

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



Meeting Minutes
May 03, 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***

The District of Columbia Board of Accountancy (Board) held its regularly scheduled meeting on Friday, May 03, 2024. This was a virtual meeting.

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The meeting was called to order at 9:01 a.m. by Board Chair, Robert Todero, and attendance taken.

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

Board Members Absent: Angela Avant

Staff Present: Angela Meggett-Strudwick, Board Administrator; Kevin Cyrus, Education Coordinator, Kendra Covington, Program Support Specialist, Donna Harrod, Program Manager.

Legal Counsel: Justin Orrison, Office of the General Counsel

Public Consumers Present: Kari Bedell, Greater Washington Society of CPAs (GWCPAs) joined at 9:04am, Paul Thrasher, GWCPAs

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Agenda Item: Comments from the Public:

Ms. Bedell stated she spoke with some students, and they were aware of the changes to the exam structure, and all seemed to be very clear on it, which was good news. She indicated there was always a lot of interest in the 120 v. 150 credit hours and the society plans to discuss it during their June 5th meeting. She will send an invite to those who can attend and will have a recording available for those who can't attend.

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Agenda Item: New Business

42nd ED & Board Staff & 29th Legal Conference Summary Report- Justin Orrison reported on his experience as a first-time attendee of the legal conference and how beneficial it was for him. He stated, the NASBA legal staff does a really good job briefing the legal staff and investigators of cases and legislation that affects the accountancy industry and state regulators. He noted that it was very beneficial to have representation and certainly notable for jurisdictions that did not have a presence. He indicated there were a lot of great topics covered by the PCAOB and the Department of Labor. It was good to make contacts and to be present.

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Angela Meggett-Strudwick summarized the ED portion of the conference and highlighted the sessions that were very informative and beneficial for the staff. PCAOB & the Labor Board presentations were wonderful and answered many questions regarding the reporting we receive from the entities.

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Agenda Item: Acceptance of Draft Minutes

Upon motion duly made at 9:20 a.m. by board member, Dr. Joseph Drew, and properly seconded by board member, Bridgett Gagne, the Board unanimously voted to approve the February 2, 2024, draft board meeting minutes.

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Agenda Items: 2024 NASBA Conferences/Meetings & Events Calendar

Upcoming Events

[Eastern Regional Meeting](#)

June 2024, Louisville, KY

Eastern Regional Conference– All board members present plan to attend, Robert Todero, Chairman, Bridgett Gagne, Board Member, Antonia Browning Smiley, Board Member and Dr. Joseph Drew, Consumer Member.

Dr. Drew inquired if they were approved to purchase their tickets. Chairman Todero asked if the board staff could confirm if they were approved to purchase their airline tickets for the conference. Board Administrator will let them know as soon as possible, once confirmed.

[GWSB - Department of Accountancy annual CPA Exam Information Session](#)

Wednesday, September 18, 2024, from 4:30 to 7:30 pm at Duques 150 Crain Center

Presentation Time; 5:15 – 5:45 pm DC Board of Accountancy

[117th NASBA Annual Meeting](#)

October 27 - 30, 2024 | Orlando, FL

Upon motion duly made at 9:48 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 117th NASBA Annual Meeting in Orlando FL, October 2024.

“Reserve the date”

June 4-6, 2024, Eastern Regional Meeting, Louisville KY

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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

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Agenda Item: Report - Applications for Licensure

Upon motion duly made at 9:55 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 May 3, 2024, minutes.

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Agenda Item: Old Business

Complaint Intake Process – Angela Meggett-Strudwick, Board Administrator informed the board that the new process was in place and the complaints would go through the Consumer Protection Unit (CPU) for tracking purposes and assigned to an investigator who would route the complaint to the manager and respective board administrators for review by legal counsel and staff to present to the boards and commissions for review.

Attorney Advisor, Justin Orrison, offered further clarification of the complaint intake process that will be a more efficient tracking system for all complaints moving forward.

Accountancy Board Outreach Efforts – Angela Meggett-Strudwick reported on the upcoming invitation from George Washington School of Business - Department of Accountancy annual CPA Exam Information Session scheduled for Wednesday, September 18, 2024, from 4:30 to 7:30 pm at Duques 150 Crain Center DC Board of Accountancy presentation time; 5:15 – 5:45 pm. Present board members and staff plan to attend.

Legislative Progress Update – Justin Orrison updated the board on the progress of the proposed rule-making the board adopted for the UAA Model Rule 5-7. They are moving forward with the notice of proposed rulemaking, which has been approved internally by DLCP. It is currently in review by the Office of the Attorney General and several other agencies that must weigh in such as the Department of Infrastructure, and the Office of Legislative Affairs must weigh in at some point. There are some other minor changes that aren't controversial. Some minor corrections were necessary with specific terms, such as, CPA Exam will change to Uniform CPA Exam, as it should be. There are also changes with the experience. limiting the period to ten years from the date of application. They hope to have approval to publish the 30-day comment period by the end of June or beginning of July 2024.

Ms. Gagne asked about the progress of the board expansion to seven (7) members. Per Justin, this requires legislative change, which is more involved and is currently in the process of drafting. A new legislative specialist has been assigned to focus on that legislation.

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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 10:08 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, complaints, technical applications, 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:

- *Complaint Review*
- *Reinstatement Review*

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Agenda Item: Legal Matters:

- *None*

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

Upon motion duly made at 10:48 a.m. by board member Dr. Joseph Drew, and properly seconded by board member Antonia Browning Smiley, the board voted unanimously to accept the following legal recommendations:

1. In the matter of Leroy Jackson v. Randy McRae –the complaint filed against Randy McRae be dismissed. No action taken.
2. In accordance with 17 DCMR section 2533, the Accountancy Board moves to appoint an Advisory Committee on Continuing Education (CE), to be chaired by Bridgett Gagne,

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Adjourn

Upon motion duly made at 10:50 a.m. by board member Bridgett Gagne, and properly seconded by board member Dr. Joseph Drew, the Board unanimously voted to adjourn. 4

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The next scheduled meeting of the Board of Accountancy will be July 12, 2024, call in/virtual.

Respectfully submitted,

A handwritten signature in black ink, appearing to read "Robert Todero". The signature is fluid and cursive, with a large loop at the beginning and a long, sweeping tail.

Robert Todero, Chair

September 17, 2024
Date

Recorder: Angela Meggett-Strudwick, Board Administrator