



Association  
of International  
Certified Professional  
Accountants®

*The unified voice of AICPA and CIMA*

# Update on AICPA DEI Efforts

September 3, 2022

# Presenters



**Kimberly Ellison-Taylor, CPA,  
CGMA**  
Chief Executive Officer  
*KET Solutions LLC*  
*Past Chairman, AICPA*  
*Chair, NCDI*



**Crystal Cooke**  
Director of Diversity and Inclusion  
Association of International Certified  
Professional Accountants  
*Staff Liaison, NCDI*  
*Vice-Chair, NCDI*

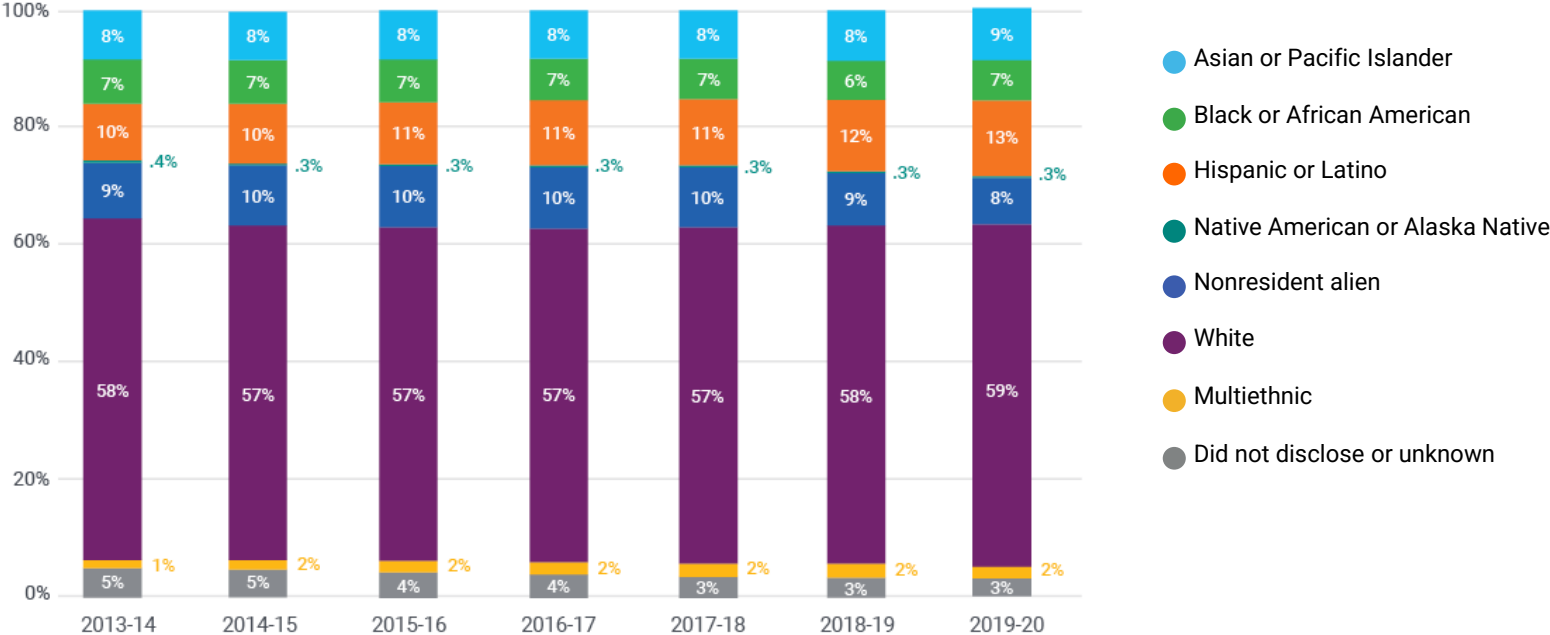
# 2021 Trends

A report on **accounting education**, the **CPA exam** and **public accounting firms'** hiring of recent graduates



<https://www.aicpa.org/professional-insights/download/2021-trends-report>

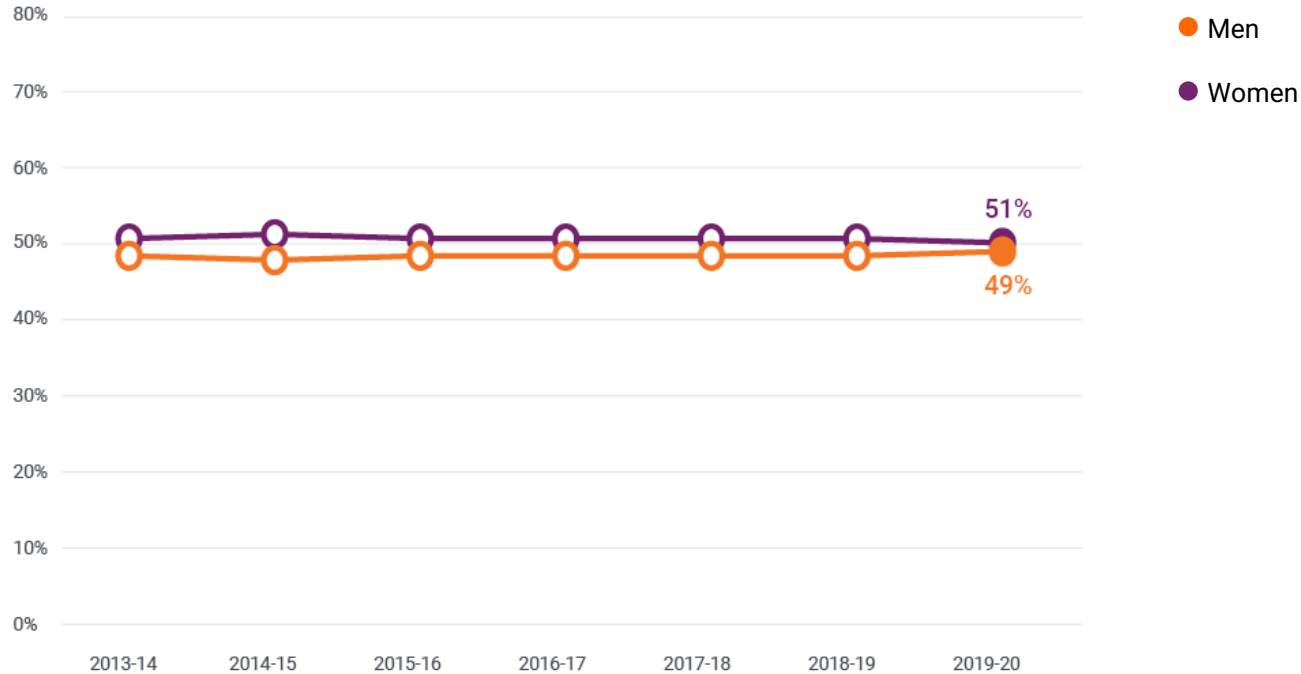
# Trends in new accounting degree completions by race/ethnicity — bachelor's and master's | 2013–20



