Diversity and Inclusion Resources Webinar

May 29, 2019
10am ET
The Association of International Certified Professional Accountants (the Association) is the most influential body of professional accountants. It combines the strengths of the American Institute of CPAs (AICPA) and The Chartered Institute of Management Accountants (CIMA) to power opportunity, trust and prosperity for people, businesses and economies worldwide. The Association represents 650,000 members and students in 179 countries.
Meet the D&I Team

Kim Drumgo
Director - Diversity and Inclusion
AICPA

Yasmine El-Ramly
Sr. Manager – Diversity & Inclusion
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Florence Holland
Lead Manager - Pipeline Initiatives
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Bridgette Holley
Analyst - Diversity & Inclusion
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Yuliana Sanchez
Associate Manager - Diversity & Inclusion
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#AICPAdiversity50yrs
Celebrating 50 years

Be present *and* accounted for.

Celebrating 50 years of promoting diversity and inclusion in the accounting profession and its workforce. Because different people, different cultures and different perspectives make us all stronger.

Get your D&I resources today at aicpa.org/diversity.
Present and Accounted For: Tools and Resources

The accounting profession serves communities and clients across the globe—different people, different cultures, and different perspectives. Now more than ever, the profession needs diversity and inclusion. Below are tools and resources to assist firms and professionals along their diversity and inclusion journey.

**General Diversity and Inclusion Resources**

*Inclusion Solutions*
- An aggregated newsletter featuring groundbreaking inclusion practices.
- You’ll learn about innovative, inclusive techniques found throughout the business community and in the accounting profession.

*Accounting Inclusion Maturity Model*
- A comprehensive assessment that helps your firm measure and improve its diversity and inclusion practices.
- It evaluates four core areas: workforce, marketplace and community, supplier relations, and more.
- This tool also provides immediate results and practical action planning capabilities.

*Recruitment and Retention Toolkit*
- A comprehensive tool to identify barriers and develop strategies to attract and retain diverse talent.
- It includes best practices and resources for retaining diverse employees.

*Webcasts*
- Provides regular webcasts that highlight diversity and inclusion best practices and features renowned speakers who are experts in their fields.

*AICPA Online Mentoring Program*
- Members will be matched with a mentor who will help them identify ways to grow and develop their skills and meet their career aspirations.

**Women specific tools and resources**

*Women to Watch Awards Program*
- Recognizes the achievements of dynamic female CPA leaders within your state. The AICPA Women to Watch Awards celebrates achievements and creates a platform to discuss and promote the challenges and opportunities for women in the profession.

*Annual AICPA Women’s Global Leadership Summit*
- The annual summit focuses on leadership and best practices to enhance the skills and career development of ear and emerging women leaders.
- Networking opportunities will connect you with a community of female finance and accounting professionals.

*Women’s Initiative Implementation Guide—Enhancing Success through Gender Diversity*
- Jump-start or refresh a women’s initiative program within your firm by using this step-by-step guide to encourage accountability and measure success.

*WIEC CPA Firm Gender Survey*
- To build effective programs, firms and the profession need credible research on the status and situation of women in CPA firms.
- This survey can help you track your own efforts over time and compare your initiatives with the profession.

*AICPA Women in the Profession LinkedIn Group Network with peers*
- Connect with experienced professionals, get advice to expand and enhance your skills, whether you’re looking for community insights, business development or career management.

For additional tools and resources please visit: www.aicpa.org/diversity

For additional tools and resources please visit: www.aicpa.org/womenlead

**Pipeline Initiatives**

*AICPA and NAP Recognition Program Partnership*
- The National Academy of Finance (NAP) and the AICPA have partnered to expand high school student exposure to the accounting profession through an annual Bank On It tournament.

*Annual Accounting Scholars Leadership Workshop Program*
- The Accounting Scholars Leadership Workshop (ASLW) is an annual invitation-only student leadership conference hosted by the AICPA.
- The workshop focuses on student leadership skills and provides leadership and professional development opportunities for students.

*Annual Accounting Profession Diversity Pipeline Symposium*
- The annual Accounting Profession Diversity Pipeline Symposium provides a platform for firms, universities, and student organizations to explore best practices and identify ways to overcome obstacles in filling the accounting pipeline with diverse professionals.

*Pipeline Research*
- The AICPA is committed to providing research to better understand and influence the dynamics of young people who enter and remain in the accounting profession.

*Minority Scholarships*
- The AICPA offers over 100 minority student scholarships each year to high performing students who are transferring from community college, pursuing their undergraduate or graduate degree in accounting and planning to obtain their CPA license.

