

# Washington CONNECTION

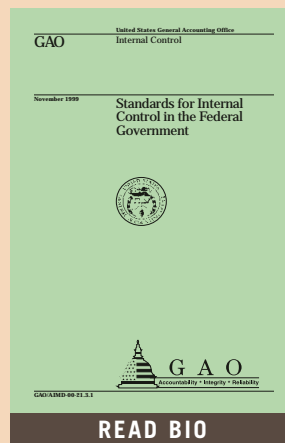


Association of Government Accountants  
Washington D.C. Chapter

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## Luncheon Series



**Kristen Kociolek**  
Assistant Director at the  
U.S. Government Accountability Office

Wednesday, October 30, 2013  
11:30am – 1:00pm

Clyde's of Gallery Place  
707 7th Street, NW Washington DC 20001

[SEE LOCATION ON MAP](#)

"Going Green: Standards for Internal  
Control in the Federal Government"

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JAMES R. DALKIN

## President's Message



It is difficult to believe Fall is upon us! This time of year is traditionally a very busy one for Federal Agencies and their auditors. This year has been complicated by the government shutdown. While Federal workers may not be able to use their official email, the good news is that AGA is open for business.

I encourage you to communicate with us through our new Twitter feed, Linked In or Facebook. Let's make the DC Chapter a leader in social media. Please link or connect with us. As long as the government is closed this is a great way to stay connected.

For those on furlough, this may be a chance to participate in a number of our programs that you may not have tried in the past due to time constraints. For example, our community services event for October is *Light the Night Walk*. Please join us on October 19. Come walk! If you know of any financial managers that feel disconnected, this is a chance to have them join the DC AGA.

On behalf of our thousands of AGA DC members, I wish you a great October. Thanks for all you do.

Regards,

James R. Dalkin  
President  
Washington DC Chapter

SARAH CHOI

## Note from the Editor



**G**reetings AGA DC Chapter! We are into our second month of this 2013-2014 term and we have had several opportunities to come together as a community—from education events like the September luncheon where we heard from Comptroller General Gene Dodaro and the GPRA and COSO Framework audio conferences to social events like the Early Careers BBQ Picnic and the Shirlington Octoberfest. We hope you have been taking advantage of these chances to get together to grow and network with the AGA community. We hope this newsletter enables and encourages you to get involved as well.

A special thank you to the DC Chapter Officers and Directors that made this newsletter possible. Thank you for your passion and commitment for this chapter. But AGA members, you can be contributors too! If you have a great idea for the newsletter, please feel free to reach out to me.

Thank you for reading this issue. See you at the next AGA event!

Best regards,

Sarah Choi  
Editor  
The Washington Connection



### NEWSLETTER TEAM

Sarah Choi, Editor

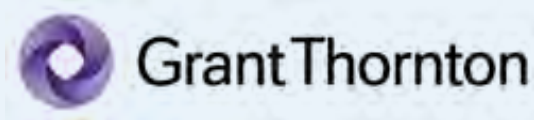
Sheri Beauregard, Designer

Michael James, Designer

AGA-DC THANKS ITS



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AGA-DC THANKS ITS

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**SILVER ● SPONSORS**



**BRONZE ● SPONSORS**





EDUCATION COMMITTEE

## Upcoming Audio Conference

The AGA DC Chapter is hosting an AGA Audio Conference on December 11, 2013, titled "Taking the High Road: How to Succeed Ethically When Others Bend the Rules" at the Smithsonian Institution Castle building located at 1000 Jefferson Drive, Washington DC on the National Mall in the Board of Regents room from 2:00pm to 3:50pm. This Smithsonian Institution Castle building is accessible from the Smithsonian and L'Enfant Plaza Metro Stations and within proximity to AGA member offices. Attendees will earn 2 hours of CPE credit.

EARN  
**2 HOURS**  
**CPE**  
CREDIT

**Topic:** Problems and consequences attributed to poor ethical decisions can arise when ethical behavior is not defined, understood, or demonstrated. Emphasizing the value of ethics training will foster an environment where:

- Ethical behavior is valued;
- Ethical behavior is considered the norm; and
- Ethical decisions help to contribute to long-term success.

