NASBA

National Association of State Boards of Accountancy

2015 Western Regional Meeting
June 17-19 – Coronado, CA
Tentative Agenda

DRAFT

Tuesday

6:00 – 8:00 p.m. **Dinner for New Accountancy Board Members (and guests) –** *Sunset Terrace*

Those attending Wednesday's Orientation Program are invited to meet and dine with NASBA officers and directors.

Wednesday

8:00 – 8:30 a.m. **New Accountancy Board Member Breakfast –** *Sunset Terrace*

8:30 a.m. – 3:00 p.m. **New Accountancy Board Member Orientation Program --** *Brittania*

Those who have served on their Board for a year or less meet with NASBA leaders to consider the role of a Board member and learn about what NASBA is doing and how they can play a part. Participants will exchange Board experiences and explore common regulatory issues.

4:00 – 5:00 p.m. **Regional Meeting Registration –** *Lobby*

6:00 – 8:00 p.m. **Welcome Reception –** *Pool/Marina Terrace*

Time to meet new friends and to greet regulators from around the country. This reception will feature good food, music and talk.

Thursday

7:30 - 8:45 a.m. **Communications Breakfast** (All Welcome) – *Sunset Terrace*

Communicating the work of the State Board is the task of all Board members and staff. NASBA offers newsletters, public service ads and expertise to help Boards get the word out. Share ideas with NASBA on reaching the public.

7:30 – 9:00 a.m. **BREAKFAST** (All Welcome) – *Bay Terrace*

9:00 – 9:15 a.m. **Welcome from Regional Directors** – *Commodore C*

J. Coalter Baker
Edwin G. Jolicoeur
Telford A. Lodden
Benjamin C. Steele

The Regional Directors set the stage for the meeting and introduce honored guests.

9:15 – 9:25 a.m. **Welcome from Host Board**
Jose A. Campos

Get some tips on what to see and do from the host Board's Chair.

9:25 – 9:55 a.m. **Update from NASBA Leadership**
Walter C. Davenport and Ken L. Bishop

What is keeping NASBA's leadership and staff busy on the Boards' behalf? Chair Walter Davenport and President Ken Bishop outline ongoing activities and current challenges facing the Boards.

9:55 – 10:15 a.m. **Exposure Draft: Revised CPE Standards**
Thomas T. Ueno and Maria L. Caldwell

The NASBA Continuing Professional Education Committee and staff have been engaged in meeting with sponsors, professionals, educators, program developers and other stakeholders to arrive at standards that reflect the latest advances in education. Hear about what has changed.

10:15 - 10:45 a.m. **BREAK –** *Commodore Foyer*

10:45 – 11:15 a.m. **Keeping the Uniform Accountancy Act (and Model Rules) Evergreen –** *Commodore C*
J. Coalter Baker and Noel L. Allen

Substantial equivalency has made the need for uniformity among States' laws even more significant as CPAs easily practice throughout the country. Find out what the UAA Committee is considering in the areas of retired CPAs, professionals from other countries, Code of Conduct, CPE and other areas.

11:15 – 12:15 p.m. **Uniform CPA Examination for 2017: The Practice Analysis' Preliminary Conclusions and Questions for the Audience**
Colleen K. Conrad, Michael A. Decker and Frederick Niswander

Panel Discussion offers insights on what has been learned during the Practice Analysis process, and poses questions to assist in creating the final product.

12:15 – 1:15 p.m. **LUNCH** (All Meeting Attendees – Table Topics) – *Bay Terrace*
Assigned seating – Meet people from other states and share views.

1:15 – 2:15 p.m. **Peer Review – Yesterday, Today and Tomorrow –** *Commodore C*
Janice L. Gray, Daniel J. Dustin, W. Michael Fritz

A look at what was and is being done to respond to peer review gaps, measures put in place to avoid similar problems, and the new program envisioned.

2:15-2:30 p.m. ***Update on Accountancy Licensee Database***
Laurie J. Tish

The Accountancy Licensee Database and CPAverify (ALD's public version) now house information on over 97 percent of U.S. CPAs. What is envisioned for the future of this resource?

2:30 – 4:45 p.m. **Meet with Your Region**

J. Coalter Baker – Southwest – *Commodore B*
Edwin G. Jolicoeur – Pacific – *Cambria*
Telford A. Lodden – Central – *Commodore E*
Benjamin C. Steele – Mountain – *Britannia*

Each Region gathers with their Regional Director to discuss mutual issues and answers. (Participation limited to Board of Accountancy members, staff and former Board of Accountancy members. Each Region will meet in a separate room with the Regional Director leading the discussion. Election of Nominating Committee Representatives in Mountain and Southwest Regions.)

2:30 – 3:30 p.m. **Seminar for Other Attendees: Advancing Uniformity Within the Profession**

John W. Johnson *– Commodore A*

How the profession and regulators can work together to bring uniformity to our statutes and rules.

