Issue III – March/April 2023

# The Washington Connection

## What's Inside



## Up Next!

**April 19th, 11:45am-1:30pm,** AGA DC Monthly Hybrid Luncheon at Clyde's. Guest speakers: Reginald Mitchell, CFO, USAID and Lydia Nylander, ERM & Internal Controls Division Director, USAID. Topic: *Evolving Enterprise Risk Management at USAID*.

**April 27th, 11:30am-1:00pm,** AGA DC VIP Luncheon at Old Ebbitt Grill (Diamond Sponsors only). With Guest Speaker Jolene Lauria, CFO at DOJ.

**April 29th, 1:00pm** (Saturday), Join fellow members of the AGA DC Chapter as the Washington Nationals take on the Pittsburgh Pirates. **Tickets** to the baseball game available now!

**May 2nd, 12-12:30pm,** AGA DC Sponsored Virtual Training: Guest speaker: Adam Krulewitz. Topic: *Compliance Built to Last*

**May 4th, 7:30am-12pm,** AGA National Event, PIO-CFO Summit. **Register now!**

**May 20th, AGA DC Chapter 73rd Annual Awards Gala;** Cocktails 6:00-7:00pm; Dinner at 7:00pm. Don't wait! Register today at: **AGA DC Chapter Annual Awards Gala**.

**June 6th, 11:30am-1:00pm,** AGA DC VIP Luncheon at Old Ebbitt Grill (Diamond Sponsors only). With Guest Speaker Vinay Singh, HUD CFO.

**We look forward to seeing you soon!**

# President's Message

Time flies when you're having fun! It's hard to believe that it's already springtime. We've had some wonderful events and training as a Chapter and I look forward to what the next few months have in store for us as well.

As you will see in this newsletter, some of our events over the last few months included:

- Three well-attended luncheons with fabulous speakers
- Multiple AGA webinars
- Additional sponsorship events
- Sold-out (for our chapter!) Washington Wizards basketball game
- Virtual Baking class

We continue to work to provide the chapter with a variety of opportunities for both personal and professional development and hopefully there is something for everyone. And, as I mentioned in our last newsletter, one additional benefit of the DC Chapter is that we support our members pursuing the CGFM. To learn more about how we can support you please reach out to the chapter at **agadc@agadc.org**.

Additionally, we are currently in the process of planning for the upcoming program year. If you would like to serve on a Board Committee, please reach out at the email address listed above. We also recently completed the evaluation of candidates for our Officer positions and I would like to congratulate our newly-elected 2023 – 2024 Chapter Officers!

- Paul Marshall, President-Elect
- Mona Amatie, Treasurer-Elect
- Wendy Morris, Secretary

Our volunteers are the drivers behind all that we do as a chapter and I would like to thank all of them for their contributions to date this chapter year and encourage others to consider getting involved as well.

Lastly, please keep an eye out for more opportunities to get involved and attend events. We have an exciting spring planned, including community service events, our annual VA Wine Tour, the Annual Chapter Gala (May 20th), and our annual Spring Training event (March 29 and 30). I hope to see you all at one of these great events!

Sincerely,

**Caitlin Holmes McGurn, *President***
***AGA Washington DC Chapter***

## Vision

AGA is the premier association for advancing government accountability. AGA defines government accountability as a government's obligation to the people for its actions and use of resources.

## Mission Statement

AGA fosters learning , certification, leadership and collaboration for professionals and stakeholders committed to advancing government accountability.

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# National Council of Chapters Meeting

## February NCC Meeting Summary

*By Paul Marshall, DC Chapter NCC Representative*

On February 1, 2023, AGA held its quarterly National Council of Chapters (NCC) meeting, with DC Chapter's NCC representative, Paul Marshall, in attendance. Some key takeaways from the meeting included:

- National President-Elect, Gwen Sykes, kicked off the meeting asking chapters to continue spreading AGA's new brand and encouraging non-accountants/auditors to become members.
- The major focus of this meeting was chapter succession planning:
    - Chapters should encourage healthy succession and participation in Chapter Officer and Director positions.
    - Chapters should develop position descriptions, clearly outlining the responsibilities of Chapter Officers and Directors for interested volunteers.
    - Chapter Officers are appointed by a vote, including:
        - President
        - President-Elect
        - Secretary
        - Treasurer
        - NCC Representative
    - Chapter Directors usually serve for 1-2 years and are open to enthusiastic committee volunteers for:
        - Membership
        - Sponsorship
        - Newsletter
        - CGFM
        - Community Service
        - Early Careers
        - Programs
        - And many more!
- The second focus for the meeting was to encourage membership engagement including:
    - Surveying members to make sure their voices are heard
    - Creating incentives for volunteers to participate in chapter leadership
    - Supporting future chapter leaders with mentorship, opportunities for leadership, collaboration with other chapters and communicating National Chapter opportunities

### NEW NGB Director for Chapters Eligibility

The qualifications for the AGA National Governing Board (NGB) Director for Chapters have been updated to include candidates with any of the following experience:

- A chapter member in good standing serving as their National Council of Chapters representative,
- A past Chapter Officer in good standing (e.g., chapter president, treasurer),
- A former National Council of Chapters representative in good standing.

The requirements are less restrictive than in the past and should open up the candidate pool for exciting NGB roles!

### LEAD Update

This year's LEAD Event will be held April 20th – April 22nd in Baltimore, MD. LEAD is a chapter leadership event open to NCC representatives, NGB members, select Chapter Officers and AGA National executive staff. The annual training event helps bring volunteers and AGA national office staff together to help them develop as leaders. The training covers:

- AGA's national direction and initiatives
- Expectations of national and chapter leaders
- Ways to improve services so current members will stay and recruit new members and leaders
- Ways to access information for more effective leadership

This year's DC Chapter attendees will be Paul Marshall and Mona Amatie! We will report back our takeaways in the final newsletter of the year.

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# Leadership Announcements

The AGA DC Nominating Committee is proud to announce that we recently selected three new leaders for the upcoming program year!

**Paul Marshall** will be serving as the Chapter President-Elect beginning on July 1, 2023, and his presidency will begin on July 1, 2024. Paul is currently a Vice President at MIL Corporation providing support to Federal agencies across the government. Paul has supported the DC Chapter, Northern Virginia Chapter, and AGA National boards and committees for over a decade and is also actively involved with AFERM. Paul also hosts the award-winning AGA Accountability Talks podcast. Through his support of AGA, Paul has served in multiple roles, including National Council of Chapters (NCC) representative, Sponsorship Director, Early Careers Director, Chapter Recognition Lead, Capital Region Education Coordinator, Capital Region Early Careers Coordinator, Programs Director, and Accountability Director. Paul is also a member of the Corporate Partner Advisory Group (CPAG) and served on multiple PDT and NLT technical committees. Paul was awarded the National President's Award in 2021 and DC Chapter's President Award in 2022. We are excited for Paul to bring his vast AGA experience to this important role!

**Mona Amatie** was selected to serve as the Treasurer-Elect, also beginning on July 1, 2023, and will support Shawn Syed when his term as Treasurer begins on July 1, 2023. Mona is currently the Accounting Director at the Architect of the Capitol, where she leads a staff of Federal financial management accountants, analysts and technicians in a full range of accounting, financial management, research, analytics and reporting activities. For the past five years, Mona has been leading our chapter's Webinars Committee. In this capacity, Mona spearheads the monthly webinar offerings for chapter members in both in-person and virtual formats. Being the recipient of the 2022 James W. Saylor Award/Volunteer of the Year Award, Mona has been an AGA member since 2005 and has served AGA in various capacities (including technical committees) over the years.

**Wendy Morris** was selected to serve as our chapter's Secretary for a two-year term beginning on July 1, 2023. In this role, Wendy will be a member of the Chapter Executive Committee (CEC) to document and make key decisions at CEC and chapter board meetings. Wendy is currently a partner with BDO Public Sector, LLC and is responsible for the development of all personnel as well as creating innovative solutions for the practice and clients. Wendy has more than 27 years of financial management and internal control experience and has led large project teams addressing high-profile and complex Federal and commercial projects. Wendy has been an AGA member since 2004 and is a member of the CPAG. She has presented at various AGA NLT/PDT sessions. Wendy is excited to bring her experience and passion for both AGA and Federal financial management to the Secretary role.

Please join us in congratulating and welcome our new leaders!

**AGA DC Nominating Committee**

Caitlin Holmes McGurn, Chapter President
Lal Harter, Chapter President-Elect (Nominating Committee Chair)
Paul Lionikis, Senior Advisor and Past Chapter President (2020–21)
Salim Mawani, Past Chapter President (2017–18)
Frank Petersen, Monthly Luncheon Program
Thomas Chin, Newsletter

## DC Chapter Member Frank Petersen Becomes National President-Elect Beginning July 2023

AGA National recently announced new National Governing Board Officers, including our very own DC Chapter member, **Frank E. Petersen III**, CGFM! Frank will be serving as the **National President-Elect beginning on July 1, 2023**, and his national presidency will begin on July 1, 2024.

Frank is currently the Deputy Chief Financial Officer - Finance of the National Aeronautics and Space Administration (NASA) and a member of the Senior Executive Service (SES). He oversees NASA's Quality Assurance and Financial Management Divisions, and is responsible for internal controls, enterprise risk management, and financial reporting. Instrumental in earning NASA's clean audit opinion for 12 consecutive years, Frank also served as Acting Senior Advisor for NASA's Diversity, Equity, Inclusion and Accessibility program. Prior to joining NASA, Frank served as the Director of the OMB Circular A-123 Appendix A implementation at the Department of Education. Before Frank's Federal service, he worked in the private sector for over 20 years at several CPA and management consulting firms.

Frank has been an active AGA member at both our chapter and national level for nearly 20 years. He often presents, as a speaker or moderator, at many AGA events, such as Professional Development Training, National Leadership Training, Internal Controls and Fraud Training, etc. A recent notable example was at the 2021 Professional Development Training when Frank served on the panel alongside former Maryland Governor Martin O'Malley where they discussed "Diversity, Equity, and Inclusion: Leading the FM Community and Beyond." As many of you know, Frank has been serving on our chapter's award-winning monthly luncheon program for many years. He helps our chapter to identify and connect with many great speakers to present at monthly luncheons. Our luncheon attendees enjoy and appreciate Frank's energy and passion whenever he hosts the Q&A session during the luncheons!

***Congratulations Frank!***

## Thought Leadership

# Are You Ready to Receive Grant Funds? Tips to Stay Ahead for Multi-Year Grant Budgets

*By: Shayna Thompson, Tim Riddlestorffer, Maurice Preston, Sarah Abdelaziz, Eric Beitia, Jr., Chris Clarke, Tom Rhoads, and Crystal Wolf, Guidehouse*


The largest source of funding for grants is the federal government. Twenty-six federal agencies administer more than 1,000 grant programs annually, to provide funding for the arts, the sciences, educational institutions, disaster recovery initiatives, agricultural projects, and innovative research. Given the rigorous requirements of the governmentwide standard grant application (SF-424), the federal funding application process can be challenging—sound judgment and accuracy are key.

The budget section within the SF-424 presents significant applicant challenges—once funds are awarded, the grantee must ensure that funds are spent in compliance with the grant budget.

### Why is Grant Budget Planning so Important?

- Federal grants use taxpayer dollars, which garner a high level of scrutiny over budgeting, accountability, and transparency of the grant objectives and procedures.
- According to Grantwatch.com: On average, ONLY one in 10 grant applications are approved for funding.
- Accurately forecasting requested funding is key to mitigate against Period of Performance (PoP) extensions or funding adjustments in the future, which is an indication of the mismanagement of funding.

### The Budget Life Cycle

The budget life cycle of the grant includes three main phases: ***Preparation & Submission, Approval/Appeal, and Execution & Accountability***. Below are some tips for developing and maintaining a budget throughout the budget life cycle.

### Preparation & Submission Phase:

The preparation and submission phase of the budget development is where you must think through your budget narrative. The narrative provides explanations, justifications, and details about line items in your budget. Depending on the reviewing agency, illustrative templates may be provided to assist with application submissions. Below are some additional considerations when preparing an "awardable" budget as an applicant:

- ***Pay close attention to the eligibility requirements***. Make sure you satisfy the requirements of the grant scope to receive funding (e.g., does my organization fit the nonprofit criteria for this grant?). This includes understanding the qualifying funding amount for your organization and the types of costs eligible within the grant program. Understanding the grant requirements enables you to develop a budget and budget narrative that appropriately aligns to your potential grant award.
- ***Effectively articulate your funding needs in the budget narrative***. When developing a budget for a multi-year grant, it is critical to understand and articulate multi-year requirements in your budget narrative to increase the likelihood of receiving the full award. This narrative should include descriptions for every line item within the budget, justifications for expenses related to the application, and details on how indirect and substantial costs were estimated.
- ***Confirm that future years of the budget are realistic and reasonable***. Future year budgets should factor in potential cost increases each year, such as: inflation, personnel expansions, or other external factors that can affect the budget. A well-planned budget includes a forecast analysis to determine funding needs for future years, taking into consideration

## Thought Leadership cont'd.

changes of services each year. Do not overestimate, as your increases should be realistic and reasonable. Include explanations to justify the increases in the budget narrative and establish that they are in alignment with the detailed instructions. The application reviewer should be able to clearly align your budget with the grant requirements.

