



# The Washington Connection



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Welcome to the start of the 2022-2023 season.

## Up Next!

- October 13th, 7:30-9:30am**, AGA DC Co-branding event: Topic: *“Future of Identity and Fraud Mitigation.”* Sponsored by JP Morgan; **Registration** and Speakers, TBA.
- October 18th, 12-1:30pm**, AGA DC Monthly Hybrid Luncheon at Clyde’s: Topic: *“Marvelous Examples of Leadership and What Not to Do.”* Guest speaker: Doug Glenn, CFO CFO, OPM. **Register here.**
- October 20th, 6-8pm**, AGA DC Sponsorship Recruitment Happy Hour @ RARE Steakhouse & Tavern, Washington, DC. **Registration** TBA.
- October 26th, 11am-1pm**, AGA DC VIP Luncheon (*Diamond Sponsors Only*): Old Ebbitt Grille, Washington, DC. Guest speaker: Doug Glenn, CFO CFO, OPM. **Registration** TBA.
- November 9th, Virtual: 12pm**: Sponsored Training/Demo; hosted by Kearney & Co. **Registration**, Topic, and Speakers TBA.
- November 15th, Virtual: 12pm**: Sponsored Training/Demo; hosted by EY. **Registration**, Topic, and Speakers TBA.
- December 13th, 12-1:30pm**, AGA DC Monthly Hybrid Luncheon at Clyde’s: Guest speaker: Tim Gribben, Commissioner, US Dept of Treasury.
- January 11th, 2023, 12-1:30pm**, AGA DC Monthly Hybrid Luncheon at Clyde’s: Guest speaker: Glen Lee, CFO, DC Office of the Chief Financial Officer (OCFO).

We look forward to seeing you soon!

## President's Message

Welcome to another program year! I'm excited to be taking the reins from AI as the DC Chapter President and I look forward to working with you all over the upcoming year.

We have a great year in store for our members, with several activities, both in person and virtual, across a variety of areas, including social events, training, and community service opportunities.

From a Chapter Leadership perspective, we're excited to welcome our new leadership team, which consists of Lal Harter (President-Elect), Chi Okinkwo (Treasurer), Shawn Syed (Treasurer-Elect), and Heather Moreland (Secretary), along with our new Chapter Executive Committee. Within the committees we are excited to welcome back our previous volunteers, while also welcoming many new volunteers to our efforts.

During this year, I plan to focus the Chapter on four primary areas:

- Expanding our membership
- Streamlining our communications to ensure members know what chapter opportunities are available to them
- Increasing member participation in chapter activities, with a focus on inclusiveness by offering activities that are in person, virtual, and hybrid
- Continuing to offer high quality CPE and training opportunities to our members across a variety of platforms and channels

I'm also excited to share that we are bringing back the Mentorship Committee this year! Our team of volunteers has a number of ideas about how we can provide mentorship opportunities to people at all stages of their careers in a way that creates meaningful and impactful connections. Please keep an eye out for email updates on upcoming mentorship activities.



Lastly, our Programs Committee has a wonderful slate of speakers lined up for our monthly luncheon series. These are great events, and also provide the opportunity to earn CPEs while networking with DC area colleagues.

I'm looking forward to a great year and I hope to see many of you at these fun events.

Sincerely,

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

## Vision

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

## Mission Statement

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

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# New Member Contest

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

During the 2022-2023 Program Year, the Membership Committee of the AGA DC Chapter is continuing to award a **CASH PRIZE** (\$100 in the form of an Amazon gift card) at the end of each quarter (i.e., September, December, March, June) to the member who sponsors and/or recruits the most new members during the quarter. With your help and dedication, we can achieve our Chapter's 10% growth goal of new members this year! **Congratulations to Craig Freeman who recruited the most members in the Spring quarter!**

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

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

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

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

## Welcome New Members!

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

Nelson Alvarado, CDFM, CFE

Caleb Alvarez

Natalie Barnes, CGFM

Henry L. Barrett

Mohamed M. Barry

Alexander B. Becker

LaKeisha Boyle

Rollin D. Brewster, III

Dasha L. Carswell-Maxwell

Seth M. Carter

Katina P. Cotton

Jeff Davis

Holly K. Donley

Arlene Zoisa Farrier

Steve Feller

Hunter Geren

Richard James Gray, Jr.

