

In partnership with the AGA Northern Virginia Chapter presents:

23rd Annual AGA Washington DC Chapter Spring Training Event

April 28 – 29, 2025





Virtual and Live at Convene – Hamilton Square



Detailed Agenda – Monday, April 28

7:30am - 8:15am

Breakfast - Lobby

8:15am - 8:20am

Welcome Remarks/Introduction

• Veronica Baird, AGA DC Chapter President-Elect 2026

8:20am – 9:10am

M101 GAO's Role in Supporting Congress

- Sara Pelton, Assistant Director at U.S. Government Accountability Office
- Berri Davis, Director, Sikich (Moderator)

During this session, a member of GAO's Office of Congressional Relations will summarize GAO's critical role in the legislative branch, describe the services GAO provides to Congress, and highlight potentially useful GAO products and suggestions for how to interact with congressional staff.

Learning Objectives / FOS – Auditing (Governmental):

- Describe GAO's role in Congress's legislative and oversight process.
- Identify GAO's services and products used by congressional decision-makers, executive branch agency staff, and members of the public focused on federal financial management.
- Summarize Federal agencies audit status and GAO's high risk list.

9:15am – 10:05am

M102 Preparing for Technology-Centric Solutions

- Erica Gaddy, Deputy Chief Financial Officer, Bureau of the Fiscal Service, U.S. Department of the Treasury
- Karin Dasuki, Deputy Chief Financial Officer, U.S. Office of Personnel Management
- **Reed Waller**, Senior Consultant, Federal Financial Management, Workiva (Moderator)

Technology innovations can dazzle federal decision-makers with an overwhelming array of possibilities. How can we decide whether the latest, shiniest IT solution will best address a problem or need? Blockchain? The Cloud? Robotics? Machine Learning? Al? What is a leader in financial management to do when there are so many toys in the toyshop, and only limited funds to spare? Fear not! Rapidly accelerating and expanding choices in technology need not distract us from choosing and applying the most effective, efficient, and practical solutions. Two leaders in federal financial and risk management share their practical, experiences and success strategies for selecting and implementing the best technologies for the given situation.

Learning Objectives / FOS – Information Technology:

- Understand challenges, risks, and rewards in determining the best technologies for a financial or risk
 management process.
- Gain practical tips for successful technology deployment.
- Benefit from experiences and lessons learned by Federal financial management leaders.

10:05am - 10:20am

Coffee / Networking Break - Lobby

10:20am - 11:10am

M103 How HUD is Adapting to Change and Assessing Impacts to its Control Environment

- MelaJo Kubacki, Assistant Chief Financial Officer for Financial Management, U.S. Department of Housing and Urban Development
- Rahaf Kaylani, Sr. Advisor to Chief Financial Officer, U.S. Department of Housing and Urban Development
- Joseph Hungate, Director, RMA Associates (Moderator)

HUD is adapting to recent Executive Orders and emerging technologies to strengthen its control environment. This session explores how the agency is eliminating information silos, managing risk, aligning with updated internal control frameworks, and incorporating AI to detect and prevent misuse of federal funds—while tackling the challenges of monitoring automated systems and ensuring data integrity.

Learning Objectives / FOS – Information Technology:

- Attendees will learn how policy shifts are driving changes in the design and execution of risk management and control environments.
- Identify strategies for monitoring third-party performance, and compliance in an increasingly interconnected federal landscape.
- Participants will gain insight into how agencies can adapt their control frameworks to support responsible Al use.



Detailed Agenda – Monday, April 28

11:15am - 12:05pm

M104 All Aboard! Lessons from WMATA on Resilience and Strategy

- Robert (Bob) Tuccillo, Senior Vice President, Finance, WMATA
- Veronica Baird, Senior Manager, KPMG (Moderator)

Local economies often face significant challenges. The DMV is a region that has withstood such challenge and change. This session will highlight how the Washington Metro Area Transit Authority (WMATA) has weathered economic downturn and continues to serve the greater D.C. community. The speaker will share his insights on maintaining a strong local presence and how other organizations can learn from successful strategies WMATA has implemented. Attendees will gain valuable perspectives on navigating economic uncertainties, addressing a fiscal cliff, and elevating their organizational strategies to transform challenges into opportunities.

Learning Objectives / FOS – Business Management & Organization:

- Gain an understanding of the economic impacts faced by WMATA since its inception and during periods of uncertainty and how these challenges are being addressed.
- Understand the importance of collaboration between public and local stakeholder organizations in fostering economic resilience.
- Discover innovative approaches to sustaining local presence and economic vitality amidst regional uncertainty.

12:05pm - 1:00pm

Lunch Break – Lobby

1:00pm - 1:50pm

M105 Demonstrating Value of Financial Modernization and Innovation

- Saesha Carlile, Deputy Assistant Secretary for Budget and Programs, Department of Transportation
- Jose Fabre, Deputy Chief Financial Officer, Immigration and Customs Enforcement
- Jeff Ledford, Director, The MIL Corporation (Moderator)

Modernization and innovation aren't always free or easy. How do we justify and budget for both ongoing operations and modernization needs?

and modernization needs?

Learning Objectives / FOS – Information Technology:

- Better understand what modernization and innovation mean.
- Learn how to obtain support from decision-makers.
- Learn how modernization tools improve productivity.
- See how innovation will shape the workforce of the future.

1:55pm – 2:45pm

M106 Challenges of Monitoring Grant Funding

- Jessie Handforth Kome, Former Director, Office of Block Grant Assistance, U.S. Department of Housing and Urban Development
- Kevin Love, Director, CohnReznick (Moderator)

This session will provide participants an overview of the challenges of monitoring grant funding and how to navigate through an audit.

Learning Objectives / FOS – Auditing (Governmental):

 Participants will learn strategies and best practices to monitor their grant funding and navigating through an audit.

2:45pm - 3:05pm

Coffee / Networking Break – Lobby



Detailed Agenda – Monday, April 28

3:05pm - 4:45pm

M107 Virginia Ethics – Al Ethics 2025

• Clare Levison, Virginia Society of Certified Public Accountants (VSCPA), Inspired Responsibility

The rapid evolution of artificial intelligence (AI) is reshaping industries, including accounting, with profound implications for professionals and firms. This Virginia Board of Accountancy-approved ethics course on responsible AI for the accounting profession explores the integration of AI in accounting, emphasizing ethical principles like transparency, accountability, privacy and fairness. The course offers a comprehensive overview of AI technologies, their applications in streamlining processes, and improving decision-making within the profession. It also addresses the challenges of regulatory compliance, data privacy and mitigating risks such as bias and security breaches. Through real-world case studies, you will gain insights into resolving ethical dilemmas, ensuring responsible AI usage, and fostering trust with clients and stakeholders.