- ***Strategically thinking through some questions will help you begin the process of preparing your budget for submission***:
  - Does my funding request, within the narrative of the grant application, align to the amount of funding my organization is requesting, based on the pool of funding available?
  - If there are various grant funding levels to be awarded, which level and/or category is my organization deemed a qualified applicant?
  - Does my budget justify all expenses, and is it consistent with the instructions provided?

### Approval/Appeal Phase:

After the grant application is submitted, the grant will either be approved for award and funds are obligated, or the application is denied. If the grant application is approved for award, the following are some tips to follow post-approval from a budget perspective:

- ***Work with the government liaison***. Confirm with your government liaison that your organization has access to the appropriate systems and accounts to receive funding. This is time-sensitive and will impact how and when you receive your funding from the award.
- ***Confirm reporting requirements with the awarding agency***. Validate the agency's expected reporting requirements for your budget (e.g., is your Federal Financial Report (SF-425) submitted on a quarterly basis or a semiannual basis?). Understanding the reporting requirements will assist your organization with determining what processes, policies, and/or procedures need to be in place to adhere to those requirements.
- ***Thank the awarding agency***. Email or call the agency to thank them for the grant award.

**In most instances, when a grant application is denied, an appeal can be submitted. The following are some tips for submitting a complete appeal:**

***Pay attention to the agency's timeline to submit the appeal from the date of the denial determination letter.*** Every grant agency has its own grant appeal timeline, so it is important to know your intended grant agency's corresponding timeline. Additionally, take note of the number of times an appeal is allowed.

***Address every piece of documentation being requested in the denial letter***. Carefully read through the denial letter to identify what was missing or incomplete about the initial grant application. When adding new documents, make sure the new information being requested aligns with the budget.

### Execution & Accountability Phase:

Once an award is approved and funds are obligated, oversight and execution of the organization's planned multi-year budget is critical—your organization must demonstrate efficient grant spending aligned to stated goals within the budget narrative. Below are approaches your organization can take to not only minimize fraud, waste, and abuse during execution, but also evidence accountability for funds spent:

- ***Review your budget goal and timeline***. Periodically review the budget details so they remain aligned with any internal or external changes. Check to see if the budget still aligns with your organization's values, mission, and staff capacity.
- ***Track the budget's progress***. Prepare a weekly, monthly, or quarterly review schedule (whichever fulfills the requirements) to confirm the budget is tracking properly, and to avoid any unnecessary changes to the budget. This includes confirming the organization is not overspending by cost type.
- ***Implement effective internal controls***. It is vital that your organization has effective internal controls in place to ensure program integrity. Organizations should confirm that they have controls in place to confirm eligible use of funds to confirm compliance with program terms.

## Thought Leadership cont'd.

- ***Use an accounting system to track budget spending***. A sound accounting system to track all budget movements is critical. Your accounting system should be able to clearly track expenses for each line item within the grant award to clearly differentiate between direct and indirect costs. The accounting system should track expenses by grant award to ensure that expenses only correspond to the grant for which they are designated. This will help maintain compliance with grant spending in accordance with the grant issuer and minimize potential scrutiny from external auditors.
- ***Work closely with the agency so there is consistent alignment with expectations***. Keep an open line of regular communication. For example, establishing a monthly call with the agency will allow you to provide updates on status/any outstanding questions. Cultivate a communications cadence to disclose impactful results and diligence that demonstrate credibility, accountability, and transparency. By keeping an open line of communication, if there is a PoP extension and/or a funding adjustment request, the agency will be more willing to support in a timely manner.

Having your grant funded is only half the battle—federal agencies demand transparency and accountability focused on how funds are intended to be spent versus how they are spent, and there is little room for disparity. By following our tips, grantees are more likely to be successful in meeting their budget and reporting requirements, enabling them to be well-positioned for future funding opportunities.

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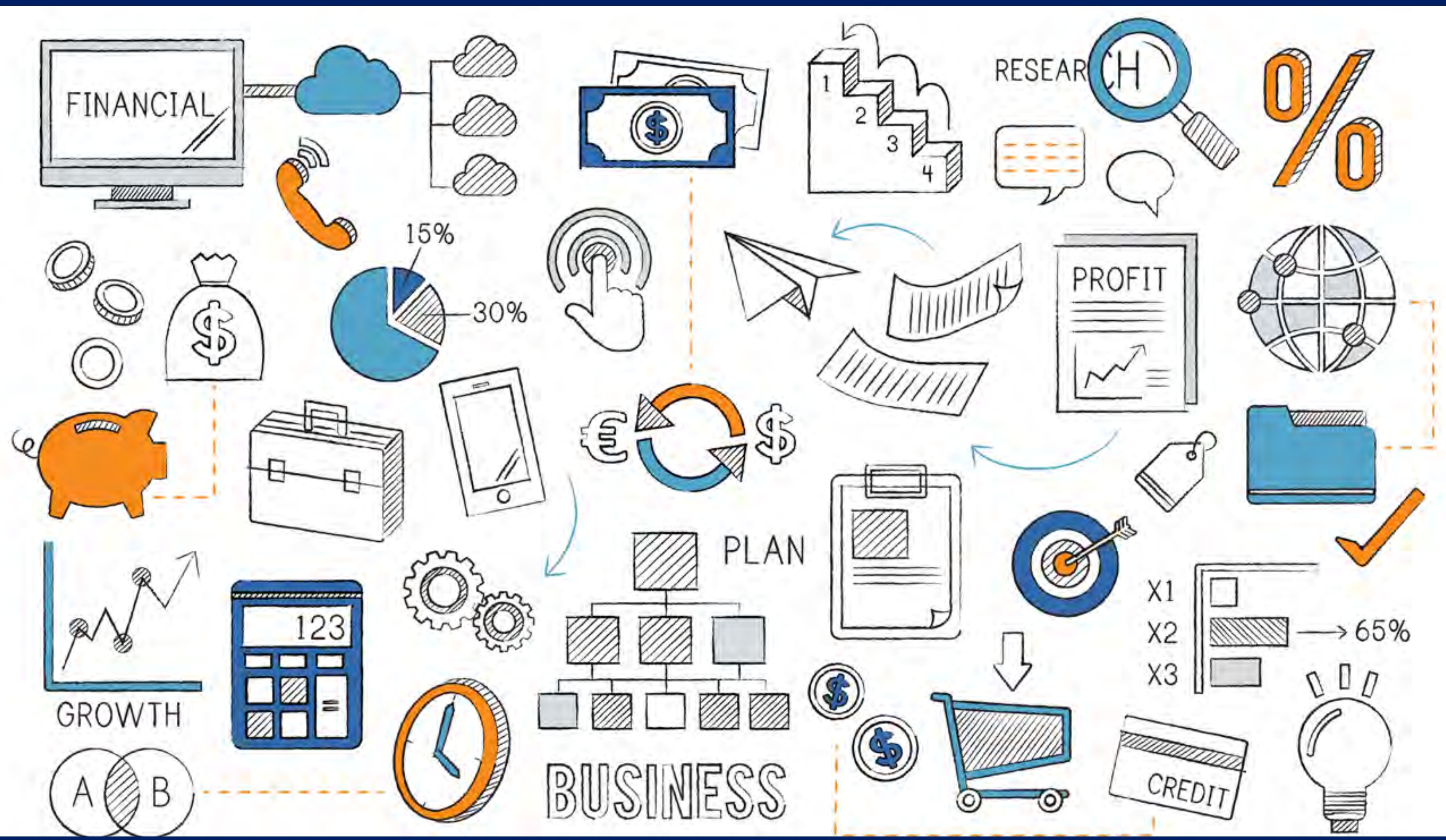


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# DC Chapter Awards Nomination

Our Chapter is seeking nominations for **2023 Chapter Awards**! This is an outstanding opportunity to recognize our chapter members for their extraordinary contributions to the DC Chapter.

This year Chapter Awards include the following categories:

- Facilitator Impact Award
- Engagement Champion
- Presenter Award
- Most Active Member/Best Attendance Award

Learn more about these awards, eligibility, criteria, and nomination submission by scanning the QR code below or **click here to the 2023 Chapter Awards nomination form**. Nomination period will end on April 21, 2023.

Awards will be presented at the 73rd Annual AGA DC Chapter Annual Awards Gala on May 20, 2023 at JW Marriott in Washington, DC. Please contact Catherine Gao at **agadc@agadc.org** if you have any questions.

Submit your **nomination** today!

## Register NOW for the DC Chapter Awards Gala on May 20!

Registration for the 73rd Annual AGA DC Chapter Annual Awards Gala reception and dinner is **now open**!

- Date: May 20, 2023 (Saturday)
- Time: Cocktails 6:00-7:00 pm; Dinner at 7:00pm
- Venue: JW Marriott at 1331 Pennsylvania Ave., NW, Washington, DC 20004
- Metro: The closest metro station is Metro Center
- Parking: Valet parking is available at JW Marriott for $63 (over 3 hours)
- Cost: $25 for AGA members; $70 for non-member guest (the cost of your ticket includes an open bar, appetizers, buffet dinner, photo booth, dancing)
- Dress: Cocktail attire

Don’t wait! Register today at: **AGA DC Chapter Annual Awards Gala**

Attendance is limited so you must register to attend. No tickets will be sold at the door. Any special accommodations and dietary restrictions may be noted when registering for the event.

Any questions? Contact Cherry Ung at **cherry.ung@gmail.com**.

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# AGA DC Chapter Monthly Luncheon

CFO, DC Office of the Chief Financial Officer, Glen Lee

## *January 2023 Luncheon (with Hybrid Simulcast)*

### *"The District's Economy Outlook"*

On January 11, 2023, the DC Chapter welcomed **Mr. Glen Lee, Chief Financial Officer (CFO) of the District of Columbia government**, as our keynote speaker. Mr. Lee was appointed to this position by Mayor Muriel Bowser in June 2022. He was introduced by **Ms. Caitlin Holmes McGurn of Guidehouse**, a proud AGA-DC Chapter corporate sponsor. We are super grateful for more than 140 in-person and virtual attendees who joined us at noon online or from Clyde's of Gallery Place in downtown Washington, DC!

As the CFO, Mr. Lee manages the District's finances, including its approximately $18.4 billion gross funds operating budget, of which $10.7 billion is generated from local, special-purpose, and dedicated revenue sources. He also manages the city's $9 billion, six-year capital improvements plan budget. Mr. Lee oversees more than 1,700 staff from various offices, including tax and revenue; treasury, comptroller and budget offices; lottery and gaming; economic/fiscal analysis United Medical Center; University of the District of Columbia; and Events DC. He also coordinates with congressional committees and the U.S. Office of Management and Budget staff that oversee District affairs. He interacts regularly with the financial community, including bond rating agencies. Previously, Mr. Lee served as the finance director for the city of Seattle, and worked as a fiscal and policy analyst for the state of California's Legislative Analyst's Office. Mr. Lee was an instructor for the Government Finance Officers Association (GFOA) and served on the Economics Department Advisory Board for Seattle University.

In his presentation, Mr. Lee noted that:

- District's economic indicators remain strong, except for recent weaknesses in housing and Federal employment.
- There is no change in the fiscal years 2023 to 2026 economic outlook.
- The District is in good financial condition with tax revenues up 16 percent with high inflation as a major factor in the fiscal year 2022 revenue increases; nevertheless, he expects reasonable growth moving forward with declines in revenue streams.
- There are risks to the economic outlook from

Left to right: : Paul Lionikis; Frank Petersen; Bo Shevchik; Glen Lee; Caitlin Holmes McGurn; Peter Moore.

## January Luncheon cont'd.


DC Chapter President Caitlin Holmes McGurn.

the National and District perspectives:

- From National:
    - Recession seems likely but probably modest.
    - Debt ceiling negotiations disrupt financial markets and Federal government operations.
    - Another COVID/Flu surge this winter weakens consumer demand or slows the supply chain, especially with the war in central Europe.
- From the District:
    - The Federal workforce continues to decline with four percent vacancies (the District is experiencing 12 percent).
    - Remote work settles at 50 percent of pre-pandemic levels.
    - Permanent population decline.

Glen Lee discussed DC's economic outlook.

During the Q&A session, Mr. Lee said that the District CFO is in a unique position as it is independent from policy formation and will wait until the back end to perform financial assessments. By Federal law, the District CFO does not report to the District but, as DC develops policy, the law requires that the CFO determine whether that policy is financially sound; meaning that revenues and expenditures should balance.

Our Chapter appreciates the time Mr. Lee devoted to a highly interesting presentation interspersed with candid and enlightening remarks.