This audio conference features easy-to-understand definitions of ethics, guidelines for tackling difficult decisions, practical examples, and a generous amount of humor; the result is an upbeat look at a key factor in long-term success.

**Speaker:** Frank Bucaro – Professional writer and speaker on ethics who holds the Certified Speaking Professional designation through the National Speakers Association.

**RSVP:** Interested parties should register at [Audio Conference Registration](#) or contact [Norma Myers](#) by December 9, 2013.

For additional information, please visit the [AGA National website](#) or contact [Salim Mawani](#).



### Location and Time

Smithsonian Institution Building  
"The Castle" on the National Mall  
1000 Jefferson Drive, SW  
Board of Regents Room 358  
Washington, DC

December 11, 2013  
2:00pm – 3:50pm

**CERTIFIED GOVERNMENT FINANCIAL MANAGER (CGFM) COMMITTEE**

# News and Upcoming Events

## Welcome to a New Year of CGFM Opportunities and News



Director  
Karl Payne

Thanks to all of our members for the continued support of the DC Chapter CGFM Program. This article is intended to update you on the latest CGFM developments and provide helpful information on maintaining your certification. If you have questions about the CGFM Program, or if we can be of assistance, please feel free to contact me at [kpayne@kpmg.com](mailto:kpayne@kpmg.com).

## Upcoming Chapter and National CGFM Events:

- **CGFM Intensive Review** – AGA's Intensive Review Course (IRC) will take place 8:00am – 5:00pm October 28 and 29. The cost of the course is only \$348 for qualified participants, and offers 18 CPE hours. The CGFM Examinations are offered at no cost to course attendees. For more information visit the [AGA website](http://www.agadcdc.org).
- **Chapter Essay Contest** – We plan to hold an essay contest in late fall (Nov/Dec) with the chance to win exam reimbursements.
- **Chapter CGFM Classes** – The DC Chapter will again host a free training for all three modules of the CGFM Exam. This class will take place in March. These have proven to be very popular classes. Last year, this class was filled to capacity.

## Congratulations! These Chapter members earned their CGFM in August!

- Ms. Erainust Lowery, CGFM
- Ms. Betsy L. Taylor, CGFM

## Proudly Display your CGFM Designation at Chapter Luncheons

Do you attend the DC Chapter's monthly luncheons? I hope you do – it is a terrific opportunity to network, socialize, hear interesting speakers and gain CPE's. And, when you pick up your name tag at the luncheon registration table, make sure to let the attendant know that you are a CGFM and they will give you a CGFM sticker. Proudly display it on your name tag, and let all of your colleagues know that you have attained a highly valued and recognized certification of your professionalism and competence.



## CGFM Mentors

Are you looking for a mentor to guide you while you prepare for the CGFM exams? The National office will help to connect you to volunteer mentors in your area. If you are looking for a mentor, or would like to volunteer to serve as a mentor, contact one of the national CGFM coordinators: Crystal Vanison, Certification Program Coordinator, at 800.AGA.7211 ext. 316, or [cvanison@agacgfm.org](mailto:cvanison@agacgfm.org), or Katya Silver, Director of Professional Certification, at 800.AGA.7211, ext. 305, or [ksilver@agacgfm.org](mailto:ksilver@agacgfm.org).

## Maintaining your CGFM – Did You Know?

- All active CGFMs are required to complete at least 80 hours of continuing professional education (CPE) every two years in government financial management topics or related technical subjects. The 80 CPE hours must be completed within the CGFM's two-year CPE cycle. The CPE cycle is determined by the CGFM award year.
- Active CGFMs are required to maintain supporting documentation on CPE hours earned for a minimum of three years and provide it to AGA upon request. This documentation may be requested by AGA as part of an annual audit of a random sample of CGFMs.

## AGA's CGFM Modules 2 and 3 study guides are now on-line

You can now access CGFM Study Guides 2 and 3 on the go! Read, search and review the study guide content on your laptop, tablet or phone — a convenient way to prepare for the CGFM Examinations. Upon purchasing the online version, you'll have immediate access to the entire publication for a period of 12 months. In addition, if a newer version of this study guide is published within this period, you'll also have access to the new version! An on-line version of module 1 will be available soon. As always, you may also purchase print copies of the CGFM study guides. Study guides may be purchased through the AGA website. To learn more, visit the national [AGA website](http://www.agadcd.org).