Source: IPEDS

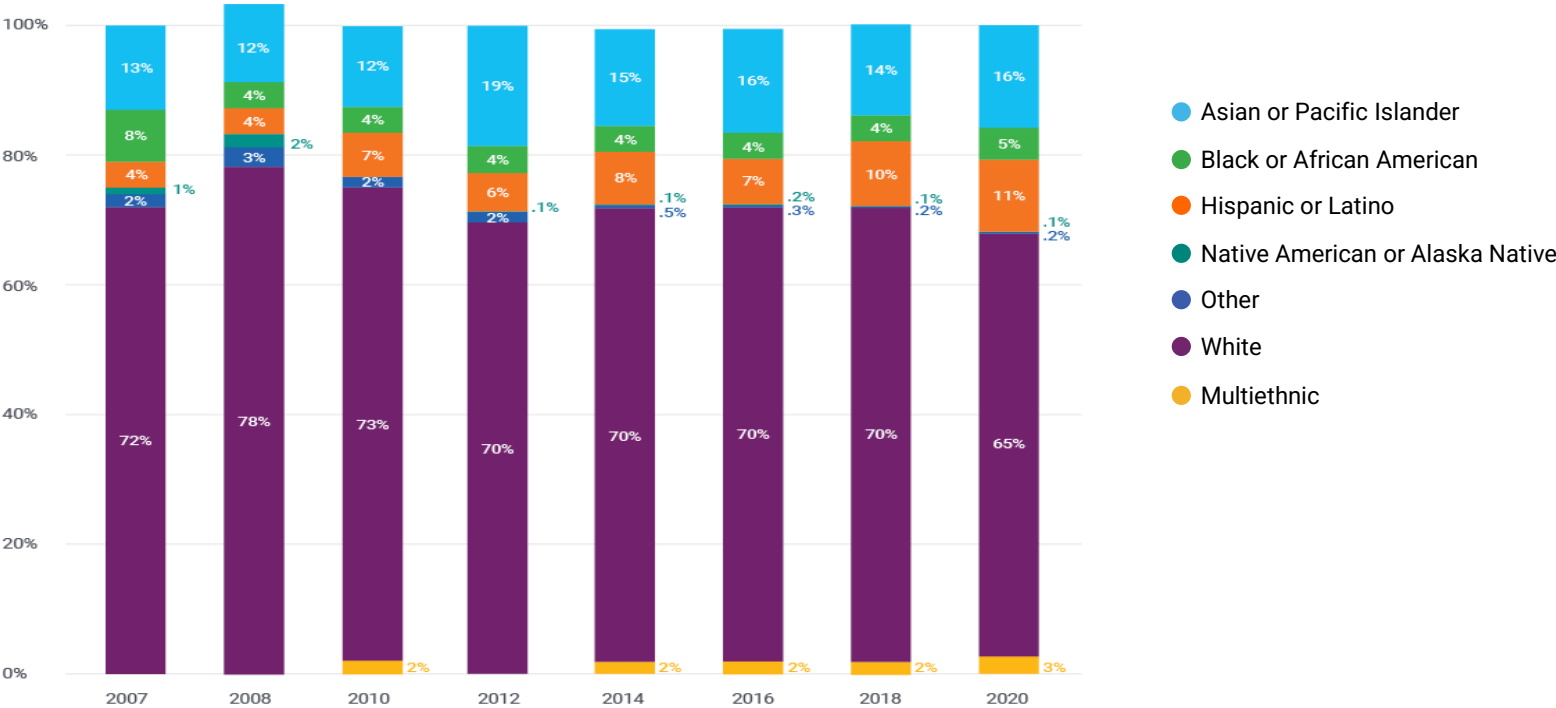


# Trends in new accounting degree completions by gender — bachelor's and master's | 2013–20

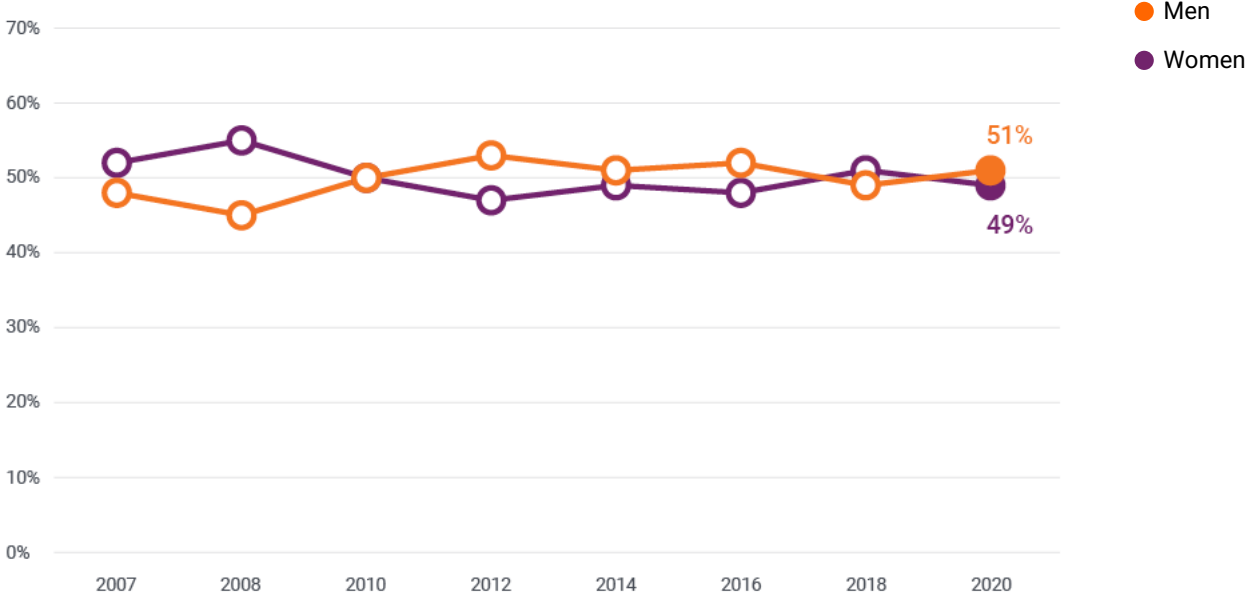


Source: IPEDS

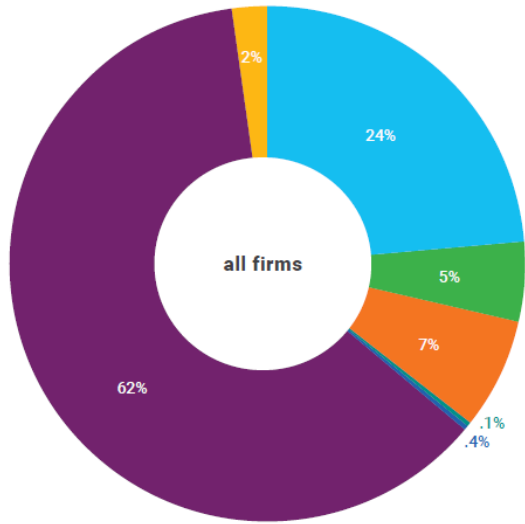
# Trends in new bachelor's and master's of accounting graduates hired into accounting/finance functions