Finally, our January lunch meeting was made possible by our hard working Monthly Luncheon Team, who always takes care of programming, in-person, and virtual operations! **THANK YOU to our Monthly Luncheon Team!**

DC Chapter board members at the luncheon.

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# AGA DC Chapter Monthly Luncheon

## *February 2023 Luncheon (with Hybrid Simulcast)*

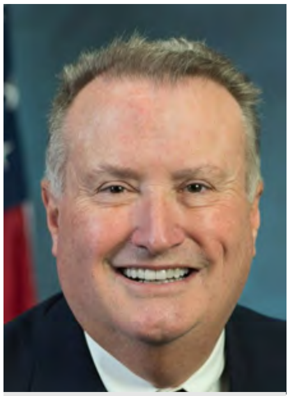
### *“FASAB: Reexamining GAAP”*

On February 8, 2023, the DC Chapter welcomed **Ms. Monica R. Valentine, Executive Director of the Federal Accounting Standards Advisory Board (FASAB)**, as our keynote speaker. Ms. Valentine joined the FASAB in 1991. **Joseph Hungate, RMA Associates**, a proud AGA-DC Chapter corporate sponsor, introduced her.

**Keynote speaker Ms. Monica R. Valentine, Executive Director of the Federal Accounting Standards Advisory Board (FASAB)**

We are very grateful for the more than210 attendees who joined us at noon online or from Clyde’s of Gallery Place in downtown Washington, DC. It was a standing room only sell-out!

As FASAB's Technical Director and Program Administrator, Ms. Valentine’s activities include developing accounting standards for Federal departments and agencies as well as responding to inquiries regarding the application of accounting standards. Ms. Valentine also manages the research staff supporting Board deliberations.



**Introductory Speaker, Mr. Joseph Hungate, RMA Associates**

Prior to her position as FASAB Executive Director, Ms. Valentine served as a FASAB Assistant Director leading the Board’s staff work on various projects and related FASAB Interpretations, Technical Bulletins, and Technical Releases. In addition, she was the lead staff member for the Accounting and Auditing Policy Committee (AAPC), a permanent committee of FASAB.

Before FASAB, Ms. Valentine was a KPMG Audit Manager where she worked in several different audit client industries. Ms. Valentine is a CPA in the District of Columbia and a CGFM. Ms. Valentine graduated with honors from Howard University, receiving a bachelor’s degree in business administration with a concentration in accounting. She is an AGA member.

In her presentation, Ms. Valentine discussed the rationale for why a reexamination of Generally Accepted Accounting Principles (GAAP) may be necessary. Her insights noted:

- The objective is to reexamine FASAB’s existing Statements of Federal Financial Accounting Standards (SSFAS) to assess their current relevance and to identify opportunities to streamline the authoritative guidance.
- Periodic assessment is necessary to review the standards

## February Luncheon cont'd.


current applicability, eliminate or revise unnecessary requirements, and evaluate change in potential approaches.

- Considerations include usefulness of required information, identifying inconsistent application, needed clarification, meeting Federal financial reporting objectives, and cost/benefit factors.
- Some FASAB standards are more than 30 years old, such as SSFAS 1: Accunting for Selected Assets and Liabilities. Sixty standards have been issued since 1993. An actual re-exam approach has not been developed and the effort is likely to last for several years. Nevertheless, a first step will involve an Invitation To Comment requesting feedback on potential alternatives.
- FASAB is not unique in its reexamination effort; both the Financial Accounting Standards Board (FASB) and the Governmental Accounting Standards Board (GASB) have created a re-exam process which has been extant for some time.


**Our Luncheon Speaker Monica Valentine from FASAB**

**Frank Petersen from the Program Committee hosting Q&A Session.**

**L-R: Frank Petersen, Monica Valentine, Caitlin Holmes McGurn**

**DC Chapter Board members with Monica Valentine**

## December Luncheon cont'd.

Our Chapter appreciates the time Ms. Valentine devoted to a highly interesting presentation interspersed with candid and enlightening remarks.

Our February lunch meeting was made possible by our hard-working Monthly Luncheon Team who always take care of programming, in-person, and virtual operations! **THANK YOU to our Monthly Luncheon Team!**

***AGA DC also congratulates Caroline Piccione, our new member raffle winner attending the February luncheon!***

Finally, a special shout-out to Frank Petersen from our Chapter's Programming Committee who presented us with interesting and topical polling questions to celebrate the Black History Month. Of relevance was a question on the nation's first Black CPA - John Wesley Cromwell Jr. (1883–1971) – who was certified in 1921. The first CPA law was passed in New York 1896. It would be another 25 years before a Black person joined the profession. Besides, we acknowledged Mary Thelma Washington, who became the first female Black CPA in 1943, passed away in 2005 and was less than a year away from her 100th birthday. Early in her career, she worked as the Assistant to Arthur J. Wilson, the country's second Black CPA, at Binga State Bank of Chicago, one of the country's largest African American-owned banks.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# AGA DC Chapter Monthly Luncheon

## *March 2023 Luncheon (with Hybrid Simulcast)*

### *"OMB Update"*

**Keynote Speaker Ms. Deidre Harrison Acting Controller of the Office of Management and Budget**

On March 22, 2023, the DC Chapter welcomed our March hybrid luncheon speaker **Ms. Deidre Harrison, Acting Controller of the Office of Management and Budget (OMB)**. We are grateful for more than 210 both virtual and in-person attendees who joined us at Clyde's of Gallery Place in downtown Washington, DC. We are also grateful to **Ann Ebberts, AGA CEO**, who joined us at the March luncheon.

Ms. Harrison is a senior member of the OMB management team supporting the President's Management Agenda and other Administration priorities. She is also responsible for overseeing the Office of Federal Financial Management's (OFFM) diverse portfolio which includes issuing government-wide policies through OMB circulars, bulletins, and memos; the Uniform Guidance; and other issuances. Prior to joining OFFM, Ms. Harrison was a senior examiner in the Treasury Branch at OMB where her portfolio included various Bureaus and offices within the Department of the Treasury and branch-wide financial management policy areas including improper payments, shared services, and financial reporting and display. Prior to her Federal career, she worked for eight years at an economic consulting firm where she was an Economist responsible for overseeing the design and implementation of large data analysis projects for clients to use in the courtroom and before regulatory agencies. Ms. Harrison received an undergraduate degree in International Politics and Economics from Middlebury College and a Master's degree in Public Policy from the Harvard Kennedy School of Government.

In her presentation, Ms. Harrison discussed different financial management initiatives and areas that OMB is working on, including policy and guidance revision, property portfolio, grant (Uniform Guidance and data collection for grant recipients), improper payments, data analytics, administering and monitoring new programs, protecting identity theft victims and fraud prevention. Throughout the presentation, Ms. Harrison answered questions from both virtual and in-person attendees. We sincerely appreciate the time Ms. Harrison spent time with us to share her insights and knowledge.

We would also like to thank our **Corporate Sponsor, Cotton (a Sikich Company)**, and **Mr. Paul Lionikis**, Director of Outreach (who's also on our luncheon program team and past chapter president), for his introductory remarks for our speaker and hosting the quiz session with our attendees to celebrate Women's History Month.

## March Luncheon cont'd.

Our March Luncheon Speaker: Deidre Harrison

## March Luncheon cont'd.

**Paul Lionikis hosted the quiz session.**

**Caitlin Holmes McGurn spoke to luncheon attendees.**

**L-R: Mark Reger, Caitlin Holmes McGurn, Ann Ebberts, Lal Harter, Deidre Harrison, Paul Lionikis, Bo Shevchik, Chi Okonkwo**

Finally, our March hybrid luncheon was made possible by our hard working volunteers from the Monthly Luncheon Team who took care of the programming, in-person, and virtual operations. **THANK YOU to our Monthly Luncheon Team!**

### Member Luncheon Videos

To access past recordings of our luncheon speaker presentations, please visit our chapter website and select the menu section "**Members Luncheon Videos**" or at this **direct link**.

***Please Note:*** *Login and password are the same as your access to the AGA National website*

## DC Chapter Remembers Laura Koschny

Our Chapter lifetime member, Ms. Laura L. Koschny (CGFM-Retired), passed away on January 24, 2023. Ms. Koschny was a devoted audit professional and active attendee of our Chapter's monthly luncheons. Please keep Ms. Koschny and her family in your thoughts.

## Thought Leadership

# AGA Intergovernmental Forum: Managing and Overseeing Pandemic Relief Funds

*By David Zavada, Senior Partner, Kearney & Company*

The volume and speed of pandemic relief programs overwhelmed traditional benefits delivery systems and processes. Benefits were delivered in record time, but at the cost of increased improper payments and fraud. Enabling both speed and adequate control in future crisis situations will require investments in systems and technology and data sharing arrangements to deliver benefits accurately and efficiently. That was the consensus of an intergovernmental discussion about the management and oversight of pandemic relief programs at AGA's Professional Development Training (PDT) 2022 from program and financial managers, as well as oversight representatives.

### Initial Response

All three panelists emphasized the gravity of the public health situation and economic consequences during the early months of the pandemic in 2020. This necessitated a large and rapid response from the government.

A total of $5+ trillion dollars was provided through six pieces of legislation that funded new and existing programs and provided multiple rounds of supplemental funding to these programs. The broad scope of the relief was unprecedented – from Unemployment Insurance (UI), Economic Impact Payments, health care providers, small businesses, airlines, state and local government, housing, and others.

The enormous size of the pandemic relief necessitated an oversight response as well. The Coronavirus Aid, Relief, and Economic Security Act (CARES Act) included a provision to establish and fund the Pandemic Response Accountability Committee (PRAC). The PRAC is comprised of 21 Inspectors General (IG) to oversee the pandemic relief programs and a data analytics center, the Pandemic Analytics Center for Excellence (PACE), to collect data and analyze risk across these programs. Given the intergovernmental nature of many pandemic relief programs, the PRAC is also serving as a "unifying force" between federal and state auditors to coordinate and share results of oversight conducted related to pandemic relief programs.

### Challenges and How They Evolved

The most significant challenge overall was the overwhelming volume of the pandemic relief programs. For example, the Small Business Administration (SBA) had since its creation in 1953 approved 2.2 million loans for a total of $66.7 billion under its Economic Injury Disaster Loan (EIDL) program. In contrast, by July 31, 2020, it had approved 3.2 million pandemic disaster loans, totaling $169.3 billion.

Panelists also pointed to the large upsurge in unemployment claims. The unemployment rate had traditionally been around 5% but skyrocketed to almost 15% in early 2020. This overwhelmed many state UI systems, which historically did not have the capacity to adjudicate this type of volume. Nor were the processes designed to handle such volume.

Secondly, given the gravity of the pandemic, the focus was on getting money out quickly, exacerbating the risk associated with these programs. There was little time for federal and state governments to follow their routine processes. Consequently, many pandemic relief programs had to initially rely on self-certification by the applicant as the only eligibility qualifier. Panelists noted that this resulted in a quick shift to a pay-and-chase mode, where the collection of benefits paid is much more difficult than establishing control on the front end.

## Thought Leadership cont'd.

Much of the fraud, improper payments, and self-certification processes occurred in the early part of the pandemic relief programs, primarily through the CARES Act. Panelists noted that, over time, program controls were put back in place for the American Rescue Plan Act (ARPA) round of funding. In February 2021, the Office of Management and Budget (OMB) issued OMB Memo 21-20 that required collaborative risk assessments be performed over the pandemic program design.

### What Went Well/What Did Not

Delivering an unprecedented amount of benefits to a variety of individuals, businesses, and other targeted organizations to avoid economic catastrophe was the predominant success story. Panelists noted that the agility and innovation needed to address volume and speed requirements to deliver benefits pushed governments to do things differently than in the past.

Over time, governments began to streamline processes and establish essential controls as pandemic relief programs grew and evolved. The sentiment was that this type of review of processes and controls will continue.

Another success was the level of collaboration within and between governments that occurred to meet the challenges of the pandemic relief. The best success stories were where multiple program, financial and oversight offices were involved early in program design and delivery. Similarly, on the oversight side, the PRAC has prioritized collaborating and sharing best practices across federal IG offices and with state auditors and the Government Accountability Office (GAO).

Both the Department of the Treasury (Treasury) and the PRAC have established data- and technology-focused oversight methods that identify risk and check for compliance in an automated fashion. The Treasury established a new Office of Recovery Programs (ORP) to oversee a number of new grant programs in a data-driven and highly-automated way – singling out high-risk grantees and using Robotics Process Automation (RPA) tools to check compliance. Similarly, the PRAC established the PACE that draws data from various sources and analyzes the data across all pandemic relief programs for risk and compliance.

What did not go well and remains a challenge is access to and sharing data across programs and between governments to deliver benefits timely and accurately to the intended recipients. Some of these barriers are intentional, whereas some just take time to establish agreements and access.

