

# The Washington Connection

*Association of Government Accountants  
Washington, DC Chapter*

November /December 2017

ISSUE  
**II**

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## MISSION STATEMENT

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

## 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.



**WASHINGTON, DC CHAPTER**

**Thank you October Luncheon Speaker!**

**Mr. Stephen C. Goss**  
**Social Security Administration,**  
**Chief Actuary**

**Thank you December Luncheon Speaker!**

**Ms. Teresa (Terri) McKay**  
**Defense Finance and Accounting Service,**  
**Director**

## January Luncheon Speaker



**Tony Scardino**

Deputy Director (Acting) and  
Deputy Under Secretary for  
Intellectual Property  
United States Patent and  
Trademark Office

## President's Message



The crisp morning air, leaves changing from green to amber or maroon, and drastic fluctuations in daily temperatures – welcome the arrival of fall and onset of winter for the Nation's Capital. For most of us, fall's arrival brings an increased number of commitments and activities—some done out of passion and excitement, and others out of sheer obligation. This time of year is traditionally a very busy time for government workers and the contractors that support them.

In the short few months since the beginning of the chapter's fiscal year, the chapter has produced several outstanding luncheon programs, hosted free audio conferences, conducted numerous member services events and early career programs, including the always popular tri-chapter annual picnic, and supported numerous community service programs.

This momentum continues into the new calendar year with the highly anticipated Federal Financial Management training program taking place in April. This training program offers 16 continuing education credit hours, including 2 hours of instructor-led ethics training. The chapter is committed to providing low cost value-add education and training. The chapter and its members also continue our tradition to pay-it-forward with our nationally recognized community service programs. Also by popular demand, our award-winning CGFM team continues to identify creative ways to encourage members to prepare and complete the CGFM accreditation program. These educational, engaging, and entertaining programs are made possible by the generous support of our sponsors.

The New Year also welcomes opportunities for members to collaborate and network. We have numerous activities planned to demonstrate leadership and mentoring, including our partnership with Junior Achievement to educate high school students about financial planning and managing budgets. Our mentorship program allows members to serve as mentors to aspiring government financial professionals and mentees to leverage the experiences of seasoned professionals, and in turn, also allows seasoned professionals to leverage the knowledge of their peers. These programs are structured to provide a hands-on perspective of financial management requirements and skills necessary for success through all levels of your career.

The DC Chapter continues to expand our membership and inform potential members of the tremendous value of AGA membership. Your path to success may be the roadmap followed by aspiring professionals.

Within a few short months, the fiscal year-end commitments, budget scenario drills, holiday family time, and calendar year-end celebrations will be in our rearview mirror. We should take time to pause and enjoy this time of year with the vibrant fall colors displayed by nature, especially as we pass the numerous majestic monuments and historic structures that encompass the Nation's Capital.