of U.S. CPA firms by race/ethnicity | 2007–2020



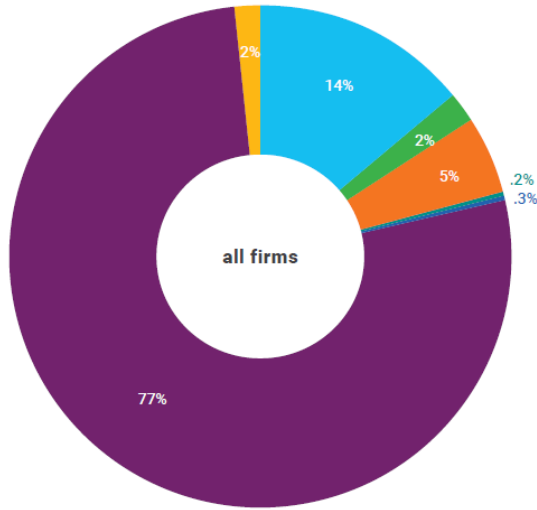
# Trends in new bachelor's and master's of accounting graduates hired into accounting/finance functions of U.S. CPA firms by gender | 2007–2020



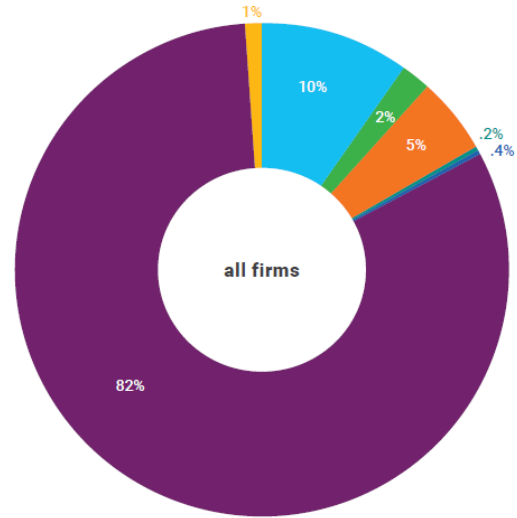
# Staff in accounting/ finance functions of U.S. CPA firms by race | 2020