By completing this course, you will develop strategies to navigate the complexities of AI governance and regulation, create robust frameworks for ethical decision-making, and adopt sustainable practices to balance innovation with responsibility. Designed for accounting professionals at all levels, this course equips learners with the tools to harness AI's potential while upholding the profession's ethical standards, ensuring compliance with legal obligations, and contributing to a more inclusive and accountable AI future.

Learning Objectives / FOS – Behavioral Ethics:

- Understand and apply ethical principles in AI usage within CPA firms and the accounting profession at large.
- Evaluate privacy, security and confidentiality concerns related to AI in accounting.
- Enhance transparency and accountability when using AI for decision-making.
- Assess real-world ethical challenges and case studies relevant to AI in accounting.

4:45pm – 4:50pm

Closing Remarks

• Annalena Winer, Vice President, CGI Federal, AGA DC Chapter Spring Training Director

5:00pm - 6:00pm

Evening Networking Reception – Lobby



Detailed Agenda – Tuesday, April 29

7:30am - 8:15am

Breakfast - Lobby

8:15am – 8:20am

Welcome Remarks/Introduction

• Annalena Winer, Vice President, CGI Federal, AGA DC Chapter Spring Training Director

8:20am – 9:10am

T101 Successfully Leading Financial Management Change

- Frank Peterson, Deputy Chief Financial Officer-Finance, National Aeronautics and Space Administration
- Bill Kubistal, Partner, Kearney & Company (Moderator)

This session will discuss successfully transitioning CFO offices through a period of change.

Learning Objectives / FOS – Finance:

- Understanding the complex federal policy environment.
- Insights into implementation of management priorities.
- Insights into financial planning and analysis.

9:15am - 10:05am

T102 From Icebergs to Clear Sailing: Strategies for Navigating Change and Risk

- Wilmer Graham, Chief Risk Officer, U.S. Department of Housing and Urban Development
- Thomas Brandt, Chief Risk Officer, Federal Retirement Thrift Investment Board
- Reed Waller, Senior Consultant, Federal Financial Management, Workiva (Moderator)

In today's rapidly changing environment, Enterprise Risk Management (ERM) can help government leaders and managers keep the Ship of State afloat and moving toward clear seas. A risk management-based approach to decision-making is essential for stewardship of government resources even in times of stability. Even more importantly now, ERM has a proven track record of navigating times of great change. The Chief Risk Officers for the U.S. Department of Housing and Urban Development and the Federal Retirement Thrift Investment Board will share their perspectives and experiences in how ERM can make sure government resources are being deployed to most effectively and efficiently provide value to taxpayers and other stakeholders.

Learning Objectives / FOS – Business Management & Operations:

- Understand how Enterprise Risk Management provides actionable data for decision-making and monitoring the status of programs, projects, initiatives, and operations.
- Gain practical tips for using ERM.
- Benefit from experiences and lessons learned by a Federal Chief Risk Officer.

10:05am - 10:20am

Coffee / Networking Break - Lobby

10:20am - 11:10am

T103 The Resilient Leader's Playbook

- Shepherd Brown, Senior Accountant, OCFO Policy Division, National Aeronautics and Space Administration
- Nancy Sieger, former Chief Information Officer, Internal Revenue Service and former Chief Technology Officer, U.S. Department of Treasury
- Jay Hurt, former Chief Financial Officer, Office of Federal Student Aid, Department of Education
- Davita Vance-Cooks, Director, Guidehouse (Moderator)

Leaders play a critical role in helping their team meet the challenges of navigating a work environment, characterized by chaos, confusion, anxiety, uncertainty, and upheaval. Our panelists – a current Federal Government professional with relevant experience and seasoned, former Federal Government executives and industry experts – will share insights on how leaders can serve as a stabilizing force by guiding their teams with clarity, resilience, emotional intelligence, and well-informed decisions.

Learning Objectives / FOS – Personal Development:

Introduce 5 key strategies that can help leaders be effective in managing their team through chaos and confusion.

- Adaptive Leadership Style.
- Coaching Mindset.
- Transparent Communication.
- Data-Informed Decision-Making Process.
- Task-Oriented Delegation Process.



Detailed Agenda – Tuesday, April 29

11:15am - 12:05pm

T104 Key Updates from FASAB

- Domenic Savini, Federal Accounting Standards Advisory Board
- Joshua Williams, Federal Accounting Standards Advisory Board
- Julia Duquette, Principal, Sikich (Moderator)

The panel will provide background information on FASAB and a status update on current Board projects, including intangible assets, commitments, Ioan disclosures, MD&A, Iand, and Ieases. The panel will also discuss federal accounting issues that could arise in the foreseeable future and explain how stakeholders can get involved with the Board's guidance development process.

Learning Objectives / FOS – Accounting (Governmental):

At the conclusion of this session attendees will be able to:

Understand the current FASAB GAAP hierarchy and AICPA recognition.

- Understand FASAB's research/project agenda, scope and direction.
- Identify which accounting topics are being re-examined.
- Explore potential impacts as a result of new Administration initiatives.
- Consider different ways they can get involved in standards-setting.

12:05pm - 1:00pm

Lunch Break – Lobby

1:00pm - 1:50pm

T105 IT Modernization for Government Financial Systems

- Liping Tan, Supervisory Accountant, Army, National Guard Bureau
- Diem Bui, Castro & Company (Moderator)

As government entities continue the journey toward IT modernization through cloud migration and the adoption of emerging technologies, the government entities face a range of risks that need to be carefully managed, particularly around security, compliance, and financial management oversight. This panel discussion will bring together experts to explore the risks tied to IT modernization and how the changes impact audit processes and financial management. Panelists will share their experiences and insights on common pitfalls organizations face during the transition to the cloud and other new technologies, as well as overall strategies to mitigate these risks effectively. Participants will gain valuable perspectives on effectively transforming the government technology profiles, ensuring proper risk management throughout the modernization process.