## Have you checked off what you need to do to reach your CGFM goal?

So, you recognize the many benefits of becoming CGFM certified. Now, do you know all of the steps you need take to reach your goal? Are you aware of all of the National and Chapter level resources available to assist you in meeting your goal? Your Chapter CGFM committee is your local resource for information on requirements, available study and classroom opportunities, advice and general certification information. Another great resource is the National AGA website. Check out the AGA National's [CGFM Certification Directory](#). You will find a wealth of valuable information that will help you along your path to attaining certification. Just some of the topics you will find covered on the website are: *Why Earn the CGFM*, *Where Do I Start*, *What Do Exams Cover*, *How Do I Prepare*, *How Do I Purchase Exams*, and *How Do I Maintain a CGFM*. And, of course, I am available at a Chapter level to answer any of your questions or concerns – Please feel free to reach out anytime.





MEETINGS COMMITTEE

# News and Upcoming Events

The Meetings Committee would like to once again thank all of YOU and Clyde's Restaurant for an outstanding September luncheon. We continue to have sellout crowds month after month! That is a testament to the excellent line up of speakers that we have this year, along with the great teamwork from all of our chapter members. For the October luncheon, please ensure to sign-up early, as we expect another early-sell out. Also, make sure you get to Clyde's on time to check in and enjoy the 3-course meal that is offered. [Click here](#) to register for this event.

We hope to see you in attendance Wednesday, October 30th at Clyde's – Gallery Place/Chinatown.

**See you there!**

Ryan Bolz	<a href="mailto:rbolz@kpmg.com">rbolz@kpmg.com</a>
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Director  
Ryan Bolz



Assistant Director  
Mark Kandra



Assistant Director  
Eric Schaefer

UPCOMING LUNCHEONS

**Mark your calendars!**

October  
**30**

December  
**4**

January  
**15**

February  
**19**

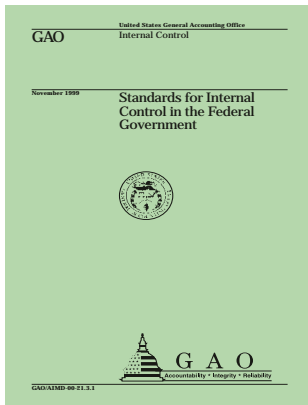
March  
**19**

April  
**16**

May  
**14**

KRISTEN KOCIOLEK

# LUNCHEON SPEAKER

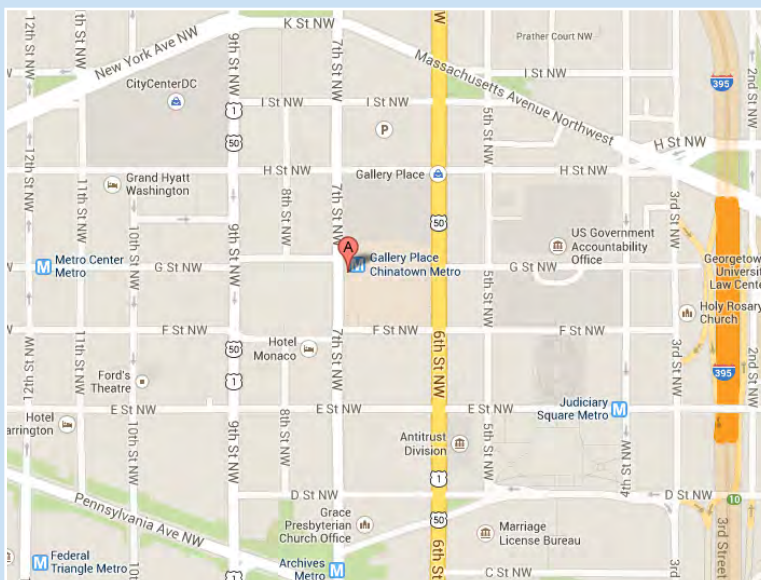


Kristen A. Kociolek is an Assistant director on the Government Accountability Office's (GAO) Financial Management and Assurance Team. Ms. Kociolek is a member of GAO's audit standards team responsible for developing, drafting, and maintaining Government Auditing Standards (The Yellow Book) and Standards for Internal