**Non-CPA  
 Professional Staff**



**CPAs**



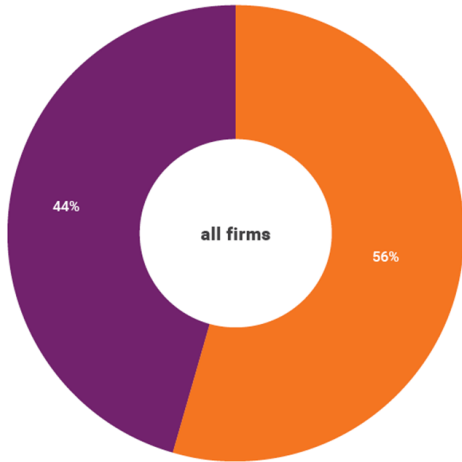
**Partners**

- Asian/Pacific Islander
- Black or African American
- Hispanic or Latino
- Native American or Alaska Native
- Other
- White
- Multiethnic

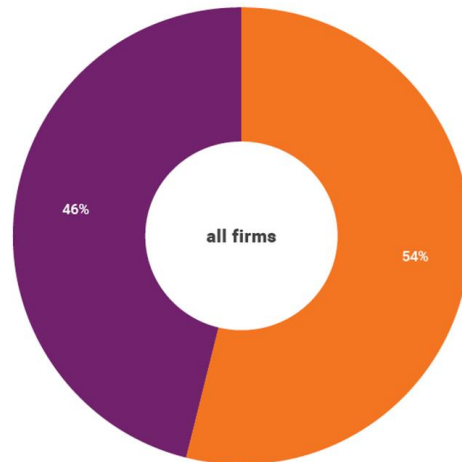


# All professional staff in accounting/finance functions of U.S. CPA firms by gender | 2020

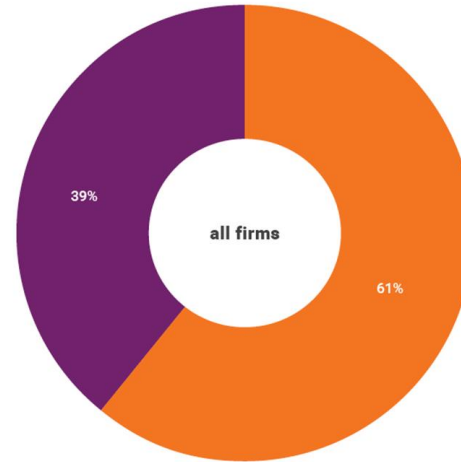
● Men  
● Women



Non-CPA  
Professional Staff

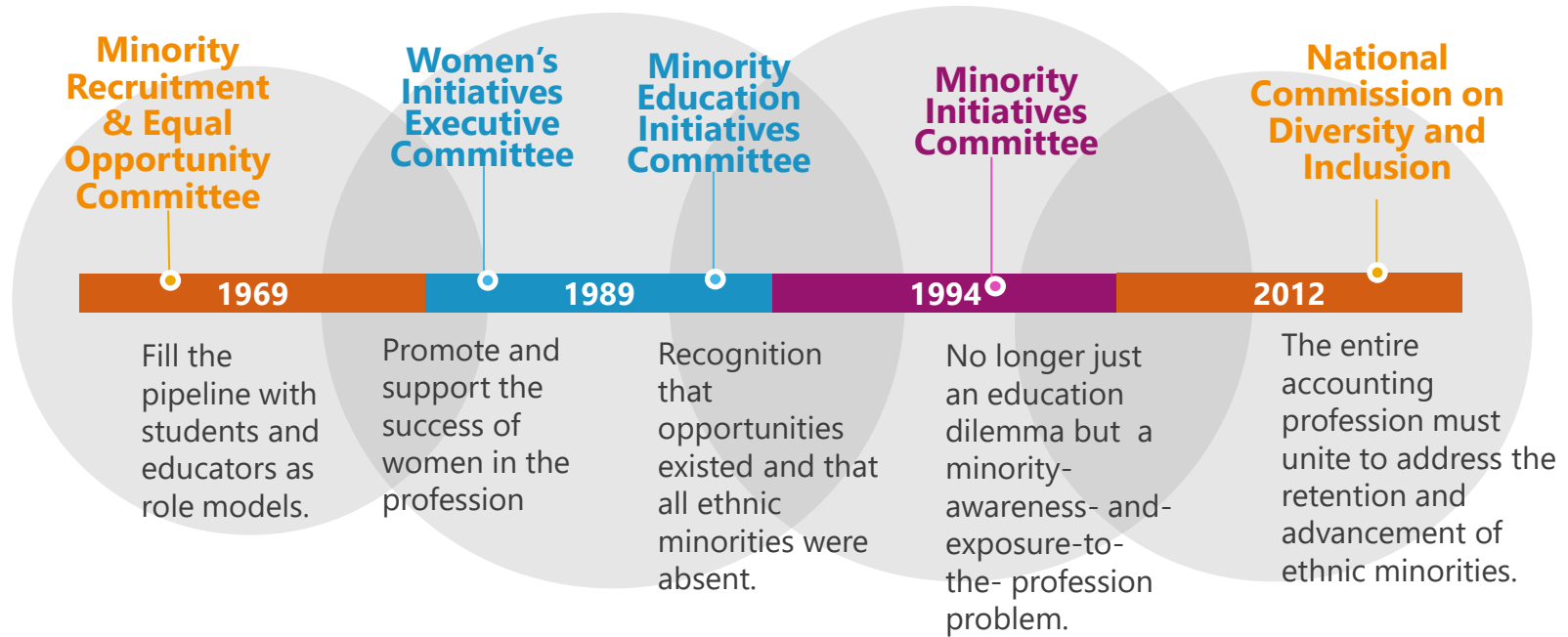


CPAs



Partners

# The History of Diversity at the AICPA



# AICPA Diversity and Inclusion Focus Areas

- Ethnic Minorities
  - *National Commission on Diversity and Inclusion*
- Women
  - *Women's Initiative Executive Committee*
- LGBTQ+
  - *LGBTQ+ Initiatives Committee*
- Young CPAs
  - *Young Member Leadership Committee*

# National Commission on Diversity and Inclusion

## VISION



The vision of the NCDI is to create a seamless handoff of students from the pipeline to the profession, and ensure retention and advancement.