Learning Objectives / FOS – Information Technology:

- Gain insights on the current IT modernization trends across government and how the modernization impacts to audit, compliance, and financial management.
- Understand how IT modernization affects audit and financial management from multiple perspectives.
- Obtain information on common pitfalls and challenges faced by organizations during the modernization journeys.
- Discuss risk mitigation strategies including how to effectively manage the modernization projects.

1:55pm - 2:45pm

T106 A Day in the Life of a Non-Profit: Using Accounting to Support Those Who Count on You

- Andrew Hullinger, Chief Financial Officer, Horton's Kids
- Joshua Shapiro, Vice President, Ascella (Moderator)

Every day non-profits serve and have meaningful impacts for communities across our country. During this session, you will learn about a very special non-profit called Horton's Kids that serves families in Southeast, DC, and how finance and accounting activities are so integral to the success of non-profits such as Horton's Kids. Horton's Kids was built on the idea that dedicated service can change lives, and with the current dynamic environment in the federal grants domain, now more than ever, non-profits including Horton's Kids need to apply innovative approaches to executing their finance, accounting, and other administrative activities.

Learning Objectives / FOS – Accounting:

- Obtain an understanding of the type of funding sources and expenses for a non-profit and how they are accounted for.
- Obtain an understanding of the impact of federal grants on a non-profit.
- Obtain an understanding of the grant lifecycle for a non-profit: apply, execute, report, and audit.
- Obtain an understanding of the application of indirect costs for grants for a non-profit and the importance of the indirect amount.



Detailed Agenda – Tuesday, April 29

2:45pm - 3:05pm

Coffee / Networking Break – Lobby

3:05pm – 3:55pm

T107 Anecdotes from "The Accountant"

- Dr. Arnold Schneider, Professor of Accounting, Georgia Institute of Technology
- Annalena Winer, Vice President, CGI Federal, AGA DC Chapter Spring Training Director (Moderator)

Professor Schneider will discuss his experiences as the accounting consultant for the movie "The Accountant," including his contributions to the accounting-related scenes, his observations during the filming of various scenes, and his brief role as an extra during one scene.

Learning Objectives / FOS – Accounting:

- To become aware of how a technical advisor assists with the acquisition of props.
- To understand the process of developing the accounting information displayed in scenes.
- To comprehend the interplay of the accounting information and two mathematical concepts.
- To ascertain how errors involving accounting terminology are handled.
- To analyze the accounting data in the film to identify the fraud.
- To understand real world fraud cases and how accounting data analytics revealed the fraud.

4:00pm - 4:50pm

T108 How to Lead an Organization During Times of Change

- Kim Farrington, Chief Executive Officer of KTech, Former Chief Financial Officer of FirstNet
- Atisha Burks, Deputy Director and Chief Financial Officer of the Financial and Program Management Directorate, Federal Protective Service
- Lloyd Farmer, Director, 2ndWave (Moderator)

Navigating changes under a new administration can be a bit challenging for federal employees, especially if it means shifts in priorities, policies, or expectations. This session will guide leaders to help them cope with these

changes.

Learning Objectives / FOS – Business Management & Organization:

The Federal government, like most public sector organizations, must constantly deal with change. As we embark on a new presidential administration, change is all around us. The learning objective of this session is to equip leaders with the skill sets necessary to lead and manage change in this new changing environment. Panelists will provide suggestions on how they have navigated change in the past and provide knowledge and expertise for leaders who are grappling with the current rapidly evolving environment.

This session will identify the key leadership challenges as they attempt to navigate organizational changes. The panel will recommend various strategies for effective leadership and management during this period. Additionally, the panel will provide examples of how they dealt with organizational change in the past and strategies that worked well in earlier changing environments.

4:45pm – 4:50pm

Closing Remarks

• Veronica Baird, AGA DC Chapter President-Elect 2026



Veronica Baird

Veronica Baird is a Senior Manager at KPMG with over 10 years of progressive experience performing CFO Act audits and audit readiness for Federal agencies. Before joining KPMG, she worked as a Program Control Analyst at Northrop Grumman. Veronica has been an active member of the AGA Washington, D.C. chapter for the last 10 years. From 2015 to 2021, she served as the Director or Assistant Director of the monthly luncheons committee, coordinating the logistics of eight luncheon events per program year. During the COVID-19 pandemic, Veronica was instrumental in transitioning the luncheons to virtual webinars, ensuring quality programming and CPEs continued for our members. In 2023, she returned to a chapter committee role as the Executive Assistant to the Office of the President, where she monitors the AGA DC email account and assists with other administrative duties. Beginning July 1, 2025, Veronica will step into the role of Chapter President-Elect.



Thomas (Tom) Brandt

Tom Brandt is a risk management practitioner and senior executive in the federal government. With three decades of federal service, he is currently the Chief Risk Officer (CRO) and Director of Planning and Risk for the Federal Retirement Thrift Investment Board (FRTIB). He previously served as CRO for the Internal Revenue Service (IRS). He is a fellow with the National Academy of Public Administration, a past president of the Association for Federal Enterprise Risk Management (AFERM) and also served as chair of the OECD Forum on Tax Administration's ERM Community of Interest from 2018–2021. In November 2021, the IRS's Enterprise Risk Management Program was awarded by RIMS (The Risk Management Society) their 2021 Global ERM Award of Distinction. In November 2024, the FRTIB was also recognized with the same award. In November 2024, Tom received the ERM Hall of Fame Award from AFERM in recognition of longstanding efforts to advance the practice of ERM in the U.S. Federal government.



Shepherd Brown

Mr. Brown serves as a Subject Matter Expert in the Financial Policy & Compliance Branch of the NASA HQ OCFO Policy Division. Shepherd formerly served as the Acting Branch Chief of the Financial Policy & Compliance Branch of the NASA HQ OCFO Policy Division during a one-year detail. Prior to the detail, Mr. Brown served as a Senior Accountant in the NASA HQ OCFO Quality Assurance Division. His main focuses are policy and procedures, enterprise risk management, fraud risk management, payment integrity, and internal controls.

Prior to joining NASA, Mr. Brown worked as a financial management consultant where he supported NASA, Department of Housing and Urban Development, Office of Justice Programs, Department of Veterans Affairs, Architect of the Capitol, U.S. House of Representatives, U.S. Patent and Trademark Office, Federal Emergency Management Agency, and Florida Division of Emergency Management in managing projects and programs; assessing and strengthening internal controls; assessing improper payments; and developing policies and procedures. Mr. Brown holds a Bachelor of Science in Accounting from the University of Maryland – Eastern Shore.