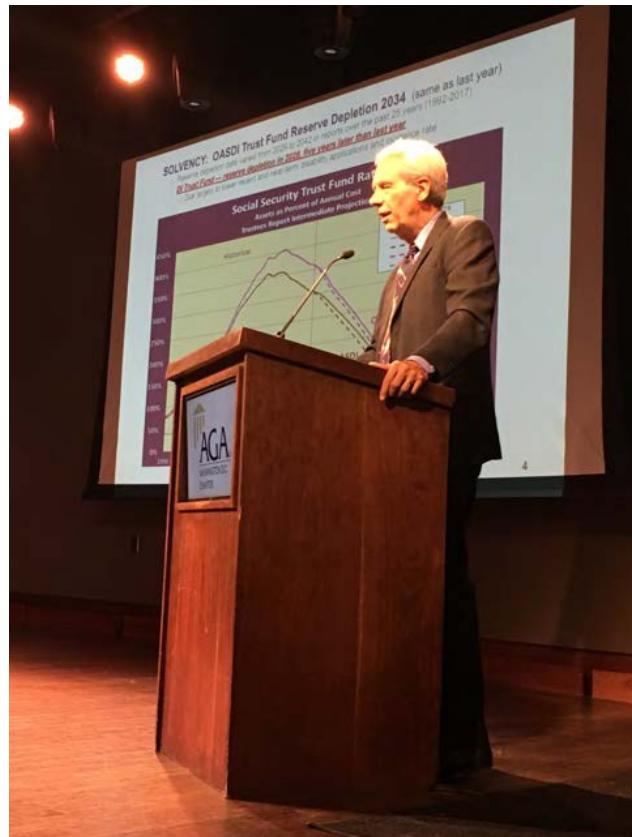
Sincerely,

Salim R. Mawani, CGFM, CPA  
2018 AGA Washington, DC Chapter President

*"I think there's no higher calling in terms of a career than public service, which is a chance to make a difference in people's lives and improve the world."* **Jack Lew**

## October Luncheon Highlights!

Thank you to all AGA members for attending the October Luncheon! A special thanks to our speaker Mr. Stephen Goss for his insights and remarks!



## December Luncheon Highlights!

Thank you to all AGA members for attending the December Luncheon! A special thanks to our speaker Ms.Terri McKay for her insights and remarks!



## **Look Ahead: Get to Know January Luncheon Speaker!**

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**Tony Scardino**  
**Deputy Director (Acting) and Deputy Under Secretary for Intellectual Property,  
United States Patent and Trademark Office (USPTO)**

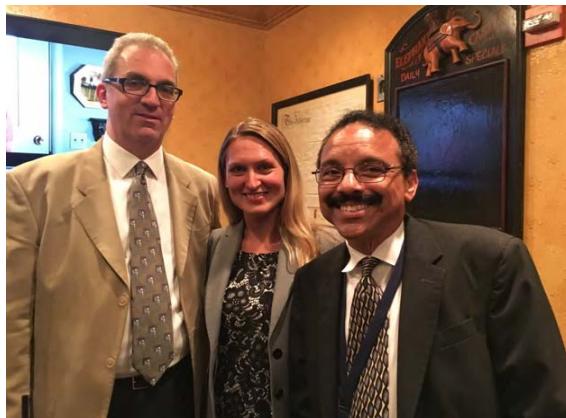
Anthony (Tony) Scardino is the Chief Financial Officer (CFO) of the United States Patent and Trademark Office (USPTO). He is also currently serving as acting Deputy Under Secretary of Commerce for Intellectual Property and acting Deputy Director of the USPTO. As CFO, Tony is the principal advisor to the USPTO Director in supporting and improving the accounting, budgeting, planning, and organizational performance systems of the USPTO. His responsibilities include managing the fiscal operations of the USPTO and providing leadership in areas defined by the Chief Financial Officers Act of 1990 and other legislation designed to improve integrity in federal financial management. As CFO, Tony oversees an annual budget exceeding \$3 billion.

Prior to joining the USPTO, Tony served in several leadership positions at the Department of Housing and Urban Development (HUD), including Acting CFO, Acting Deputy CFO, and Budget Director. In these capacities, he oversaw an annual budget of more than \$45 billion, served as a key advisor to the Secretary of HUD, and acted as a principal liaison with congressional appropriators and the White House Office of Management and Budget. His other federal experience includes time at the Federal Bureau of Investigation, the Federal Election Commission, and the Broadcasting Board of Governors, where he successfully implemented a new accounting and payroll system in a fiscally constrained environment. Additionally, Tony has spent time with two consulting firms supporting federal finance challenges and served as the Deputy CFO at a federally funded grantee of the U.S. government.

In 2014, Tony was the recipient of the Meritorious Presidential Rank Award, given annually by the President to no more than 5 percent of the federal government's Senior Executive Service in recognition of "sustained extraordinary accomplishment" throughout their executive tenure.

Tony has a Bachelor of Arts in political science from the State University of New York at Geneseo and a Master of Public Administration from the State University of New York at Albany. As a lifelong learner, Tony has attained a Certified Government Financial Management (CGFM) certification, is a graduate of Harvard's John F. Kennedy School of Government's Senior Managers in Government program, and also a graduate of the Advanced Management Program at the Wharton School of the University of Pennsylvania.

