

The Washington Connection



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Up Next!

June 17: VIP Luncheon with guest speaker John Fabre, Deputy CFO, U.S. Immigration and Customs Enforcement. *(Diamond Sponsors Only)*

June 26, 6pm-9pm: The AGA DC Chapter - End of the Year Happy Hour! Hosted by our Corporate Sponsors Committee. [Register here!](#) *Space is limited!*

Jul 28-29, 2025: AGA National Professional Development Training (PDT): (14 CPEs; Virtual Event) [View agenda here.](#) [Register and get more information here.](#)

THANK YOU!

A big thank you to those who participated in the following events:

- May 29, VIP Luncheon
- April 16, VIP Luncheon
- April 19, Potomac River Earth Day Clean Up
- April 22, DC Monthly Luncheon
- April 28-29, Annual AGA DC Chapter Hybrid Training Event
- May 6, Visa Government Forum
- May 14, Nationals Members-only Webinar
- May 21, DC Monthly Luncheon
- June 7, Annual Awards Gala
- June 11, CGFM Study Group Exam 2
- June 14, Annual Wine Tour

President's Message

Dear AGA Washington DC Chapter Members,

This is my last message as DC Chapter President and I will say I really appreciated the opportunity to lead the Chapter this year. It's a bit of a cliché, but it's true, the year really flew by. We had wonderful speakers at our monthly lunches, fun member events, a successful Spring Training and we are wrapping it up with a huge lineup of awardees at our Annual Gala.

As I now reflect on the past year, I want to share some observations that prove to me why the Washington DC Chapter is such a great chapter:

- **No matter how much things change, the DC Chapter is steady as a rock:** Things in government changed very quickly and dramatically this year, but our Chapter just pivoted, bent and weaved like Neo in the Matrix! We didn't cancel a single lunch or member event. When speakers couldn't make it, we found new ones with little to no notice. We even covered new ground including supporting outreach to universities to engage students, kicking off a mentoring program and reestablishing our Citizen Centric Reporting (CCR) program.
- **We have a strong base of volunteers that support us year to year, but we felt the energy from a new crop of volunteers:** This year we had a large number of first-time volunteers that really made a big difference on our committees, including Communications, CGFM, Webmaster, Historian, Mentorship and CCR. These new volunteers came out swinging and showed they had as much enthusiasm as some of us "old timers"!
- **The President is just a conductor, the Chapter volunteers make the music happen:** Although at times I certainly found it challenging to play the role of Chapter President, I will have to say the



biggest surprise was just how much harder it could have been were it not for our volunteers. We have the extreme luxury of having 80+ volunteers supporting the DC Chapter. This means that things like monthly lunches, member events, sponsorship events, chapter expenses and administration – are all well taken care of regardless of who is President! I just shared my goals and vision for the year and the volunteers were off and running. If only my day job was this easy!

- **It's a club, but anyone can be a member:** We certainly are a tight knit group of colleagues in the DC Chapter (funny to say for an organization with 2,000+ members), but it does feel like a community - and this community always welcomes new members. I saw us embrace new members and volunteers this year, quickly bringing them into the fold and making them feel like they were active participants in our organization. We all share a common desire, accountability of America's tax dollars and the continued improvement of governmental financial operations. Having that shared ethos makes it easy for us to come together, enjoy each other's company and make the DC Chapter a great place to spend some time! It was a great year, thank you for letting me be the conductor for a little while

Sincerely,

Paul Marshall, 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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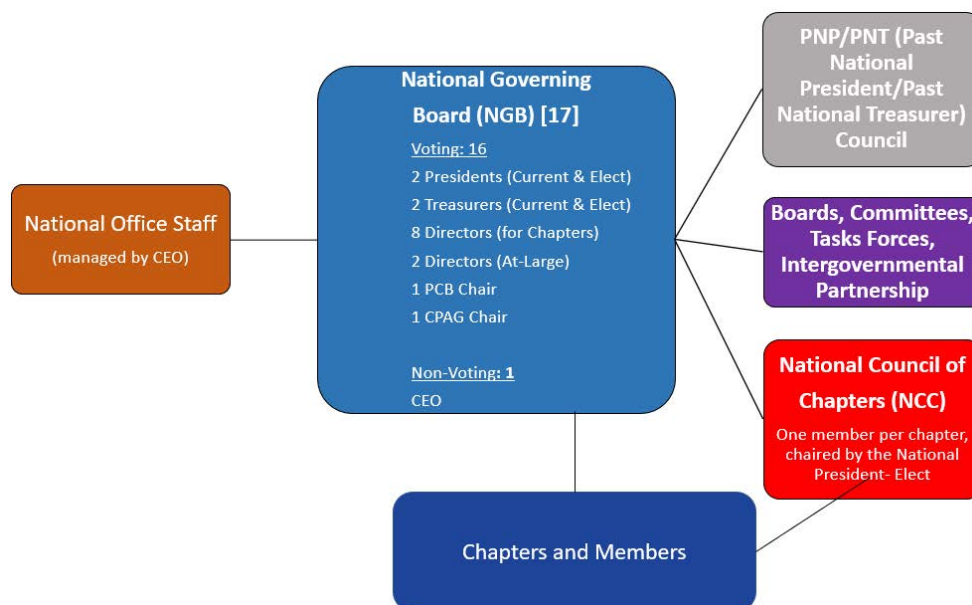




In April 2025, DC Chapter leaders Paul Marshall, President and Crystal Wolf, DC Chapter President Elect, attended LEAD! 2025 held in Baltimore, Maryland. LEAD! is AGA's annual leadership training event for chapters that covers AGA's national direction, initiatives, expectations of leaders, areas for improvement and insight into how to access AGA resources. Additionally, it's an opportunity to meet the National Governing Board Directors - Paul Lionikis is the new regional Director for our region 8 – and representatives from chapters across the country.

Some highlights from LEAD! are included below:

- **Governance Structure:** AGA is run by the National Governing Board and supported by several councils as shown below:



- **Membership:** We are encouraged to find new members and share not only the benefits of membership, but activities members can participate in such as:
 - Mentor/Mentee relationships
 - Get published in the AGA Journal
 - Speak at an in-person event or webinar
 - Volunteer as a chapter leader
 - Support community service activities
- **ACE:** The group discussed ways to help chapters meet the goals of the Achievements in Chapter Excellence (ACE) program. Chapters should assign an individual to keep track of chapter achievements and update ACE periodically throughout the year. At least quarterly, this progress should be shared with the CEC to make sure the chapter is meeting its goals. Chapters were also reminded that they should have an annual evaluation or audit of their financials to ensure accurate accounting practices and appropriate internal controls over chapter funds.
- **National Community Service Fund:** AGA National will match chapter-raised donations up to \$500 per fiscal year.

LEAD! 2025 Cont'd.

- **Resources:** Chapter leaders should sign in and refer to Chapter Resources on [AGA's website](#) find great templates and guidance for the following:
 - ACE
 - Administrative & Operations (including re-branding)
 - CGFM
 - Communications & Marketing (including new logos)
 - Community Service
 - Education & Meetings
 - Membership
 - Virtual Meetings & Events
 - Young Professionals, Colleges & Universities



From left to right: Ethan Draves (Director for Chapters Area 1) Paul Lionikis, Paul Marshall, and Crystal Wolf



From left to right: Paul Marshall, Mark-Allen Mitchell (AGA National President-Elect), and Crystal Wolf



LEAD! attendees with Ann Ebberts



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Together, We Navigate Challenges — AGA is Here for You

For 75 years, AGA has deeply appreciated the dedication and expertise of government financial management professionals. Your unwavering commitment to accountability, transparency, and responsible stewardship of public funds is invaluable — not just to AGA, but to the communities you serve. As the federal landscape continues to shift, we want you to know that we value you and we are here to support you through these challenging times.

To support our members during this time, [AGA's Job Board](#) now offers free job postings for organizations, making it easier to connect job seekers with new opportunities. We encourage state and local employers to post their openings and help skilled professionals find their next role.

To support our community in this rapidly changing environment, we've extended the annual renewal

deadline for AGA membership and CGFM certification to **April 30**. If you are able, we encourage you to renew by the original deadline of March 31.

Finally, do not forget to update your personal and contact information in the "My AGA Profile" at <https://my.agacgfm.org/>. Sign in your AGA account, then edit your "My AGA Profile" as needed to get it up to date.

Your work has always been critical, and we remain committed to providing you with the resources and support you need.

Thank you for all that you do.



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Meet & Greet:

Chapter President-Elect Crystal Wolf

Editor's Note: *Crystal Wolf is currently serving as the DC Chapter President-Elect with her presidency beginning on July 1, 2025. The newsletter team recently checked in with Crystal for a few questions as our Chapter is preparing for the new program year.*

Editor: Many DC Chapter members recognize you from past member service/network events and educational sessions at Professional Development Training (PDT). Can you share with us more on your involvement with AGA activities?

Crystal: I served on the DC Chapter Member Services Committee for 16 years, everyone's favorite committee because we organized so many fun events like the annual wine tour and Caps game. I also have been attending national events since 2009 and heading to PDT is always something I book my summer plans around. I'm going to miss the opportunity to go in person this year [Editor's note: 2025 PDT will be an all virtual event]. Something most members may not know is that I also serve on the National Higher Education Committee. Connecting with students/future leaders is a passion of mine and our committee is focused on enhancing the connection between AGA and colleges and universities across the country.

Editor: What is your favorite AGA story?



Crystal: There are too many, but in the spirit of AGA's 75th anniversary I will tell you about two of my favorite events I used to organize for the DC Chapter over 10 years ago. The first was an authentic Chinese dinner to celebrate the Chinese New Year. Karl Boettcher previously organized this event and I took it over. It was always such a unique experience and everyone really enjoyed it. We also used to have Opera Night at Cafe Mozart where we enjoyed German cuisine and listened to a beautiful opera concert.

Editor: As you're preparing for the chapter presidency starting in July, what's your vision and goals you would like to achieve during the next program year?

Crystal Wolf has built a distinguished career as a consultant specializing in the public sector. Known for her expertise in implementing new government programs, resolving critical audit issues, and ensuring sound financial management to minimize risks, Crystal's dedication promotes the integrity of large federal programs. In 2024, Crystal founded **Akela, LLC** and serves as the CEO.

Crystal holds a Master of Science and a Bachelor of Business Administration in Accountancy from the University of Notre Dame, graduating in 2007 and 2006, respectively. She is also a Certified Public Accountant, Certified Government Financial Manager, Certified Internal Controls Auditor, and Certified Grants Management Specialist.

In addition to her professional accomplishments, Crystal is actively involved in industry organizations. She is a prominent member of AGA and has served the DC Chapter Board since 2008, where she will soon be Chapter President. She is also a member of the American Institute of Certified Public Accountants, National Grants Management Association, the Association of Certified Fraud Examiners, and American Mensa, underscoring her dedication to continuous professional development.

Meet & Greet Cont'd.