Diem Bui

Diem Bui is the Director of IT Advisory at Castro and Company LLC, a public accounting and advisory firm based out of Alexandria VA. In her role, she leads multiple engagements that assist the government in identifying, assessing, and mitigating technology related risks. With

extensive experience in auditing and consulting, Diem Bui has led various teams delivering tailored risk management solutions to a wide range of DoD and civilian entities.

Throughout her career, Diem Bui developed an in-depth understanding of the government landscape, including the complex regulatory frameworks and compliance requirements that govern technology risk management. She has worked closely with federal agencies to implement effective risk management strategies, enabling the government entities to adhere to stringent regulatory frameworks and standards.

As a trusted leader in technology risk management, Diem Bui is passionate about staying at the forefront of emerging IT risk management trends and cultivating a culture of resilience. Today, she will moderate a session on IT modernization, audit risk, and mitigation, offering valuable insights on how organizations can successfully navigate and manage the complex risks within the evolving federal IT landscape.



Atisha Burks

Atisha Burks is the Deputy Director (CFO) of the Financial and Program Management Directorate, for a federal agency where she leads actions to sustain and improve business operations to meet agency goals. She provides executive leadership in financial management, acquisitions, and risk management, and ensures that the results of financial transactions are analyzed and interpreted to determine the impact upon agency resources. She previously served as a Senior Leader (Financial Operations) with the Department of Navy, Chief of Financial Reporting, Policy, and Property with the U.S. Coast Guard and most of her career at the Department of Commerce where she served as the Department's Director Financial Reporting and Policy.

Saesha Carlile

Saesha Carlile serves as the Deputy Assistant Secretary for Budget and Programs, where she has responsibility for the Department's budget formulation and execution, agency-wide performance, evaluation, and risk management, including the development of the Department's annual budget request and performance and evaluation plans.

Prior to joining the Department, Saesha was the Chief Administrative Officer at the District Department of Transportation. During her time there, she positioned the Department to successfully execute on significant growth in its infrastructure portfolio. She also served as interim Chief of Staff to the Director. Prior to that, Saesha served as the Deputy Budget Director within the Executive Office of the Mayor of DC, where she led the capital and operating budget teams, spearheading the development of the Mayor's \$15.5 billion annual budget process across 100+ District agencies. Saesha also spent nearly 9 years at the Treasury Department, serving as the Director of the Office of Financial Management under the Assistant Secretary for Management. Saesha was also selected as the first Director of Shared Services for the Treasury Department, where she was responsible for the corporate oversight of the Treasury Franchise Fund and Treasury Working Capital Fund. Prior to that, she spent several years in senior analyst roles, most notably as the Department's analyst for the Internal Revenue Service.

Additionally, Saesha has served in State and Regional agencies prior to her federal experience. Saesha has a bachelor's degree in Liberal Studies, graduating summa cum laude from the University of Illinois and a Master's Degree in Public Policy from Rutgers University. She currently lives in the District of Columbia.



Karin Dasuki



Karin has most recently served as Deputy CFO for the U.S. Office of Personnel Management, prior to which she was Director of the Office of Finance and Accounting and the DCFO for Headquarters at the U.S. Department of Energy. She has led agency-wide accounting and financial operations that include financial statements, investments, trust funds, loans accounting, ERM/internal controls, fraud, risk management, and audits with staff located in multiple physical locations. Karin attended the Federal Executive Institute's Leadership for a Democratic Society and is a member of the Senior Executive Service. She holds a graduate degree from Johns Hopkins University and is a licensed CPA in Maryland and CGFM.



Berri Davis

Berri Davis joined Sikich in October 2024 as a Director, following her retirement from the U.S. Government Accountability Office (GAO). Throughout her career, Ms. Davis has served in multiple aspects of financial audits, performance audits and evaluations, development of professional standards, and strategic and operational planning. In this new role at Sikich she is leveraging her extensive knowledge of government operations and industry standards and her significant expertise in financial systems and financial accounting to help ensure clients continue to benefit from best practices.

Before joining Sikich, Ms. Davis served as Managing Director of Financial Management and Assurance at GAO. During her career there, Ms. Davis oversaw financial and performance audits across a wide range of critical areas, including the financial statement audits of the Consolidated Financial Statements of the U.S. Government, the SEC, IRS, FDIC, CFPB, the Schedule of Federal Debt and Schedules of the Federal Government's General Fund. Her performance audits addressed improper payments, grants management, performance of Inspectors General, healthcare financial management, and state and local government financial oversight. She played a key role in the oversight of public funds related to recovery from the COVID-19 pandemic, identifying billions of dollars of improper payments to be returned to the federal government.

Before joining GAO in 2011, Ms. Davis served as Vice President of Standards and Guidance at the Institute of Internal Auditors, where she helped shape best practices in auditing. Ms. Davis received the AGA's Elmer Staats Award for Excellence in Government Financial Management in 2019.

Julia Duquette



Ms. Duquette joined Sikich in January 2024 as a principal, bringing more than 38 years of diverse experience performing financial and performance audits, evaluating internal controls, performing risk assessments, analyzing the efficiency and effectiveness of operational and administrative processes, and leading audit readiness reviews. She has managed audit engagements for federal government clients as well as led teams supporting advisory engagements at the Department of the Navy and the U.S. Marine Corps. Ms. Duquette's financial audit experience includes Department of Defense agencies such as the U.S. Transportation Command, the U.S. Special Operations Command, and the Military Retirement Fund, as well as non-DoD agencies including the Library of Congress, Federal Deposit Insurance Corporation, and the Department of State.

Throughout her career, Ms. Duquette has served in every aspect of financial audits, having worked as an internal auditor, a preparer of federal financial statements, an auditor in commercial practice at a Big 4 firm, a federal auditor at the GAO, and as a federal contractor.