## Thank you for Attending Member Services Happy Hour!





## Save the Date!

### 17th Annual Federal Financial Management Training

Don't miss out on this opportunity to hear firsthand from our government leaders on the latest financial management developments. This annual training offered by the DC Chapter will give you 16 hours of valuable NASBA CPE credits.

**When:**

April 11th and 12th, 2018  
(Networking Reception evening of April 11th)

**Where:**

Ronald Reagan Building and International Trade Center  
1300 Pennsylvania Ave, NW Washington, DC

### 2018 Year Luncheon Speaker Schedule

Date	Speaker	Title	Organization
1/24/2018	Tony Scardino	Deputy Director (Acting) and Deputy Under Secretary for Intellectual Property	U.S. Patent and Trademark Office
2/20/2018	Ann Ebbert	CEO	Association of Government Accountants
3/21/2018	Craig Bennett	Deputy Chief Financial Officer	U.S. Coast Guard
4/24/2018	Wendy Payne	Executive Director	Federal Accounting Standards Advisory Board
5/16/2018	Jose Arrieta	Director	Office of IT 70 Schedule Contract Operations

### 2017 AGA DC Audio Training Schedule

The AGA DC Chapter will host the following National audio trainings throughout this program year at the Ford House Office Building, 441 2nd Street SW, 3rd Floor, Room #H2-108, Washington, DC 20515, across from the Federal Center, SW Metro Station. Registration links will be distributed to members the week before each training.

**Cost:**

There is no charge for AGA members in good standing for these events and attendees will earn two (2) CPE credit hours.

**When:**

January 10 Grants Management  
March 7 Infrastructure Financing  
March 28 Cybersecurity  
April 25 DATA Act  
May 16 Fraud/Data Analytics Leadership  
June 13

## AGA DC Chapter President-Elect Nominations!

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The AGA DC Chapter is accepting nominations for the **President-Elect position** for the 2018 to 2019 timeframe and serve as President effective July 2019 to June 2020. Interested DC Chapter members in good standing should submit interest by **January 12, 2018**, to Jorge Asef-Sargent ([jasef-sargent@kpmg.com](mailto:jasef-sargent@kpmg.com)) with the following information:

- Statement of interest to serve as the 2019 to 2020 DC Chapter President-Elect
- Candidate profile with background and experience serving government organizations
- Listing of AGA committee involvement
- Candidate contact information

Questions should be directed to Jorge Asef-Sargent via email at [jasef-sargent@kpmg.com](mailto:jasef-sargent@kpmg.com) or via phone at (202) 533-4480.



## **Update from Awards Committee!**

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The Awards Committee thank you for your National Leadership Training awards nomination submission!

Now you have another opportunity to recognize well-deserving individuals for their contributions to the AGA. AGA will present the following awards at the Professional Development Training (PDT) in July 22–25, 2018 at Orlando, Florida:

- Robert W. King Memorial Award
- Einhorn-Gary Award
- Frank Greathouse Distinguished Leadership Award
- Achievement of the Year Award
- Educator Award
- Cornelius E. Tierney/Ernst & Young Research Award
- Chapter Service Award
- International Achievement Award
- Emerging Leader Award of Excellence
- Relmond P. Van Daniker Government Transparency Award

We need your assistance in identifying outstanding individuals who exemplify the characteristics and contributions to the profession and AGA.

Visit our Awards webpage for detailed descriptions of the award categories at <https://www.agacgfm.org/Chapters/WashingtonDC/Our-Chapter/Chapter-Awards.aspx>.

Please send the names and nomination information of outstanding professionals to Myriam Galvan-Zambrana ([Myriam.Galvan-Zambrana@us.gt.com](mailto:Myriam.Galvan-Zambrana@us.gt.com)) or Thomas Chin ([T.Chin@cncsoig.gov](mailto:T.Chin@cncsoig.gov)) no later than March 5, 2018.



