

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



Meeting Minutes
September 29, 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, September 29, 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 (9:14 a.m.)

Board Members Absent: Angela Avant

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

Legal Counsel: Justin Orrison, Office of the General Counsel

Public Consumers Present: Kari Bedell, Greater Washington Society of CPAs (GWCPAs) and Nicholas Weil, Esq., Trial Attorney, Office of Open Government (OOG)

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Agenda Item: Comments from the Public:

Kari Bedell of GWSCPA – No comments from the public.

Chairman Todero inquired of Ms. Bedell what she is hearing about the exam credit extension and additional pathways to obtaining the 30 credit hours in her circles. Ms. Bedell indicated that they get some comments from individual members, but when their board discussed this, they were in favor of extension up to 36 months, or even longer for passed parts of the exam indefinitely. She also indicated that their board, along with other leadership, are in favor of additional pathways for the 30 hours.

Agenda Item: Acceptance of Draft Minutes

Upon motion duly made at 9:18 a.m. by board member Antonia Browning Smiley, and properly seconded by board member Dr. Joseph Drew, the Board unanimously voted to approve the July 14, 2023, draft board meeting minutes after correcting the next meeting date.

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Agenda Item: Correspondence:

Board Administrator, Angela Meggett-Strudwick briefly summarized the correspondence received as reported on the update summary document provided in the meeting materials.

- *AICPA and Credit Extension Support:* AICPA, and the largest CPA firms in the United States, support the initiative to reinstate credit to CPA Exam candidates for sections successfully earned during 2020- 2023 but lost during the COVID-19 pandemic.
- *Credit Relief Program:* NASBA is urging the state boards to adopt a program to have uniformity in all jurisdictions.
- *CPA Credit Initiative Presentation:* Extend credit periods through June 30, 2025, for CPA Examination credits that expired from January 30, 2020, through May 11, 2023.
- *AICPA-NASBA Experience Earn & Learn Program:* Pipeline Acceleration Plan
ELE's pilot is a near-term initiative launching in fall 2023 post-pilot phase is a mid-term initiative launching in 2024.

Agenda Items: 2023/2024 NASBA Conferences/Meetings Calendar Meetings & Events

Upcoming Events

[116th NASBA Annual Meeting](#)

Oct. 29 – Nov. 1, 2023, New York, NY (voted all board members & staff attend)

[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

[Eastern Regional Meeting](#)

Location & Date (TBA)

[117th NASBA Annual Meeting](#)

Location & Date (TBA)

Upon motion duly made at 9:36 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 all the NASBA 2024 accountancy conferences listed above: 42nd Annual Conference for ED &

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Board Staff; 29th Annual Conference for Board of Accountancy Legal Counsel; Eastern Regional Meeting; 117th NASBA Annual Meeting 2024.

“Reserve the date”

October 28th, 2023 – November 1st, 2023, 116th Annual Meeting

November 30th, 2023 (Tentatively)

On Campus Board Meeting @ University of the District of Columbia (UDC)

Exact location TBD

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

October 27 (Special Meeting/Executive Session Only) November 30
December (Recess)

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Agenda Item: Report - Applications for Licensure

Upon motion duly made at 9:39 a.m. by board member Bridgett Gagne, and seconded by Dr. Joseph Drew board member, the board unanimously voted to approve the September 29, 2023, list of accountancy applications for licensure, attached hereto and made a part of the September 29, 2023, minutes.

Agenda Item: Old Business

Board Calendar – 2024 meeting dates TBA / Conferences / Meetings – Board agreed to meet October 27th for a special meeting to discuss legal matters only in the executive session. The November 2023 meeting date will be announced and posted once an availability date is agreed upon between the UDC’s Department Chair and the DC Board.

Updates – Leon Lewis updated the board on the appointment of the new DLCP Director, Tiffany Crowe. He stated she worked previously at DCRA in the operation of the agency and will be an asset in her role as Acting Director.

Accountancy Board Outreach Efforts – The American University MSA Orientation 2023 outreach event was successful, and the students were excited to have the BOA Chair, Robert Todero and Consumer Member, Dr. Joseph Drew be a part of the event. Everyone briefly reported on their experience attending the event. Patricia Hartman, Director of Client Relations (NASBA) presented virtually. A handout was created for the event & future events by the Board Administrator in collaboration with NASBA. The board staff attendees consisted of Leon Lewis, Program Coordinator, Angela Meggett-Strudwick, Board Administrator, and Kendra Covington, Program Support Specialist. Kendra Covington presented the material while the board members 3 and board staff answered questions from the students and faculty.

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Angela Meggett-Strudwick informed the board that she was in contact with UDC's Accountancy Department's Chair. They are scheduled to meet this afternoon to discuss the DC Accountancy Board conducting a board meeting on campus before the end of the year and before the students break. Email to follow with an update on the results of the meeting.

BOA Newsletter- Pictures – Angela Meggett-Strudwick updated the board on the progress of the newsletter. She will send out a rough draft the week of October 2-6, once she receives it from NASBA. Moving forward without getting a picture of the Board Members and Board Staff so that a newsletter will go out the first quarter of the new FY 2023-2024.

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

116th NASBA Annual Meeting 2023, NY, NY - All board members and selected staff plan to attend. MS. Meggett-Strudwick updated staff on status of advance for travel to the conference. Travel approval is in process with hopes of completion soon. Update to follow by email.

Mr. Lewis updated board members on previous travel reconciliation statuses for members that had not received their funds yet. He also explained the process has changed because of the new DIFS system which has caused delays during the transition but should move smoothly, and the advances approved more expeditiously moving forward. He apologized for the delays and assured the board that the new director is aware, and everyone is working diligently to ensure that the board members and board staff receive their advances before travelling in the future.

Kari Bedell inquired about the DC Board's position on the 30-month extension and Chairman Todero reiterated the Board's position on the adoption of the 30-month plan. He stated the Board agreed to remain open to re-visiting, extending it longer than 30 months in the future, if necessary. The DC Board is also in favor of additional pathways for the 30 hours with plans to discuss further in future meetings.

EXECUTIVE SESSION

Upon motion duly made by board member Bridgett Gagne, and properly seconded by board member, Dr. Joseph Drew, the board unanimously agreed by roll call to enter closed session at 10:14 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:

- *Complaint*
- *Disciplinary 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 12:03 p.m. by board member Bridgett Gagne, and properly seconded by board member Dr. Joseph Drew, the board voted unanimously to adopt proposed language from legal counsel with regards to the technical application and complaint we had before us.
- Upon motion duly made at 12:04 p.m. by board member Bridgett Gagne, and properly seconded by board member Dr. Joseph Drew, the board unanimously agreed to have a special meeting on October 27th, 2023, to be held fully in executive session.
- Upon motion duly made at 12:04 p.m. by board member Dr. Joseph Drew, and properly seconded by board member Antonia Browning Smiley, the board agreed unanimously to grant the board staff the authorization to approve exam candidates thirty (30) month extensions providing the board staff provide the board with a list of the candidates benefitting from the extension.

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Adjourn

Upon motion duly made by board member Antonia Browning Smiley, and seconded by board member Bridgett Gagne, the Board voted unanimously to adjourn at 12:05 p.m.

The next scheduled meeting of the Board of Accountancy will be October 27th, 2023, special meeting (virtual).

Respectfully submitted,

Robert Todero, Chair

January 8, 2024

Date

Recorder: Angela Meggett-Strudwick, Board Administrator