### Preparedness

Delivery of pandemic relief benefits required workarounds and innovative approaches under daunting circumstances. This experience led to the recognition of the need to invest in systems, technology, and streamlined but controlled processes to deliver benefits timely and accurately in the future. Simultaneously, greater data access and sharing, to the extent possible, within and between governments would improve efficiency and accuracy and better prepare us for a future crisis. It was noted that the ability to use quality data and to achieve transparency begin at the front end in designing reporting mechanisms to collect robust data at all levels. Also, having an agile organizational capacity to respond across the agency and government, utilizing data and being able to scale up and down quickly would improve preparedness. Further, as some program managers and auditors put it, “be intentional about risk” when these situations occur. That is, understand the initial trade-offs between speed and control and have a plan to mitigate the risk over time. Better yet would be to have streamlined and efficient processes, systems and technology, and access to critical data to avoid an improper or fraudulent payment from occurring.

*This summary was based on an AGA Intergovernmental Forum held July 17, 2022, as part of the AGA PDT in Anaheim, California. Thank you to the panelists for their insights: Dave Lebryk, Fiscal Assistant Secretary at the Treasury, Russell Fong, Chief Administrative Officer and Deputy Controller in the California State Controller’s Office, and Bob Westbrooks, Executive Director of the PRAC.*

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# Member Spotlight

## Xinyu (Shirley) Zhang

***Senior Accounting Student at American University (Kogod School of Business)***

**AGA-DC:** How did you first learn about the AGA and become an intern for our DC Chapter?

**Shirley:** I came to the U.S. in the 2019 fall semester studying accounting at American University. In order to connect with more people from different backgrounds, my aunt introduced me to a great opportunity – the AGA National Leadership Training (NLT) event. Thanks to my accounting professor who also had experience working in government, the great recommendation letter made me stand out from other students that I won the scholarship to join the NLT event in 2022. During the AGA NLT event, my mentor Jesse helped me a lot to connect with other public, private, and government employees. I feel comfortable networking with these people, and I try to stay longer in the community. With the help from an AGA staff, I found an opportunity to join the AGA DC Chapter.

**AGA-DC:** Currently you're a teaching assistant for your university and a member of the AGA National Higher Education Committee. What's your view about university accounting curriculum in general and how do you bring the student's perspective to the Committee?

**Shirley:** Joining the National Higher Education Committee allows me to share some of my thoughts about accounting from the student's perspective. For example, one of the things the Committee worried about is whether universities still value government accounting. My answer is that for students studying accounting majors, universities should set up more classes teaching government accounting. In particular, some important topics such as Federal tax can be sorted out into a separate course. Universities can hire some instructors/professors who have government work experience so that more students may be attracted to work for the government.

**AGA-DC:** What's your future plan after graduation later this year?

**Shirley:** I will take a combined degree at American University majoring in accounting and specialization in analytics. I'm planning to take the CPA exam during my master's degree study, and hopefully, all the knowledge and experiences that I have until now can benefit a lot for my future full-time job. Moreover, I will try to learn more programming skills because it can help develop my logical thinking and contribute to my accounting work. I will also try to maintain my connection with AGA and the members from the DC Chapter and National Higher Education Committee. I'm also open to joining other committees to get different experiences.

**AGA-DC:** What keeps you motivated each day?

**Shirley:** Senior year is way busier than I thought, as I have two courses and one full-time audit internship this semester. I acknowledge that everyday there's something I need to learn and improve. I've made commitments to clear my goals on a daily, weekly, and monthly basis. And here I get the motivation to work hard in the accounting field. On weekends, I usually spend my time in the coffee shop; coffee gives me more energy to study and work. I am very excited to finish my undergraduate study and start

## Member Spotlight cont'd.

my graduate study after the summer vacation. Looking forward to meeting more students and professors and getting more new experiences soon!

**AGA-DC:** Thank you for your time and insights Shirley!

*The contents of this interview had been condensed and edited for length and clarity.*

### Curriculum Vitae

Xinyu (Shirley) Zhang
*Senior Accounting Student at American University (Kogod School of Business)*

**Education:**

- Senior Accounting Student at American University (Kogod School of Business)

**Hometown:** Tianjin, China

**Fun Fact:** I have traveled to different countries, including Singapore, Malaysia, Japan, Korea, and more.

**AGA Activity:**

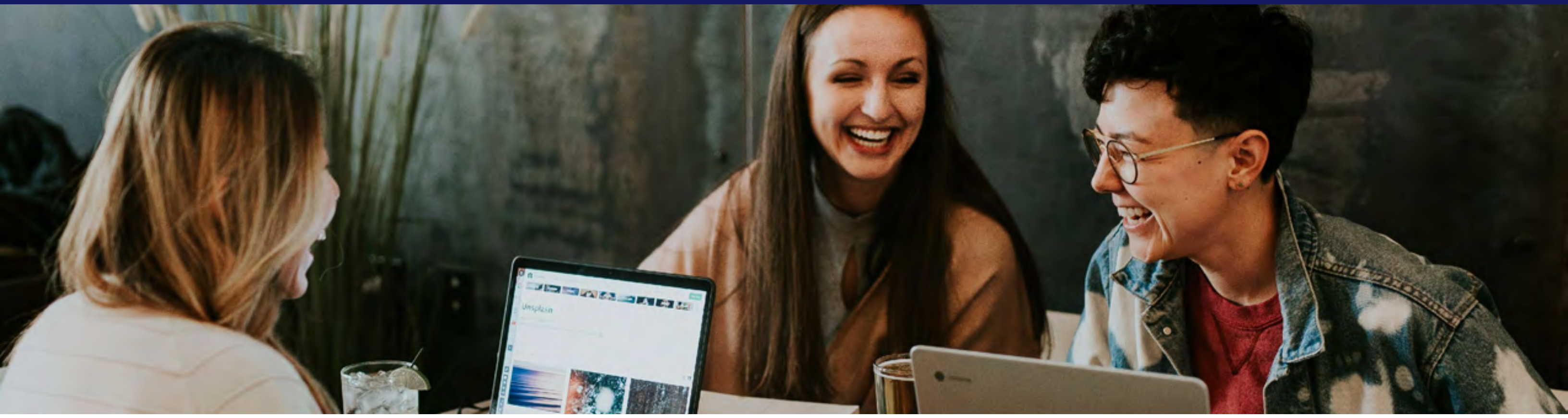
- Intern, Washington, DC Chapter
- National Higher Education Committee
- National Collegiate Leadership Scholarship Recipient (for 2022 National Leadership Training [NLT])

**Professional Experience:**

- Research & Teaching Assistant, American University
- Audit Intern, Crowe
- Accounting Intern, Ryan & Wetmore, P.C.

**Honors:**

- Honors program in Kogod School of Business at American University
- Have been on the Dean's list for several semesters



# AGA Young Professionals and Mentoring

The DC Chapter supports the **AGA National's Achievements in Chapter Excellence (ACE) program**, as we highlight the Young Professionals and Mentoring programs mentioned below:

## AGA - Young Professionals

Whether you are considering a **career** in government financial management or have already started down the path, AGA is here to support you! Membership in AGA gives you access to practical resources to develop your skills, expand your knowledge, boost your job performance and advance your career. Remember to check out what each AGA **chapter** offers — like scholarships, board positions and other opportunities to develop your leadership skills. **For more details on discounts, scholarships, awards, education, training, and more, click here:** AGA Young Professionals

## AGA - Mentoring Program

Mentoring is important, not only because of the knowledge and skills young professionals can learn from mentors, but also because mentoring provides professional socialization and personal support. At a time when most are working remotely, having a trusted advisor to turn to can help balance the blending of work and life. The program is open to AGA members only. Having complete and accurate profiles is crucial to the success of mentor/mentee selection and matching! **For more details on the roles of a mentor and/or a mentee, and how to enroll, click here:** AGA Mentoring Program

# Mentorship Spotlight

## A Conversation with Atisha Burks on Mentorship and Career Development

Maura Russell from Lodestar Consulting and our Chapter's Mentorship Committee recently sat down with our DC Chapter member **Ms. Atisha Burks**, Chief Financial Officer (CFO) for the DHS Federal Protective Service (FPS), to talk about the role of mentorship in her transition to Federal Senior Executive Service (SES). Ms. Burks has been in Federal service for 22 years, working on all aspects of financial management.

***Maura:*** *When was the first time in your career that you considered becoming an SES?*

**Ms. Burks:** When I was a GS-5 20 years ago, my supervisor at the time handed me a folder with information regarding the Executive Core Qualifications and told me, "Get started on these." Of course, I didn't, but it was the first time I even considered becoming a SES. I still have that folder.

***Maura:*** *From your perspective, is there a difference between mentorship and sponsorship? If so, what do you believe is the role of mentorship in our careers? What role did it play in your transition between GS and SES?*

**Ms. Burks:** Yes, I define "sponsorship" as an advocate or someone that can vouch for your abilities. A mentor, on the other hand, is someone that can provide advice, play "devil's advocate" and can also help you get out of your own way. Sometimes, you doubt your own abilities. My mentors have been instrumental in getting me to believe in myself and reminding me that I've something to offer. They also provide advice on identifying opportunities and building my network.

***Maura:*** *Many people believe that if they work hard, their coworkers will naturally see that they have something to offer. Did you find that you had to sometimes speak up to articulate your value in order to get noticed? What advice did your mentors give you about self-advocacy?*

**Ms. Burks:** Unfortunately, hard work alone isn't always as visible. People are needs-based, so your hard work may go unnoticed if it's not needed at the time. For instance, I could be a great baker, but no one in my office will know that unless they've a need for a great baker. It's still very hard for me to advocate for myself, but the key shouldn't be to "get noticed." The key is to be knowledgeable. Knowledge is the one thing that people can't take from you. In my career, I sought "to be in the know" and not just about what is on my desk but rather how what I do fits into the big picture and how other people's roles in the organization fit into the big picture. That knowledge made me an asset. My mentors didn't speak about this specifically, but I watched them and learned that it was their knowledge of topics AND resources that moved them ahead.

***Maura:*** *When did you first know that you needed a mentor, and in what ways did you find them? If you found that mentors weren't available in your workplace, what did you do to get coaching and advice? What advice would you have for someone who doesn't naturally draw people to them?*

## Mentorship Spotlight cont'd.

**Ms. Burks:** I've been lucky enough that I never identified mentors, per se. I've always had someone that saw something in me that I didn't necessarily see in myself, and as a result, they wanted to help cultivate that spark. Many of my mentors have no idea that I consider them mentors. Instead, it has always been a personal relationship that I chose to learn from. I don't think I naturally draw people to me. I'm genuinely interested in the people I encounter. That includes people I work with. I think it goes with my quest for knowledge. I ask questions, and I believe that genuine interest is what people are drawn to.

***Maura:*** *Do you find that you still need mentors as an SES? Sponsors?*

**Ms. Burks:** Absolutely! I'm good, but I recognize that I don't know everything, and my entire life is about self-exploration. I learn things about myself almost every day, and it's easy to have blind spots. I'm lucky to have people around me (peers, coworkers, contractor support) to point them out to me. I continue to be grateful for their support and willingness to tell me the truth.

***Maura:*** *Is it fair to say that the transition from doing to directing is a key challenge? Did you seek advice from a mentor in making that jump?*

**Ms. Burks:** It was a HUGE challenge and still is. I was told when I became a GS-15 that the higher you go, the less technical your job is. As you progress in your career, the skills needed to achieve aren't so much about what you know; it becomes more about how you lead a team, how you manage conflict and resources, and how you collaborate across the organization to achieve the mission. I was told by a mentor that I just need to know enough about the technical side to be dangerous. The key theme is that knowledge is power.

***Maura:*** *If there was any single myth you could "bust" about the transition from GS to SES, what would it be? What is the reality?*

**Ms. Burks:** I always believed that the SES cadre "possess well-honed executive skills and share a broad perspective on government and a public service commitment that is grounded in the Constitution." Well, not necessarily. Depending on the agency, they use their SES' in different ways. For instance, instead of involving them in strategic discussions, they may want them to ensure the tactical and transactional activities are successfully performed day-to-day. I encourage everyone to consider the role of SES' in any organization they decide to join.

***Maura:*** *Is it fair to say then that the agency culture will influence what kind of SES you have to be? For example, being more of a generalist or strategist versus a specialist or subject matter expert?*

**Ms. Burks:** It goes back to the needs of the organization. Some organizations are not in a place for those strategic discussions. Some organizations are just trying to make it day-to-day. In that case, you have to decide whether or not you want your job to be a day-to-day operator, if you want to be that person that helps elevate the organization to more strategic level discussions, or if you want to look elsewhere. Just know the landscape before jumping in.