4:45 p.m**.** ***Recess***

<u>Friday</u>

7:30 – 8:50 a.m. **Board of Accountancy Chairs' and Presidents' Breakfast Meeting –** *Commodore A*

Walter C. Davenport – Moderator

Board Chairs and Presidents exchange questions on common problems and bring their concerns directly to NASBA Directors and Officers.

7:30 – 8:50 a.m. **Board of Accountancy Executive Directors' Breakfast Meeting –** *Commodore B*

Russ Friedewald – Moderator

Accountancy Board EDs compare notes and raise questions to arrive at best practices.

8:00 – 9:00 a.m. **BREAKFAST** (All Welcome) – *Bay Terrace*

9:00 – 9:15 a.m. **Report from Regional Breakouts** – *Commodore C*

J. Coalter Baker
Edwin G. Jolicoeur
Telford A. Lodden
Benjamin C. Steele

The four Regional Directors give a concise summary of their Thursday breakout sessions.

9:15 – 9:45 a.m. **Private Company Council – Progress Report**

Billy M. Atkinson

It has been two years since the Financial Accounting Foundation established the Private Company Council to assist the Financial Accounting Standards Board respond to the concerns raised by some small and some not-so-small companies. What has the PCC accomplished?

9:45 – 10:15 a.m. **Legal Heads Up**

Noel L. Allen

Legal Counsel provides a summary of selected recent cases from across the country that are significant for all Boards of Accountancy.

10:15 – 10:45 a.m. **BREAK –** *Commodore Foyer*

10:45 – 12:00 p.m. **Breakout Sessions** (Select one)

Each session will be presented twice so that attendees can discuss two topics.

1- **Peer Review Compliance – Problems and Answers –** *Commodore A*
Janice L. Gray and James W. Brackens, Jr.

An opportunity to do a deeper dive into the topics presented in Thursday's plenary session. How has your state responded to identified peer review gaps? And what do you think about the proposed quality monitoring plan?

2- **CPE Standards and Model Rule Changes – Why and How? –** *Commodore E*

Thomas T. Ueno, Maria L. Caldwell, Jessica Luttrull

Will the new standards work with your state's requirements? Is your state ready to begin considering nano/micro learning? How will competency-based learning work? Get the details.

3- **Accepting International Professionals – Beyond MRAs –** *Brittania*
Telford A. Lodden

Only six mutual recognition agreements have been completed by IQAB in more than a decade. Experienced professionals from other countries are coming to the U.S. and working here. Is there a better way to bring them under the Boards' regulation for the public's protection?

4- **Evolving Educational Issues – Facing the Present –** *Commodore B*
Robert J. Cochran

The rising cost of higher education has made states consider unorthodox ways of enabling students to obtain degrees without spending as much time in the classroom. What will that do to the balance of the three E's of education, experience and examination when life experience is equated to course credits? What are the accrediting bodies doing to ensure course quality?

12:00 – 1:00 p.m. **LUNCH** (Meeting Attendees Only) – *Bay Terrace*

1:00 – 2:15 p.m. **Breakout Sessions**
(*Select one from breakouts listed for morning. Participants asked to select different session from one attended earlier.)*

2:15 – 2:45 p.m. **BREAK –** *Commodore Foyer*

2:45 – 3:15 p.m. **Summary of NASBA Education Research Projects –** *Commodore C*

Panel Moderator - ***Alfonzo Alexander***

Panelists – ***Martin Coe, Martin G. Fennema and Joseph C. Ugrin***

Each year NASBA awards grants to accounting education research projects that can assist the State Boards to better match the environment in which their candidates and professionals operate. This panel will cover the highlights of the 2014 grant recipients' research findings:

3:15 – 3:30 p.m. **Report from the CPA Examination Review Board**

Ronald E. Nielsen

The State Boards all depend on using a high quality Uniform CPA Examination. The CPA Examination Review Board throughout the year studies the production and delivery of the Examination and then annually, in June, presents its findings to the State Boards.

3:30 – 4:00 p.m. **Evaluating Candidate Statistics – Proactive Use of NASBA's Findings**

James Suh

Thanks to the combined efforts of the State Boards and NASBA, some telling statistics are produced that provide insights into the schools, the candidates and the Examination, which can benefit all.

4:00 – 4:15 p.m. **Questions and Answers for NASBA**

Ken L. Bishop and Walter C. Davenport

An opportunity to ask Chair Walter Davenport and President Ken Bishop questions about NASBA's operations, positions on current issues and plans for the future.

4:15 – 4:30 p.m. **Raffle Drawing**

Time for some laughs and prizes with NASBA's Communications Director Tom Kenny and his staff. You have to be in the room when your name is called to be a winner.

6:30 p.m. **GALA –** ***Ocean Beach***

An evening of dining, entertainment and conversation with old friends and new.

5.27.15