*Real CPA Pipeline Campaign*
- To encourage diverse students to go into accounting, the AICPA has created a national awareness campaign called Real CPAs. This campaign features real CPAs representing diverse backgrounds. Each year features new “Real” CPAs that depict the typical stereotype of accounting professionals. Real and future CPAs can be found at RealCPA and #FutureCPA.

For additional tools and resources please visit: www.aicpa.org/diversity

or contact any of our team members:

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General Diversity and Inclusion Resources

Presenters:

Kim Drumgo
Director - Diversity and Inclusion
AICPA

Yuliana Sanchez
Associate Manager - Diversity & Inclusion
AICPA
General Diversity and Inclusion Resources

Inclusion Solutions

Inclusion Solutions is an aggregated newsletter featuring groundbreaking inclusion practices. You’ll learn about innovative, inclusive techniques found throughout the business community and in the accounting profession.

Recruitment and Retention Toolkit

The Recruitment and Retention Toolkit outlines the processes necessary to make diversity and inclusion initiatives an ongoing part of your company’s culture. The toolkit provides insight on how to attract, recruit and retain a diverse workforce.

Webcasts

AICPA provides regular webcasts that highlight diversity and inclusion best practices and features renowned speakers who are experts in their fields.

Accounting Inclusion Maturity Model

The Accounting Inclusion Maturity Model is a comprehensive assessment that helps your firm organization evaluate its diversity and inclusion practices. It’s based on four core areas: workforce, workplace, marketplace and community/supplier relations. This tool provides immediate results and practical action planning capability.

AICPA Online Mentoring Program

Mentees will be matched with a mentor who will help them identify ways to grow and develop their skills and meet their career aspirations.
Monthly D&I Newsletter

10 relevant news stories

Poll question

AICPA D&I initiatives and news
What AIMM measures

Workplace (Culture)
- Leadership and Accountability
- Communication
- Strategy & Implementation
- Training
- Affinity Groups

Workforce (People)
- You are Optimizing the diversity around you.
  Diversity and inclusion is a key to the organization’s mission and client service. By employing many leading practices, your organization and clients benefit significantly from your inclusive culture. You are at the top of your D&I game.
  85%-100%

Marketplace (Clients)
- Advertising
- Marketing

You are Managing a diverse and inclusive environment.
Diversity and inclusion are intentionally planned, performed, and measured. You employ a majority of the leading practices and ensure they expand to all employees in the organization as a fabric of behavior and understanding. You are doing better than a majority of your peers. By implementing more of the leading practices, you will move to the optimizing category in no time.
70%-84%

You are Emerging into fuller understanding.
Your organization has established the fundamentals of diversity and inclusion awareness. You are now expanding beyond early adopters and starting to build upon leading practices. There are clear opportunities for improving your organization’s performance with more consistent commitment from your leaders and employees.
55%-69%

You are Aspiring to create a solid foundation.
The practice of diversity and inclusion is new to your organization. Your efforts are primarily driven by early adopters and focused on building diversity and inclusion awareness. This is a good, and important first step. Continue to identify and adopt leading practices that can move your organization into the Emerging phase.
54% or Below

www.aicpainclusion.com | Understanding the Accounting Inclusion Maturity Model

#AICPAdiversity50yrs
CEO [ACTION] FOR DIVERSITY & INCLUSION

A coalition where of CEOs nationwide commit to:

– Open dialogue on complex, sometimes difficult conversations about D&I

– Implement and expand unconscious bias education

– Share best known and successful, and unsuccessful actions
Firm CEOs are taking action…
Toolkits

Coming soon….

- Updated Recruitment and Retention Toolkit
- Inclusive Workplaces
- Unconscious Bias
- Difficult Conversations
Request a Speaker / Inclusion Champions

Rebekah Brown, CPA
Director of Development
Maryland Association of CPAs

Jerome Fulton, Jr., CPA
Consultant
Deloitte

J. Michael Kirkland, CPA, CGMA
JMK Consulting

Jenny Herrera, CPA, CGMA
Partner, Citrin Cooperman

Kecia Smith, PhD, CPA
Assistant Professor, Virginia Tech

Ralph Thomas, CGMA
CEO, New Jersey Society of CPAs

Richard Levychin, CPA, CGMA
Partner, Galleros Robinson

#AICPAdiversity50yrs
Connect lesser experienced professionals with more experienced professionals in a positive way.

Create a unique membership benefit that facilitate connection among members.

Sustaining the profession by attracting and keeping women, minorities and young CPAs in our pipeline increased employee loyalty.

