



Chrislynn
Freed, CPA

ACCOUNTANT, EDUCATOR, PRESIDENT

EDUCATION FOUNDATION PRESIDENT CONSTANTLY ADAPTING

Chrislynn Freed, CPA, a professor of clinical accounting at the USC Leventhal School of Accounting, recently took the reins as president of the CalCPA Education Foundation. Freed's career and experience encompasses both the professional and academic facets of accounting. Prior to joining USC, she was a senior manager at an international CPA firm specializing in the hospitality and financial services industries. She's a member of USC's Committee on Academic Policies and Procedures, the advisory board of University of Florida's Fisher School of Accounting and the University of Florida's Foundation National Board.

Freed also received numerous awards during her career, including the CalCPA Outstanding Accounting Educator Award in 2013; Golden Apple Teaching Awards in 2010, 2012 and 2014; USC Mellon Award for mentoring undergraduate and graduate students in 2008 and 2009; and the USC Parents Association Teaching and Mentoring Award in 2008.

We asked Freed some questions to see what's on tap for the Education Foundation during her time at the helm, as well as how it has—and will be—pivoting to adapt to these unprecedented times.

Q: How is work as a professor of clinical accounting at the Leventhal School of Accounting going these days?

A: Teaching online has been my greatest career change. I'm a professor that enjoys getting to know students, which is harder to do in this environment. I read everything publicly available on how to make the educational experience better for the students and ways to engage them. Placing them to different break-out rooms with assignments seems to work well. It gives them

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a chance to know their classmates and build study groups. This semester I'm going to give students the opportunity on Fridays to schedule a meeting with me so we can get to know each other. Teaching online is a work in progress and I'm always looking for ways to improve.

Q: Why did you get involved in CalCPA Education Foundation leadership?

A: It seemed like a natural next step for me. Accounting education has been my life for more than 30 years. I've been a member of the CalCPA Accounting Education Committee since 1998, where I served as co-chair for five years. I felt it was time to get involved with the Education Foundation. In 2015 I applied to be a trustee and over the years applied for leadership positions. I believe I can provide additional perspective to the Foundation from an educator's point of view.

Since March, our country has contended with a pandemic, civil unrest, natural disasters, businesses closing and rising unemployment. Yet it's not the time to despair; it's the time to recognize new opportunities and build the future we want. Right now,

we see opportunities in how education pivoted to a distance learning model, and how restaurants pivoted to take-out or outdoor dining, and how online conference and file-sharing applications have skyrocketed in adoption and use. This is making lemonade out of lemons and is quintessential to the American, can-do spirit. The Foundation has had to rethink how it offers its conferences and programs. We're living in a virtual world; lucky for the Foundation, it knew how to deliver virtual content.

Q: What are your goals during your term?

A: I'm focused on building a community with our faculty and establishing relationships with potential new faculty to ensure we're committed to our goals of diversity, equity and inclusion. Our faculty are the engine that drives our success. They're the heart and core of our offerings.

It's also important to me to continue to enhance the member/customer experience. I want to connect more with our members in the virtual environment and be more proactive in providing new offerings that can help them not only survive, but also succeed during these trying times.



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My combination of practicing in public accounting for more than eight years, which included a rotation in the national office to develop firm-wide education, together with my more than 30 years as an accounting educator gives me a unique perspective of how life-long learning plays a vital role in an accounting professional's career. It's critical to create education that focuses on competency—not just filling the required education to maintain one's license—and I wanted to provide that perspective. I'm a collaborative professional who works well in a leadership team environment.

Q: What has changed at the CalCPA Education Foundation?

A: A lot has changed since 2015 when I joined the Education Foundation as a trustee. We did not have as much competition as we do today; moreover, many of our competitors are providing free CPE. We've gone through a change in the leadership of the organization with the retirement of past CEO Loretta Doon and Anthony Pugliese becoming CEO in May 2019. His vision for what we needed to do to re-energize our offerings and the experience he brings added new life to the Foundation. The addition of Chief Learning Officer Brad Monterio in September 2019, the changes he has made, the staff he has hired and his development of a strategy for the future has made it an exciting time to serve in a leadership position on the board.

Q: What will this look like?