***Maura:*** *If you could "build a mentor" for someone who is seeking their transition from GS to SES, what are the top qualities you would include?*

**Ms. Burks:** I can think of the following three qualities:

1. Seek someone that understands that SES is a job and not a barrier to the people you serve. Regardless of position, I am Atisha Burks first. I don't lead with my title because when I leave my current position or even retire, someone else will have that position, and I will still be Atisha Burks.
2. Seek someone that understands that being a Senior Executive is the highest level of civil SERVICE (not power) in the Federal Government. We are charged with serving not only the people in our agencies but also the

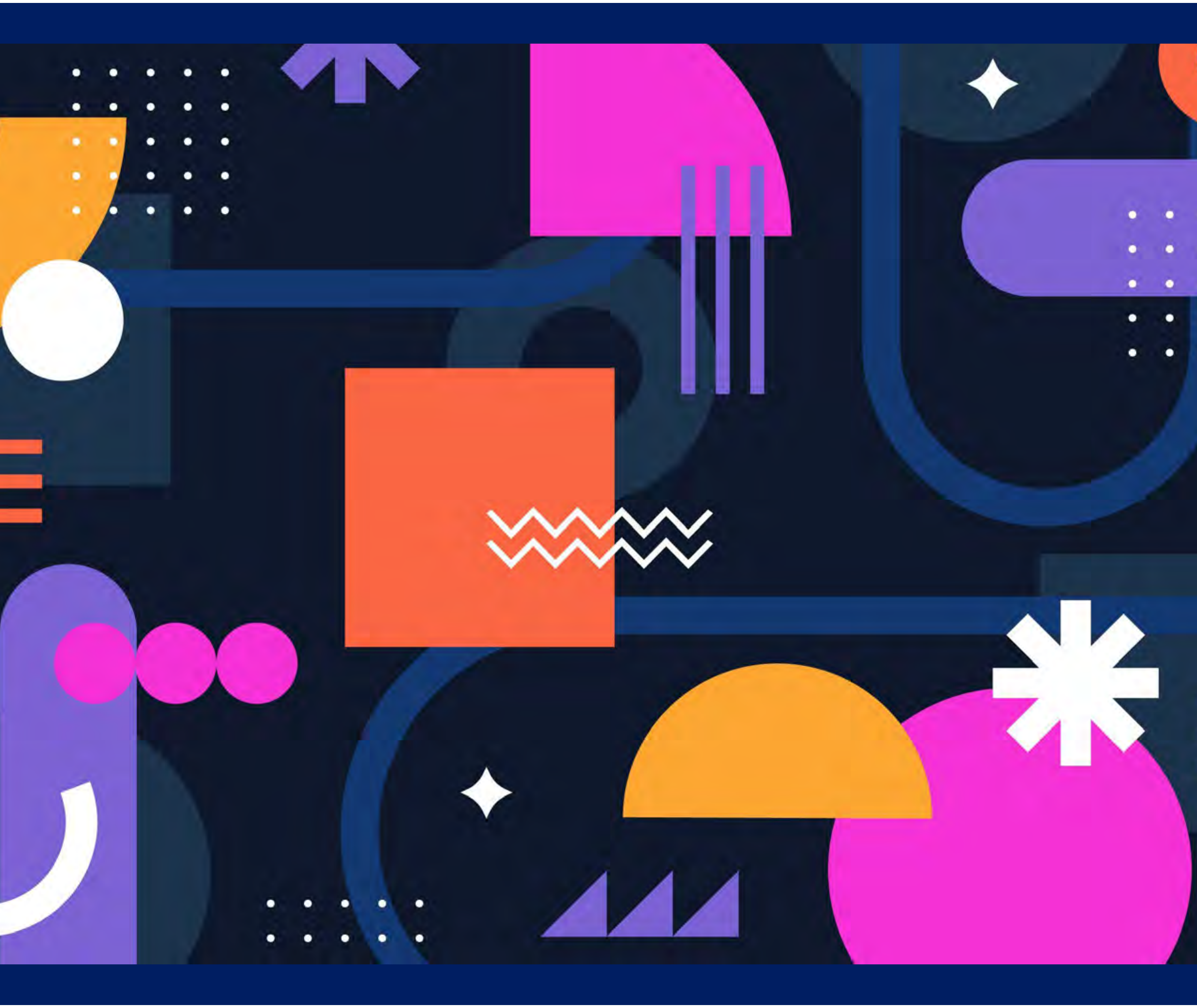
## Mentorship Spotlight cont'd.

   American public. It's an important job that we must remember is less about us and more about the people we serve.

3. Seek someone that is genuinely interested in your growth and not just looking for recognition for being "the one that got you to where you are." Being a mentor is like being a stagehand. Mentors are not in the spotlight, but they play an instrumental role in making sure that you are.

*The Mentorship Committee extends sincere thanks to Ms. Burks for her insights! Stay tuned for an upcoming Mentorship Committee event around the transition from GS to SES early this summer!*

*The contents of this interview have been slightly edited for length and clarity.*



# Special Events

Member Services (Crystal Wolf, David Baskin, Manoj Mirchandani, Anthony Richards) is very excited to continue to provide our chapter members various in-person events! Please be on the lookout for familiar events like sporting events, happy hour, and wine tours. Stay tuned!

## Washington Capitals Hockey Game

On January 18, 2023, our Chapter's Member Services Committee brought back our popular Capitals game to our members! We had more than 50 members and guests attending the event to cheer for the Capitals against Minnesota Wild at the Capital One Arena. Everyone's having a great time enjoying BBQ and unlimited beverages. Thank you to those who came for our first 2023 Chapter's in-person social event!

## January VIP Luncheon

Our chapter hosted the VIP Luncheon at Old Ebbitt Grill in downtown DC on January 24, 2023. The Honorable Jon J. Rychalski, Assistant Secretary for Management and Chief Financial Officer of the Department of Veterans Affairs, was our guest speaker. Paul Marshall, our chapter Sponsorship Committee Director and VP from MIL, made the speaker introduction. During the VIP luncheon, Mr. Rychalski discussed the Department of Veterans Affairs' journey to a new finance and acquisition management system and answered questions from our 23 Diamond sponsor representatives (MIL, Cotton, PNC, Guidehouse, Kearney & Company, JP Morgan, RMA Associate, and OneStream).

Thank you Mr. Rychalski for his insights, our Diamond sponsors for the participation and support, and our sponsorship committee for organizing this in-person VIP Luncheon!

**The Honorable Jon J. Rychalski**

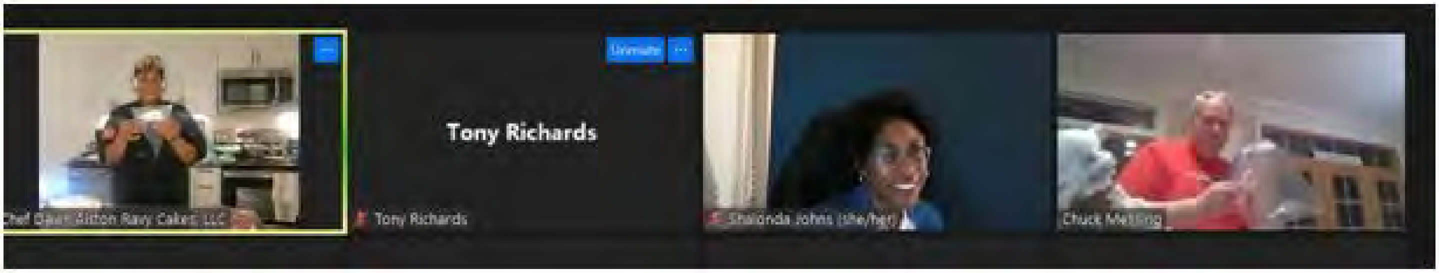
## Special Events cont'd.

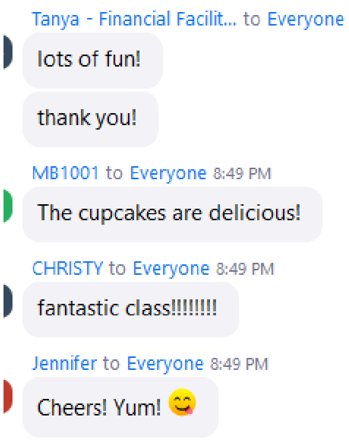

L-R: Paul Lionikis, Cherry Ung, The Honorable Jon J. Rychalski, Lora Pickard, Paul Marshall


Diamond Sponsor representatives pictured with The Honorable Jon J. Rychalski.

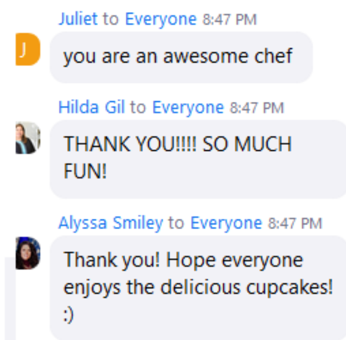
## Virtual Baking Class

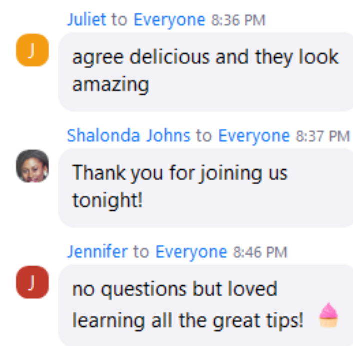
The Member Services Committee held our first-ever virtual baking class on February 22, 2023! Chef Dawn Alston of **Ravy Cakes** has catered to celebrities, politicians, beauty queens, and corporations, as she specializes in custom cakes and pastries. Our 17 members had a fun and educational baking session with Chef Alston, who shared her baking secrets and useful tips with our members. We thank Chef Alston for a beautiful evening sharing her wonderful cookie recipes with our members, as well as her time and energy to make this virtual baking class fun and engaging!



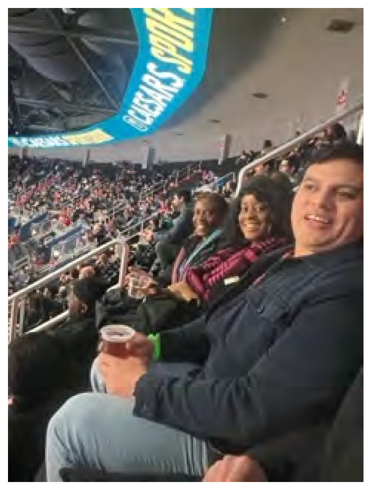

## Special Events cont'd.

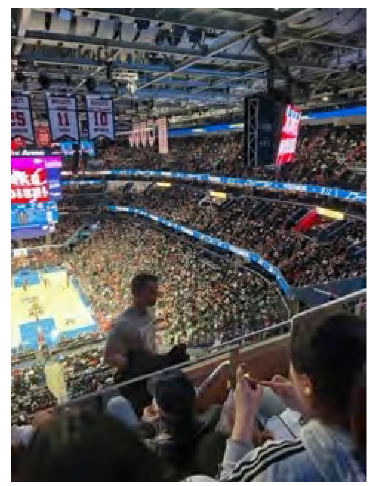



## Washington Wizards Basketball Game

The Wizards basketball game against Atlanta Hawks was featured as the Member Services Committee's activity in March. About 40 members and their guests joined us at the Capital One Arena to cheer for Wizards on March 10! Our members and guests enjoyed the food and unlimited drink provided at the Devil's Backbone Lounge and company throughout the game. Thank you to those who participated in the event!





## Thought Leadership

# Achieving balance between speed and accuracy of payments

**Help protect your payments and reduce errors with Account Validation Service**

Government entities need to make more immediate, seamless and secure payments just like any business. Now, more than ever, innovative collaborations with the commercial sector offer critical solutions to pay faster, create stronger customer experiences and reduce fraud.

## Improper payments in the public sector

Improper and unknown payments continue to contribute to financial waste in government spending.

**$214B+** in improper payments made in FY 2022[1]

**41%** **increase** in improper and unknown payments from 2019 to 2022[1]

**To build trust and credibility with the communities they serve, the public sector needs to manage the financial and reputational risk, while improving the user experience from end to end.**

- Use emerging technology that can learn and correct discrepancies via return intelligence
- Have confidence in validation and authentication with identity proofing processes
- Interrogate multiple data sources for optimized results
- Employ frictionless, straight-through processing

## Addressing improper payments

As little as three steps to improvements in addressing improper payments[1].

**1. Build a technology framework**

Better technology can help reduce the need for manual processing, improve payment times and lower the error rate.

**2. Leverage data to prevent fraud**

Use data analytics to increase accuracy, proactively prevent errors and mitigate payment fraud.

**3. Improve the user experience**

Enhance all aspects of the payment experience, including identity validation and payment account verification, to minimize improper payments.

## Thought Leadership cont'd.

# Protect against fraud

Take action to help protect against fraud and improper payments.

### Validate recipient accounts

- Mitigate risk of payments fraud as technology advances
- Reduce identity takeover and re-direction of funds to unauthorized recipients
- Manage operational, collection and recovery costs from payments fraud more effectively
- Minimize reputational risk, which can be just as damaging as financial losses

### Defend against fraud and cyberattacks

- Authenticate account ownership identity prior to payment initiation
- Validate accuracy of payee information
- Reduce returned transactions due to bad payee information
- Limit financial losses associated with payment fraud
- Support customer satisfaction with rapid risk decisioning


# AVS use cases

Account Validation Services helps government entities and GSEs overcome challenges.