Crystal: I'm still planning the year with our amazing Board and Committees of Volunteers so more to come once we kick off the year. Here are a few I know of for sure though:

Focus on our members. Now more than ever, we need our community, and I want to make sure that we focus on hearing what our members need and adapting our plans to meet those needs. To that end, we need to hear from you. Please complete the member service expected to come out very soon, so we can bring value to our membership!

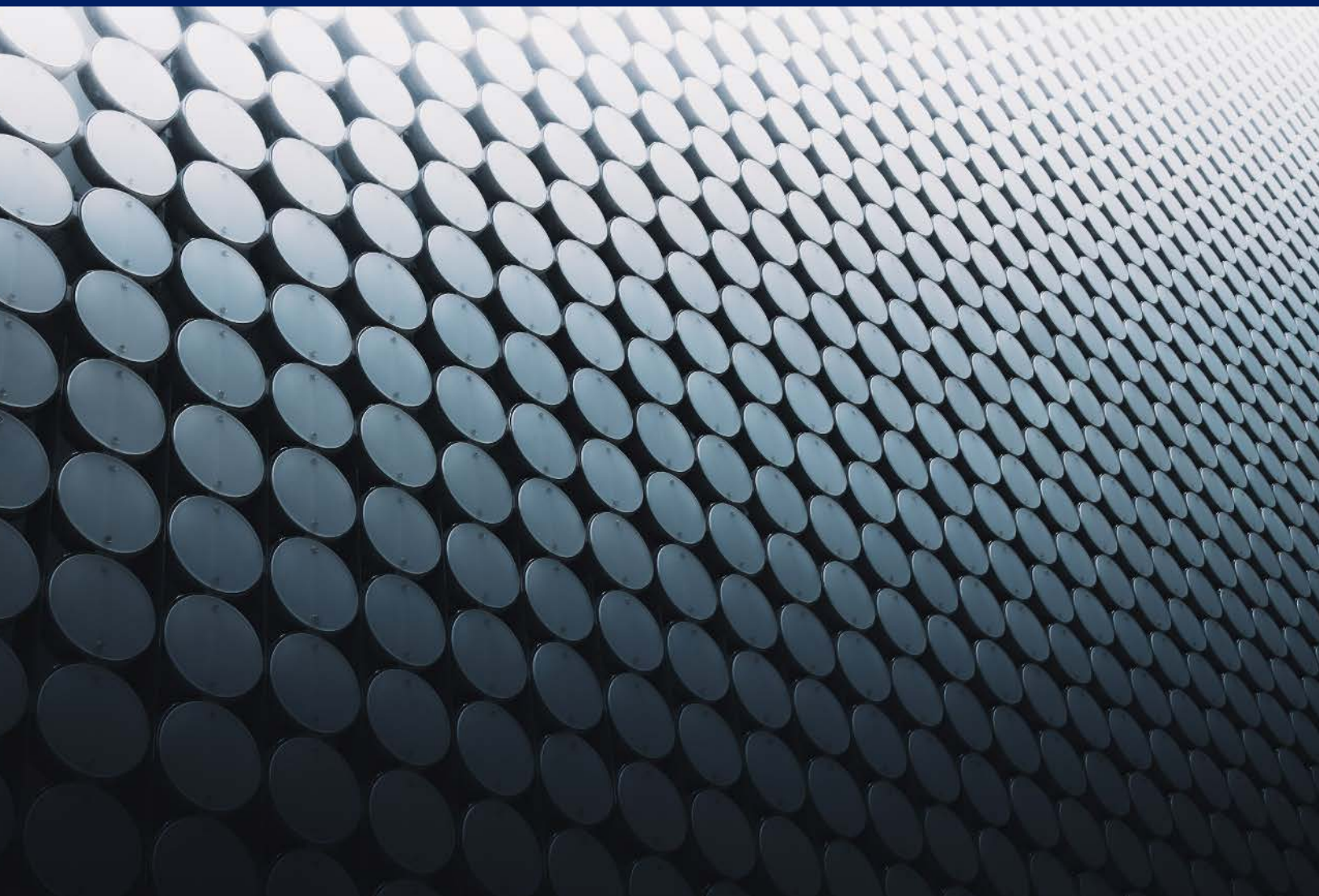
Grow our Young Professionals Membership. You already know this is a passion of mine, but we need to get aggressive with it. Did you know students get free AGA membership? So, we need to be out there

recruiting our future leaders and showing them how amazing this community is. Stay tuned on how all members can help connect with students in our community.

Solidify Financial Position. We are focused on the members and must protect our funds. Don't worry, our leadership has always done that; however, we can bring in more controls to include an independent review of our financials, and a tax preparer to further our financial integrity.

Editor: Five words to describe our DC Chapter.

Crystal: I will link them into one big description: a Wise, Fun, Tenacious Leadership Community.



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AGA DC 65th Annual Awards Gala

Our DC Chapter celebrated another successful program year as this sold-out event with more than 180 volunteers, members, sponsors, and guests gathered at The Hamilton Live in Washington, DC on the night of June 7, 2025!

We held the awards ceremony to recognize our outstanding members and volunteers who contributed much to the success of our financial management profession and chapter, conducted the chapter presidential gavel exchange between outgoing Chapter President **Paul Marshall** and new Chapter President **Crystal Wolf**, and of course enjoyed dancing with the band [Gotcha Covered](#), featuring our very own past Chapter President **Scott Bell** with musical guest **Paul Marshall**!

During this year's Annual Awards Gala, we recognized and celebrated our DC chapter members who made long-standing and significant contributions to our financial management profession and/or contributed to the success of our DC Chapter in a sustained period of time. **Congratulations to all 2025 award winners!**

For our award details and winners' bios, please visit our [award webpage here](#).

AGA Washington, DC, Northern Virginia, and Montgomery/Prince George's County Chapters Award for Extraordinary Service to the Nation in Advancing Government Performance and Accountability for Over Five Decades:

The Honorable Gene L. Dodaro. Comptroller General, U.S. Government Accountability Office



The eighth Comptroller General of the United States, the Honorable Gene Dodaro has been the standard of excellence in the government accountability community for over five decades and a role model for ethics and integrity. Mr. Dodaro inspires others and leads with dignity and respect for each and every individual. It is no accident that GAO stands at the top of the annual federal survey of employee engagement and satisfaction and that he has served at the top of government for 40 years. The three AGA Chapters are honored to recognize the Honorable Gene Dodaro, CGFM, for his service to the nation in advancing government performance and accountability for over five decades.

For the Honorable Gene Dodaro's full bio and award details, please visit our [award webpage here](#).

AGA Awards Gala Cont'd.

William J. Anderson Lifetime Achievement Award:

Jeffrey C. Steinhoff, CGFM, CPA, CFE, CGMA, Retired Assistant Comptroller General of the United States and Managing Director, Financial Management and Assurance, U.S. Government Accountability Office



Mr. Jeff Steinhoff has had a distinguished career in the government accountability profession spanning 57 years, with 40 years in federal service. Mr. Steinhoff's career is marked by his results-oriented, collaborative management style, and his contributions have had a lasting impact on government accountability and financial management. He played a pivotal role in developing and enacting major federal financial management legislation, most notably as the principal architect of the Chief Financial Officers Act of 1990. Senator John Glenn praised his persistence and diligence as critical to passing this landmark legislation. Mr. Steinhoff served in top leadership positions within GAO's Senior Executive Service, including as Assistant Comptroller General for Accounting and Information Management, leading GAO's largest audit unit, with responsibility for Internal Control and Auditing Standards and support to FASAB. As AGA's 43rd National President of the AGA, Mr. Steinhoff founded the Certified Government Financial Manager Program and led the development of the uniform examination. He has served on numerous AGA committees and task forces, contributing significantly to the organization's growth. He is presently a member and former chair of AGA's Professional Ethics Board.

For Mr. Steinhoff's full bio and award details, please visit our [award webpage here](#).

DC Chapter Founder's Award for Advancing Government Accountability:

Robert Dacey, JD, CGFM, CPA, Chief Accountant, U.S. Government Accountability Office

The AGA DC Chapter presents Mr. Dacey with the Chapter Founder's Award for Advancing Government Accountability in recognition of his significant leadership for over 30 years, through demonstrated expertise in government financial management, proven success in directing large scale audits and other projects, and building collaborative partnerships.



AGA Awards Gala Cont'd.

DC Chapter Founder's Award for Enhancing the Prestige of the Government Accountability Profession:

David A. Lebryk, MPA, Retired Fiscal Assistant Secretary, U.S. Department of the Treasury



The AGA DC Chapter recognizes Mr. David Lebryk's decades of transformative leadership and demonstrated ethics and integrity by presenting him with the DC Chapter Founder's Award for Enhancing the Prestige of the Government Accountability Profession.

James W. Saylor Chapter Service Award:

Bo Shevchik, CGFM, PMP, Program Director, AGA DC Chapter; Outreach and Marketing Strategy, Federal Reserve Bank of St. Louis

The AGA DC Chapter is honored to present Mr. Bo Shevchik with the James W. Saylor Chapter Service Award for his exceptional leadership and dedication as the Chair of the AGA DC Chapter's Monthly Luncheon Program Committee. He has successfully led efforts to identify and secure outstanding speakers for the Chapter's monthly luncheons, ensuring consistent, high-quality programming — even during challenging periods such as the COVID-19 pandemic and the recent transition to a new administration. Mr. Shevchik's contributions have been instrumental in maintaining the Chapter's reputation for excellence and reliability in professional development.



AGA Awards Gala Cont'd.

AGA DC Chapter President's Award for Exceptional Dedication:

Crystal Wolf, CPA, CGFM, CGMS, CICA,
President-Elect



AGA DC Chapter President's Award for Exceptional Program Leadership:

**Paul Lionikis, Senior Advisor & Assistant Director of
Programs**



AGA DC Chapter President's Award for Exceptional Stewardship:

Mona Amatie, CGFM, PMP, Chapter Treasurer



AGA DC Chapter President's Award for Exceptional Collaboration:

Wendy Morris, CGFM, CPA, PMP, Chapter Secretary



AGA Awards Gala Cont'd.

AGA DC Chapter President's Award for Exceptional Partnership Engagement:

Cherry Sancho Ung, Director of Corporate Sponsorship and Annual Awards Gala



AGA DC Chapter President's Award for Exceptional Technical Support and Communications:

Howie Simanoff, CPA, CGFM (pictured right), Assistant Director of Admin & Communications – Webmaster & **Jeff Ledford** (pictured left), **MBA, CGFM**, Director of Admin & Communications – Webmaster



AGA DC Chapter President's Award for Exceptional Event Coordination:

Alexis Alfaro Trejo, CGFM, CPA, Co-Director of the Monthly Luncheon – Virtual



Emerging Leader Award of Excellence:

Mr. Aaron Ruiz, CPA, Senior Auditor, U.S. Government Accountability Office



The AGA DC Chapter is honored to present the Emerging Leader Award of Excellence to Mr. Aaron Ruiz for fostering collaborative relationships across federal and state governments.