A: There are various pieces, including:

- We're working on a new Faculty Portal as part of our new database and other community building features. This will improve communications with, and reporting for, our faculty.
- We will have a new Partner Portal for our distribution partners as part of our new database, which will allow for regular periodic communications and marketing support for our distribution partners.
- We will re-examine business models and seek to innovate where it makes sense, disrupt where needed.
- We will offer more self-study programs, including on-demand and e-learning programs, and a larger collection of our BitLearning nano programs.
- Supplementary virtual platforms are being developed that will allow members/customers to engage more together.
- We're adding a new Learning Management System to our technology platform.
- And we'll of course be responsible of cost and expenses.

Q: What are some of the trends in the professional education world and how is CalCPA responding?

A: Virtual learning continues to dominate, and CalCPA will



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continue to build on its strengths in this area and continue to innovate where we can, such as in engagement capabilities and in the use of newer technologies. Other trends include:

- Self-study, shorter subject programs also will grow, and CalCPA will be offering more of its new BitLearning nano education, as well as an expanded portfolio of non-instructor-led programs as part of its e-learning collection.
- As audio interfaces increase in popularity, CalCPA looks to expand its audio and mobile audio courses.
- With a shift toward competency assessments rather than a focus on CPE credit compliance, we'll begin the process to build out competency frameworks for our members as well as assessment tools.

Q: Any new topics being offered people can expect?

A: We're offering a new Personal Financial Planning (PFP) conference called ADVI\$OR Jan. 22; it's been several years since CalCPA offered a PFP conference. Other things to expect:

- We plan to increase PFP offerings across the board, including webcasts, seminars, on-site and self-study.
- CalCPA will offer a Fraud/Forensics Conference in spring 2021, and will be collaborating with our Forensic Services Section on additional forensic and valuation services education programs in the coming year.
- Our product development team is studying the sustainable business and reporting space and planning to offer education in this and related emerging areas like integrated reporting and environmental, social and corporate governance reporting.
- Look for more data analytics, cybersecurity and tech topics.

Q: How has nano-learning been evolving?

A: Progress was made this year with the California Board of Accountancy with respect to nano-learning—so much so that we will be focusing on a formal launch of BitLearning-branded nano-education products sometime in 2021. BitLearning will be used strategically with our other products in bundles and collections to help with drip learning and extending the learning experiences for our members/customers.

Q: What do you believe sets the Education Foundation apart?

A: Two primary things: uniqueness and quality. We have a strong in-house product development team and a stellar, nationally recognized faculty that together create unique programs that CPAs can't buy off the shelf from the more mass-market providers. We also focus very heavily on the quality of our products to ensure that members/customers are receiving the latest, accurate information they need to perform their jobs well.

Our fast-track development platform also allows us to be timely as new topics arise, particularly related to new legislation or rules. This allows us to get to market quickly with information our members are demanding, all the while focusing on quality.

Q: How will diversity, equity and inclusion (DE&I) fit into the Education Foundation's agenda?

A: They fit in on many levels, from ensuring we have a diverse, inclusive staff and faculty (through things like recruiting, training etc.), to ensuring the content meets DE&I best practices as best we can, to ensuring our conference planning committees are as inclusive and diverse as possible (through things like rotation, chair rotation etc.). Several staff at the Foundation are involved with the CalCPA DE&I Commission itself, so they walk the walk, not just talk the talk.

Q: What is the Education Foundation doing to innovate/compete in a crowded CPE market?

A: Staying focused on our strengths, such as uniqueness, quality, top faculty, timely content and innovation in our formats and delivery methods. We won't compete directly with all the free CPE providers. Our education demonstrates quality and relevance which ultimately has higher value than simply the price, and our members and customers recognize our value.

Q: What are the new education needs of CalCPA members, and what is the Foundation doing to meet those needs?

A: They need greater variety in terms of length of program and format—both of which we're expanding through offering shorter one-, two- and four-hour programs, as well as on-demand programs in our self-study portfolio.

We added mobile audio education this year, and we plan to expand on the audio category this coming year as well.

At the end of the day, members and customers want education that's relevant to their jobs, is reliable and accurate, and gives them value; we've always focused on this and will continue to do so in the future. These lynchpins are like our North Star. We will not cut corners on quality, which is what sets us apart from the competition. 

want more?

We have lots more info on the topics discussed in this Q&A. Here are a few webpages to check out:

CalCPA conferences: calcpa.org/conferences

Self-study: calcpa.org/education/self-study

Education series: calcpa.org/education/series

On-site learning: calcpa.org/education/onsite-learning

Mobile learning: calcpa.org/prodio

BitLearning: calcpa.org/bitlearning calcpa.org/bitlearning

Learning opportunities: <https://learning.calcpa.org>