Control in the Federal Government (the Green Book). Ms. Kociolek also leads GAO's financial statement audit of the U.S. Securities and Exchange Commission. Prior to joining GAO, Ms. Kociolek worked as an audit manager with Ernst & Young in Harrisburg, PA, where her work focused on financial audits of state and local governments. Ms. Kociolek graduated from Elizabethtown College in Elizabethtown, PA with a Bachelor of Science degree in Accounting. She is a Certified Public Accountant and a Certified Government Financial Manager. She is a member of the American Institute of Certified Public Accountants and the Pennsylvania Institute of Certified Public Accountants.

OCTOBER

## Luncheon Series



Wednesday October 30, 2013  
11:30am – 1:00pm

Clyde's of Gallery Place  
707 7th Street,  
NW Washington DC 20001

202-349-3700

COMMUNITY SERVICE COMMITTEE

# Upcoming Events

For the month of September, the AGA DC Chapter selected The Fishing School (TFS) as the DC chapter's community service project. The primary goal of the TFS program was to collect new school supplies and monetary donations for the students attending TFS afterschool programs in the upcoming year. Our members supported this worthy cause by donating school supplies and/or monetary donations during our September luncheon, which was held Wednesday, September 12th at Clyde's Restaurant.



In total, the DC AGA Chapter donated a huge box full of school supplies as well as monetary donations. As a reminder, TFS is part of the CFC (#56490) as well as the United Way (#8553). To get more information, visit the [TFS website](#).

We would like to send an enormous **THANK YOU** to our members that participated in the TFS program for 2013. Through your generosity and continued support, we made this another successful community service event and were able to help less fortunate children.

Leo Givs, Executive Director of TFS, also sent his appreciation to the AGA DC Chapter for inviting TFS to our event and collecting the donations.

Sincerely,  
The DC Chapter Community Service Committee

For questions, please contact:

Jennifer Nielsen at [jennielsen@deloitte.com](mailto:jennielsen@deloitte.com)  
Melody Miller at [mmiller252@gmail.com](mailto:mmiller252@gmail.com)  
Darien Thall at [dthall@kpmg.com](mailto:dthall@kpmg.com)

## JOIN THE AGA 2013 LIGHT THE NIGHT TEAM!

Light The Night is The Leukemia & Lymphoma Society's annual evening fundraising Walk to celebrate and commemorate lives touched by blood cancer. Every Fall, more than 200 communities across North America come together for this inspirational and memorable walk.

Walk with the AGA 2013 Team:  
Washington, DC – Freedom Plaza  
Saturday, October 19, 2013  
Check-in: 5:00 p.m. • Walk begins: 7:00 p.m.

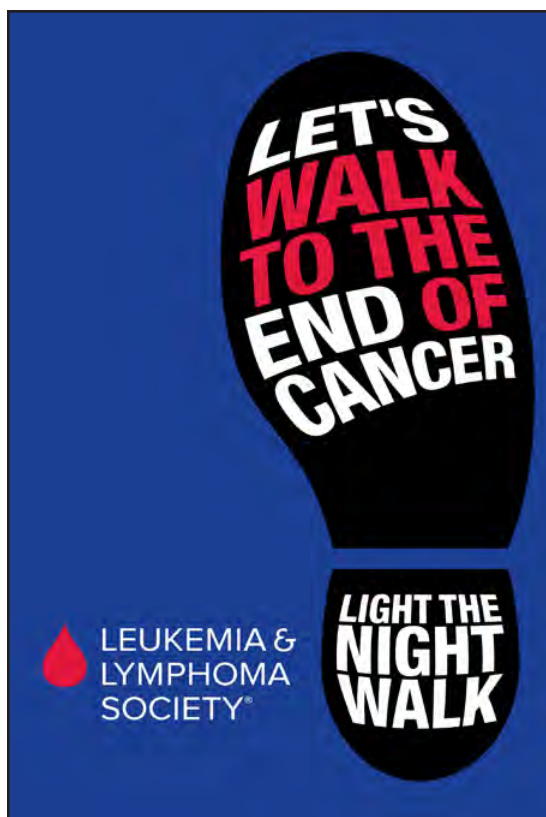
## SUPPORT US TODAY

Register for the AGA Team or support us by donating at  
<http://pages.lightthenight.org/nca/WashDC13/TeamAGA2013>



Register by scanning the QR code and go directly to our Team AGA 2013 Light The Night Team Page!