AGA Awards Gala Cont'd.

Excellence in Research Award:

Monica Valentine, CGFM, CPA, Executive Director,
Federal Accounting Standards Advisory Board



The AGA DC Chapter is honored to present Ms. Monica Valentine with the Excellence in Research Award for advancing research and the state of federal accounting standards.

International Achievement Award:

Dawn Simpson, CPA, Director, Financial
Management and Assurance, U.S. Government
Accountability Office



The AGA DC Chapter is honored to present the International Achievement Award to Ms. Dawn Simpson in recognition of her outstanding global leadership in International Organization of Supreme Audit Institutions (INTOSAI).

Achievement of the Year Award:

United States Marine Corps



The AGA DC Chapter is honored to present the Achievement of the Year Award to the Accounting Branch of the United States Marine Corps – who serve under the leadership of Lieutenant General James H. Adams III, Deputy Commandant for Marine Corps Programs and Resources – for DoD leadership in attaining two consecutive clean audit opinions.

Distinguished Leadership Award:

Tonya R. Johnson-Simmons, MBA, MAcc, Deputy
Chief Financial Officer and Director, Office of Financial
Management, U.S. Department of the Interior



The AGA DC Chapter is honored to present Ms. Tonya Johnson-Simmons with the Distinguished Leadership Award for transformative contributions to federal financial management and excellence in accountability reporting.

AGA Awards Gala Cont'd.

Government Transparency Award:

The Honorable Daniel I. Werfel, Former Commissioner of Internal Revenue, U.S. Internal Revenue Service



The AGA DC Chapter presents the Honorable Danny Werfel with the Government Transparency Award for his unprecedented citizen-focused leadership, contributions to government transparency, and transformative measures.

Educator Award:

Dr. Dorothy Potter, PHD, CDFM-A, DFMC3, CICA, CBM, Professor and Department Chair, National Defense University, College of Information and Cybersecurity



The AGA DC Chapter is honored to present the Educator Award to Dr. Dorothy Potter in recognition of her commitment to academic excellence.

DC Chapter also recognized our nominees who received AGA National awards at the 2025 National Leadership Training event back in February:

AGA National's Elmer Staats Federal Leadership Award:

Mike Wetklow, CGFM, CPA, Chief Risk Officer, U.S. Internal Revenue Service and Adjunct Professor, George Mason University



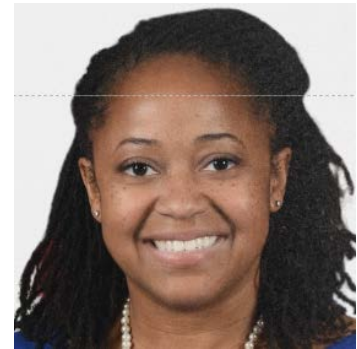
AGA National's Distinguished Local Government Leadership Award:

Michael J. Coveyou, Director of Finance, Montgomery County, Maryland

AGA Awards Gala Cont'd.

AGA National's Eleanor Clark Leadership Award:

Calandra Layne, CDFM, PMP, Director, Financial Improvement and Audit Remediation, U.S. Department of Defense



This year's Annual Awards Gala was made possible by our wonderful and hard working volunteers. Thank you to all our volunteers from the Annual Awards Gala Committee including **Cherry Sancho Ung** (Director), **Izzie Yi** (Assistant Director), the Awards Committee including **Orinda Basha** (Director), **Evelyn A. Brown** (Voting Member), **Virginia B. Robinson** (Voting Member), **Jeffrey Steinhoff** (Voting Member), **Pat Wensel** (Voting Member), and **Scott Bell** (Senior Advisor)!

Special thanks to the band **Gotcha Covered** featuring our very own past Chapter President **Scott Bell** and special musical guest **Paul Marshall**!

Thank you for coming to the Annual Awards Gala! We hope you had a great time!



Chapter presidential gavel exchange: Outgoing Chapter President Paul Marshall and New Chapter President Crystal Wolf



AGA National President Frank Petersen (left) and Award Recipient David Lebryk

AGA Awards Gala Cont'd.



AGA National President Frank Petersen (left) and Award Recipient Gene Dodaro



Cherry Ung (left - Director of Annual Awards Gala) and Orinda Basha (Director of Awards Committee)



Past Chapter President Scott Bell (left) and Outgoing Chapter President Paul Marshall performed on stage



The band Gotcha Covered performed at Awards Gala

AGA Awards Gala Cont'd.



Chapter President Paul Marshall performed on stage



Past Chapter President Scott Bell introduced Award Recipient David Lebryk



AGA Awards Gala Cont'd.



AGA Awards Gala Cont'd.



AGA DC's 75th Anniversary Celebration

HELP UNCOVER THE HISTORY OF AGA DC!

Calling all AGA DC Chapter Volunteers,
Sponsors, Members, and Non-Members:

We've been around a long time - 75 years to be exact!
- and AGA DC wants to collect memories from
everyone to celebrate the 75th Anniversary of our
organization this summer!

Do you have photos, videos, other multimedia, or
written stories to share?! We would love to hear from
you! Also, if you would like to help the Historian
Committee organize and curate the information, we
would love to have you on board!

**SUBMIT YOUR MATERIAL TO
AGA DC'S HISTORY
COMMITTEE AT:
bgrams@gmail.com**

WE'RE LOOKING FOR:

Photographs

Videos

Letters and Documents

Other Multimedia



Inside the Black Box

by Simcha Kuritzky, CGFM, CPA

Asset Differentiation

Enterprise Risk Management (ERM) hasn't just been a buzzword for the past decade. OMB Circular A-123 mandates agencies to identify and manage risks, and agencies have complied. One way to reduce risk is to differentiate one's assets. For example, an agency that procures significant quantities of computer equipment may want to ensure they purchase from different manufacturers or use at least two different operating systems (or versions of operating systems), so that if a virus is unleashed at the agency or a vulnerability is discovered with the hardware or operating system, the whole IT infrastructure is not compromised.

I had an experience like this (on a minor scale) back in the early 1990s. I worked on site for an agency and somehow the PCs there got infected with a virus that planted itself in floppy drive boot blocks. It was only a minor nuisance, because we never booted from floppies, and so never activated the virus. However, I couldn't reformat floppy disks because the operating system identified there was a virus. Fortunately, I had an Amiga computer at home which would happily format floppy drives in Amiga or PC format. It was unaffected by the virus since the Amiga's operating system was a cousin of Unix, not DOS (we weren't using Windows yet). When I told it to format the disk, it overwrote the virus. This was possible only because I had access to computers running two different operating systems, and the virus only affected one.

I got my MBA in operations research at the University of Chicago. All MBA students were required to take a class in finance, by which they meant investing funds in established markets, generally the stock market. Over half the class was devoted to portfolio analysis. The key concept was that, if one only had enough funds to make one purchase, one should establish the criteria for what is the best opportunity, evaluate options based on that criteria, and invest in the best one. However, if one had enough funds to buy more than one equity, then one has to take into account how these second (and third, and so on) equities correlated with one another. For example, if the first stock purchased was in a high-tech company, one might want to rule out a high-tech company for the second choice, because an event could negatively impact the entire industry, and both stocks could go down in value when one needed to liquidate some of the investment. Risk is reduced, and often average return increased, by choosing stocks in different



industries. And if some event causes stocks to suddenly rise in a particular industry, like COVID did for pharmaceuticals, then the more industries one has investments in, the more likely one can take advantage of that rise by selling the stock.

Ever hear of the Copper Age? The Bronze Age lasted for over a thousand years. Pure copper is soft, but metallurgists figured out millennia ago that, by adding some tin and zinc, the resulting alloy is stronger and corrodes less readily. The same is true for most metals. All United States silver and gold coins intended for circulation were alloyed with copper to strengthen them. Combining different metals produces superior materials.

On the other extreme, in Victorian times it was believed that purity of breed led to superior results. For horses and dogs, they would breed for specific features, and would often use pairings that would be illegal with humans: mating siblings, first cousins, nephews with aunts, or nieces with uncles. The results are that today, many breeds have genetic defects and major health risks. What many thought was a kind of meritocracy was actually breeding in weaknesses.

These are all examples of how differentiating assets leads to better results and reduces risks. Whether the assets are investments, metals, IT infrastructure, or living beings, differences are their strengths.

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.

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Thought Leadership

Sustainability Reporting in the Age of AI

By Elliott Munizza, Staff Auditor, RMA Associates

Introduction

As environmental, social, and governance (ESG) policies continue to shape the future of public and private sectors, the emergence of artificial intelligence (AI) introduces promising innovations and pressing sustainability concerns. While ESG has historically centered around curbing emissions and preserving natural resources, we now face a new issue in which data centers and digital infrastructure carry their environmental weight. This article explores how existing ESG frameworks apply to AI development and usage, examining both the challenges and the solutions on the horizon. By tying policy, innovation, and sustainability together, we can help ensure that tech growth stays smart and responsible.

ESG Public Policy

In the public arena, there are plenty of ways to look for solutions to undesirable actions, called "Internalizing the Externality." This idea can be boiled down to dissuading market actors from conducting themselves unfavorably by making that activity more expensive. In the example of ESG, a pretty simple way to internalize the externality would be to give corporations a fine for exceeding the allotted amount of emissions designated for them in a given period. Companies are allotted carbon credits based on various factors and may receive more through carbon offset or capture efforts; however, if a company is to emit more than their permitted amount of carbon in a given period, they will be required to pay penalties. These penalties would be a form of the government internalizing, or controlling, the externality—the variable controlled by an outside party.

If a company were allowed to emit one hundred tons of carbon emissions into the atmosphere per year, they would be given one hundred carbon credits; they may acquire more through efforts of carbon recapture and carbon offset. A common method of carbon offset used by companies to receive more carbon offset credits would be for a company to purchase, or support, some amount of acreage of forest, with the idea that the trees on the land owned by the company are therefore protected and offsetting emissions produced by the company. However, a common critique of this method is whether forests in isolated and unpopulated areas are truly in danger of deforestation. Because the point of the carbon offset

is to protect trees that would otherwise be taken down, should we be focusing on forestry that has a chance of being cut down? Furthermore, there's a valid question about whether preserving forestry in South America, for example, has a tangible impact on emissions produced by a company in California.

While there is a broad understanding that environmental responsibility is generally a good thing, it can be quite an abstract topic to determine whether or not a country is doing a "good" job with its ESG efforts. Because it's tough to quantify ESG success, there's no universal benchmark for tracking progress. Therefore, while legislation makes efforts toward change, it is difficult to determine whether those efforts are effective in reaching proposed goals. In Finland's capital city, Helsinki, there are serious efforts in place to become carbon neutral by the year 2035. Finland has promoted electric transit over gas-fueled alternatives, invested in renewable energy, and enhanced the city's green spaces. Along with becoming carbon neutral, Helsinki aims to set the standard for cities worldwide in environmental consciousness.