Further details on aicpa.org/mentoring.
Webcasts

AICPA provides regular webcasts that highlight diversity and inclusion best practices and features renowned speakers who are experts in their fields. **Coming up this year:**

- **June 2019**  
  **Artificial Intelligence:** Changing the Face of Recruiting

- **August 20, 2019**  
  **Women in the Profession**

- **August 2019**  
  **Ridding Bias in the Mentor-Mentee Relationship**

- **October 2019**  
  **How to Recharge your D&I program**
AICPA LGBTQ Networking Groups

Goals

1. Identify and share best practices on creating an inclusive work environment for LGBT professionals

2. Connect with Colleagues - Develop enduring relationships with peers from leading global organizations

3. Promote a welcoming culture in the accounting profession for LGBT professionals

4. Solve Problems Effectively - benchmark and problem solve in a collaborative manner

2019 LGBTQ Networking Event
August 22-23 | Washington, DC
Pipeline Initiatives

Presenter:

Florence Holland
Lead Manager - Pipeline Initiatives
AICPA
Pipeline Initiatives

AICPA and NAF Recognition Program Partnership
The National Academy Foundation (NAF) Academies of Finance (AOF) and the AICPA have partnered to create a recognition program for students who have decided early to be a CPA and be recognized by the AICPA.

Annual Accounting Profession Diversity Pipeline Symposium
The Annual Accounting Profession Diversity Pipeline Symposium provides a platform for firms, universities/faculty, and state societies to explore best practices and identify ways to overcome obstacles in filling the accounting pipeline with diverse professionals.

Minority Scholarships
The AICPA offers over 100 minority students scholarships each year to high-performing students who are transferring from community college, pursuing their undergraduate or graduate degree in accounting and planning to obtain their CPA license.

Real CPA Pipeline Campaign
To encourage diverse students to go into accounting, the AICPA has created a national awareness campaign called Real CPAs. This campaign features real CPAs representing diverse backgrounds. Each year features new “real” CPAs that debunk the typical stereotype of accounting professionals. Real and Future CPAs can be found at #RealCPA and #FutureCPA.

Annual Accounting Scholars Leadership Workshop Program
The Accounting Scholars Leadership Workshop (ASLW) is an annual invitation-only, student leadership conference hosted by the AICPA. Its purpose is to help teach the leadership skills necessary in the accounting profession to underrepresented minority students.

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#AICPAdiversity50yrs
George Willie Ethnically Diverse Internship & Scholarship

5 firms. 5 students. Up to $100,000 in scholarships for our shared commitment to a **diverse** and **forward-looking** profession.

- Firms provide an **internship** in busy season 2020; PCPS awards up to **$20,000** towards tuition per student
- 2019-2020 **cosponsoring firms** were selected in January
- **Student applications** now being accepted through **May 31st**

[Image of smiling diverse group of people holding signs]

aicpa.org/PCPSscholarship

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**Anglin Reichmann Armstrong (G400)**
Huntsville, AL

**Kreischer Miller (G400)**
Horsham, PA

**Aprio (MFG)**
Atlanta, GA

**Cover & Rossiter (Medium)**
Wilmington, DE

**Glenn Burdette (Medium)**
San Luis Obispo, CA

Look for your opportunity to apply to be a co-sponsoring firm later this year!

#AICPAdiversity50yrs
HBCU Engagement
HBCU Engagement

In *Title III of the Higher Education Act of 1965*, Congress officially defined an HBCU as “a school of higher learning that was accredited and established before 1964, and whose principal mission was the education of African Americans.”

Today there are:

- **102** HBCUs
  - 51 private
  - 51 public
- **292K** students enrolled
- **20%** of degreed African Americans with an HBCU degree
There are 40 HBCUs accredited by the AACSB or by the ACBSP*

ALABAMA
Alabama A & M University
Alabama State University
Oakwood College

FLORIDA
Bethune Cookman University
Florida A & M University
Florida Memorial University

DELAWARE
Delaware State University

DISTRICT OF COLUMBIA
Howard University

GEORGIA
Albany State University
Clark Atlanta University
Morehouse College
Savannah State University

MISSOURI
Harris-Stowe State University
Lincoln University

MARYLAND
Bowie State University
Morgan State University
University of Maryland Eastern Shore

MICHIGAN
Wayne State University

MISSISSIPPI
Jackson State University
Lincoln University

TENNESSEE
Tennessee State University

TEXAS
Prairie View A & M University
Texas Southern University

VIRGINIA
Hampton University
Norfolk State University
Virginia State University

KENTUCKY
Kentucky State University

LOUISIANA
Dillard University
Grambling State University
Southern University and A & M College
Southern University at New Orleans
Xavier University of Louisiana