Jose Fabre

Jose Fabre is an accomplished federal financial executive and public servant with extensive experience in budgetary leadership roles across multiple government agencies. He currently serves as the Deputy Chief Financial Officer for U.S. Immigration and Customs Enforcement (ICE). Prior to this, he was the Deputy Budget Director for the Department of Homeland Security (DHS), where he oversaw the formulation and justification of budget requests exceeding \$100 billion to support DHS's mission across 15 components. Prior to his role at DHS, Mr. Fabre worked as the Executive Director of Budget Directorate at Customs and Border Protection (CBP) responsible for \$18 billion budget, spearheaded innovations in budget tools, and implemented organizational reforms to enhance efficiency and communication.

Before joining CBP, Mr. Fabre worked as a Senior Consultant for IBM, focusing on financial systems development and business process reengineering for federal agencies. He began his career at the Government Accountability Office (GAO) as a Senior Analyst specializing in international trade and financial services.

Mr. Fabre holds a BA in Economics from the University of Puerto Rico and completed graduate studies in Political Economy, International Relations, and Public Policy at SUNY Albany. He has also conducted research on industrial policy in Brazil as a junior research fellow at the University of Brasilia and taught macroeconomics as an adjunct professor. In 2022, he earned a certificate in Public Sector Leadership from Harvard Kennedy School.

In recognition of his contributions, Mr. Fabre received the Presidential Rank Award in 2023 for his leadership during challenging periods such as the COVID-19 pandemic. Outside of work, he is a dedicated father who enjoys traveling and hiking with his two sons.

Lloyd Farmer



Lloyd Farmer, Director of CFO Services for 2ndWave LLC, has over 30 years' experience in the management and operations of both large and small organizations. His specialty is Federal contracting. He is a subject matter expert on Federal contracting and has led teams that have provided a wide variety of financial management and information technology services for both DoD, Intel and Civilian Agencies. Mr. Farmer has served on the AGA's Washington DC Chapter executive leadership team in a wide variety of roles as the director of community service and director of corporate sponsorships. Additionally, Mr. Farmer is a part-time instructor for Government Procurement Innovators (GPI) teaching students about Federal contracting and served on the boards for Sherwood Crossing Condominium Association and ScreenThem Background Investigations, a company he co-owns with his wife.



Kim Farington



Kim Farington is the Assistant Executive Director and Chief Financial and Administrative Officer for FirstNet. Ms. Farington is a Certified Public Accountant (CPA), with more than 30 years of Federal government service. Ms. Farington joined FirstNet in 2015. She oversees all budget, financial, accounting, and reporting operations as well as human resources, facilities, security, and other administrative functions for the FirstNet Authority. Kim also led the development and implementation of FirstNet's Budget, Financial, and Costing Tool (BFACT). Ms. Farington's extensive government career includes positions at the White House Office of Management and Budget, US Department of Agriculture, the US Office of Personnel Management, and the Office of the Secretary of Defense. In addition to being a CPA, Kim also is a Certified Telecommunications Network Specialist, a former Board member of Excelsior College's National Cybersecurity Institute in Washington, DC, former President of the Association of Government Accountant's (AGA's) Washington DC Chapter and currently serves as a member of AGA National's Council for the Advancement of Women. She holds an Associate's degree from Indiana University, a Bachelor's degree in Accounting from Excelsior College and achieved a Harvard Kennedy School Executive Certificate in Public Leadership.



Erica Gaddy

Erica Gaddy serves as the Deputy Chief Financial Officer and Chief Risk Officer at the U.S. Department of the Treasury's Bureau of the Fiscal Service. In this capacity she exercises bureau-wide responsibility for the development, administration and oversight of policies and programs for the budget, accounting and financial reporting, risk management, audit, and internal control functional areas. Before joining the Bureau of the Fiscal Service, she served as the U.S. Small Business Administration's Deputy Chief Financial Officer. She received her appointment to the Senior Executive Service in 2021.

Ms. Gaddy held several progressively responsible positions with the Department of the Navy. She focused on leading and guiding the execution of financial statement audit readiness and remediation activities and the OMB Circular A-123 program while serving as an advisor to Senior Leadership on financial management issues.

She holds a Master of Business Administration degree in Finance and a Bachelor of Business Administration in Law & Business. She is a graduate of the Federal Executive Institute – Leadership for a Democratic Society program.



Wilmer Graham

Wilmer Graham is the Chief Risk Officer at the U.S. Department of Housing and Urban Development. She provides executive leadership and direction for HUD's Enterprise and Fraud Risk Management programs. She leads the HUD Risk Community, working with Department officials and leadership at all levels to influence effective risk management practices with the identification and mitigation of challenges introduced by enterprise and fraud risks.

Wilmer holds a Bachelor of Science in Accounting from the University of North Carolina at Charlotte, and she is a Certified Public Accountant. She earned certificates for Executive Leadership from the University of Michigan and the Federal Executive Institute. She is an



Alumna of the Excellence in Government program and has earned numerous performance commendations throughout her career.



Andrew Hullinger

Andrew has spent 38 years dedicated to the financial and administrative management of non-profit organizations in the DC-area, with a special affinity for those that serve children, youth, and their families. He is currently the Chief Financial and Administrative Officer at Horton's Kids. Prior to that, he served as the vice president and chief financial officer at Youth For Understanding USA, and also worked for Alexandria City Public Schools, Washington National Cathedral, and Children's National Hospital, with a particular focus on long-range strategic and financial planning. A Wisconsin native, Andrew has called DC home since 1987, having moved here shortly after graduating from UW-Madison with a bachelor's of science in industrial engineering. An urban farmer in his spare time, Andrew maintains several garden plots around town, and is currently creating garden spaces on the Horton's Kids grounds. A lover of nature, Andrew delights in finding the extraordinary that hides in the everyday ordinary.



Joseph Hungate

Joseph Hungate is an RMA Director who has over 35 years of experience, with 28 years in the US Government (Centers for Disease Control, Housing & Urban Development, Treasury, and Commerce) in oversight of IT, Tax Administration, and Executive Leadership. He is responsible for Performance Audits and A-123 engagements, including enterprise risk management, to help government agencies improve processes and procedures. Passionate about financial transformation, he is a Certified Government Financial Manager (CGFM) from AGA and has achieved the Presidential Rank Award of Meritorious Executive. Joe enjoys traveling, single malt whisky, and spending time with his family outside of work.