ESG Efforts in Other Countries

Countries such as Canada, Denmark, the United Kingdom, and others across Europe are also making their environmental strides. Iceland, for instance, is leading the way in sustainability through its focus on renewable energy sources—mainly hydro and geothermal. Their national goals include becoming carbon neutral before 2040 and reducing emissions by 40% by 2030. Iceland has also made significant investments in recapture efforts, including afforestation—the process of establishing forests in areas where there were none. Only 2% of Iceland is currently forested, a stark contrast to the estimated 40% coverage when the Vikings arrived. After college, I visited Reykjavík, Iceland, and explored Langjökull—"The Long Glacier." While there, I was told the glacier could vanish within a century due to climate change.

AI's Environmental Impacts

Just like the technological boom of the late 1990s with the wide adoption and implementation of the internet, we are experiencing another technological renaissance with the growing prevalence of Artificial Intelligence (AI). Mass economic and industrial

Thought Leadership Cont'd.

advances occurred largely due to the internet's invention and continued evolution, and many believe a similar transformation is underway with AI. From tweaking resumes to generating images, AI's potential often comes down to how creative the user can get. However, AI isn't without its flaws, particularly when it comes to sustainability.

Just as a light bulb uses a different amount of electricity than a refrigerator, AI programs have a unique demand for energy. AI is essentially a digital brain operating on electronic circuits, and when you enter a question into a program like ChatGPT, it scans vast amounts of data almost instantaneously. While this efficiency is impressive, the energy cost is substantial. Experts have estimated that if just 10% of Americans made one query using ChatGPT per week for a year, the energy consumed would be equivalent to that used by every household in Washington, D.C. for 20 days.

In addition to energy usage, there's also a considerable water cost. Servers handling AI requests run hot and require cooling. For every 100 words generated by ChatGPT, it's estimated that between one and three bottles of water are used as coolant, depending on server location and climate. When companies like Meta train new AI models, the water usage can reach staggering levels. For instance, training LLaMA-3 reportedly consumed 22 million liters of water, roughly what 164 Americans would drink in an entire year. And because no single AI model is leading the industry, many companies are developing their own, each with a similar environmental cost.

Solutions to AI's Energy Problem

So far, we have mentioned two environmental issues that are likely to worsen as AI use grows: large-scale energy consumption and extensive water usage for server cooling. As AI becomes embedded in government operations and daily life, it's important to explore how these environmental costs can be mitigated.

One solution lies in making AI itself more energy efficient. Just like computers shrank from room-sized machines to pocket devices, AI models can be built to do more with less. Developers are employing techniques such as model pruning, quantization, and knowledge distillation to streamline AI training processes. These approaches reduce the volume of data and computations required, leading to lower energy use. Specialized hardware like tensor processing units (TPUs) also plays a role, as they're built specifically for AI tasks and consume less energy than general-purpose chips.

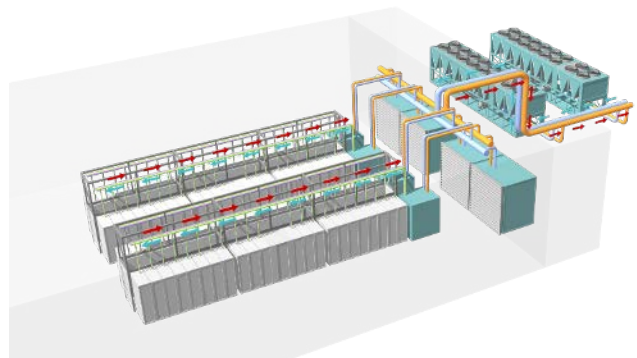
Beyond the technical improvements, we are starting to see efforts to internalize the environmental externalities of AI, similar to carbon credits in ESG. Some cloud providers now offer carbon-aware computing, letting clients schedule operations during periods when clean energy is more available. While this concept is still in its early stages, it shows promise in guiding environmentally responsible AI use.

Government agencies have an opportunity to lead by example. By integrating ESG criteria into technology procurement, agencies can encourage transparency in energy and water use from AI vendors. Establishing performance benchmarks tied to sustainability could further push the tech industry toward greener practices.

Much like the public goals set by cities like Helsinki or national targets in Iceland, AI needs clear standards and measurable goals if we are to balance innovation with environmental responsibility. The AI revolution is here—but it must be guided by the same principles of stewardship and accountability that drive successful ESG initiatives.

Conclusion

As we stand on the threshold of another technological revolution, it's important to recognize that innovation and sustainability are not mutually exclusive. AI holds immense potential to improve government efficiency, streamline services, and even help solve environmental problems. But it also introduces a new class of challenges that require proactive strategies, clear standards, and thoughtful governance. If we take the same ESG principles we've applied to industrial emissions and use them to our digital infrastructure, we not only prepare for a more responsible future but also reinforce the importance of public accountability in every sector—digital or otherwise. AI may be the brain of the future, but sustainability must remain its conscience.




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Thought Leadership

Defense Resourcing for the Future 2.0

By Lara Sayer, Former Executive Director for the Commission on PPBE Reform; Annie Crum, Former Director of Operations for the Commission on PPBE Reform; Elizabeth Bieri, Former Director of Research for the Commission on PPBE Reform; David Zorzi, Partner from Kearney & Company



The National Defense Authorization Act (NDAA) for Fiscal Year (FY) 2022 established and directed the Commission on Planning, Programming, Budgeting, and Execution (PPBE) Reform to conduct a comprehensive assessment of all four phases of the PPBE process and recommend improvements with a particular focus on defense modernization. This was the first time such an effort was made to analyze the efficiency and efficacy of the PPBE process since its establishment in early 1961. After two years of extensive research and engagements with subject matter experts and practitioners across the PPBE ecosystem, the Commission published its research and recommendations in Interim (August 15, 2023) and Final (March 6, 2024) Reports available on the Commission website at <https://ppbereform.senate.gov/>.

The current PPBE process has many strengths, such as involving all stakeholders and identifying key budget issues in balanced short- and long-term views; however, much of it, except for the Execution Phase, is about planning for future cycles and does not respond quickly enough in an agile and effective manner to counter the rapidly evolving security environment and pace of technological change. The Department of Defense (DoD) must have a modern process that enables strategy to drive resource allocation in a more analytically informed way and allow the DoD to quickly pivot and respond to the changing landscape to resource the warfighter at the speed of relevance in all phases of the PPBE process. The United States risks losing more of its diminishing technological edge without immediate transformational change, especially in the year of execution when most of these opportunities arise and must be addressed.

The Commission identified five critical goals for reform and 28 actionable recommendations to transform all aspects of the PPBE process, preserve and strengthen congressional oversight, and maintain transparency for industry and the American public. The most impactful recommendations depend on where an individual sits within the process, but

regardless of that role, the collective impact of all 28 recommendations is transformational for Congress and the DoD. Each one is essential for changing how the DoD approaches resourcing decisions to support DoD and national security priorities; improves the speed, agility, and analytical capabilities needed to support those decisions; and ensures that the DoD and Congress have the tools needed to proactively address current and future threats.

On the day the Commission's Interim Report was released, the Deputy Secretary of Defense directed the Department to adopt the 13 recommendations ready for near-term implementation. The implementation plans were publicly released the day the Final Report was published. The Military Departments and other stakeholders are also actively assessing the recommendations and supporting overall DoD implementation efforts. The DoD working groups were established, and schedules and milestones are in development to implement the Commission's recommendations to Review and Consolidate Budget Line Items (BLI) (#10), Review and Update PPBE-Related Guidance Documents (#12), Restructure the Justification Books (#18), and Improve Training for Personnel Involved in Defense Resourcing (#27).

DoD is also making a more deliberate effort to Encourage Improved In-Person Communication (#17) by engaging with Congress on year-of-execution issues, fact-of-life changes, and program updates that would impact their markup of the FY 2025 President's Budget (PB). By engaging now, the need for future time-consuming reprogrammings can be alleviated by having the resources correctly realigned as part of the final enacted authorization and appropriation bills.

The Department has also reviewed the Commission's Final Report recommendations and plans to publish implementation plans and develop the associated courses of action once the additional recommendations have been approved. The Office of the Under Secretary of Defense (Comptroller) has established a dedicated "PPBE Reform" page at

Thought Leadership Cont'd.

<https://comptroller.defense.gov/PPBE-Reform/> to share information on the Department's implementation efforts.

Congressional action supporting Commission recommendations is encouraging. The signed NDAA for FY 2025 directs the DoD to Establish a Cross-Functional Implementation Team for Commission Recommendations (#28), revise the DoD Financial Management Regulation (Review and Update PPBE-Related Guidance Documents (#12), revise the authorization language for the Defense Modernization Account to allow for the funds to promote innovation and integration of commercial technologies and services (#16), and requires biannual reports on implementation of the Commission's recommendations.

On the appropriations side, the House Appropriations Subcommittee on Defense included \$5 million to support the Development of Communication Enclaves (#19), encourages collaboration between DoD and Congress on resourcing issues, and looks forward to continued discussion on the Department's views on the Commission's recommendations. The Senate Appropriations Subcommittee on Defense supports the DoD actions to implement the 13 Commission Interim Report recommendations that can be done without changes to statute nor require congressional action. These include: Improved Information Sharing and Effective Communication with Congress (#17); Continued Rationalization of the Office of the Secretary of Defense Resourcing Systems (#23); Reviewing and Consolidating BLI (#10); Continued Focus on Recruiting and Retention for the Resourcing Workforce (#25); Improve Training of Defense Resourcing Personnel (#27); and Streamlining Process and Improving Analytic Capabilities (#26). The Committee also transferred funding for the DoD data analytics platform, Advanced Analytics (ADVANA), to the Budget Activity Eight (Software and Digital Pilot Program) in Research, Development, Test, and Evaluation

(RDT&E) for more adaptable execution (Addressing Challenges with Colors of Money (#11). The Committee also supports establishment of a DoD Task Force to ensure the Department is working with Congress on implementation efforts. Both Sub-Committees also increased the Below Threshold Reprogramming Limits (#8) to \$15 million for Military Personnel, Operation and Maintenance, Procurement, and RDT&E appropriations in the DoD Appropriations Act, 2024. That Act also directed the United States Army (Army) to consolidate the BLIs in its Other Procurement, Army appropriation (#10). While the Congress has expressed some concerns regarding some of the Commission's more far-reaching recommendations, these changes represent the first significant steps toward lasting reform of the PPBE process and the results that can be achieved when the Department and Congress work together.

Despite the frequent finger pointing the Commission heard during its research, PPBE process inefficiencies fall on both the DoD and Congress and will require teamwork and a strong partnership to improve the delivery of capability to the warfighter. The DoD need and requests for more flexibility come with the need to ensure appropriate congressional oversight. Many changes will rely on the willingness of DoD and Congress to work together to achieve a more efficient resourcing process the DoD can leverage now and into the future. Significant effort over time will show how successful both parties are in achieving lasting reform.