PENDSALIANIA
Lincoln University

WEST VIRGINIA
Bluefield State College
West Virginia State University

*As of YEAR; for a student to sit for the CPA exam, they must have attended an institution accredited by the AACSB or by the ACBSP in Business or Business/Accounting.
Possible Engagement Strategies

Strengthen Community of Accounting Professors and Deans

- Host annual roundtable to share new practices in preparing students; new trends, professional update
- Curriculum examples (syllabus/exam review)
- Externship for professors at firms
- Increase salaries / benefits
- Vendors to host pre-CPA exam annually
- Share education best practices (introduce tools like pre-CPA study tests for students, ensure academic champions are on campus)
Possible Engagement Strategies

Prepare Students

- Host development programs (similar to ASLW but more focused on practice in the workplace) – tutor specialist
- Structured tutoring program for all accounting classes (state societies)

Engage Firms

- Internships and full time recruiting and placement (time)
- Endowed professorship (firms do this)
- Grant/professional development for professors
- Online accounting resources for students (i.e. Khan Academy)
- Adopt a school program – firms select a school where they would serve on their academic board (time)
Accounting.

IT'S NOT WHAT YOU'D EXPECT.

Find out why being a CPA could be a great fit for you at ThisWayToCPA.com/RealCPAs

"Financially, I've been able to fly. I bought a house at 27." — Andrew Cumber, CPA since 2013

"The diversity of the role and responsibilities is incredible." — Angela Ho, CPA since 2008

"For me, it's the excitement of traveling to so many different countries." — Jennifer de Leon, CPA since 2009

#AICPAdiversity50yrs
Real CPA 2.0 – Durran Dunn
Real CPA 2.0 – Adrienne Davis
Real CPA 2.0 – Jeremias Ramos
Real CPA 2.0 – Real CPAs. Real Lives.
Women Specific Tools and Resources

Presenter:

Yasmine ElRamly
Sr. Manager – Diversity & Inclusion
AICPA
Women Specific Tools and Resources

Annual AICPA Women’s Global Leadership Summit
The annual summit focuses on leadership and best practices to enhance the skills of both senior and emerging women leaders. Networking opportunities will connect you with a community of female finance and accounting professionals.

AICPA Women in the Profession LinkedIn group
Connect with experienced professionals. Get advice to expand and enhance your skills, whether you’re looking for community, insights for business development or career management.

Women to Watch Awards
Be inspired by the success stories of dynamic female CPAs within your state. The AICPA Women to Watch Awards celebrates achievers and creates a platform to discuss and promote the challenges and opportunities for women in the profession.

Women’s Initiative Implementation Guide — Enhancing success through gender diversity
Jump-start or refresh a women’s initiative program within your firm by using this step-by-step guide to encourage accountability and measure success.

WIEC CPA Firm Gender Survey
To build effective programs, firms and the profession need credible research on the status and situation of women in CPA firms. This survey can help you track your own efforts over time and compare your initiatives with the profession.
1989: Upward Mobility of Women
Task Force

15 committee members men and women

Educating, Advocating, Advancement

aicpa.org/womenlead
Provide Credible Statistics

Are firms making the most of the talent pool?

The results examine the state of gender diversity in firms today.

The 2019 survey will be published this Fall.
Engage top talent

D&I Communication toolkit includes ready to use press release, podcast scripts, emails & town hall talking points to promote business case, encourage acceptance and foster program success.

Sponsorship and mentoring toolkits examine the benefits and subtleties involved in building these programs.

Business case toolkit to align D&I initiative with the organization’s strategic goals.

FAQs to help leaders answer key questions.
Create a community

- **Women to Watch Program**
  - 5 states in 2009; 20 states and still counting
  - Newly launched **Elevating Women Leaders** awards

- **AWSCPA Legacy Initiatives:**
  - AWSCPA Small firm **Networking** group
  - AWSCPA **Scholarship** launched in 2018
  - AWSCPA Lifetime Achievement **Award** to be introduced at the 2019 AICPA Women’s Summit

- **AICPA Women in the Profession LinkedIn Group** with more than 8,000 members

- **AICPA & CPA Practice Advisor Most Powerful Women in Accounting Recognition**
Women's Global Leadership Summit

November 6-8, 2019 | San Diego, CA

Objective
To focus on leadership, boardroom diversity, and best practices to enhance the skills and potential of women leaders within the financial community

Who Should Attend
Female financial professionals/accountants
Global leaders
Male colleagues
Kim Drumgo  
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Questions?
Thank you