For more information on joining the AGA 2013 Light The Night Team, contact Jennifer Nielsen, Community Service Director, at  
571.318.2897 • [jennielsen@deloitte.com](mailto:jennielsen@deloitte.com)



MENTORSHIP COMMITTEE

# Mentorship Program

**S**tart this year off with a new MENTOR to help achieve your career enhancing goals! Are you looking for someone to challenge you or need someone from outside of your agency or company to get valuable feedback from? If so, the Mentorship Program is for you!!!

The Mentorship Program is designed to connect mentees with a career mentor. Through events such as Happy Hours, training luncheons, and networking functions, we plan to provide all the tools you need to form a solid mentoring relationship.

**Mentoring**  
MAKES A DIFFERENCE

Become or request to be a mentor and starting building a career-long relationship today.

If you wish to join the Mentorship Program or have any questions, please reach out to Sharnell Montgomery at [montgomery.sharnel@dol.gov](mailto:montgomery.sharnel@dol.gov) or by phone at 202-693-6854.

*Stay tuned for details about upcoming events.*

## Connections at Your Fingertips... Just Click

- AGA Membership Information
- AGA Membership Application
- CGFM Program Information
- CGFM Program Application
- AGA National Home Page
- AGA DC Home Page (Washington DC)
- AGA Northern Virginia Home Page (Virginia)
- AGA Montgomery/PG Home Page (Maryland)
- MACPA Home Page (Maryland)
- VSCPA Home Page (Virginia)
- GWSCPA Home Page (Washington DC)
- AICPA Home Page



# Snapshots

## September Luncheon

For the September Luncheon, AGA DC Chapter heard Gene Dodaro, the Comptroller General of the United States and head of the U.S. Government Accountability Office speak on his perspectives on fiscal and performance challenges facing government.





# Snapshots *Continued*

## Early Careers BBQ

The DC, Northern Virginia and Prince Georges County/ Montgomery County AGA Chapters jointly sponsored a very successful third annual Famous Dave's Early Careers BBQ on a very warm Saturday, September 14th with over forty attendees at the beautiful West Potomac Park at Haines Point. There, we ate lots of good food, talked about the latest accounting developments, and shared good times.





# Request for Newsletter Submissions, Comments, or Suggestions

**D**o you have any comments or suggestions for the newsletter? Do you have an article you would like to see in print? Have you traveled to any interesting locations? The Washington Connection requests that you submit any and all items of interest to our federal, state, and local members, including: reviews of recently published books related to financial management; unique travel experiences or assignments; lessons learned on rollouts of new systems; and noteworthy accomplishments by our members. We also welcome digital photos that accompany your submission.

The deadline for submitting articles to appear in the **November 2013** issue is **October 25, 2013**. Please send your comments and contributions to Sarah Choi, the newsletter editor for the 2013-2014 program year, at [chois@sec.gov](mailto:chois@sec.gov).



## Preparing the FMS-2108 Year-End Closing Statement

### Background

For years, agencies have produced the FMS-2108 Year-End Closing Statement to show the cash withdrawn from cancelling funds and reconciling their cash balances at Treasury with their budgetary account balances. Previous mappings of the Standard General Ledger (SGL) to the FMS-2108 had a number of different options based on the type of authority used by the fund. For FY2014, Treasury has come up with a single, consolidated mapping of SGL accounts to the various columns. This should help agencies prepare the statement. Some might want to prepare the statement during the year to find any problems early, but that would require mapping accounts that should be zero at year end.

### Basic Definition

This is a summary of the definition provided by Treasury. For funds without borrowing and contract authority, columns 3, 4, and 5 will be zero. If they have no investments, then only proprietary cash (generally just 101000 Fund Balance with Treasury) will be in columns 2 and 6.