Jay Hurt

Jay has over 33 years of financial and program management experience, as both a Federal executive and a management consultant. From 2003 through 2018, he served at the U.S. Department of Education's Office of Federal Student Aid (FSA) in multiple roles, including the Chief Financial Officer. From 2018 through May 2025, he has been a Managing Director at Grant Thornton Public Sector and a Partner at Guidehouse. As of June 2025, Jay will be practicing resiliency. He lives in Centreville, Virginia with his wife Kristine and near his two adult sons Jacob and Christopher. He is an avid backpacker and invites any conversation on the topic.



Rahaf Kaylani



Rahaf Kaylani serves as the senior advisor to the Chief Financial Officer at the Department of Housing and Urban Development. Ms. Kaylani has served HUD in roles spanning from overseeing the financial operations and management of HUD funds, establishing and implementing enterprise risk management and fraud risk management in grant programs, establishing internal audit standards, implementing AI in financial operations, to helping lead the first financial transformation at HUD. Rahaf has been instrumental in improving financial governance of program funding by introducing methodologies that streamline government operations, for the first time in HUD's history of grant operations.

Ms. Kaylani is involved in collaborative initiatives across Federal agencies to improve payment integrity and fiscal responsibility within government financial operations.



Jessie Handforth Kome

Jessie is a national subject matter expert in federal grant compliance, leveraging nearly four decades of leadership experience at the U.S. Department of Housing and Urban Development (HUD). As the former Director of HUD's Office of Block Grant Assistance, she oversaw a multi-billion-dollar portfolio of community development, affordable housing, and disaster recovery programs, including the Community Development Block Grant (CDBG) program. Jessie is adept at resolving complex policy issues, developing and implementing program budgets, negotiating grant-management performance metrics, and overseeing major mixed financial/grant performance management IT systems. Jessie provided instrumental in launching and managing significant initiatives such as the CDBG Disaster Recovery and Neighborhood Stabilization Program.



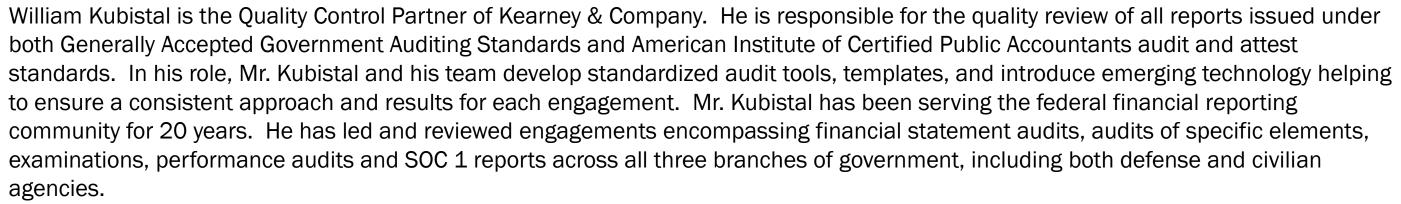
MelaJo Kubacki

Ms. MelaJo Kubacki's passion is forging a better path to results. During her three-decade, five-agency career with the federal government, MelaJo has enhanced mission delivery, improved financial results, enrichened skills, driven risk and control engagement, and cultivated technology empowerment. During her days at NASA, MelaJo envisioned and delivered financial statements from the system of record (SAP) – a government first. While the Deputy CFO for U.S. Agency for Global Media, MelaJo moved the agency from a failing government service provider to a commercial service provider, and successfully implemented a major financial management system upgrade (Momentum) in 6 months. Her efforts earned the agency an unmodified audit opinion.

At HUD, as Assistant Chief Financial Officer for Financial Management, MelaJo advanced the Departments capabilities across several fronts. She spearheaded Robotic Processing Automation (RPA) - successfully delivering over a dozen automations; she reimaged training and delivery – increasing reach by 1,000%; she reshaped HUD's internal control and risk program to be forward-looking harnessing the power of data analytics to reduce mission burden and drive unbiased evidence-based decision-making.

In addition, MelaJo has experience in payment integrity, budget formulation and execution, travel, payroll, contracts, and passport management, financial reporting, and system development and implementations. MelaJo has managed 8 contracts at 4 federal agencies. Prior to joining the federal sector MelaJo was an auditor with big 8 CPA firm and worked in banking. MelaJo has a bachelor's degree in accounting and a master's degree in tax law.

William Kubistal



Mr. Kubistal is a Certified Public Accountant, Certified Information System Auditor, and Certified Data Privacy Solutions Engineer. Mr. Kubistal is a graduate of the University of Maryland College Park and a former board member of the Greater Washington Society of CPAs.



Clare Levison

Clare Levison, CPA, CGMA is owner of Inspired Responsibility, a consulting company dedicated to delivering continuing education to finance professionals via positive messages and meaningful content that inspires change. Prior to founding Inspired Responsibility, Levison spent more than twenty years in the aerospace and defense industry involved in all aspects of management, project, and financial accounting, as well as government compliance.

Levison is a member of the American Institute of CPAs and Virginia Society of CPAs. She has served on the Board of Directors of the VSCPA and the Board of Directors of the VSCPA Educational Foundation and currently serves as a member of the AICPA Professional Ethics Executive Committee and chair of PEEC's Artificial Intelligence task force.

Levison is a fervent financial literacy advocate. She is the author of "Frugal Isn't Cheap: Spend Less, Save More, and Live Better" and has appeared on major radio and television networks across the country discussing finance topics. She has been a contributor to numerous publications including Family Circle, Fox Business, Glamour, Kiplinger's, Redbook, The Wall Street Journal, USA Today, and U.S. News & World Report.



Jeff Ledford



Jeff Ledford has 25 years' experience supporting federal financial management, beginning in 2000 with American Management Systems. He is a subject matter expert on CGI's Momentum platform, particularly the Momentum database schema, and has led teams providing a variety of financial management and information technology services for the Department of State and the General Services Administration. His experience has included the implementation and support of many highly visible and successful projects including federal annual close, 1099 reporting, G-invoicing and interfacing with various Treasury financial systems. Most of all, he is a skilled teacher for college hires who have gone on to successful careers in the industry.

Mr. Ledford holds a Bachelor's Degree in Physics from the University of Texas at Austin, and an MBA from Louisiana State University. He currently serves as the AGA's Washington DC Chapter Webmaster. Additionally, Mr. Ledford serves on the Board for the Woodbury Heights Condominium Association as the current President and as a past Treasurer.



Kevin Love

Kevin Love is a Director in CohnReznick's Government and Public Sector. He has over 15 years of experience performing financial statement audits of the federal Government. He has CFO Act audit experience serving large cabinet level agencies. He also specializes in performance audits of state and local agencies.



