

Rutgers AICPA Data Analytics Research Initiative (RADAR)

Conference Call

June 6, 2018

Brian Miller	Brian Wolohan
Dan Balla	Kristine Hasenstab
Susan Davis (proxy for Katie Greehan)	Brian Collins
Brittany Kelly (proxy for Brian Wolohan)	Muthu Raj
Danielle Kearny (proxy for Erica Nelson)	Trevor Stewart
Denise Motta (proxy for Alex Peirano)	Michael Wynen
Mary Grace Davenport	Kari Lee
Ami Beers	Jamie Friedman
Dorothy McQuilken	Won No
Miklos Vasarhelyi	Soo Hyun Cho
Jason Guthrie	Abdulrahman Alrefai
Kelly Hnatt	

Meeting Minutes:

- The board approved the April meeting minutes for posting to the website.
- The board approved the April invoice for payment to the research teams
- The board discussed the next steps and plan for completing the current projects.
 - **MADS** – The group discussed the following next steps to (1) help further test the MADS framework and (2) communicate our current findings and project status to the profession.
 - **MADS Pilot Program** – The goal of the pilot programs are to further test the MADS framework in a real-life setting. The group walked through the objectives of the pilots, and a high level overview of how the pilot programs would be run. Pilot program volunteers will have the opportunity to participate in a training session on the MADS framework in order to gain an understanding of the framework, how to design the filters, and other areas that may need further clarification. The group will need to identify volunteers, areas (or accounts) that should be covered, and any additional matters. Volunteers will touch base

throughout the process to share thoughts and recommendations. Tentative timing is as follows:

- **June 29th** – If interested in participating, Board representatives will send volunteer contact information to AICPA staff.
 - **July timeframe** – AICPA staff to coordinate a training session(s) for all volunteers to attend.
 - **August 1st Board Call** – Touch base to discuss the state of the pilot program
 - **September/October** – Run pilot programs
 - **November** – Meet and share results of the pilot programs
- **MADS Communications** – the goal of the MADS communications would be to develop some sort of deliverable (i.e. whitepaper(s) or video(s)) that can be posted to the website and shared with the profession. The deliverables would: (1) discuss the purpose and objectives of the MADS framework, (2) include a recap of the four examples, (3) discuss the challenges encountered and open questions, discuss the next steps for completion (i.e., MADS pilots). Board members are encouraged to support the development of this deliverable(s) if they are unable to participate in the pilot programs.

Next Steps:

- **Board members will reach out to AICPA staff if they are interested in participating in the pilot or in sponsoring the development of a deliverable by COB, June 29th. Board member who are interested in participating in the pilot should also send AICPA staff contact information of everyone from their firm who will be participating.**
- **AICPA staff to organize a “training session” for the pilot program volunteers during the July/August timeframe.**
- **AICPA staff to send out an outline (along with the meeting minutes) for board members to utilize when identifying volunteers to participate in the pilot programs.**
- **AICPA staff to schedule November in person meeting.**