## MISSION



**Champions** that influence the accounting profession to make diversity and inclusion a priority in the areas of recruitment, certification, and advancement of ethnic minorities. **The NCDI accomplishes this mission by:**



Identifying challenges ethnic minorities face in the profession.



Developing solutions and innovative practices that address the challenges.



Maximizing opportunities of having a more diverse and inclusive profession.

## GOALS



### Students

Increase the pipeline of ethnic minorities enrolling and graduating from accounting programs, earning the CPA credential, and ensure their successful transition into the profession.

### Educators

Equip ethnic minority serving educators with the tools and training required to teach diverse future CPAs.

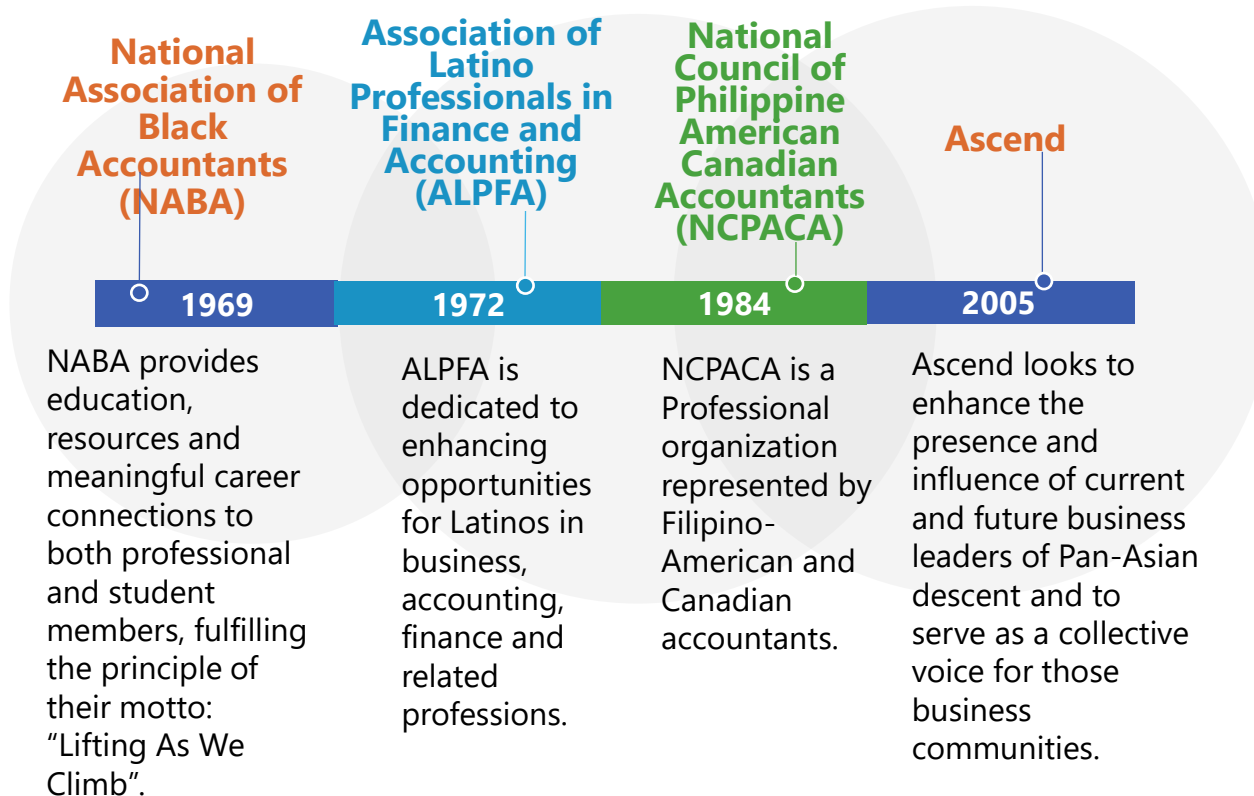
### Professionals

(1) Increase ethnic minority representation in the profession through credentialing, conference participation and committee appointments. (2) Support professionals focused on improving D&I in the accounting profession by providing impactful D&I training and volunteer opportunities.

### Firms

(1) Assist firms in the development of effective diversity and inclusion programs. (2) Assist firms in improving retention and advancement of ethnic minorities.

# NCDI Affinity Group Partners



Accounting  
Scholars  
Leadership  
Workshop &  
Diversity  
Symposium

**For more Symposium  
details and registration  
information click [here](#).**



# George Willie Ethnically Diverse Internship & Scholarship

10 firms. 10 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 2024
- AICPA PCPS awards up to **\$10,000** towards final year of tuition
- Firm applications will open again in the fall. **Learn More:** [aicpa.org/PCPSscholarship](https://aicpa.org/PCPSscholarship)