**1. Help ensure payment accuracy**

Use recurring ACH enrollment to validate new payee details, identify potential errors, and authenticate ownership before issuing a first payment.

**2. Work to prevent identity theft**

Simplify tax payments and earned income credits. Confirm the taxpayer is registered, validate deposit accounts, and asses the risk associated with processing a refund.

**3. Protect constituent data**

To make changing bank details more secure, authenticate account ownership and validate account existence and status. Review vendor financial information before updating emails.

**4. Issue emergency payments and benefits**

For one-time and recurring payments, customers provide account information for monthly benefit payouts. AVS validates the account's existence, status, ownership and associated risk.

Sources:
1 https://www.paymentaccuracy.gov/payment-accuracy-the-numbers/
2 https://www.jpmorgan.com/solutions/treasury-payments/insights/strategies-for-addressing-improper-payments

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- Increasing transparency across your cash operations
- Digitizing your infrastructure and processes
- Simplifying the payments experience for constituents

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# New Member Contest

## DO YOU LIKE MONEY? IF SO, PLEASE READ

During the 2022-2023 Program Year, the Membership Committee of the AGA DC Chapter is continuing to award a **CASH PRIZE** ($100 in the form of an Amazon gift card) at the end of each quarter (i.e., September, December, March, June) to the member who sponsors and/or recruits the most new members during the quarter. With your help and dedication, we can achieve our Chapter's 10% growth goal of new members this year! **Don't miss out on the great chance to win a CASH PRIZE, and help our Chapter! Make sure your name and AGA ID are included in the membership form of new recruited members!!**

Please note the membership referral/sponsoring application is a three-step process:

1. New members should create a "My AGA Account" on the AGA National website
2. New account login details will be sent to the email provided during registration (Step 1)
3. Within your "My AGA Account," new members must complete their AGA membership application and include the "Recruited by Member ID" and/or "Recruiter's Name" within the Demographics data page of the application.

Recruitment/Sponsoring winners will be contacted via email and announced in the following quarter's newsletter. The Membership Committee looks forward to continuing to grow our membership!

***(NOTE: Previous quarters' winners are ineligible for future prizes in the same program year.)***

# Welcome New Members!

*By: Emily Law and Giovanni Leon*

The AGA DC Chapter and the Membership Committee extends a warm welcome to our newest members! Thanks to you, the AGA continues to grow. Stay up-to-date on fantastic programs, membership benefits, and recruiting incentives starting now. Remember if you have not yet renewed, you may do so at the **AGA Washington DC Chapter** website to take advantage of member benefits throughout the next program year.

Omotola Abe
Ayesha Ahsan
Matthew Arovas
Anu Atreya
Kerry Anne Baker
Abimbola Balogun, CGFM
Victoria Barclay
Carla E. Batist
Karen P. Bentley
Jacqueline Bienko
Walter John Biswas, MBA, CGFM
Ronald Joseph Bozant, III, CPA
Peter Brady
Sheila Denise Brooks
Shepherd Brown, PMP, CICA
Grady E. Bryant, Jr.
Victor Buadu
Paul Burke
William Cabrera
Maverick P. Calisay
Lena Chapeton, CGFM, CFE, PMP, CICA
Robin R. Collins, MBA, PMP
Christine Cuadro
Angela Davis
Arthur Dedoulis
Anthony G. Dougherty
Erin Alana Downey
Bret D. Edwards
Jason Falcone
Ronnyka Fitzpatrick
Tyrell D. Frazier
Annupama Gangar
Adrienne L. Gatlin
Katherine Giesen
Keith A. Graham
William Graham
Wilmer J. Graham
Thalia Guitele Grant-Wisdom
Deone D. Hammond-Hatcher
Thomas Harker, CPA
James Tyler Hickman, CGFM
Ashley Johnson
Edouard M. Julien
Mohammad A. Khan

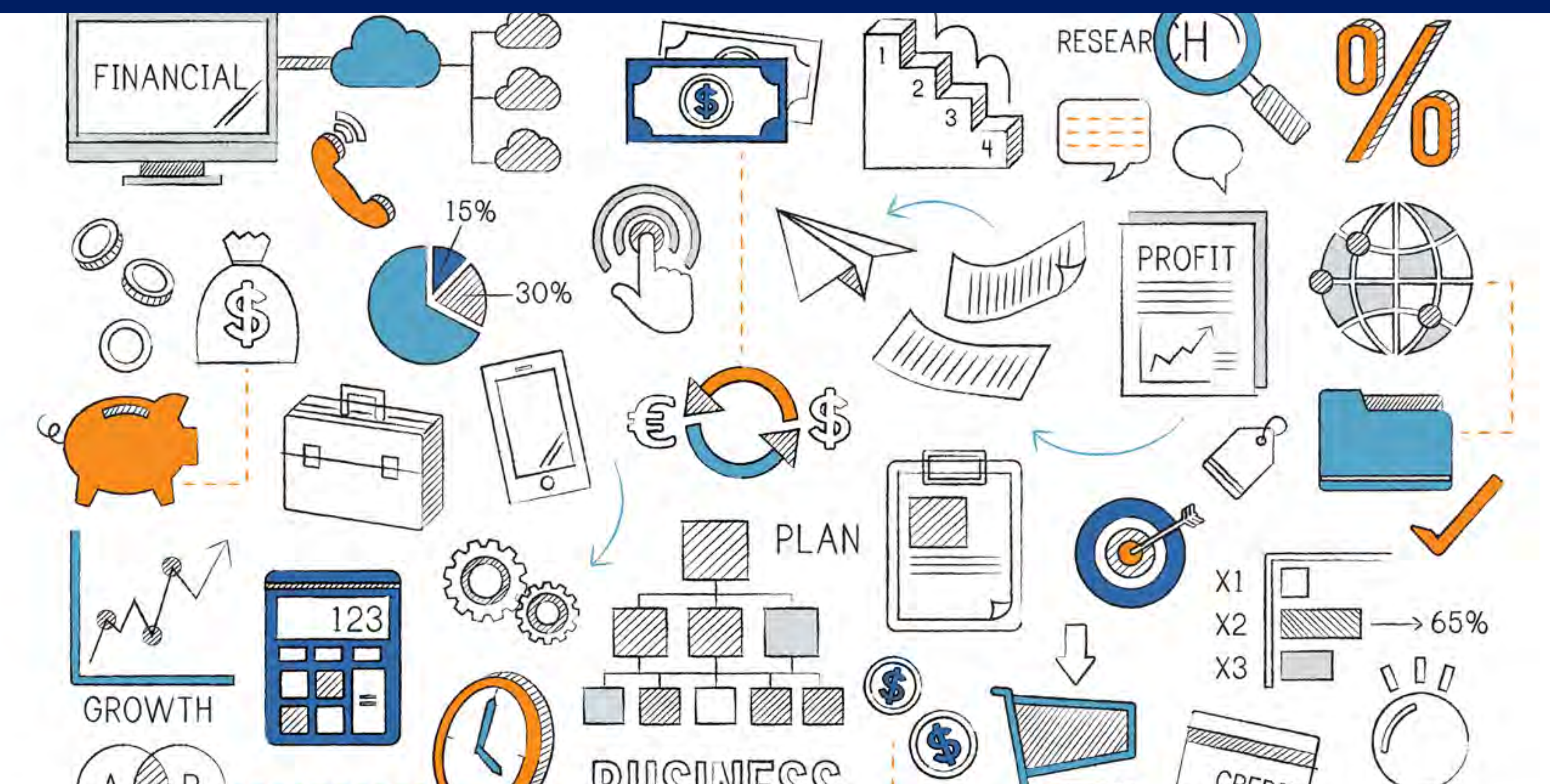
## New Members cont'd.

Edward Kim
Teresa Kline
Vladyslav D. Kruk, CGFM
MelaJo K. Kubacki
Dinesh Kumar
Rahel Kumela, CGFM
Michael Kurtz
Jessica L. Kuykendall
Taeree Lee, CGFM
Norma Lopez Luna
Erin M. Mather
Devon McMillian
Jamie S. Meikle, CGFM
Benjamin Messika
Terrance Montgomery
Annalise M. Moose, CGFM

August Muller, IV
Ryan P. Mullikin, CGFM
Michael A. Nixon
Kevin O'Brien, CPA
Andrew Pavord
Elizabeth A. Pearson, CGFM
Craig Pendleton
Robert Persons, II
Ryan T. Phillips, CGFM
Juan A. Price
Valerie Marie Pulphus
Mary M. Reding
Justin R. Riordan
John Ruff
Tarcilia C C Saracuza, CGFM
David Scaffido, CISA

Randolph N. Singh
Clyde Springfield, Jr.
Madison Sweat
Itin Taneja
James C. Tanton, CGFM
Solomon Tekle
Jeffrey D. Thomas, CGFM
Jayakumar S. Vedapuri
Rowena Paula Vicencio
Minh Vuong
Ilene Weinberger
Delphia E. Wilson, CGFM
Kyle A. Wolfe, CGFM
Ethan Mark Zavacky
Donna J. Zavesky
Laura Lee Ziligson

***Attention to all new members! Join us at the next monthly chapter luncheon and you will be entered in the raffle for a gift card!***

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# AGA DC Training and Events

## AGA Sponsored Training & Events

**April 19th, 11:45am-1:30pm,** AGA DC Monthly Hybrid Luncheon at Clyde's. Guest speakers: Reginald Mitchell, CFO, USAID and Lydia Nylander, ERM & Internal Controls Division Director, USAID. Topic: *Evolving Enterprise Risk Management at USAID*.

**April 27th, 11:30am-1:00pm,** AGA DC VIP Luncheon at Old Ebbitt Grill (Diamond Sponsors only). With Guest Speaker Jolene Lauria, CFO at DOJ.

**April 29th, 1:00pm** (Saturday), Join fellow members of the AGA DC Chapter as the Washington Nationals take on the Pittsburgh Pirates. **Tickets** to the baseball game available now!

**May 2nd, 12-12:30pm,** AGA DC Sponsored Virtual Training: Guest speaker: Adam Krulewitz. Topic: *Compliance Built to Last*.

**May 4th, 7:30am-12pm,** AGA National Event, PIO-CFO Summit. **Register now!**

**May 17th, 11;45am-1:30pm,** AGA DC Monthly Hybrid Luncheon at Clyde's: Guest speaker: Margaret Schaus, Chief Financial Officer (CFO), NASA.

**May 20th, AGA DC Chapter 73rd Annual Awards Gala;** Cocktails 6:00-7:00pm; Dinner at 7:00pm. Don't wait! Register today at: **AGA DC Chapter Annual Awards Gala**.

**June 6th, 11:30am-1:00pm,** AGA DC VIP Luncheon at Old Ebbitt Grill (Diamond Sponsors only). With Guest Speaker Vinay Singh, HUD CFO.

*****************

DC Chapter members are provided FREE training opportunities throughout the year — thank you, Sponsors! These training sessions or product demos are *informational only*. **CPE will not be provided unless specified.**

For questions regarding Training and Events, please contact us at **agadc@agadc.org**.

**** SAVE THE DATE****

## AGA DC Webinar Training Schedule

The AGA DC Chapter will host the following AGA National webinar sessions throughout the 2022-2023 program year.

**Cost:**
There is no charge for active DC Chapter members for these events and attendees will earn two (2) CPE credit hours.

**When:**

**04/26/23** — CARES Act/ARPA

**05/10/23** — Fraud/Data Analytics

**05/24/23** — Leadership

For more information on this audio conference and the full schedule of AGA National's audio conferences please visit the AGA National website at: **AGA National Webinars**

**** SAVE THE DATE ****

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# March is CGFM Month!

Mayor Muriel Bowser has recognized the month of March 2023 as Certified Government Financial Manager Month in Washington, D.C. See the proclamation below.

WASHINGTON, DC
MURIEL BOWSER, MAYOR

# Proclamation

## CERTIFIED GOVERNMENT FINANCIAL MANAGER MONTH

MARCH 2023

**WHEREAS,** the Association of Government Accountants (AGA) has 90 chapters and 14,000 members worldwide and approximately 1,986 active Washington, DC members representing state, federal, municipal, and private sector accountants, auditors, and financial managers; and

**WHEREAS,** in accordance with AGA's mission, AGA DC members are promoting government accountability by broadening educational efforts and emphasizing high standards of conduct, while making significant advances in professional ability and service to the DC residents; and

**WHEREAS,** to acquire Certified Government Financial Manager (CGFM) certification, candidates must meet stringent education and employment history requirements, pass three examinations, and abide by the strict AGA Code of Ethics; and

**WHEREAS,** to maintain CGFM status, certification holders must complete a minimum of 80 hours of approved continuing professional development education every two years:

WE ARE WASHINGTON DC

**NOW, THEREFORE, I, THE MAYOR OF WASHINGTON, DC,** do hereby proclaim March 2023 as **"CERTIFIED GOVERNMENT FINANCIAL MANAGER MONTH"** in Washington, DC.