In accordance with the established language in the NDAA, the Commission ceased operations on August 28, 2024. We would like to once again sincerely thank everyone who supported the Commission's research and encourage everyone involved in resourcing to be agents for change to preserve our national security by delivering the very best that we can to our warfighters.





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Thought Leadership

The Benefits of Using Technology Platforms in the Federal Financial Management Environment

Brought to you by Guidehouse

Technology platforms help federal financial managers improve outdated processes. Platforms like Microsoft Power Platform, Appian, Salesforce, and ServiceNow offer accelerated development and flexibility. These technologies enhance operational efficiency, data quality, decision-making, collaboration, and accountability. Financial managers can achieve secure data access, automate workflows, enforce business rules, and consolidate reporting

Platform features include:

- **Secure, customizable user provisioning** to provide role-based access aligned with business needs—ensuring that users only interact with data and features relevant to their roles while maintaining compliance with security standards
- **Standardized data input and business logic rules** that maintain data entry integrity and consistency to enforce validation, reduce errors, support uniformity across processes, and improve data quality for downstream analysis
- **Automated workflow integration** that streamlines processes by connecting various applications and automating workflows—reducing manual effort and delays and enabling seamless communication and task execution across platforms
- **Data aggregations and reporting roll-up** that combine data visualization software and platforms—enabling real-time insights and reporting and simplifying decision-making through a unified view of performance metrics and trends

Success Stories

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demonstrates how we've effectively delivered innovative solutions to address challenges faced by financial managers.

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Challenge – A federal agency that we support had previously used a highly manual process for completing its quarterly deferred revenue audit, which relied on email communication for review completion and tracking all statuses and documentation.

Approach – We developed an application to filter data for each audit stakeholder specific to their office, safeguarding users and preventing unauthorized access to sensitive audit data. Users can input audit data in an intuitive interface that captures and stores all required information. Workflows automatically initiate and administer the audit, send notifications as statuses change, and store documentation. Audit submission data rolls up into metrics, allowing stakeholders to track submission totals by review status.

Impact – Stakeholders now have a more streamlined, modernized process for completing their deferred revenue audit that requires less manual effort and features an interactive user interface and seamless integration of automated tasks.



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AGA DC 23rd Annual Training

On April 28 and 29, 2025, Washington DC Chapter successfully held our 23rd Annual Training at Convene Hamilton Square in downtown Washington, DC. Once again in partnership with the AGA Northern Virginia Chapter, this event provided training by key leaders in the Federal financial management sphere delivering insight into the current financial environment. We are grateful for our 112 attendees both in person and virtual attendees. See our [training agenda here](#) and [training slide decks and video here](#).

We would like to thank all of our speakers, moderators, sponsors, and volunteers for making this year's annual training a successful event!

Conference Planning Committee Members:

- Annalena Winer, CGI Federal (Co-Program Director, Co-Director – Technical Committee, Private Sector)
- Jennifer Torres, Department of Labor (Co-Director, Technical Committee, Government)
- Tonya Baker, Guidehouse (Co-Program Director, Technical Committee)
- Ellie Harris, BDO (Director – Logistics)
- Julia Duquette, Sikich
- Tyler Hampton, Guidehouse (Director – Registration)
- Majorie Gill, CGI Federal (Director – Registration)
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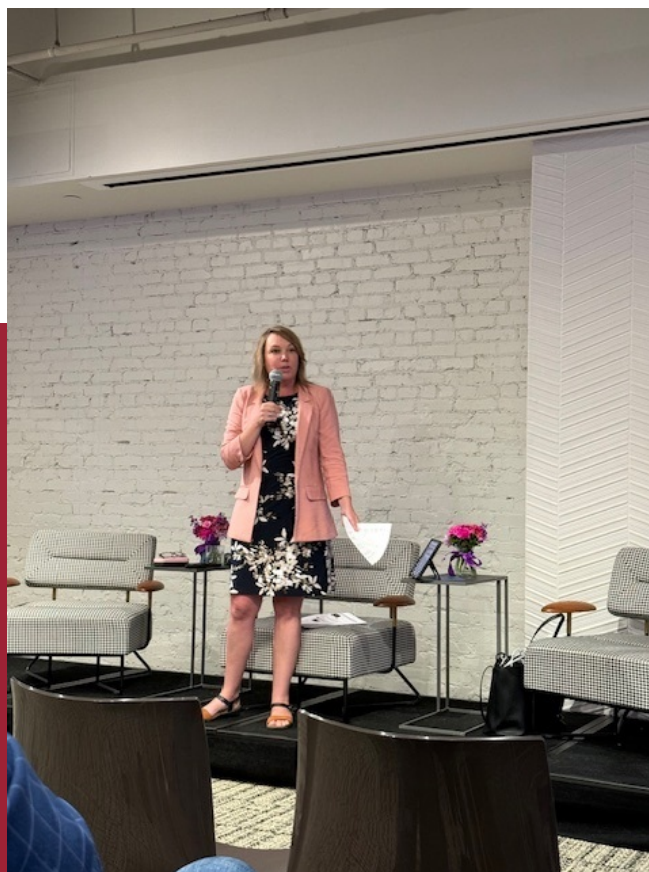
On-Site/Additional Volunteers:

- Nupur Moondra, CGI Federal
- Diane Rudnick, Retired
- Drew Ungerleider, CGI Federal



AGA DC Annual Training Cont'd.





AGA DC Annual Training Cont'd.



AGA DC Annual Training Cont'd.



Thanks for a great event - back in DC!

- 4 college students attended (registration funded by the Young Professionals committee)
- Average of 60 people in person for each session
- 72 virtual attendees

Save the Date - AGA DC Chapter 2026 Spring Training!

- **When:** Monday, April 27-Tuesday, April 28, 2026
- **Where:** Convene Hamilton Square, 4th Floor; 600 14th Street, NW, Washington DC 20005
- **Type:** In person and virtual



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AGA DC Training and Events

AGA DC Upcoming Events

Wednesday, June 11, 7:30pm: CGFM Study Group Exam 2 Part 1. [Virtual Registration Link here!](#)

Saturday, June 14, 9am-6pm: Annual Wine Tour *[Sold out!]*

Tuesday, June 17, VIP Luncheon with guest speaker John Fabre, Deputy CFO, U.S. Immigration and Customs Enforcement. *(Diamond Sponsors Only)*

Thursday, June 26, 6pm-9pm: The AGA DC Chapter - End of the Year Happy Hour! Hosted by our Corporate Sponsors Committee. [Register here!](#) **Space is limited!**

For questions regarding AGA DC events listed here, please contact us at agadc@agadc.org.

AGA National Training Events

2025 Professional Development Training (PDT): Jul 28-29 (14 CPEs; Virtual Event)

[Register and get more information here.](#)

**** SAVE THE DATE ****



AGA DC Sponsored National Webinar Training Schedule Program Year 2024-2025

AGA DC sponsored National webinars will continue to be offered in a virtual format.

Dates & Topics:

TBD by National Office. All webinars start at 2:00pm and end at 3:50pm ET.

You can earn 2 CPEs for each webinar!

The DC Chapter will notify you via email of the open pre-registration period to participate in AGA webinars facilitated by AGA National. If you are interested in any webinar, look out for email from the DC Chapter as you must pre-register.

The DC Chapter sponsors these webinars that are limited to 60 DC Chapter members for each webinar. You will receive further instructions on how to obtain an access link to the webinar after the pre-registration period closes. After you successfully pre-register, you will receive two follow-up emails: (1) with instructions on how to finalize and confirm your registration; and (2) with the webinar access link, from customercare@gotowebinar.com, prior to the scheduled event date.

For more information on these webinars, please visit the AGA National website at **AGA National Webinars**.

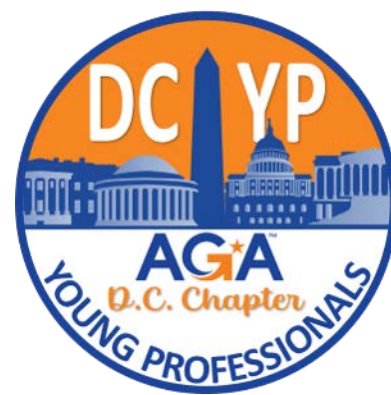
For questions, please contact: Danielle Burrell at danielle.c.burrell@hud.gov

**** SAVE THE DATE ****

AGA Young Professionals

Thank you to those who joined the Top Golf Happy Hour on May 19 evening, as sponsored by the Washington, DC and Northern Virginia Chapter Young Professional Committees! This joint event brought our Young Professionals, Chapter Board, and Committee Leads from both Chapters together at the National Harbor Top Golf for a fun evening. Everyone enjoyed some friendly golf competition with great food and drink!

Thank you to our Young Professionals Committee volunteers (Michelle Paul, Christel Pico, Cherice Washington, and Shannon Johnson) who organized this event!



Young Professionals Committee Members. From left to right: Cherice Washington, Michelle Paul, Shannon Johnson, Christel Pico



We Need You!

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AGA DC Chapter Community Service Events

By Community Service Committee

Potomac River Earth Day Cleanup

Thank you for joining our Chapter and the Potomac Conservancy on April 19 for a rewarding day of volunteering and environmental stewardship at Gravelly Point! Led by our Community Service Committee member, **Niko Lojanica**, our Chapter members joined the community-driven effort to clean up trash and make a positive difference for our hometown river!



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Thought Leadership

Investing in oversight: The value of a third-party Integrity Monitor

Brought to you by CohnReznick



Corruption does not need an invitation, just an environment where oversight is weak or nonexistent, enforcement is inconsistent or absent, and accountability is optional. While some may see oversight as a bureaucratic formality, it is an essential safeguard against fraud, waste, and abuse. Having spent many years as an inspector general before transitioning into the private sector and integrity monitoring, I have seen the need for oversight from both the public and private sector perspectives. Especially in public sector infrastructure projects, where billions of taxpayer dollars are at stake, the absence of rigorous oversight creates an environment that is fraught with risk and where fraud, waste and abuse can thrive.

Large infrastructure projects – such as highways, airports, transit systems, and energy grids – represent some of the most significant public expenditures in any government's budget. These projects are expensive and extraordinarily complex, involving multiple contractors, subcontractors, and regulatory agencies. This complexity creates opportunities for bad actors to manipulate contracts, inflate costs or cut corners, and deliver substandard work.

Far-reaching consequences

The consequences of poor oversight are well documented. Throughout history, there are plenty of examples of infrastructure projects plagued by major cost overruns, kickbacks, pass-through schemes, and other types of outright fraud. From projects that have used subpar materials to ghost employees siphoning money from government contracts, the absence of strong oversight can transform ambitious projects into financial disasters plagued by fraud, waste, and abuse.

Unchecked corruption in infrastructure projects creates a ripple effect of consequences beyond just wasted money. It delays critical projects, erodes taxpayer confidence, and weakens public faith in government institutions. When fraud, waste, and abuse are ignored or go unpunished, it signals that

wrongdoing is tolerated.