**BBD, LLP** (G400)  
Philadelphia, PA

**Bernard Robinson & Company**  
(G400)  
Greensboro, NC

**Blackman & Sloop, CPAs, PA** (G400)  
Chapel Hill, NC

**Brown, Edwards & Company LLP**  
(MFG)  
Roanoke, VA

**Lance CPA Group** (Small)  
Chicago, IL

**Lurie, LLP** (MFG)  
Minneapolis, MN

**Novogradac & Company** (MFG)  
San Francisco, CA

**REDW** (G400)  
Albuquerque, MN

**Smith Patrick CPA** (Small)  
Webster Groves, MO

**Tonnison + Co** (G400)  
Wakefield, MA

# NEW! Unconscious Bias in Undergraduate Education



## Objective

Define diversity and inclusion

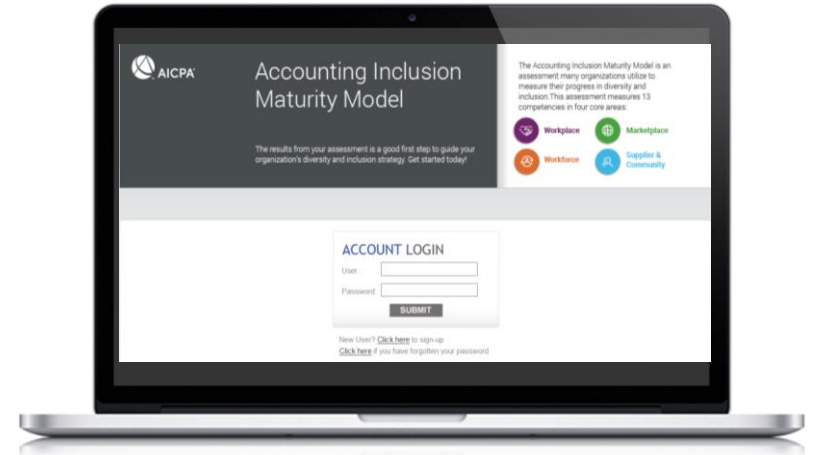
Understand unconscious bias and assess oneself

Identify ways to manage bias



# Firm Guidance: 3 Key Steps for Getting Started

- **Step 1 – Understand the business case for diversity inclusion and ensure all staff are aligned.**
  - Use video
  - Leverage our 10 reasons document (<https://www.aicpa.org/career/diversity/initiatives/dibusinesscase.html>)
- **Step 2 - Assess Yourself & Establish Accountability**
  - Accounting Inclusion Maturity Model (<https://www.aicpainclusion.com/default.aspx>)
- **Step 3 - Create a strategic plan**
  - Engage Staff (Leverage [D&I toolkit sample questions](#))
  - Key Elements (Leverage 4 core areas from assessment tool)



## 6. DIVERSITY AND INCLUSION

Embracing diversity and practicing inclusion is critical to the success of your firm.

ASSOCIATE	SENIOR	MANAGER	SENIOR MANAGER/DIRECTOR	PARTNER
<ul style="list-style-type: none"> <li>Understands that collective and individual intelligence increases in diverse groups.</li> <li>Commits to understand dimensions of diversity, and continuously build greater cultural awareness.</li> <li>Ability to respectfully address diverse customer service needs and interest.</li> <li>Understands the backgrounds of their clients and the cultures they live in.</li> <li>Demonstrates belief that ethnically, generationally and gender diverse firms perform significantly better and are more likely to have industry-leading profitability.</li> <li>Understands and communicates the importance of working in a collaborative environment with diverse teams to promote creativity and innovation.</li> <li>Practice self-awareness to unconscious biases and participates in regular unconscious bias training.</li> <li>Continuously learn and model inclusive behavior.</li> <li>Able to work effectively in collaborative and diverse teams.</li> </ul>	<ul style="list-style-type: none"> <li>Understands that collective and individual intelligence increases in diverse groups - open to explore new ideas.</li> <li>Commits to understand dimensions of diversity, and continuously build greater cultural awareness.</li> <li>Ensures equitable distribution of client work and opportunities for growth and development.</li> <li>Ability to respectfully address diverse customer service needs and interest.</li> <li>Understands the backgrounds of their clients and the cultures they live in.</li> <li>Demonstrates belief that ethnically, generationally and gender diverse firms perform significantly better and are more likely to have industry-leading profitability.</li> <li>Demonstrates awareness of the client's shared value for diversity and inclusion.</li> <li>Understands and communicates the importance of working in a collaborative environment with diverse teams to promote creativity and innovation.</li> <li>Practice self-awareness to unconscious biases and participates in regular unconscious bias training.</li> </ul>	<ul style="list-style-type: none"> <li>Understands that collective and individual intelligence increases in diverse groups – open to explore new ideas.</li> <li>Commits to understand dimensions of diversity, and continuously build greater cultural awareness.</li> <li>Monitors equitable distribution of client work and opportunities for growth and development.</li> <li>Ability to respectfully address diverse customer service needs and interest.</li> <li>Understands the backgrounds of their clients and the cultures they live in.</li> <li>Demonstrates belief that ethnically, generationally and gender diverse firms perform significantly better and are more likely to have industry-leading profitability.</li> <li>Acknowledges, in a stated or unstated fashion, other's perspectives. Understands how to motivate and work with both minority and majority groups.</li> <li>Understands and communicates the business case around why the accounting profession should focus on diversity and inclusion.</li> <li>Practice self-awareness to unconscious biases and participates in regular unconscious bias training.</li> </ul>	<ul style="list-style-type: none"> <li>Constantly in touch with industry/market trends and how they inform and influence inclusion and diversity.</li> <li>Understands that collective and individual intelligence increases in diverse groups – open to explore new ideas.</li> <li>Commits to understand dimensions of diversity, and continuously build greater cultural awareness.</li> <li>Monitors equitable distribution of client work and opportunities for growth and development.</li> <li>Ability to respectfully address diverse customer service needs and interest.</li> <li>Understands the backgrounds of their clients and the cultures they live in.</li> <li>Appreciates that diversity leads to productivity and understands the need for diversity goals, actions and outcomes in performance review.</li> <li>Acknowledges, in a stated or unstated fashion, other's perspectives. Understands how to motivate and work with both minority and majority groups.</li> <li>Understands and communicates the business case around why the accounting profession should focus on diversity and inclusion.</li> </ul>	<ul style="list-style-type: none"> <li>Constantly in touch with industry/market trends and how they inform and influence inclusion and diversity.</li> <li>Understands that collective and individual intelligence increases in diverse groups - champion new ideas.</li> <li>Commits to understand dimensions of diversity, and continuously build greater cultural awareness.</li> <li>Effectively convey the firm's commitment to successfully build, direct and maintain motivated, empowered and diverse teams.</li> <li>Ability to respectfully address diverse customer service needs and interest.</li> <li>Understands the backgrounds of their clients and the cultures they live in.</li> <li>Appreciates that diversity leads to productivity and understands the need to champion efforts and establish diversity goals, actions and outcomes in performance review.</li> <li>Acknowledges, in a stated or unstated fashion, other's perspectives. Understands how to motivate and work with both minority and majority groups.</li> <li>Understands and communicates the business case around why the</li> </ul>