# CGFM Committee Updates

AGADC is proud to support our chapter members in obtaining the CGFM designation. We can pay up to $125 per chapter member per program year to help offset the costs of training modules, study guides, practice exams, and/or exam fees. This subsidy is not available if your costs were already reimbursed by your employer. Rebates are available on a first come, first served basis until funds for the program year are exhausted.

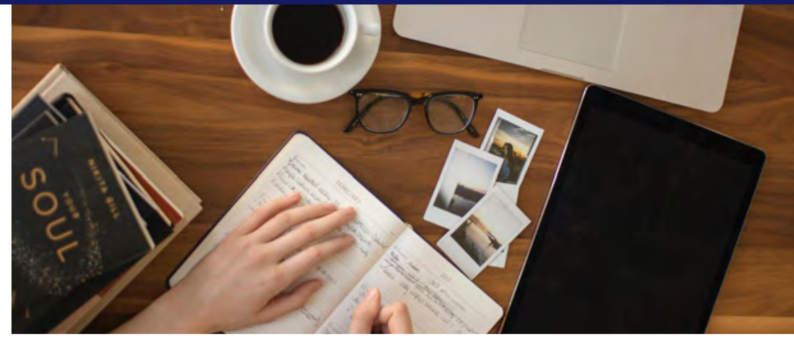
You must submit the following to qualify for study material rebate:

1. Proof you have scheduled the exam;
2. Proof of payment;
3. Mailing address; and
4. AGA member number.

You must submit the following to qualify for exam rebate.

1. Copy of certification showing that you passed the exam;
2. Proof of payment;
3. Mailing address; and
4. AGA member number

Submit the above documentation to **Sara Specht** via email to obtain a rebate.




## Available Study Resources

**Study Guides** - AGA offers CGFM study guides in two convenient formats - print (hard copy) version and online access.

**Training Modules** - AGA offers CGFM Training Modules, which are currently available in course bundles for all portions of the CGFM exams.

**Practice Exams** - In addition to study guides, AGA provides practice exams for use in studying for the CGFM exam.

If you have additional questions about the CGFM Program, please feel free to contact **Debbi Thomas**.


The following members obtained their CGFM in the period of September 2022 to December 2022!

**Mr. Anthony Quispe, CGFM**
**Mr. Vladyslav D. Kruk, CGFM**
**Ms. Adrienne L. Ferguson, CGFM**

Check out our CGFM chapter **webpage** or contact **Debbi Thomas**

## Already Have Your CGFM?

***CGFM Digital Badge*** – Did you know that AGA has partnered with Credly (formerly known as Acclaim) to provide active CGFMs with a digital badge of their CGFM certification. For more information, please visit **AGA National's Digital Badge** website.

***CGFM Certificate*** – Would you like an updated CGFM Certificate with the new logo? These are now available through AGA National.

CGFM Corner

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# Inside the Black Box

by Simcha Kuritzky, CGFM CPA

## *New USSGL Accounts 480110 and 490110 for Reinstated Grant Orders*

### Background

An agency is generally considered to have spent their authority when they place a legally binding order, represented as a credit balance in 480100 Undelivered Orders - Obligations, Unpaid, though the end state for the spending is normally 490200 Delivered Orders - Obligations, Paid. Most transactions go from 480100 to 490200 through either 480200 Undelivered Orders - Obligations, Prepaid/Advanced (if funds are advanced prior to delivery of goods or services), or 490100 Delivered Orders - Obligations, Unpaid (when a payment is either accrued or scheduled). However, oftentimes the transition is not smooth, and the obligation can move back and forth through several states. The U.S. Standard General Ledger (USSGL) Board recently added a new obligation account to handle a special case of spending moving from paid back to unpaid, before finally being paid again.  s a caveat, the logic shown here only applies to grant payments (OMB Object Class 41.0) and is slated to begin in FY2024. This column includes a proposed account 490110 that is likely to be, but hadn't been, approved as of the writing of this column.

### Simple Cases

Before looking at the situation the USSGL Board addressed, let us look at some situations which did not cause problems. All of these concern cases where an obligation is incurred in one year and the final disposition is in a subsequent year, in an unexpired fund (so either a no-year or a multi-year fund). The simplest case is the obligation is unpaid and outstanding at year end. The balance sits in 480100, which stays open during annual close, and then it is liquidated in the subsequent year. Similarly, if the order is prepaid, the balance sits in 480200, or accrued, the balance sits in 490100, both of which stay open during annual close, and then it is liquidated in the subsequent year.

### Advances Refunded

Many agencies treat grants as prepayments, so grant funds will sit at year end in 480200 Undelivered Orders - Obligations, Prepaid/Advanced. If the Agency did not anticipate the grantee would return some of the grant (that will be disbursed back to the grantee later), then when a refund is collected, they would post:

**C130** Collect a refund of an advance or prepayment that results in a downward adjustment to a prior-year obligation.

| | | | |
|---|---|---|---|
| Debit | 487200 | Downward Adjustments of Prior-Year Prepaid/Advanced Undelivered Orders - Obligations, Refunds Collected | |
| | 101000 | Fund Balance with Treasury | |
| | Credit | 445000 | Unapportioned - Unexpired Authority |
| | | 141000 | Advances and Prepayments |

This transaction will be reported as an increase to Unobligated balance from prior year budget authority (line 1071) and Unapportioned, unexpired accounts (line 2405) on the Statement of Budgetary Resources

## Inside the Black Box Cont'd.

(SBR), as well as a decrease to Outlays (line 4190) and Disbursements (line 4220). On the SF-133 Report on Budget Execution, it shows up as an increase to Recoveries of prior-year paid obligations (line 1033) and to Unapportioned, unexpired accounts - other (line 2403). One might think that OMB apportionment would be required before the funds are re-used, but the new SGL transaction shows a re-obligation using the unapportioned account as follows:

**D105** Reinstate a prior-year undelivered order without a cash advance where a collection of a refund or prepayment had resulted in a downward adjustment of a prior-year paid obligation.

| | | |
|---|---|---|
| Debit | 45000 | Unapportioned - Unexpired Authority |
| | Credit | 480110 Reinstated Undelivered Orders - Obligations, Unpaid |

This uses the new account 480110 which will be added to the USSGL in FY2024. In addition to reducing unapportioned authority (line 2405 of the SBR and 2403 of the SF-133), it will reduce the SBR's Unobligated balance from prior year budget authority (line 1071) and the SF-133's Withdrawal for existing unpaid obligation (new line 1047). It will also be reported on the SF-133 as an Adjustment for existing unpaid obligations (new line 3012) and increase Unpaid obligations, end of year (line 3050).

Presumably the guidance will be updated to cover the case where an agency anticipates recoveries using:

**A140** Anticipated collections including refunds from prior-year amounts that were obligated and outlaid in unexpired Treasury Account Symbol.

| | | |
|---|---|---|
| Debit | 431000 | Anticipated Recoveries of Prior-Year Obligations |
| | Credit | 449000 Anticipated Resources - Unapportioned Authority |

Entry C130 already has the option to credit 431000, which would be accompanied by Entry A123 to move the funds from 449000 to 461000 Allotments - Realized Resources, so D105 would need the option to debit 461000.

### Expenditures Refunded

The description for entry D105 above mentions the possibility of a refund. Many agencies expend the disbursement of funds to a grantee, even though the grantee has not used the grant funding for its purpose yet. OMB has indicated their intention of adding a new account 490110 for this purpose. Presumably the process will look something like the following.

**C132** Collect a refund of an advance or prepayment that results in a downward adjustment to a prior-year obligation.

| | | |
|---|---|---|
| Debit | 497200 | Downward Adjustments of Prior-Year Paid Undelivered Orders - Obligations, Refunds Collected |
| | 101000 | Fund Balance with Treasury |
| | Credit | 431000 Anticipated Recoveries of Prior-Year Obligations [if anticipated] |
| | | 445000 Unapportioned - Unexpired Authority [if unanticipated] |
| | | 610000 Operating Expenses/Program Costs |

This transaction will be reported the same as the advance refund on the SBR, whether or not it was anticipated. The same goes for the SF-133, except that a credit to 431000 will decrease Anticipated recoveries of prior year unpaid and paid obligations (line 1061) instead of increasing Unapportioned, unexpired accounts - other (line 2403). The reinstatement of the accrual prior to disbursement may look as follows:

## Inside the Black Box Cont'd.

**D10X** Reinstate a prior-year delivered order where a collection of a refund had resulted in a downward adjustment of a prior-year obligation.

| | | | |
|---|---|---|---|
| Debit | 461000 | Allotments - Realized Resources | |
| | 610000 | Operating Expenses/Program Costs | |
| | Credit | 219000 | Other Liabilities with Related Budgetary Obligations |
| | | 490110 | Reinstated Delivered Orders - Obligations, Unpaid |

The reporting on the SBR and SF-133 would likely be the same as for advances. However, since I am allowing for OMB apportionments, the entry to 461000 will reduce apportioned authority (line 2204 of the SBR and 2201 of the SF-133).

### Closing Entries

The initial guidance does not show these accounts closing. However, since any liquidation will occur in the parent SGL account (480100 or 490100), these new SGL accounts will have to close into them, just like 497100 Downward Adjustments of Prior-Year Unpaid Delivered Orders - Obligations, Recoveries closes into 490100 in F325 and 487100 Downward Adjustments of Prior-Year Unpaid Undelivered Orders - Obligations, Recoveries closes into 480100 in F332.

### Conclusion

Three years ago, I wrote about using 219000 for grants and subsidies (both using OMB Class 41.0). It appears this is not the only SGL account that will be exclusively used for these special cases. It would be nice, though, if the description of these accounts (219000 and 480110, and probably 490110) included wording to indicate these are only to be used in these cases. Right now, the only indication in the official guidance is a line at the end of the description of Entry B402.

*Comments and critiques, as well as specific questions or suggestions for future topics, are always welcome. Please send them to* ***Simcha.Kuritzky@CGI.com****, and not to the AGA.*

# Community Service

The Chapter offers members the opportunity to "pay it forward" by sharing their gifts and talents with the DC Community through volunteer opportunities in areas such as:

- **Social Safety** - Hunger, homelessness, and unemployment
- **Education** - Literacy and college prep
- **Health** - Awareness for mental, emotional, and physical illnesses
- **Veterans** - Support for service personnel and their families
- **Equal Opportunity** - Diversity and inclusion
- **Capital Causes -** Other local causes

## Autism Speaks | Health

The Community Service Committee will be collecting donations for Autism Speak. As with our previous sponsorships, we want to make the biggest impact possible and ask the AGA National to help match our donations.

Serving all communities in Maryland, Virginia, and Washington, DC. Autism Speaks is dedicated to promoting solutions, across the spectrum and throughout the lifespan, for the needs of individuals with autism and their families. Autism Speaks is able to do this through advocacy and support, increasing understanding and acceptance of people with autism, and advancing research into causes and better interventions for autism spectrum disorder and related conditions.

Your donation will help Autism Speak National Capital continue to promote solutions, across the spectrum and throughout the lifespan, for the needs of individuals with autism and their families.

You can participate in giving by going directly to the organization using this link (**Autism Speaks - National Capital**). Once you give, please provide a screenshot evidencing your proof of donation to Maurice Preston (***mpreston@guidehousefederal.com***) and LaVerne Mason (***lmason@bdo.com***) so we are able track and take advantage of AGA's matching!

We hope you will join us in participating in all or some future community service opportunities. We invite you to share photos on the impacts you are making, and thoughts on how we can support your cause by connecting with the **Community Service Committee**.

As always, thank you, for everything you do to make an impact in our community.

Be well and stay safe!

*For questions about Thrive DC, please contact the Community Service Committee: Maurice Preston (**mpreston@guidehousefederal.com**) or LaVerne Mason (**lmason@bdo.com**).*

## Thought Leadership

# Federal Agencies Struggle to Find Balance Between Work at Home, Office

*By: Christy Beck and Jason Wagoner, CliftonLarsonAllen LLP (CLA)*

Since 2020, many federal employees have primarily worked remotely because of the COVID-19 pandemic. More recently, many agencies are looking to balance in-person work with remote work, while achieving mission success.

Over the past few years, employees have become acclimated to working at home, saving travel costs, travel time, and work attire. A 2021 Society for Human Resource Management (SHRM) survey of 1,000 U.S. workers found 52% would choose to permanently work from home on a full-time basis if given the option.