Sara Pelton

Sara Pelton works in GAO's Office of Congressional Affairs, liaising with congressional staff primarily on health, workforce, education, retirement, and veterans' issues. Before joining this office, Sara worked in GAO's Education, Workforce, and Income Security mission team for 14 years, leading program audits on disability employment, disaster assistance, child nutrition, and worker protections, among other topics. She was detailed to the Senate Veterans Affairs Committee in 2017-18 and has been recognized for her contributions on a wide range of efforts with multiple GAO-wide and team awards.



Frank E. Petersen III, CGFM

Mr. Frank E. Petersen, III serves as National Aeronautics and Space Administration's (NASA) Deputy Chief Financial Officer – Finance. In this capacity, Mr. Petersen oversees the Associate Chief Financial Officer for Policy and Systems (Financial Policy, Agency Financial Systems Office, and HQ Travel Office); Quality Assurance Division (QAD); and Financial Management Division and is responsible for the financial systems, financial policies, financial management, quality assurance, internal controls, enterprise risk management (ERM) and reporting of all Agency financial resources.

Prior to his current position, Mr. Petersen was the Director of QAD. He led the Agency's ERM program which includes the identification, implementation, and execution of the Unified Comprehensive Operational Risk Network (UNICORN) and developed the first ever Agency Enterprise Risk Profile. Mr. Petersen is instrumental in NASA earning an unmodified (clean opinion) for 14 consecutive years. Prior to Joining NASA, Mr. Petersen was the Director of the A-123 Appendix-A implementation at the U.S. Department of Education (ED).

Prior to joining ED in 2001, Mr. Petersen worked in the private sector for over 20 years at several 8(a) minority-owned Certified Public Accounting and Management Consulting firms. Mr. Petersen is married to his lovely wife Jasline and they have three children (Frank IV, Johnny, and Jenifer) and five grandchildren. Mr. Petersen is a CGFM and holds a Master's Certificate in Project Management from The George Washington University and a Bachelor of Science Degree in Accounting.



Domenic N. Savini, CPA, CMA, CRFAC, MSA

Mr. Savini is an assistant director at the Federal Accounting Standards Advisory Board (FASAB) and FASAB Chair at the National Defense University where he specializes in the area of infrastructure. He began his career with the Defense Contract Audit Agency and as a result of his accomplishments, was selected for the prestigious Director's Fellowship Program. Mr. Savini also worked for the Department of the Navy (MSC) responsible for financial management of a multibillion dollar program. He also served in several prominent positions with the Department of Housing and Urban Development (REAC) where he directed financial assessments and GAAP conversion of HUD's 3200 Public Housing Agencies.

Prior to joining FASAB, Mr. Savini held the prestigious CFO position with the Smithsonian Institution's Sackler/Freer Galleries of Art. Mr. Savini is founder and chief executive of EthicQuest LLC, and former Chairman of the Institute of Internal Auditor's Public Sector Advisory Council. He is a former Board member of the Association of Government Accountants (AGA) CEAR program; former member of the Government Finance Officer's Association's Special Review Committee; a Fellow with the Institute for Responsible Infrastructure Stewardship; and a long-standing member of the American Institute of Certified Public Accountants and the Virginia Society of Certified Public Accountants. Mr. Savini is an adjunct professor at Rutgers University where he teaches Ethics in Government Financial Management. He has a bachelor's degree in accounting from Kean University, master's degree in general administration from Central Michigan University, and is a Certified Management Accountant (CMA) as well as a licensed Certified Public Accountant (CPA) in New Jersey and Virginia and a certified forensic accountant (CRFAC)



Arnold Schneider



Arnold Schneider is a Professor of Accounting at Georgia Institute of Technology. He received a B.S. in Accounting from Case Western Reserve University, a Ph.D. from Ohio State University, and obtained a CPA certificate in Maryland. Professor Schneider was formerly an auditor with what is now the U.S. Government Accountability Office. He has also held visiting faculty positions at Macquarie University (Australia), Emory University, and Shanghai Jiao Tong University. Dr. Schneider has authored textbooks on managerial accounting and accounting for healthcare professionals. He has published over 80 journal articles on auditing and cost/managerial accounting topics and has also served on the editorial boards of several journals.



Nancy Sieger

Nancy has over 35 years of federal government experience including serving as the former IRS Chief Information Officer (CIO) and Treasury Chief Technology Officer (CTO), transitioning from federal government in 2024. During her federal government tenure, Nancy served as the IRS CIO during both the COVID-19 pandemic and longest government shutdown in history. While in Treasury as the CTO, she was a member of the White House Chief Al Council. Nancy maintains strong relationships and connections with federal agencies and international CIOs. Nancy now serves as the Guidehouse IRS Account Leader.



Josh Shapiro

Joshua Shapiro applies his more than 20 years of combined Federal IT systems consulting and U.S. Federal Government financial management systems experience and subject matter expertise to analyze, identify, develop, and implement financial management solutions for government agencies and organizations. Mr. Shapiro is currently a Vice President with Ascella Technologies, Inc. (Ascella) where he manages several portfolios of accounts, leads client relationship and engagement efforts, supports financial management system shared services migrations, and implements Ascella's GovCycle® budget formulation and execution solution. Mr. Shapiro specializes in federal financial management, budget, and acquisition systems, and has an in-depth understanding of the data and systems associated with the U.S. Federal Government budget and spending life cycle, including how the information in this data can be unlocked through data analytics to support data-driven and evidence-based decision-making.

Prior to joining Ascella, Mr. Shapiro served as the Financial Systems Manager and as the Acting Budget Director for a U.S. Federal Government agency where he managed and executed agency-wide financial system upgrades, enhancements, maintenance, and operations activities. Prior to entering federal service, Mr. Shapiro was a Senior Consultant and Project Manager with CGI Federal (CGI) and served as a financial systems subject matter expert for CGI's Momentum® solution. Mr. Shapiro graduated from The College of William and Mary with a Bachelor of Business Administration (BBA) in Operations and Information Systems.



