate because of the current education requirement. She is in favor of a three (3) year minimum threshold instead of five (5).
- Upon motion duly made at 11:16 a.m. by board member Dr. Joseph Drew, and properly seconded by board member Antonia Browning Smiley, the board unanimously agreed to adopt all amendments to the UAA Model Rule Section 5-7 and incorporate them into the DC regulations.
- Upon motion duly made at 11:18 a.m. by board member Bridgett Gagne, and properly seconded by board member Antonia Browning Smiley, the board agreed three to one (3 to 1) to adopt proposed language for initial licensee limiting experience which must be completed within twelve (12) years prior to applying for licensure. Board member Dr. Joseph Drew abstained because he felt it harmed older individuals in the profession.
- Upon motion duly made at 11:20 a.m. by board member Antonia Browning Smiley, and properly seconded by board member Dr. Joseph Drew the board unanimously agreed to grant a 30-month extension to the following candidates:

1. Joshua Brooks



2. Kevin Lopez

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Adjourn

Upon motion duly made by board member Bridgett Gagne, and seconded by board member Dr. Joseph Drew, the Board voted unanimously to adjourn at 11:23 am.

The next scheduled meeting of the Board of Accountancy will be October 27, 2023, virtual/call in.

Respectfully submitted,

Robert Todero, Chair

October 4, 2023

Date

Recorder: Angela Meggett-Strudwick, Board Administrator