Ideally, effective oversight is not just about catching wrongdoing after the fact; it is about preventing it from happening in the first place. Strong, proactive oversight mechanisms – whether in the form of inspectors general, integrity monitors, independent audits, or compliance reviews – act as deterrents to fraud, waste, and abuse. These mechanisms confirm that taxpayer funds are spent wisely, contracts are awarded fairly, and contractors are held to high standards.

The value of integrity monitors

Real-time oversight can play a critical role in mandating accountability and preventing corruption. An integrity monitor is an independent, third-party “watchdog” that can assist in oversight of large-scale projects that present an elevated risk for fraud and mismanagement. Integrity monitors work proactively beside project teams to quickly identify compliance issues, safety concerns, regulatory violations, and inefficiencies, as well as recommend corrective actions before they result in legal or financial liabilities. This real-time, boots-on-the-ground oversight allows for immediate corrective action when risks arise.

Depending on the project's scope and complexity, a monitor can be engaged to oversee the entire project or focus on a specific aspect where heightened oversight is necessary due to elevated risks. Often, this determination is based on a risk assessment (which the integrity monitor can conduct) that identifies potential vulnerabilities, such as financial mismanagement, procurement fraud, regulatory noncompliance, or safety concerns. By evaluating these risks, stakeholders can strategically deploy an integrity monitor to monitor high-risk activities, enforce compliance, and assist in implementing corrective measures.

The use of an integrity monitor under these circumstances does not, and should not, signal that wrongdoing has been committed. Rather, it is a proactive measure to prevent wrongdoing from

Thought Leadership Cont'd.

happening. Whether providing comprehensive oversight or addressing targeted risks, an integrity monitor plays a vital role in ensuring accountability and protecting tax dollars.

Cost considerations

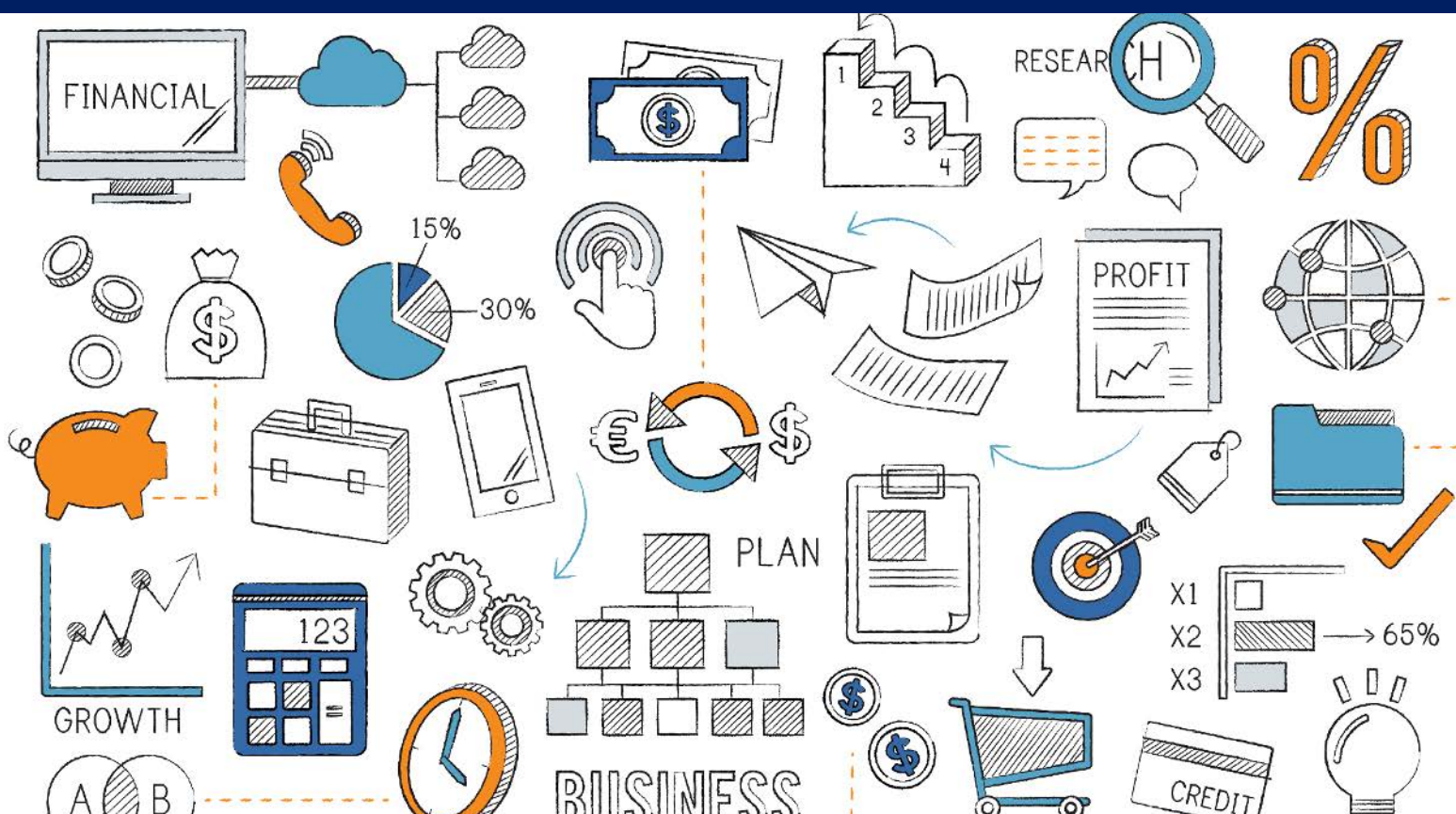
The cost of engaging an integrity monitor is usually a small investment compared to the value brought to the project to promote accountability, fraud prevention, and savings. An integrity monitor's fee is generally based on the project's complexity, staffing needs and specializations, duration, and risk factors. A common pricing model is a fixed fee for the project, which provides a level of budget certainty for the stakeholders. Whether based on a fixed-fee pricing model or an alternative flexible pricing structure, selecting the appropriate pricing for the project allows for predictability of oversight costs and flexibility to adjust oversight levels as needed.

For both government entities and stakeholders, integrity monitoring should be seen as a strategic investment in project integrity and efficiency. Infrastructure projects are critical to economic growth, but their success depends on strong oversight, accountability, and risk management.

An integral part of the solution

Oversight is often a major factor in making sure an organization's culture values and promotes integrity. It promotes transparency, allowing taxpayers to see how their money is spent. Open procurement processes, public reporting requirements, and citizen engagement all serve as additional layers of accountability, making it harder for corruption to take root and fester. Investing in oversight mechanisms – whether by funding and supporting the mission of an inspector general in government or hiring an integrity monitor on a large project – is never a waste. It is, very simply, good management.

Without transparency and accountability, corruption will take hold and public trust will erode, resources may be diverted from essential services and the very purpose of public investment in communities will be undermined. For nearly all organizations, particularly those in the public sector, fostering a culture of transparency and integrity is crucial to building public trust, ensuring efficiency, and preventing corruption. Integrity monitors are one more tool in the regulatory toolbox to accomplish this goal.



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CGFM Committee Updates

AGA-DC is proud to support our chapter members in obtaining the CGFM designation. We can pay up to \$135 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.

Please visit the [AGA DC Chapter website](#) for more information.



Congratulations to the following new CGFMs who obtained their CGFM since the previous Chapter newsletter!

Ms. Valerie Cruz Santos, CGFM
Mr. Matouk Cruz, CGFM

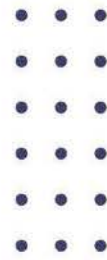
Have questions? Check out our CGFM chapter [webpage](#) or contact Lauren Peck at laurenpeck@kpmg.com.

Already Have Your CGFM?

CPE Reminder – Make sure your continuing professional education (CPE) is current by completing at least 80 hours of CPE in government financial management topics or related technical subjects within each designated two-year cycle (including 4 hours in ethics per cycle).



CGFM STUDY GROUP

**AGFA™**

Exam 2 Part 1

We will discuss governmental financial accounting, reporting, and budgeting general knowledge

**DATE**

JUN 11, 2025

[**REGISTER NOW**](#)**TIME**

4:30 PM TO 7:30 PM

**LOCATION**

VIRTUAL

Instructors

Kevin Shers

Lauren Peck

Delphine Johnson

- **CPE #:** 3
- **PreReq.:** N/A
- **Cost:** \$20
- **Food/Drinks:** N/A
- **Max Participation:** 40

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VIP Luncheon

April & May VIP Luncheons

Our Chapter hosted two VIP Luncheons at the City Club of Washington in downtown DC on April 16 and May 29. Our Diamond sponsor representatives met with our guest speakers Ms. Erica Gaddy (Deputy Chief Financial Officer and Chief Risk Officer at Bureau of the Fiscal Service, Department of the Treasury) and Mr. David Lebryk (Fiscal Assistant Secretary [Retired], Department of the Treasury).

Thank you, Ms. Gaddy and Mr. Lebryk for their insights, our Diamond sponsors for the participation and support, and our Corporate Sponsorship Committee for organizing this in-person VIP Luncheon!



April VIP Luncheon Speaker Ms. Erica Gaddy



April VIP Luncheon Attendees

VIP Luncheon Cont'd.



Corporate Sponsorship Committee Director
Cherry Ung welcomed VIP Luncheon attendees



Paul Lionikis from Sikich introduced VIP
Luncheon Speaker



May VIP Luncheon Speaker Mr. David Lebryk



May VIP Luncheon Attendees

VIP Luncheon

June VIP Luncheon

Our Chapter hosted another VIP Luncheon at the City Club of Washington in downtown DC on June 17. Our Diamond sponsor representatives met with our guest speaker Mr. Jose Fabre, Deputy Chief Financial Officer at U.S. Immigration and Customs Enforcement. Thank you, Mr. Fabre for his insights, our Diamond sponsors for the participation and support, and our Corporate Sponsorship Committee for organizing this in-person VIP Luncheon!



June VIP Luncheon Speaker Mr. Jose Fabre



June VIP Luncheon Attendees

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FINANCIAL MANAGEMENT

GRANTS MANAGEMENT

DATA ANALYTICS

AGA DC Chapter Monthly Luncheon

April 2025 Hybrid Luncheon

On April 22, 2025, the DC Chapter held the monthly luncheon with our April hybrid luncheon speaker **Mr. John Lynskey, Deputy Chief Financial Officer and Controller, and Mr. Rafael Cotto, Internal Controls Program Manager**, from Smithsonian Institution. We are grateful for more than 110 in-person and virtual attendees who joined us at Clyde's of Gallery Place in downtown Washington, DC.

At the Smithsonian, John oversees the daily financial and accounting operations of the Institution. He is responsible for the institution's financial reporting and financial statements (federal, trust, and endowment), treasury activities, cash management, payment activities, and official financial records. Treasury activities include short and mid-term investments, bond management, trust advances, and debt ratings. He is also responsible for risk management, internal controls, and Enterprise Risk Management (ERM). He supports audit activities and oversight activities of the Regents Audit and Review and Finance Committees. He advises senior leadership and unit management on financial issues and provides customer support to the finance community across the institution.