## Inside the Black Box

by Simcha  
Kuritzky,  
CGFM CPA

Column 11 can actually be calculated as column 6 + 7 + 8 – 9 – 10. If that formula does not work, then the FMS-2108 is not in balance. I recommend that clients who generate this report out of their trial balances or accounting system add at least one more column which shows the difference between column 11 based on the GL account balances shown above and based on the formula above. If this column has a zero balance then all is well.

### Common Pitfalls

There are three common problems which cause Column 11 to be out of balance, and one rare problem. The rare problem is debits and credits do not balance for budgetary GL accounts within Treasury Symbol. If your agency has this problem, you are no doubt already addressing it, as this will affect practically all your reports.

If budgetary accounts are in balance, then the only possible sources of discrepancy are with the budgetary accounts not included on the FMS-2108. There are three kinds: cash, anticipations, and temporary. Amounts temporarily unavailable (SGL 438400, 438700, 438800, and 439500) will have zero balance at year end, and so are excluded from the report. However, if an agency runs the report during the year to check for imbalances,

*continued on next page*

Num	Column Description	Accounts
1	Treasury Appropriation Fund Symbol	n/a
2	Pre-closing Unexpended Balance	101000-120900, 161000-167900, 413900, 414900
3	Borrowing and Contract Authority: New Authority and Rescissions	413100, 414000, 414100, 439200, 439300
4	Appropriations to Liquidate Contract Authority*	413500, 413600, 414500
5	Borrowing and Contract Authority Adjustments*	413200-413500, 414000, 414300, 414400, 439200, 439300
6	Post-closing Unexpended Balance	(column 2 + 3 - 4 - 5)
7	Reimbursements Earned and Refunds	408100-418300, 412100-412600, 413700, 415300-415400, 416600-417100, 419900, 422500, 423200-423400, 425100, 428300-428700
8	Unfilled Customer Orders	422100, 423000
9	Undelivered Orders and Contracts *	48x100
10	Accounts Payable and Other Liabilities *	412400, 412700, 417200, 432000, 49x100
11	Unobligated Balance *	415700, 415899, 435700, 438200, 438300, 439400-439900, 442000-472000

\* Credit balance shown as positive

it will be necessary to include these. I suggest using a new column to separately identify them. It will also assist agencies in ensuring these balances are zero as year end approaches.

Cash is represented by the proprietary accounts, so any discrepancy caused by excluding cash budgetary accounts (most commonly 411900, 422200, 425200, 426000, 480200 and 490200) would point to a disconnect between proprietary and budgetary cash account balances. I discussed this in my April, 2010 column. If the discrepancy is caused by a timing difference, set up a special payable or receivable sub-account to hold the timing difference and report this in a separate column (e.g., if a payment voucher for advance posts dr. 14100000 480100000 cr. 21100014 48020000 and confirming the schedule posts dr. 21100014 cr. 10100000, then 21100014 would represent the timing difference). Otherwise, add all proprietary cash account balances and subtract the budgetary cash balances to calculate the discrepancy in cash.

The anticipated resource accounts (403200 thru 407000, 412000, 416000, 416500, 418300, 421500, and 431000) should have the same debit balance as the credit balance in anticipated status accounts (459000 and 469000). Place these accounts' balances in a new column to identify any discrepancy among anticipations.

## Analysis Columns

Combining these recommendations, you could add these new columns to the report to analyze the cause of any discrepancies (see table below). While Treasury shows the report as a new row for each symbol and all the amounts for a symbol arrayed across columns, I usually define the amounts as rows on the report with a new page for each Treasury Symbol to facilitate printing and reading.

## Conclusion

The FMS-2108 is the original tie-point report, comparing the budgetary available amount to proprietary cash and investments. However, it is built with the assumption that it is only run right before closing the books. If agencies want to run the report to check for imbalances during the year, they may need to add some more accounts to the report definition. Adding new columns to capture common problems will also aid the analysis.