## Update from CGFM Committee!



As we find ourselves amidst the holidays and the season of giving, please consider giving yourself the gift of achievement by obtaining the CGFM! Passing the CGFM exam and obtaining that certification is a worthy way to demonstrate your commitment and dedication to the industry!

The AGA DC chapter CGFM Committee is very excited to provide you with the following opportunities to help make that gift achievable in 2018!

- Exam Rebate Initiative – Take the exam and pass it from now through March 2018, and we will reimburse you for the cost of your exams! You must submit the passing certification per module in order to qualify for the rebate. Please note, we only have a limited amount of rebates available.
- Loaner Study Guides/Practice Exams – Taking the exam? Need the materials? AGA DC will be making electronic versions of the study guides as well as practice exams available to AGA DC members on a short-term loaner basis. Please contact Wendy Allen at [wjallen@kpmg.com](mailto:wjallen@kpmg.com) for more information.
- DC Chapter CGFM Class – The DC Chapter is planning on hosting a three day training for Module 2:

Governmental Accounting, Financial Reporting and Budgeting of the CGFM exam. The cost is \$300 per person, and the CGFM committee will pay \$150 towards each individual's training class. All fees are due prior to the start of the class and will cover all training materials and the instructor. Availability is limited to 30 individuals only, and class dates are still being finalized. Interested AGA DC members will be required to demonstrate their eligibility prior to registering. Please email the CGFM committee to express your interest. Please note, your interest email is not a guarantee of acceptance; an official application email will be sent out once dates for the CGFM class have been finalized.

Congratulations to the following members who already achieved that goal in August and September! Way to go!

- Hanzhi Gu, CGFM
- Peter O'B. Moore, CGFM
- Mr. Michael T. Carney, II, CGFM
- Tamara W. Abramowitz, CGFM
- Mr. Samuel Varela Molina, CGFM
- Stephanie Marie Shapiro, CGFM
- Sydney A. Mobley, CGFM

*"The CGFM designation has allowed me to venture into career paths otherwise unattainable. It allowed me to meet individuals who influenced my growth and leadership skills, and ultimately my federal career."*

**– Salim Mawani, AGA DC Chapter President**

As always, if you have questions about the CGFM Program, please feel free to contact Wendy Allen at [wjallen@kpmg.com](mailto:wjallen@kpmg.com).

## Call for Mentors & Mentees!!

**BACK BY POPULAR DEMAND...AGA DC Chapter 4th Annual Speed Mentoring Event!**

**This year, we're offering new and exciting changes to the format of this event!  
We're formatting this event to ensure that all mentees have a  
chance to get to know each mentor.**

**AGA DC Chapter** is looking for dedicated professionals to help support our chapter and give back to others by sharing their experiences. We are in the process of recruiting mentors and mentees to participate in our Mentorship Program. The Program supports professional development and provides a venue for connecting professionals in the government financial management community.

The program is designed to:

- Create an environment that facilitates continuous dialogue regarding career development and advancement with industry colleagues and
- Build sustainable relationships while focusing on targeted developmental activities.

### **Program Structure**

Speed Mentoring: Pairing Up – **Save the event date, February 6, 2018 at 6pm**

(more detail to follow once participation has been confirmed)

Peer to Peer Mentoring

Group Mentoring/Leadership Activities

If you are a chapter member and are interested in forming a mentoring partnership, please sign up.

To participate, please email Sharnell Montgomery at [Montgomery.Sharnel@dol.gov](mailto:Montgomery.Sharnel@dol.gov) for more information.



## AGA DC Member Services Upcoming Events!

Please join AGA DC Member Services to celebrate the holiday season and to kick-off 2018 at our annual Holiday Happy Hour. This year we will be at **Clyde's of Gallery Place on Jan. 3rd, 2018 from 5:30 pm to 7:30pm.** We have the Piedmont Room reserved which is on the top floor. Please RSVP quickly on the AGA DC Chapter website as space is limited! Please direct any questions to David Baskin at [david.b.baskin@us.pwc.com](mailto:david.b.baskin@us.pwc.com)



Join fellow members of the AGA DC Chapter to cheer on the **Washington Capitals** as they take on the **Carolina Hurricanes** at the **Capital One Arena on Thursday, January 11, 2018.** There are a limited number of tickets available so be sure to register soon! Members are welcome to bring one guest.