The U.S. Patent and Trademark Office (USPTO) 2021 Annual Telework Report found telework improved retention rates, which helped:

- Maintain examination quality and production levels
- Reduce the cost to train and replace trademark examiners
- Allow employees to work extra hours without as much impact on their personal lives
- Allow employees to be productive in inclement weather
- Save significant money on office space

An agency's telework policy can impact retention and recruiting. Employees are looking for agencies with policies that fit their work-life balance and desires. Employees expect the work-life flexibilities telework allows and agency workers are leaving jobs that are enforcing strict office re-entry policies, according to Kiran A. Ahuja, U.S. Office of Personnel Management (OPM) director. The conventional standard of office work is not likely to come back completely, and some hybrid version of remote and in-office is the most probable scenario going forward.

Some agencies are implementing policies to bring people back to the office, while others are fully embracing remote work or hybrid options:

- The U.S. Department of Interior's telework program requires teleworkers to physically report to their regular work site at least two workdays per bi-weekly pay period.
- The Securities and Exchange Commission's telework program includes fully remote options.
- The USPTO has proposed a "hybrid first" initiative, which allows 95% of employees to telework up to five days a week.

The Federal News Network conducted several telework surveys. Some key results from a November 2021 survey include:

- 60% of federal employees currently work in a hybrid environment
- 33% work entirely remote
- 7% work entirely in person
- Those who work in a hybrid environment are typically teleworking four days a week and going into the office one day per week
- Many federal employees want more remote options

Lawmakers are also discussing telework. On February 1, 2023, the House of Representatives passed the "Stopping Home Office Work's Unproductive Problems Act of 2023" or the SHOW UP Act of 2023. The bill requires federal agencies to reinstate their 2019 pre-pandemic telework policies, requiring any expansion of telework to be certified by OPM as "having a positive effect on the agency's mission and operational costs."

According to the House Oversight and Accountability Committee: "The expansion of

## Thought Leadership cont'd.

telework during the pandemic led to massive backlogs and delays at agencies such as the IRS, Department of Veterans Affairs, and the State Department." Although not yet passed by the Senate, it will be interesting to see what, if any, legislation might be passed regarding federal telework.

OPM recently issued guidance for agencies to track data in their payroll systems to allow agencies improved understanding about their workforce and telework characteristics. This will also have the potential, according to OPM, to "improve government-wide reporting of federal employee participation in remote work, telework, and mobile work, as well as allow OPM to evaluate trends and determine how such work arrangements might advance the accomplishment of mission critical requirements and organizational effectiveness."

It is also interesting that in surveys of young professionals, many want designated in-person days built into hybrid schedules, to learn and engage with their leaders and teams. Having the data described by OPM could help agencies make

better, informed decisions regarding their telework policies and what works best for mission success.

*The information contained herein is general in nature and is not intended, and should not be construed, as legal, accounting, investment, or tax advice or opinion provided by CliftonLarsonAllen LLP (CLA) to the reader. For more information, visit* ***CLAconnect.com****.*

***CliftonLarsonAllen LLP (CLA) is a Silver Sponsor of our AGA DC Chapter.***

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# PDT Awards Nomination & Academic Scholarship Application

## 2023 PROFESSIONAL DEVELOPMENT TRAINING AWARDS

AGA seeks nominations for 2023 Professional Development Training (PDT) Awards of Distinction, annually recognizing individuals for their extraordinary contributions to AGA and the government financial management community by advancing government accountability. We invite individuals, government agencies, and AGA members and chapters to nominate outstanding individuals.

**Nominations of many PDT awards are open to both AGA members and non-members.** Learn more and **click here to the 2023 PDT awards website**. Awards will be presented at AGA's PDT on July 23-26, 2023 at Orlando, Florida.

**Click here to submit your PDT awards nomination via Submittable by April 30, 2023 before 11:59 pm!**

## 2023 National Academic Scholarship

AGA is also accepting applications for the **2023 National Academic Scholarships**. **Each scholarship is worth $3,000!** AGA National Academic Scholarships program aims to increase awareness of the potential for a vibrant and rewarding career supporting the government financial management community.

Scholarships are open to **AGA student members only** who are pursuing undergraduate or graduate studies in disciplines such as accounting, economics, finance, information systems/technology or public administration. Not an AGA student member yet? **Click here to apply for FREE student membership!**

AGA National Office will award scholarships to outstanding student members from the following categories:

- Rising college freshman (full-time): Two scholarships
- Undergraduate students (full-time): Four scholarships
- Graduate students (full-time or part-time): Three scholarships
- Community service: Two scholarships among any of the three categories noted above

**Click here to submit your academic scholarship application via Submittable by June 11, 2023 before 11:59 pm!**

# AGA DC Newsletter Survey

You ask, we listen!

In our previous newsletter, we announced the launching of a new newsletter survey that allows our newsletter team to continue to hear from you and receive feedback. Our new newsletter survey continues to be open all year around.

We invite you to provide your quick feedback on our newsletter at any time, with only two questions:

- How satisfied are you with the most recent issue of the AGA DC Chapter newsletter? (On a scale of 1 to 5)
- Please provide any comments or feedback on this issue of the AGA DC Chapter newsletter. (Open ended question)

Please visit the survey site at: **AGA DC Chapter Newsletter Survey** to rate and provide any feedback on our newsletter!

Thank you again for your support!

**AGA DC Newsletter Team**

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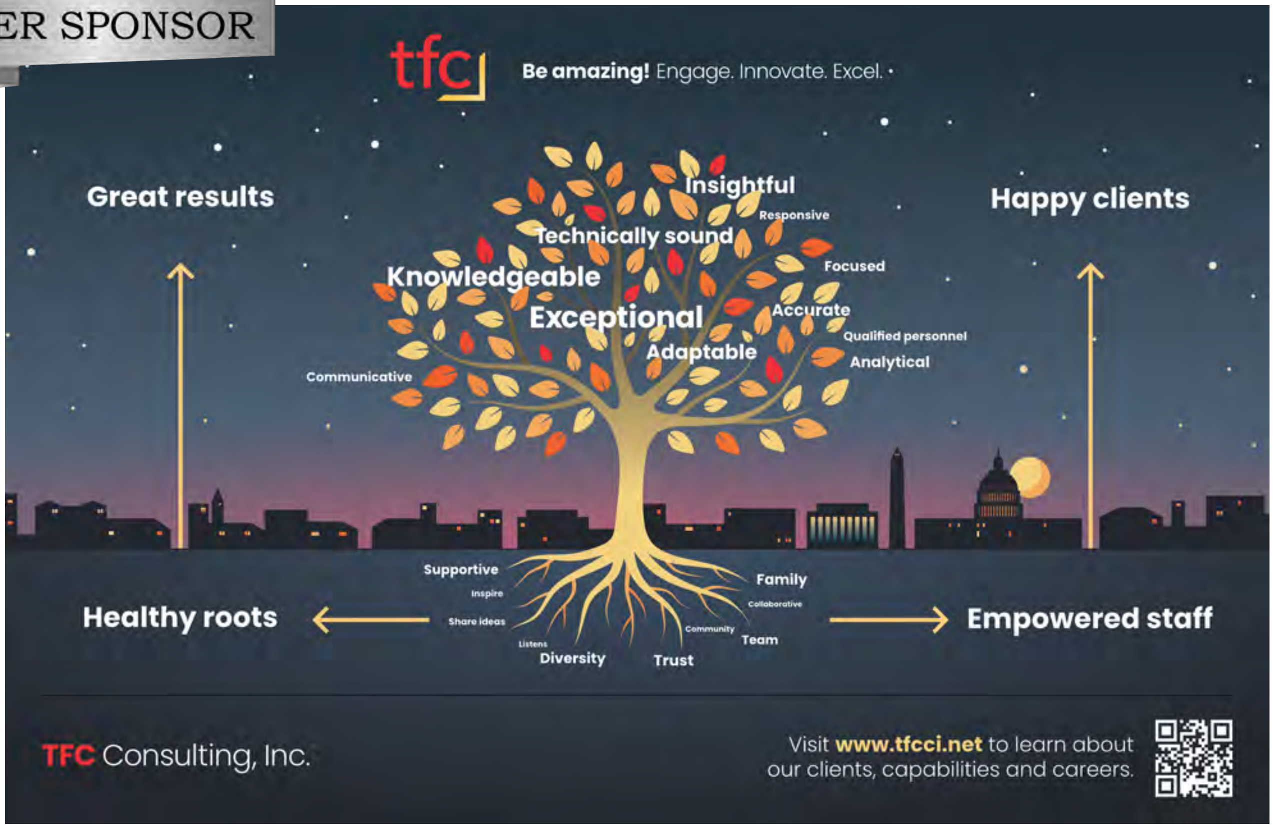


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# AGA DC Chapter Officers

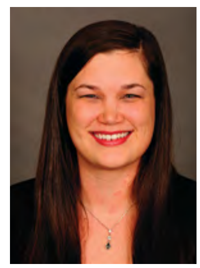
**Caitlin Holmes McGurn**
President

**Lal Harter**
President-Elect

**Al Pavot**
Immediate Past President

**Chidilim Okonkwo**
Treasurer

**Shawn Syed**
Treasurer-Elect



**Heather Moreland**
Secretary

**See a complete list of Chapter leadership at: AGA DC Chapter Leadership.**

**To contact any of the AGA DC Chapter Officers please send an email to: agadc@agadc.org**

# AGA DC Chapter Volunteer Roster

**Paterne Koukpesso**
ACE Reporting

**Melanie Geeseman**
Communications Director

**John Lynskey**
Senior Advisor

**Paul Lionikis**
Senior Advisor

**Paul Marshall**
NCC Representative

**Cherry Ung**
Annual Gala

**Orinda Basha**
Annual Gala

**Julia Duquette**
Annual Gala

**Annalena Weiner**
Annual Training Program

**Brittany Hopwood**
Annual Training Program

**Tonya Baker**
Annual Training Program

**John Hooley**
Annual Training Live Ops

**Orinda Basha**
Annual Training Live Ops

**Christy Beck**
Annual Training Live Ops

**Sophie Cutler**
Annual Training Virtual

**Joseph Peter**
Awards

**Catherine Gao**
Awards

**Richard Webster**
Awards

**Robert Garcia**
Citizen Centric Reporting

**Sara Specht**
CGFM

**Debbi Thomas**
CGFM

**Maurice Preston**
Community Service

**LaVerne Mason**
Community Service

**Paul Marshall**
Corporate Sponsors

**Hollyann Morton**
Corporate Sponsors

**Shannon Gatz**
Corporate Sponsors

**Lora Pickard**
Corporate Sponsors

**Cherry Ung**
Corporate Sponsors

**Christy Beck**
Bylaws/CPE Coordinator

**Eileen Parlow**
Historian

**Joseph Peter**
Historian

**Shawn Syed**
Internal Audit

**Emily Law**
Membership

**Giovanni Leon**
Membership

**Crystal Wolf**
Member Networking Events

**David Baskin**
Member Networking Events

**Anthony Richards**
Member Networking Events

**Manoj Mirchandani**
Member Networking Events

**Paterne Koukpesso**
Mentorship

**Stacey Ferris**
Mentorship

**Maura Russell**
Mentorship

**Daniel Lange**
Monthly Luncheon Live Ops

# AGA DC Chapter Roster

**Emma Pollock**
Monthly Luncheon Live Ops

**Victoria Abril**
Monthly Luncheon Live Ops

**Craig Freeman**
Monthly Luncheon Live Ops

**Bo Shevchik**
Monthly Luncheon Program

**Frank Petersen**
Monthly Luncheon Program

**Peter Moore**
Monthly Luncheon Program

**Paul Lionikis**
Monthly Luncheon Program

**Alexis Alfaro-Trejo**
Monthly Luncheon Virtual

**Amanda Chait**
Monthly Luncheon Virtual

**Matthew Gorman**
Monthly Luncheon Virtual

**Areeba Rizvi**
Monthly Luncheon Virtual

**Wendy Schiffman**
Monthly Luncheon Virtual

**Thomas Chin**
Newsletter

**Hao Nguyen**
Newsletter

**Monique Llanos**
Newsletter

**John Yakaitis**
Newsletter

**Simcha Kuritzky**
Publication Columnist

**Gary Wong**
Strategy

**Myriam Galvan-Zambrana**
Strategy

**Wendy Allen**
Strategy

**Tharana Seddiq**
Social Media

**Kevin Katindig**
Social Media

**Radhika Patel**
Social Media

**Shirley Zhang**
Student Accounting Intern

**Mona Amatie**
Webinars

**Danielle Burrell**
Webinars

**Leigha Kiger**
Webmaster

**E. Marie Butler**
Webmaster

**Niyair Morris**
Webmaster

**See a complete list of Chapter leadership at: AGA DC Chapter Leadership.**

**To contact any of the AGA DC Chapter Officers please send an email to: agadc@agadc.org**

# Contact Us

Whether you're looking for more information, or you'd like to give us your suggestions or comments, you'll find easy ways to contact us right here.

The most direct way to get your question answered is to send an email to: agadc@agadc.org. See a complete list of Chapter leadership at: AGA DC Chapter Leadership.

**AGA DC Chapter**
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