

College of San Mateo Accounting Department Advisory Council

AGENDA

Friday, May 9, 2025, 11:00 a.m. to 11:45 a.m.

Location: Zoom

- I. **Welcome & Introductions** (3 minutes)
 - Brief welcome by Vincent Li
 - Roundtable introductions

- II. **Welcome & Introductions** (3 minutes)
 - Enrollment trends
 - Curriculum updates

- III. **Industry Trends & Feedback and Curriculum Alignment** (20 minutes)
 - Discussion: What skills and knowledge do employers expect from accounting grads today?
 - Changes in CPA exam, tech (e.g., AI, data analytics), or regulation
 - Are we teaching the right skills?
 - Helpful software students should know
 - Review of new or proposed courses (e.g., forensic accounting, advanced auditing, advanced accounting, ESG reporting)
 - Suggestions for course improvement or additions

- IV. **Internship & Career Readiness** (10 minutes)
 - Feedback on student preparation?
 - Opportunities for internship partnerships

- V. **Open Discussion & Next Steps** (5 minutes)
 - General suggestions

Report of College of San Mateo Accounting Department Advisory Council

Spring 2025

To: Francisco Gamez, Dean, Business/Technology Division

From: Stephen Heath, Melissa Nelson and Vincent Li

The advisory council met on May 9, 2025. Council members are listed below:

- Melissa Nelson, CSM Full-time faculty
- Stephen Heath, CSM Full-time faculty
- Vincent Li, CSM Full-time faculty
- Grace Li, Deloitte Senior Audit & Assurance Associate
- Sean Li, PWC Deal Advisory Manager

1. Welcoming comments

Vincent thanked advisory committee members for attendance

2. Introduction of members attending meeting

Vincent introduced Sean and welcomed back Grace from the prior year.

3. Understanding and integrating AI in Accounting Practices

Sean discussed the increasing use of AI tools in various industries, emphasizing the need for students to adapt quickly to these tools to enhance efficiency. He suggested using AI tools for research, such as Chat GPT, but also stressed the importance of verifying the accuracy of the data provided by these tools. Sean proposed integrating AI into accounting practices to make work more efficient and recommended starting with Chat GPT, despite its limitations. He also mentioned the need for learning how to prompt AI tools effectively, similar to how one would use a database or Google search.

4. Microsoft Copilot for Meeting Summaries

Sean and Melissa discussed the use of Microsoft Copilot for note-taking and summarizing meetings. Sean suggested using Copilot to analyze various file types and create summaries, which Melissa agreed could be helpful for students. They also discussed the need for frequent prompting of the AI tool to capture detailed information. Sean proposed a practice session using a fake office meeting to help students become comfortable with the tool.

5. Integrating AI Tools in Education

Sean emphasized the importance of students using AI tools, even in their rudimentary state, to stay up-to-date with improvements and maintain their skill level. Melissa discussed her plans to introduce students to AI tools in her classes, including using Chat GPT for case studies. Grace shared that while AI is used in auditing, it's mostly for summarizing and fixing audit documentation, and not extensively. Sean also mentioned the use of Power BI and Alteryx for data manipulation and summarization. Melissa expressed interest in incorporating Alteryx into her classes.

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6. Excel Skills and University Experiences

Sean and Melissa discussed their shared experience at the University of Texas at Austin, where they both studied accounting. Sean mentioned that he learned more about Excel on the job rather than in school. They also discussed the importance of teaching students how to think and apply formulas in Excel, rather than just providing them with tools.

7. AI Companion Tool Review Meeting

Vincent, Melissa, and Grace discussed the need to update the CSM accounting website and the potential of incorporating AI tools in their computerized accounting classes. Grace suggested focusing on teaching keyboard shortcuts in Excel to improve efficiency.