The cost includes a ticket in Section 421, all-inclusive buffet in the Becks Lounge (Section 427) with a buffet, unlimited beer, wine, and soda, and a Washington Capitals T-shirt. The lounge is open at 6:00 PM and remains open until the start of the third period. The game starts at 7:00 PM.

Please note, your registration ticket through Eventbrite will not provide you access to the game. You will receive directions to gaining game access closer to the event. Please direct any questions to Crystal Wolf at [crystal.l.wolf@us.pwc.com](mailto:crystal.l.wolf@us.pwc.com). Hope to see you there!

## February Community Service Event!

The AGA DC Community Service Committee would like to highlight Junior Achievement of Greater Washington for the month of February.

We are calling for **volunteers** for a great community service day event at the Junior Achievement Finance Park in **Landover, MD** where the AGA DC chapter will help middle school students from Hyattsville Middle School immerse themselves in a reality-based decision-making process addressing aspects of individual and family budgeting, including housing, transportation, food, utilities, health care, investments, philanthropy, and banking. The on-site activities are designed to allow students the opportunity to "put into action" what they have learned in the classroom and to understand the basic steps of maintaining a realistic personal budget.

**When:** Monday, February 26, 2018

**Time:** 9:30 AM – 2:30 PM

**Location:** 960 Nalley Rd Landover, MD

**Prerequisite:** Just bring your real world experience.

Please contact **Wendy Cheung** at [wecheung@deloitte.com](mailto:wecheung@deloitte.com) directly if you can volunteer by February 19.



## **Inside the Black Box**

by Simcha Kuritzsky, CGFM, CPA

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### **The Debit/Credit Indicator on the SF 133**

#### A Source of Confusion

Several Standard General Ledger (SGL) accounts are mapped to multiple lines on the SF-133 Report on Obligations, where the Debit/Credit Indicator must be used to determine which line is appropriate. However, there are two different ways the Debit/Credit Indicator is used and agencies must use care to report amounts on the correct line.

#### To or From

Starting in FY2010, the SF-133 has split out transfer lines between transfer to and from the current Treasury Account Fund Symbol (TAFS). While the associated equity account (such as 310200/310300, 575000/576000) is split between transfers to and from, no such split currently exists for most budgetary accounts. The Debit/Credit Indicator in these cases is used to separate the debit activity (transfers in) from the credits (transfers out), which assumes that a reduction or cancellation of a transfer is recorded with a negative debit or credit. Agencies may find it easier to set up two subaccounts for each SGL account to segregate the transfers in and out.

SF-133 Line Numbers for Nonexpenditure Transfers of Unobligated Balance - Part One

SGL Account	Unexpired Funds		Expired Funds	
	Credit	Debit	Credit	Debit
417600	1010	1011	1070	1071
419000	1010	1011		

The first lines that report transfers split them out a number of different ways, as shown in the above chart.

SF-133 Line Numbers for Nonexpenditure Transfers of Unobligated Balance - Part Two

SGL Account	Authority Type	Fund Type	Discretionary Funds		Mandatory Funds	
			Credit	Debit	Credit	Debit
413700			1510	1511	1610	1611
415300					1610	1611
416600			1120	1121	1220	1221
416700			1120	1121	1220	1221
416800			1120	1121	1220	1221
417000	D		1172	1173	1272	1273
417000	P		1120	1121	1220	1221
417000	S		1710	1711	1810	1811
417300		ES/ET	1120	1121	1220	1221
417300		EG/EP		1711	1810	
417500		ES/ET	1120	1121	1220	1221
417500		EG/EP		1711	1810	
419300	P		1120	1121	1220	1221
419300	S		1710	1711	1810	1811

The next section maps SGL Accounts between three quadruplets of lines. Each quadruplet includes transfers of discretionary authority to other funds, discretionary authority from other funds, mandatory authority to other funds, and mandatory authority from other funds. The three types of authority are appropriated (lines 1120-1221), contract (1510-1611), and offsetting collections (1710-1811), as shown in the chart above. For SGL Accounts 417000 and 419300, Authority Type is also needed to determine on which line to report the transfer. For 417300 and 417500, it is Fund Type that is needed.