In September, John retired from the National Science Foundation (NSF) after 31 years of federal service. He served for over 20 years as the Controller and Deputy Division Director for Financial Management at the NSF and in the Senior Executive Service. As NSF's "Controller" he was responsible for fiscal stewardship of NSF's daily financial operations including financial statements, financial reporting, accounting operations, grant payments and grant financial administration, internal controls, and NSF's financial system. As controller of a \$10 billion CFO Act agency, he led NSF programs for internal control, improper payments, financial audits, and strategic financial initiatives. He also oversees NSF's



John Lynskey, Deputy Chief Financial Officer (DCFO) & Controller, Smithsonian Institution

cloud-based, FedRamp-certified financial system and spearheads grantee financial outreach to NSF's 1,700 institution customers. Under his stewardship, NSF was a government leader in sustained success in obtaining "clean" audit opinions and in financial reporting excellence.

Prior to joining NSF, John served eight years with the U.S. Secret Service where he developed the Secret Service's first financial statements and a detailed budget model for protective events. He held several positions related to financial management, budgeting, and administration both under the CFO and in protective operations. John was part of the security teams for events such as political conventions, United Nations General Assemblies, the State of the Union Address, and the Olympics. His time with the Secret Service instilled in him traits that make him worthy of trust and confidence at all times. Prior to his federal government service, John worked in the private sector for Deloitte, Haskins, and Sells

April Luncheon cont'd.

(currently Deloitte).

John has been very active in AGA, serving in many positions culminating as AGA National President in 2018-2019. As National President, he transformed the governance structure setting AGA up for long-term success along with expanding the certification and student programs. John graduated with honors in 1989 from James Madison University in Virginia with a BBA degree in Accounting. John is a Certified Public Accountant and a Certified Government Financial Manager.

Rafael Cotto serves as the Internal Controls Program Manager at the Smithsonian Institution, where he leads initiatives to enhance accountability, risk awareness, and operational resilience through effective internal controls. With 33 years of project management experience across various federal agencies, Rafael has significant expertise in financial management policy, audit, ERM, and internal controls to improve organizational outcomes.



Rafael Cotto, Internal Controls Program Manager, Smithsonian Institution

Before his current role, Rafael was instrumental in developing policy, managing audits, and

implementing the Data Analytics and Assurance Program at the National Science Foundation. There, he applied ERM and internal control principles to enhance decision-making and risk oversight. He holds a certification in Enterprise Risk Management for the Public Sector from George Washington University and a Master's in Business Administration.

During Mr. John Lynskey's and Mr. Rafael Cotto's presentation titled "Smithsonian 101 with a Financial Emphasis," they provided an overview of the Smithsonian Institution and its ERM implementation. They also answered questions from our in-person and virtual attendees. We sincerely appreciate the time Mr. John Lynskey and Mr. Rafael Cotto spent with us to share their knowledge and experience.

Our April 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!



Chapter President Paul Marshall welcomed luncheon attendees and provided chapter updates



April Luncheon cont'd.



Luncheon speakers John Lynskey (left) and Rafael Cotto



DC Board Members with Speakers. From left to right: Peter Moore, Paul Lionikis, Crystal Wolf, Rafael Cotto, Paul Marshall, John Lynskey, Bo Shevchik, Lal Harter

AGA DC Chapter Monthly Luncheon

May 2025 Hybrid Luncheon

On May 21, 2025, the DC Chapter held the final monthly hybrid luncheon of this program year with our luncheon speaker **Mr. Stephen Kunze, Deputy Chief Financial Officer (Retired), from the Department of Commerce**. We are grateful for more than 110 in-person and virtual attendees who joined us at Clyde's of Gallery Place in downtown Washington, DC. **Mr. Keith Taylor, Chief Executive Officer & Founder of 2ndWave LLC**, a proud AGA-DC Chapter corporate Diamond sponsor, introduced our speaker at the luncheon.

Mr. Stephen Kunze was the Deputy Chief Financial Officer for the Department of Commerce for over eight years until his retirement on March 31, 2025. In that position, he was responsible for financial management and accounting throughout the Department, which included the annual consolidated financial statements and the development and implementation of a modern Department-wide integrated financial system. Mr. Kunze's passion for mentoring and developing staff led him to be the

Chair of the US CFO Council's Workforce Modernization Executive Committee where he assisted in the development and implementation of a strategic workforce plan for the federal financial management community as well as the Career Planning Training Tool (CPTT). The CPTT provides a single portal to access career



Keith Taylor, Chief Executive Officer & Founder, 2ndWave LLC



Stephen Kunze, Deputy Chief Financial Officer (Retired), Department of Commerce

development training from top rated vendors, all aligned to the competencies for the four most popular job series in the financial management career field. Mr. Kunze lives in Maryland with his wife and is currently spending as much time as possible with his two granddaughters in New England.

During Mr. Kunze's presentation titled "Succeeding in Challenging Times," he shared his leadership advice and tips on navigating changes and challenging times, drawn from his prior experience at Internal Revenue Service and Department of Commerce when he was in leadership roles. Mr. Kunze also answered questions from our in-person and virtual attendees. We sincerely appreciate Mr. Kunze spending time with us to share his insights and experience.

Our hybrid luncheons held during this program year were made possible by our hard working volunteers

May Luncheon cont'd.

from the Monthly Luncheon Team who took care of the programming, in-person, and virtual operations. THANK YOU to our Monthly Luncheon Team!



Luncheon speaker Mr. Steven Kunze



Chapter President Paul Marshall welcomed luncheon attendees and provided chapter updates



Chapter President Elect Crystal Wolf concluded the luncheon and thanked speaker and attendees

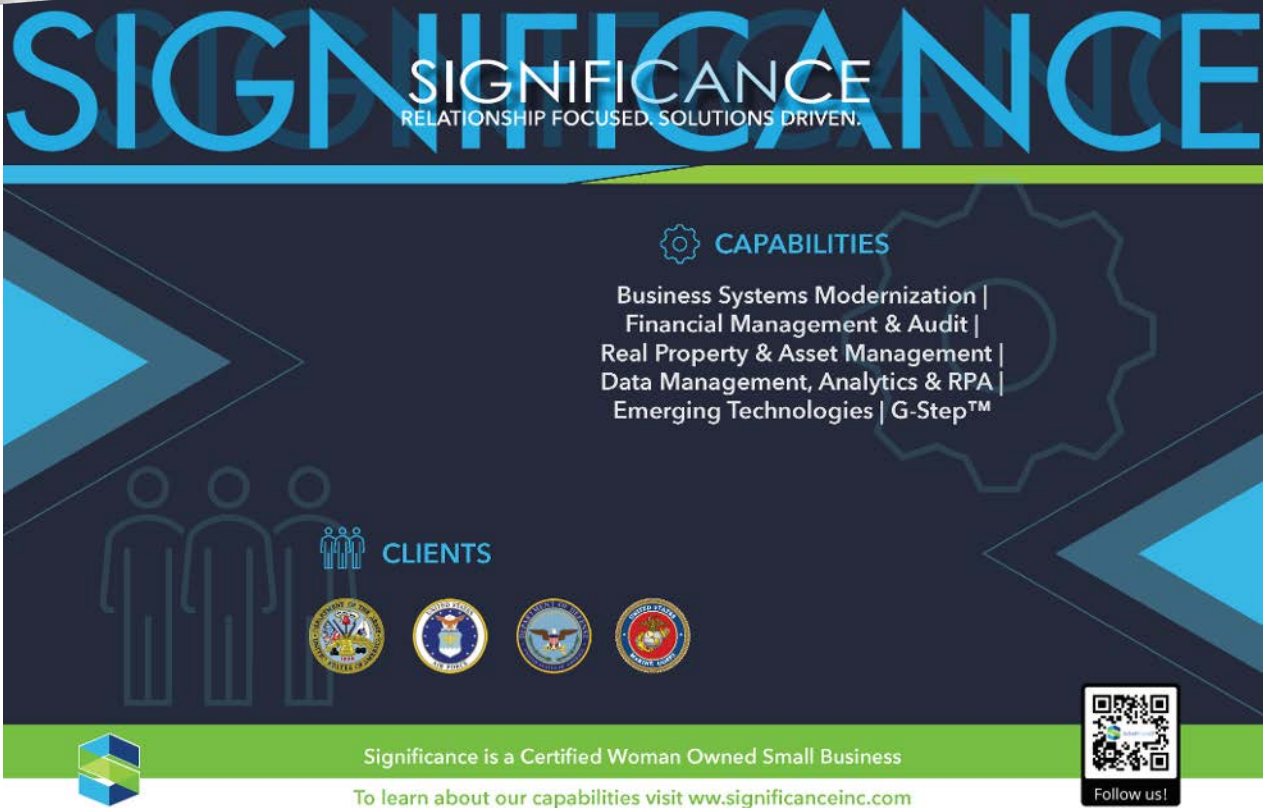


From left to right: Salim Mawani, Diane Rudnick, Thomas Chin



DC Board Members with luncheon speaker Mr. Steven Kunze

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Wendy Morris / Public Sector Partner, Federal Civilian Services Leader / wmorris@bdo.us

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Member Network Special Events

Spring Happy Hour

On May 8 the Member Services Committee hosted the DC Chapter Spring Happy Hour at The City Club of Washington. Our Chapter members had a great evening to network and enjoy drinks and light appetizers. We had a great turnout and thank you for joining us at the Spring Happy Hour. Thank you to our Member Services Committee volunteers for organizing the event!



Special Events cont'd.



Special Events cont'd.

Annual Winery Tour

Our Chapter's popular annual winery tour was held on Saturday, June 14. More than 40 members and guests came together at three Northern Virginia wineries for wine tastings. As part of our chapter's great tradition, the winery tour sold out FAST and once again provided a wonderful opportunity for our members and guests to enjoy good wine, good food, and great company! We were happy to see a lot of new faces, along with those we look forward to seeing every year!



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- GSA OASIS Small Business Pool 1, Contract No. 47QRAD20D1142
- GSA OASIS Small Business Pool 2, Contract No. 47QRAD18D000X
- GSA Multiple Award Schedule, Contract No. GS-23F-0057W

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Financial Management News Express

Time to Upgrade: Modernizing the \$4 Trillion Federal Lending System

By Tom Coleman, Executive Vice President for Loan & Grant Programs at Allocore

As of September 2024, the **government held \$4.4 trillion in outstanding loans and guaranteed debt across 130 lending programs**. These programs deploy critical emergency, infrastructure, housing, and other assistance, while responsibly balancing the cost of these programs between taxpayers and borrowers. However, these programs face significant risk as they often operate on outdated technology systems and are frequent targets for sophisticated fraudsters. The criticality and vulnerability of federal lending programs merit a discussion of how we can strengthen these programs.