Liping Tan

Ms. Liping Tan is a Certified Public Accountant and a Certified Information Systems Auditor. She also holds a dual bachelor's degree in Accountant and Information Systems & Operations Management. Ms. Tan has numerous years of experience with leading and performing audits and associated internal control reviews for compliance with laws and regulations, the internal control system, and accounting standards. Proficient in the Federal Information Security Management Act (FISMA), Federal Information Systems Controls Audit Manual (FISCAM), National Institute of Standards and Technology (NIST) Special Publication 800-53, Office of Management and Budget (OMB) Circular A-130, OMB Circular A-123, Appendixes A - D, Standards for Internal Control in the Federal Government (the Green Book), and Generally Accepted Government Auditing Standards (GAGAS) principles and standards.

Ms. Tan currently serves as the Risk Management & Internal Control Brach Chief in the Army National Guard in Arlington, Virginia, where she oversees annual statement of assurance (ASOA) tasks completed by 54 states/territories/District of Columbia and 12 Offices of Primary Responsibility (OPRs). Prior to serving in this role, Ms. Tan served as the Supervisory Accountant of the Internal Control team in Defense Intelligence Agency.

Robert (Bob) Tuccillo



As Senior Vice President of Management and Budget, Robert is responsible for formulating and executing Washington Metropolitan Area Transit Authority's (WMATA) \$5 billion capital and operating budget. He is also responsible for financial reporting, grants management, data analytics, and revenue, ridership, and debt service forecasting. Mr. Tuccillo has over 30 years of senior financial leadership experience in the public sector including 20 years as the Chief Financial Officer of the Federal Transit Administration and over 10 years as a Senior Budget Analyst at the White House Office of Management and Budget. Robert has undergraduate and graduate degrees in economics and business administration and completed executive development training at Harvard's John F. Kennedy School of Government.





Reed Waller

Reed Waller is a Federal Financial Management consultant supporting Workiva with strategic planning for Workiva to best serve customers in the Federal FM, risk, controls, and audit communities. In his prior career in Federal service, most recently in the Financial Management Quality Service Office (FM QSMO) with the U.S. Department of the Treasury. As an FM QSMO senior subject matter specialist, he helped design the Financial Management Capability Framework, and led Human-Centered Design, CX, and Vendor Experience programs.

In a prior position at the U.S. Department of Justice, he led financial management strategic planning and initiatives, led the Treasurysponsored Momentum Working Group, and co-led the DATA Act broker and information model schema working group. He has studied leadership and quality service with the Disney Institute, and his passion is connecting people and organizations with their creativity, through fun, innovation, and embodied presence. In his spare time, he writes satirical fantasy fiction. He welcomes all pronouns.



Josh Williams

Josh Williams joined the FASAB staff in August 2020. He manages the intangible assets project which includes leading an effort to update financial reporting guidance for software technology. He has also managed other FASAB related issuances, including a Technical Bulletin clarifying reporting guidance for seized and forfeited digital assets. He is currently the FASAB staff liaison for the Financial Statement Audit Network.

Mr. Williams began his federal career in 2008 with the U.S. Army Corps of Engineers (USACE) and served various roles as a budget analyst and an accountant. He managed many aspects of the USACE Civil Works financial statement audit for multiple years in which USACE received a clean opinion each year. In 2018, he led a team that managed the first ever USACE Military Construction financial statement audit and successfully achieved a clean audit opinion. During his tenure at USACE, Mr. Williams was also responsible for other financial management activities, including managing overhead cost accounts, writing policies, updating regulations, and managing programs to fund USACE construction field management of military construction contracts.

Mr. Williams is a Certified Public Accountant in the District of Columbia and a Certified Government Financial Manager. He holds a bachelor's degree in business administration with concentrations in economics and finance from the University of North Carolina Wilmington as well as a master's in business administration and a master's in public administration from Syracuse University.



Annalena Winer

Annalena is Vice President, Consulting Expert at CGI Federal and has over 28 years of experience working with the Momentum Enterprise Solution suite. She has practical experience in all aspects of the system development life cycle including requirements definition, structured system design of application programs, unit and system testing, system implementation, deployment and user support, and data conversion.

She possesses an extensive knowledge of Government financial management processes and recognized as a subject matter expert in various areas of financial management. She is known for her problem solving and analysis abilities, strong attention to detail and the

ability to establish and maintain a strong rapport with customers, senior management and team members.



Davita Vance-Cooks

Ms. Vance-Cooks has over thirty-five years of experience in public administration and private sector operations, with a history of transforming organizations. Her expertise is in the areas of organizational change management (OCM), program management, business process re-engineering, stakeholder engagement, communications, and strategic planning. Ms. Vance-Cooks has a broad knowledge of public sector management, having served as Agency Director/CEO (political appointee) for the Government Publishing Office (GPO), where she led the transformation of the agency from a print manufacturing facility to a content-centric, digital-focused, publishing operation.

In addition, she has over 20 years of private sector experience serving in executive level positions managing and transforming large scale operations. She frequently serves as a subject matter expert (SME)and leverages her areas of expertise, public and private sector work experience, and industry knowledge into the management of successful consulting engagements. Ms. Vance-Cooks is a Prosci Practitioner and certified in Lean Six Sigma Green Belt, and SAFe 4 Scrum.



Navigation and Other Information You Need to Know

How to Attend:

Our 23rd Annual AGA DC Chapter Training will be hosted in a hybrid format:

- In person at Convene Hamilton Square, 4th Floor; 600 14th Street, NW, Washington DC 20005
- Virtually via Conexiant.

Stay Engaged and Earn CPEs:

Training participants are eligible to receive up to 16 CPE credits across a range of fields of study.

Note the following:

- Your attendance in each session is being tracked and failure to participate will result in denial of CPE credits.
- You must attend for the entirety of each session. For in-person attendees, your badge must be scanned to track your attendance. For virtual attendees, you must participate in alertness checks throughout the session to be eligible for CPEs.

Questions during the session:

•<u>Registration questions</u>: Please direct questions related to AGA registration to <u>thampton@guidehouse.com</u>

•<u>Technical questions</u>: If you are experiencing technical issues joining the AGA Event on the day of training, refer to the attendee support at this link <u>https://aga.digitellinc.com/support</u>. If you are experiencing issues after joining a virtual session, click the Request Support button in the lower left corner of the player.

•Content Questions for the Speaker:

。 All questions will be done using Conferences IO at this link <u>https://agadc.cnf.io</u>.



April 28 – 29, 2025

Thank you to our Volunteers!

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) Christy Beck (Director – CPE)

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