**SF-133 Line Numbers for Nonexpenditure Transfers of Obligated Balance**

SGL Account	Associated SGL	Credit Line	Debit Line
419900	422500	3080	3081
423000	422100	3080	3081
423200	422500	3080	3081
423300	425100	3080	3081
423400	428700	3080	3081
483100	480100	3031	3030
493100	490100	3031	3030

Similarly, section three tracks transfers of obligations, unfilled customer orders, and other budgetary receivables. Transfers in are reported on lines 3031 and 3081, while transfers out are on lines 3030 and 3080 (the debits and credits are reversed because 48x100 and 49x100 have natural credit balances while the rest of the accounts have natural debit balances).

#### **Anticipated or Unavailable**

The other way the Debit/Credit Indicator is used is to map anticipated authority to a budgetary resource (section one) if the net total is a debit, and to a status (section two) if the net total is a credit. The anticipated authority SGL Accounts are 406000, 407000, 421000, 421500, and 431000. The first four are mapped to budgetary resource line 1740 for discretionary funds and 1840 for mandatory funds, while the last one (anticipated recoveries) is mapped to budgetary resource line 1041. Any of these five accounts with a net credit balance are reported on line 2403 as other unapportioned authority. This allows an anticipated SGL account to go negative if the actual proceeds exceed the anticipation. Let's look at how the entire transaction sequence affects the SF 133.

The estimate increases resources on line 1740 and unavailable on line 2302. As collections take place, the resource amount moves from line 1740 to 1700, and the agency is allowed to spend what is available, moving the status from unavailable on line 2302 to available on 2301. What the dual definition of the SF 133 report (which also appears on the related Statement of Budgetary Resources) says is that, should collections exceed the estimate, the negative balance on line 1740 should be instead reported as a positive balance on line 2403. However, there is no provision for a negative

(debit) balance in SGL Account 4690, so entry A123 moving the 4690 balance to 4620 should no longer be included with the A708 collection.

The effect of the dual definition is to say "Okay, you didn't post what you should have, but we'll make you report the data as if you had." The same logic applies to other anticipated collections (accounts 406000, 407000, and 421500), as well as anticipated recoveries (431000), except that it is possible for the offsetting status account to be 463000, which is also mapped to line 2403, in which case a negative (debit) balance in the available account will not cause a negative line balance on the SF 133 or SBR. I'm hard pressed to come up with another example of where the SGL has adjusted report definitions to allow abnormal balances of SGL Accounts.

#### **Conclusion**

Agencies may want to use a subaccount to separate transfers in and out in the budgetary source accounts, rather than rely on the debit/credit balance. Agencies should also monitor their anticipated amounts and get authorization to increase them in a timely manner if actuals look like they will exceed the anticipation.



## 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 the AGA DC Board Member via [agadc.org](http://agadc.org). Check out the Officers and Directors for their contact information. For example, if you have a question about the AGA DC monthly luncheon, contact Eric Schaefer at [eschaefer05@yahoo.com](mailto:eschaefer05@yahoo.com).

**AGA DC Chapter**  
PO Box 432  
Falls Church, VA 22040

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Issue II - Nov./Dec. 2017

The Washington Connection

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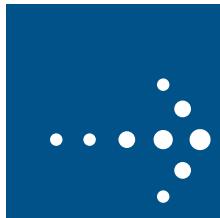


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Our leadership has well-established credentials in their areas of expertise. Our founder and CEO has spent the last 20 years managing the implementation of large ERP systems. Our associates are certified professionals with deep expertise in financial management systems and the implementation of complex technology solutions.