I recently had the opportunity to broach this topic when moderating a roundtable—hosted by the AGA DC Chapter and sponsored by Allocore—to discuss the [future state of federal lending](#), and wanted to share some reflections from that discussion.

Recent directives from the Trump administration regarding IT modernization, data sharing, and streamlining operations present opportunities to modernize federal credit programs. If properly seized, these opportunities can enhance borrower experience, protect taxpayers through enhanced fraud prevention, and permanently reduce the cost of administering federal credit programs by:

- Leveraging a Center of Excellence (CoE) model to provide access to critical federal credit resources and functions on a shared-service basis;
- Sharing proven federal loan origination and management solutions between agencies; and
- Preventing federal lending program fraud through interagency data sharing.

The government has long understood the value of centralizing delivery capabilities in governmental CoEs that can support multiple agencies through a shared services model. CoEs already exist for functions such as financial management, grants management, and procurement. Applying a CoE model to federal lending would reduce the risk of losing key personnel at many agencies, allow

cost-efficient scaling of operations and prevent the duplication of resources across 130 unique loan programs. A shared and common solution model for federal lending is long overdue and would reduce the cost of federal lending programs while improving access to the skilled personnel needed to administer these programs.

Many federal loan programs operate a patchwork of systems that are outdated, don't integrate with one another, and require expensive maintenance. ***The existing federal technology practice would not be acceptable for a community bank and is certainly not appropriate to manage the U.S. Government's \$4+ trillion-dollar lending portfolio.*** Thankfully, the government has several strategies it can leverage to upgrade its systems quickly and efficiently. ***The recently passed SHARE IT Act, requires agencies to make their custom code available to one another with the goal of lowering the cost of IT modernization.*** While many federal lending systems are outdated, several are built on modern technologies, mirroring commercial lending systems. If agencies can acquire a system at no-cost through code sharing, they can shoulder the total cost of modernization and transition more easily from their legacy systems.

Federal lending programs can protect against fraud through inter-agency data sharing. In March, the Trump Administration issued an Executive Order which charges agencies to promote the use of interagency data sharing to detect fraud. If agencies share data regarding fraudulent borrowers and applications, the government could leverage the collective strength of its fraud detection controls across agencies instead of enabling fraudsters to search for program-specific vulnerabilities. The price of inaction is immense. For example, GAO noted how a program's 4-month lapse in data sharing capabilities with the IRS led to \$92 million in disbursements to borrowers with suspect tax ID numbers.

Recent Executive Orders have laid the groundwork to support these vital reforms. Implementing these big ideas will not be easy, but the outcomes of reduced cost, fraud prevention, and improved borrowing experience will provide taxpayer dividends for years to come.

Federal Credit Forward: *Celebrating, Reflecting & Reimagining*

Summit and Allocore are pleased to sponsor Federal Credit Forward, an in-person gathering at the City Club of Washington, bringing together policymakers, economists, technologists, and program leaders to reflect on the upcoming 35th anniversary of the Federal Credit Reform Act (FCRA) of 1990.

The event will feature two expert panels on the evolution of federal credit programs and the future of federal credit with shared stories, insights, and visions for modernizing credit delivery. The event will also offer time for attendees to network with fellow thought leaders who shape the future of federal credit.

This event is proudly hosted by the AGA DC Chapter. Join us as we honor the past and look forward to the future of federal credit policy, operations, and technology.

[Register here!](#)

The poster features a green geometric background with a white central area. The text is arranged in a clean, modern layout. A circular inset image on the right shows a group of people at a conference.

JOIN US FOR
Federal Credit Forward
Recognizing and reflecting on the 35th anniversary of the Federal Credit Reform Act

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Tuesday, June 24 — 8:30 am-12:30 pm
The City Club of Washington
Breakfast provided

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**ACCOUNTABILITY
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New Member Contest

DO YOU LIKE MONEY? IF SO, PLEASE READ

During the 2024-2025 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. Quarterly new member referral contest winners will be announced in the newsletter.

- ▶ **April-June 2024: none**
- ▶ **July-September 2024: Veronica Baird and Cory Johnson**
- ▶ **October-December 2024: Dan Lange**
- ▶ **Jan-March 2025: Christine Turner and Deanie Wu**

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: Membership Committee

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.

Jonathan O. Braxton

Angel Manuel Brito

Christian T. Burns

Shauna Erickson

Matthew Gonzales

Maxine Y. Harvey, CGFM-Retired

Jodriguel Kelley

Kristen A. Kociolek, CGFM

Paul Linseisen

Cassandra L. Miller

Trudy Miller

Amie Napier

Andrew M. Nucifora

Vivian L. Peers Crouch

Jennifer Read

Emily Reuter

Jacqueline Stockner

Jeffrey J. Suhanick

Chynna Terrell

Ralph Tormey

Edward L. Wright

Aron J. Brown

Erin T. Deutsch, CGFM

Khurram Haider

New Members cont'd.

Ajee Clarissa Heartsfield
Eddie J. Jo, CGFM, CPA
Damion Cortez Jones
Jeffrey Ledford, CGFM
Mitchell Reed Palmertree

Joshua Reiter
Melissa A. Rhea
Suzanne Roosen
Jasmine Rose
Molly Sandberg

Akansha Sharma
Heather M. Straub
Andrew Warr

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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Final Words

As we are wrapping up this program year of 2024-25, the Newsletter Team would like to express our appreciation for the support and suggestions for *The Washington Connection* you provided throughout the program year!

As our Chapter President Paul Marshall shared in his President's Message, even with all the dramatic and fast-pace changes happening within the federal government, our DC Chapter adopts and continues to provide important services, especially education and network events, to our members in trying times. With that said, the Newsletter Team would like to express our appreciation to Paul for his leadership and tireless support provided to all committees, including the newsletter team!

The new chapter leadership team and all volunteers have started planning for the new program year. With efforts continuing into the summertime, we are supporting the strategic plan, and events, with the objective to continue addressing the challenging operating environment within the federal financial management community. If you have any suggestions and/or would like to become a volunteer of AGA DC Chapter, let us know today at agadc@agadc.org! We are a volunteer organization, and the community is stronger when we are united and help each other!

As we shared with you in the previous newsletter, AGA Washington DC Chapter will continue to stand with, and support our members. *The Washington Connection* will also continue to faithfully bring you useful information that support your professional and personal needs and to showcase our talented, strong, and resilient community!

AGA DC Chapter Newsletter Team

Thomas Chin

Guy Hadsall

Monique Llanos

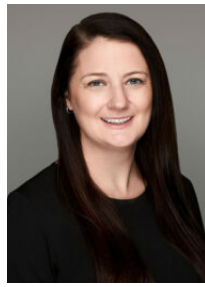
Hao Nguyen

PS: If you have any suggestions on featuring the important work you do, or simply have any words you want to share about public service, our newsletter team always welcomes your ideas and contents to be included in the next chapter newsletter. Please [click here to visit the survey and feedback site](#) today!

AGA DC Chapter Officers & Directors



Paul Marshall
President



Crystal Wolf
President-Elect



Lal Harter
Immediate Past President



Mona Amatie
Treasurer



Wendy Allen
Treasurer-Elect



Wendy Morris
Secretary



Thomas Chin
Chapter Director (Appointed)



Bo Shevchik
Chapter Director (Appointed)



David Baskin
Chapter Director (Appointed)

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

Evelyn Brown

Senior Advisor
Awards Committee

Salim Mawani

Senior Advisor

Paul Lionikis

Senior Advisor
Monthly Luncheon
Program

John Lynskey

Senior Advisor

Paterne Koukpesso

ACE Reporting
Mentorship

Melanie Geeseman

Admin and Communications

Lydia Tamblyn (Miller)

Admin and Communications
Social Media

Veronica Baird

Admin and Communications

Nicole Bailin

Admin and Communications

Cherry Ung

Annual Gala/Special Events
Corporate Sponsors

Elizabeth (Izzie) Yi

Annual Gala/Special Events
Corporate Sponsors

Orinda Basha

Awards Committee

Virginia Robinson

Awards Committee

Jeff Steinhoff

Awards Committee

Pat Wensel

Awards Committee

Scott Bell

Awards Committee

Brittany Hopwood

Annual Training Program
Strategy Committee

Annalena Weiner

Annual Training Program

Tonya Baker

Annual Training Program

Jennifer Torres

Annual Training Program

Ellie Harris

Annual Training Program

Julia Duquette

Annual Training Program

Jeff Ledford

Annual Training Program
Webmaster

Christy Beck

Annual Training LiveOps
Bylaws/CPE Coordinator

Joslyn Marshall

Citizen Centric Reporting

Lauren Peck

CGFM

Debbi Thomas

CGFM

LaVerne Mason

Community Service

Niko Lojanica

Community Service

Maurice Preston

Community Service

Michelle Paul

Corporate Sponsors
Young Professionals

Britney Munn

Corporate Sponsors

Carl Biggs**Mbalu Tunkara****Malena Brookshire****Wendy Allen**

Finance Committee

Terri Dawson

Finance Committee

Rachel Bright

Finance Committee

Alicia Pelikan

Historian

Brad Grams

Historian

Giovanni Leon

Membership

Makia Robertson

Membership

Cherice Washington

Membership
Young Professionals

David Baskin

Member Services

Anthony Richards

Member Services

Jamison Howell

Member Services

Manoj Mirchandani

Member Services

Ryan Phillips

Mentorship

Megan Curtis

Mentorship

Aubrey Harris

Mentorship

Sherri Legall Daly

Mentorship

Chapter Volunteer Roster cont'd.

Shepherd Brown

Monthly Luncheon
Program

Bo Shevchik

Monthly Luncheon
Program

Peter Moore

Monthly Luncheon
Program

Daniel Lange

Monthly Luncheon Live Ops

Victoria Abril

Monthly Luncheon Live Ops

Emma Pollock

Monthly Luncheon Live Ops

Chad M. Willhite

Monthly Luncheon Live Ops

Craig Freeman

Monthly Luncheon Live Ops

Alexis Alfaro-Trejo

Monthly Luncheon Virtual

Areeba Rizvi

Monthly Luncheon Virtual

Katherine Rexroad

Monthly Luncheon Virtual

Lal Harter

NCC Representative

Simcha Kuritzky

Publication Columnist

Thomas Chin

Newsletter

Monique Llanos

Newsletter

Hao Nguyen

Newsletter

Guy Hadsall

Newsletter

Matt Gorman

Strategy

Claire Chen

Strategy

Jennifer Meade

Strategy

Danielle Burrell

Webinars

Michelle Bowers

Webinars

Tyler Gall

Webinars

E. Marie Butler

Webmaster

Christina Low

Webmaster

Howie Simanoff

Webmaster

Brent Watson

Webmaster

Christel Pico

Young Professionals

See a complete list of Chapter leadership at: [AGA DC Chapter Leadership](#).

**To contact any of the AGA DC Chapter Volunteers 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](#).

NEW ADDRESS

AGA DC Chapter
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McLean, VA 22102

Website: <http://www.agadc.org>

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