*Comments and critiques, as well as specific questions or suggestions for future topics, are always welcome. Send them to [Simcha.Kuritzky@CGI.com](mailto:Simcha.Kuritzky@CGI.com), and not to the AGA.*

Num	Column Description	Accounts
12	Unobligated Balance (Calculated)	column 6 + 7 + 8 – 9 – 10
13	Gross Difference	column 11 – 12
14	Temporarily Unavailable *	438400, 438700, 438800, 439500
15	Cash Discrepancy	1010-1209, 1610-79, less all accounts that close into 4139, 4149, 4201, 4222, and 4802
16	Anticipations Discrepancy	403200-407000, 412000, 416000, 416500, 418300, 421500, 431000, 459000, 469000
17	Remaining Unexplained Difference	column 13 + 14 + 15 – 16

\* Credit balance shown as positive

MEMBERSHIP COMMITTEE

# News and Upcoming Events

The 2013-2014 membership committee is thrilled for the opportunity to help the AGA DC Chapter continue to grow and thrive. Our main purpose is to continue building membership and attracting interest in all DC Chapter offerings, including continuing professional education and networking opportunities.

## Planned Highlights

**Recruitment Contest:** The membership committee will continue to run its successful and popular recruitment contest. The first 30 members of the DC Chapter to recruit/sponsor a new member, and attend a chapter luncheon with the new member, will receive a \$50 Visa or Master Gift card. The new member will also receive a \$50 Visa or Master Gift card and their first luncheon free. What a terrific incentive! *To participate in this contest, please email the Membership team (email addresses below) at least 3 weeks prior to the luncheon date with the name of the new member you will be bringing to reserve their spot. If you are the sponsor, please ensure that you are already registered online.*

**Happy Hours:** The membership committee is planning on hosting at least two happy hours during the upcoming year. Stay tuned for further details.

**Publishing Names of New Members:** The team will continue to publish names of all new members in the monthly Newsletter.

**Photos of New Members and Sponsors at the Monthly Luncheons:** The team will continue to provide a monthly newsletter article with photos/names of new members and/or sponsors recognized at the monthly Chapter luncheons.

If you have any questions or are interested in learning more about our team, please contact:

Hakeem Khwaja [hkhwaja@kpmg.com](mailto:hkhwaja@kpmg.com)

Faith Kim [yfkim@kpmg.com](mailto:yfkim@kpmg.com)

Drew Rosen [dhrosen@kpmg.com](mailto:dhrosen@kpmg.com)



Co-Director  
Hakeem Khwaja



Co-Director  
Faith Kim



Assistant Director  
Drew Rosen



# Welcome New Members!

## *Members New to AGA DC Chapter (August 2013)*

Name	Company/Organization
Bernard Baranosky	DC Government
Zachary Bechtel	CliftonLarsonAllen LLP
Roxanne Beil	Mekelexx Management Services
Vonda Bell	Department of Interior
Jeanette Brock	Winlor Consulting Service
Joan Dec	Farm-Credit
Sonal Dhanani	KPMG LLP
Claudette Green-Thompson	WMATA
Joseph Hepp	Peace Corps
Adrian Ifill	PBGC
Michael Ipsaro	IMC
Eric Lippold	HUD
Melody Miller	SBSI
Abisoye Oki	KPMG LLP
Raman Singh	Tantus Technologies
Jessica Smith	Ernst & Young LLP
Joye Smith	Premier Group Services
Peter Smith	Neosmith, Inc.
Milford Sprecher	IBM Global Business Services
Roxan Tomlinson-Martin	Department of Treasury BEP

OCTOBER–DECEMBER

# Upcoming Events



## Leukemia & Lymphoma Society's Annual Light the Night Walk

Freedom Plaza  
Check-in at 5:00pm



## CGFM Intensive Review Course

Washington, DC  
8:00am – 5:00pm



## October Monthly Luncheon

Clyde's of Gallery Place  
11:30am – 1:00pm



## December Monthly Luncheon *Registration Opens Soon*

Clyde's of Gallery Place  
11:30am – 1:00pm



## AGA Audio Conference – Taking the High Road: How to Succeed Ethically When Others Bend the Rules

Smithsonian Institution Castle  
2:00pm – 3:50pm



2013 – 2014

# Officers and Directors

## OFFICERS

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703-532-2319

**Past President, Eileen Parlow**  
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## ACCOUNTABILITY & OUTREACH

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## ADMINISTRATION

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**Co-Director, Pushparajan Arokiaswamy**  
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## AWARDS

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**Assistant Director, Chris McGrath**  
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