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Watkins Government Services LLC (WGS) is a woman owned small business consulting firm in metropolitan Washington, DC that serves the government sector; delivering financial management, grants management and business process re-engineering services to federal, state and local agencies.



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**Senior Advisor** ..... Ross Simms

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Assistant Director.....Toni Dyson-Moore

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Co-Director .....Heather Moreland

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Asst. Director.....Myriam Galvan-Zambrana

Advisor.....Scott Bell

Assistant Director.....Thomas Chin

### Awards Gala

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Assistant Director.....Diane Rudnick

### By-Laws and Procedures

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### CGFM

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### Member Services

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Co-Director ..... Crystal Wolf

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Assistant Director ..... Anthony Richards

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Assistant Director ..... Lance Rees  
Assistant Director ..... Masoud Najmabadi

### **Mentorship**

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Assistant Director ..... Boris Lyubovitsky  
Assistant Director ..... Charles Kwening Jr.

### **Newsletter**

Co-Director ..... Gary Wong  
Co-Director ..... Nadia Khartami

### **Programs**

Co-Director ..... Terry Bowie  
Co-Director ..... Paul Lionikis

### **Publications**

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### **Social Media**

Director ..... Calandra Layne  
Co-Director ..... Charles Moka  
Co-Director ..... Alexander Yow

### **Strategic Directions**

Director ..... Malena Brookshire  
Co-Director ..... Eric Schaefer

### **Webmaster**

Director ..... Tim Coulson

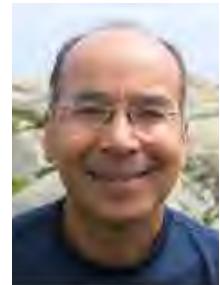
## Chapter Officers



Salim Mawani  
President



Wendy Morton-Huddleston  
Immediate Past-President



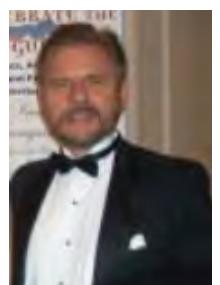
Al Pavot  
Treasurer



Christy Beck  
Treasurer-Elect



John Lynskey  
Senior Advisor



Karl Boettcher  
Senior Advisor



Ross Simms  
Senior Advisor

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Director,  
A & O



**Swamy Arokiaswamy**  
Co-Director,  
Administration



**Heather Moreland**  
Co-Director,  
Administration



**Eveka Rodriguez**  
Director,  
Awards



**Kerrey Olden,**  
Director,  
Awards



**Wendy Allen**  
Director,  
CGFM



**Lloyd Farmer**  
Director,  
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Assist. Director  
Early Careers



**Susanne Selk**  
Co-Director,  
Early Careers



**Jennifer Nielsen**  
Director,  
Education



**Karin Dasuki**  
Co-Director,  
Education



**Eileen Parlow**  
Director,  
Historian



**Eric Schaefer**  
Co-Director,  
Education



**Veronica Baird**  
Co-Director,  
Meetings

## Chapter Directors



Caitlin McGurn  
Co-Director,  
Member Services



Crystal Wolf  
Co-Director,  
Member Services



Drew Rosen  
Co-Director,  
Member Services



Sharnell Montgomery  
Director,  
Mentorship



Gary Wong  
Co-Director,  
Newsletter



Nadia Khartami  
Co-Director,  
Newsletter



Terry Bowie  
Co-Director,  
Programs



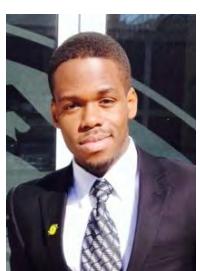
Paul Lionikis  
Co-Director,  
Programs



Simcha Kuritzky  
Director,  
Publications



Calandra Layne  
Director,  
Social Media



Charles Moka  
Co-Director,  
Social Media



Alex Yow  
Co-Director,  
Social Media



Malena Brookshire  
Director,  
Strategic Directions



Tim Coulson  
Director,  
Webmaster