# CPA Firm D&I Competency Model

# Women's Initiatives Executive Committee

## VISION



To assist Accounting organizations with creating a culture for women to succeed in a variety of roles; fill the gap in personnel and mirror the marketplace.

## MISSION



Promote and support the success of women to advance the profession together.



Promote the accounting profession in such a way that encourages women to join.



Provide resources to women in our profession to help them achieve high levels of success.



Engage and educate both men and women to build a robust, full-service profession.

## GOALS



### Education and Learning

Support women in the accounting profession by providing impactful learning opportunities.

### Global Engagement

Expand US efforts to support our women members globally.

### Cultures of Inclusion

Assisting firms with creating an environment that will invite people to come together to meaningfully contribute and create a sense of belonging for everyone.

### Amplify Voices

Actions to help the voices of the women in the profession be heard and recognized.

### Advocate and Advance

To represent for the women in the profession and assist with creating opportunities that will contribute to their advancement.

### Communicate

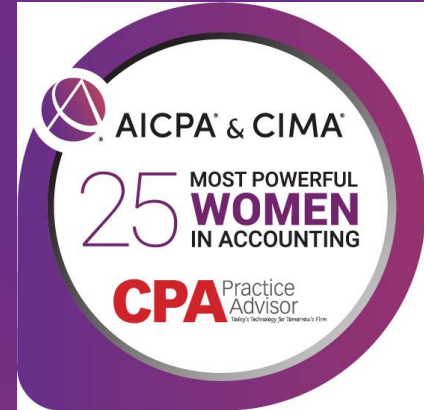
Share news, information, and ideas in support of women in the profession.

# Women in the Profession Recognition Programs

## AICPA & CPA Practice Advisor Most Powerful Women in Accounting – **OPEN IN NOVEMBER 2022!**

- The awards are given to outstanding women professionals who continue to make their mark on the accounting profession as well as those who are emerging as the next generation of firm leaders, whether through new technologies, practices, workflow or dynamic work environments.

Visit [aicpa.org/womenlead](https://aicpa.org/womenlead) to find out more.



# Demonstrate your organization's commitment to DEI initiatives

Be recognized as a DEI leader and take part in discussions to help let all voices be heard.

## AICPA & CIMA Women's Global Leadership Summit

Nov 8-10, 2022

Miami + Live Online

### Keynotes speakers include:

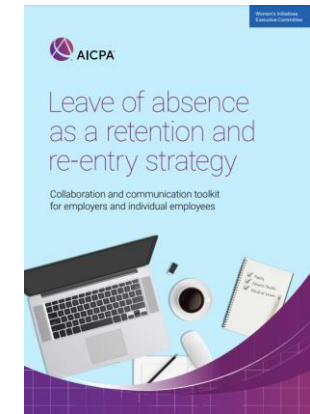
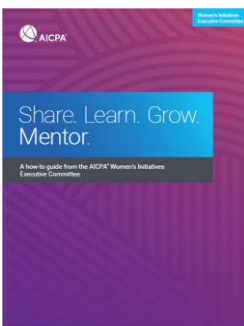
**Nadja West** - First African American Army Surgeon General and Former Commanding General, US Army Medical Command

**Hamza Khan** - Future of Work Expert | Author of Leadership, Reinvented



Interested in attending? Register [here](#) before September 25, 2022 to save \$100.

# Publications, Toolkits & Guides



# LGBTQ+ Initiatives Executive Committee

## VISION



To assist the accounting profession with creating an inclusive culture that supports the LGBTQ+ community and helps everyone succeed in our industry.

## MISSION



The mission of the Lesbian, Gay, Bisexual, Transgender, and Queer (LGBTQ+) Initiatives Committee is to facilitate an environment for discussions and actions that will encourage increased representation and incorporate and maintain an inclusive atmosphere for individuals and groups from a diversity of identities across gender and sexual orientation.



To assist the accounting profession in creating an environment where those that identify as LGBTQ+ feel a sense of belonging and are empowered to feel safe and comfortable bringing their authentic selves to the workplace.



To support individuals who identify as LGBTQ+ so that they too have an equitable opportunity to achieve high levels of success and longevity in the accounting profession



To support firms/organizations in being able to adequately and effectively support their LGBTQ+ workforce.

## GOALS



### Students

Increase the pipeline of LGBTQ+ members enrolling and graduating from accounting programs, earning the CPA credential, and ensure their successful transition into the profession.

### Global Engagement

Expand efforts to support our LGBTQ+ members globally.

### Education & Learning

Provide the accounting profession and firms with learning opportunities to better support LGBTQ+ members.

### Amplify Voices

Actions to help the voices of the LGBTQ+ community in the profession be heard and recognized.



LGBTQ+ inclusion in action toolkit

How to  
advance from  
idle to ally to  
advocate

Check out how our **AICPA LGBTQ+ Initiatives Committee** celebrates Pride Month 2022 [here](#).



**Journal of Accountancy Article:** [5 ways accounting firms can better support LGBTQ+ employees](#)



# Young Member Leadership Committee

## VISION



To create a network for young professionals to learn, share, and grow as they advance in their careers to become the next generation of the profession's leaders.

## MISSION



Actively promote and enhance the young CPA experience in the accounting profession by providing targeted leadership programs and networking opportunities.



Inspire, develop and empower young CPAs



Provide access to a well-connected professional network



Create opportunities to exercise a voice within the profession



Position AICPA as their professional home

## GOALS



### Engagement

Develop a pipeline of young leaders ready to serve the AICPA, their state society and the CPA profession.

### Communication

Maintain a unified and amplified voice for young members in order to communicate the AICPA's value proposition and key offerings for this group.

### Connection

Retain young members by creating a strong affinity to the AICPA and the CPA profession by building and strengthening internal and external stakeholder relationships.

# AICPA Leadership Academy

Four-day program focused on strategic thinking, strengths, core values, thinking styles, well-being, resiliency and leadership vision

Exposes participants to professional updates and environmental scanning to better position them as future leaders in the profession



[AICPA.org/LeadershipAcademy](https://aicpa.org/LeadershipAcademy)



Be  
bold

# AICPA Outstanding Young CPA Award

Recognizes young CPAs who personify an unwavering commitment as demonstrated through successful practices, involvement in and contributions for the interest of the accounting profession

- Nomination deadline Nov. 15
- Application deadline Dec. 15

**[AICPA.org/youngCPAaward](https://aicpa.org/youngCPAaward)**

# We're About Success

- Aimed to give ethnic minorities early in their careers the tools, resources, and support needed to navigate a successful career in the accounting profession and continue to advance to leadership levels in their firms.
- Firms may select up to ten high-potential and/or high-performing ethnic minority accountants who have 2-3 of experience
- Virtually held in August



# Diversity and Inclusion Website

Can be accessed at [aicpa.org/diversity](https://aicpa.org/diversity) or via the AICPA homepage by clicking on Career Guidance.

AICPA > Career > Diversity and Inclusion Initiatives

## Diversity and Inclusion

- LGBTQ+ Initiatives Committee
- National Commission on Diversity and Inclusion (NCDI)
- Women in the Profession
- Young CPA Network

### Quick Links

- Statement of Commitment to DEI
- Accounting Inclusion Maturity Model
- Business Case for Diversity and Inclusion
- CEO Action for Diversity & Inclusion
- PCPS Diversity and Inclusion Toolkit
- Journal of Accountancy DEI articles

### Contact Information

Ronald Atkins  
Specialist - Diversity & Inclusion  
[Ronald.Atkins@aicpa-cima.com](mailto:Ronald.Atkins@aicpa-cima.com)


Elizabeth Burkhalter, CPA  
Senior Manager – Diversity and Inclusion  
Young Member Initiatives  
[Liz.Burkhalter@aicpa-cima.com](mailto:Liz.Burkhalter@aicpa-cima.com)

Crystal Cooke  
Director – Diversity & Inclusion  
[Crystal.cooke@aicpa-cima.com](mailto:Crystal.cooke@aicpa-cima.com)

Mandy Gallagher  
Lead Manager – Diversity & Inclusion  
Women's Initiatives  
[Mandy.gallagher@aicpa-cima.com](mailto:Mandy.gallagher@aicpa-cima.com)

For general inquiries contact us at [diversity@aicpa.org](mailto:diversity@aicpa.org)

## Diversity and Inclusion




The AICPA & CIMA works to encourage and promote diversity, equity, & inclusion within the CPA accounting and finance profession and its workforce, as we believe a workplace that is reflective and inclusive of the global communities in which they serve - different people, different cultures, and different perspectives - are greatly positioned to innovatively solve the challenging and complex issues facing clients and the evolving public interest.

**For Firms** | **For Professionals** | **For Students** | **For Educators**

Search within the Diversity and Inclusion Initiatives

### Spotlight on Professional Resources



LGBTQ+ inclusion in action toolkit - How to advance from idle to ally to advocate


The difference between an ally and an advocate comes down to action. Use this toolkit to facilitate an environment for discussions and actions that will help advance LGBTQ+ inclusion in the workplace.

1 2 3

### 2022 Diversity Holidays

The world is rich with diversity, which is reflected in the observances celebrated by various cultures and

### Is Everyone Present and Accounted For?



IS EVERYONE PRESENT and ACCOUNTED FOR?

Did you know that minorities only represent 14 percent of the CPA Profession? And we are missing out. From rapidly shifting demographics and buying power to recruiting and retaining the best talent, the business case for increasing diversity and inclusion is crystal clear.

### Webcasts

# Questions





Worldwide leaders in public and management accounting

 Kimberly N. Ellison-Taylor

 Kimberly.Ellison-Taylor@ketsolutions.com

 Crystal Cooke

 Crystal.Cooke@aicpa-cima.com

# Thank you



AICPA<sup>®</sup>

CIMA<sup>®</sup>

CGMA<sup>®</sup>

CPA