Guy Hadsall Hadsall

Faith Harris

John Hinkson

Natalia J. Kalloo, MBA

Rahaf Kaylani

Denisha M. Kephart

Sia L. Kiawu

Larry Koskinen

Nawfal Kulam

Anna R. Lavis

Sarah Lilly

Ronald Darrell Miller

Leslie G. Mitchell

Siad Morgan

Jeffrey C. Mounts

Katelyn Mullen

Afolabi Ojumu, CPA, CGMA,  
CISA, CSM

Michelle L. Oltmans

Dwaine K. Osborne

Elijah M. Owuor

Ryan Patrick Pahr

Cathy Q. Park

Radhika H. Patel

Davina Payne

Roy A. Perez

Lora Pickard

Penny Nixia-Bernice Poppo

Christopher Rhi

Francisco E. Rodriguez

Oguz Saltik

Vinay V. Singh

Coia Walker

Tennyle L. Walker, CGFM

Tanishia M. Warren

Amber N. Williams

Austin Williams

Yared Yilma

Norina Zeb



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# AGA DC Chapter Monthly Luncheon

## SEPTEMBER 2022 HYBRID LUNCHEON

### *“Fraud, Waste, and Abuse in Pandemic Programs”*

On September 15, 2022, our DC Chapter kicked off the new program year’s monthly luncheon series. We welcomed our September hybrid luncheon speaker **Mr. Brian D. Miller from the Special Inspector General for Pandemic Recovery**. We are grateful for the more than 165 attendees, both virtual and in-person, who joined us at Clyde’s of Gallery Place in downtown Washington, DC.

Mr. Brian Miller was confirmed by the United States Senate to be the Special Inspector General for Pandemic Recovery (SIGPR) on June 2, 2020. Mr. Miller’s prior positions include Senior Associate White House Counsel; Inspector General of the General Services Administration (GSA) (Senate confirmed on July 22, 2005); Senior Counsel to the Deputy Attorney General; Assistant United States Attorney in the Eastern District of Virginia; Special Counsel on Health Care Fraud for the Deputy Attorney General; and, Counsel to the United States Attorney. As a Federal prosecutor, Mr. Miller litigated civil and criminal cases in multiple federal district and appellate courts, involving terrorism and terrorist financing, drug-related conspiracies and murder, and the False Claims Act. As an Inspector General, Mr. Miller work is documented in “Those Who Dared: 30 Officials Who Stood Up for Our Country,” a report by Citizens for Responsibility and Ethics in Washington.



Mr. Miller began his presentation by discussing his investigation of a lavish GSA conference in Las Vegas and his independent oversight at the GSA as the Inspector General. He then discussed the typical Office of Inspector General (OIG) investigations process, and the differences of investigation performed by “traditional” OIG and Special IG – as such SIGPR. Mr. Miller shared the attendees on history of the SIGPR’s office establishment as well as SIGPR’s investigative focus areas, current projects/priorities, Main Street Lending Program, and partnership with other oversight partners. Mr. Miller also discussed some closed cases resulted in successful prosecution of fraudsters. The presentation ended with a robust Q&A session when Mr. Miller answered questions from both virtual and in-person attendees.



We sincerely appreciate the time Mr. Miller spent with us to share his knowledge and experience. We would also like to thank our Corporate Sponsor, **OneStream Software**, and **Mr. Blake Hudson**, Regional Manager of OneStream Software, for his introductory remarks.

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

September Luncheon cont'd.





## September Luncheon cont'd.



## Member Luncheon Videos

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

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

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# Special Events



Member Services is very excited to kick off this year with the most in-person events since 2019! Please be on the lookout for familiar events like the hockey game and wine tour, the return of some previous events, and even new events like trivia night! In addition to collaborating on the Multi-Chapter Picnic in Haines Point, we are working on a Haunted Walking Tour with Washington Walks in October. Stay tuned!

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## Multi-Chapter Kick-off Picnic

On September 10th our Washington, DC Chapter joined three other Chapters (Northern Virginia, Baltimore, and Montgomery/Prince George's County Chapters) for this year's Multi-Chapter Kick-off Picnic. More than 50 members, with their family and friends, gathered at the historic Hains Point in DC to enjoy food, music, and company. The event was a success despite the road closures, delays, and the unexpected trek to the picnic area from the parking lot. Famous Daves catered the event with delicious barbeque that left everyone full and satisfied. Huge shoutout to the volunteers from the four AGA Chapters in the DMV. Special thanks to Jacob MacDonald (NoVA - membership), Cherry Ung (DC - sponsorship/gala) and Manoj Michandani (DC - membership) who made this event great!



Special Events cont'd.



### Special Events cont'd.



## Special Events cont'd.

### Program Year 2022-23 Chapter Committee Planning Meeting

We held our annual Chapter Committee Planning Meeting on August 20, 2022 at the Lauriol Plaza restaurant in Washington, DC. Our Chapter President, Caitlin McGurn, thanked our volunteers and looked forward to collaborating with each Committee to provide outstanding services to our Chapter members and to recruit more new members. Our committee members in attendance were able to catch up with each other and discussed planned activities for our members. It was an enjoyable kick-off to the new program year!



### DC Chapter Recognized for Outstanding Operation at 2022 PDT

Our DC Chapter once again received the Platinum Achievements in Chapter Excellence (ACE) Award! The Platinum level of ACE Award recognizes our Chapter's highest level of performance for maintaining a well-rounded operation for the professional growth of its members. Our Chapter is proud to continue to provide outstanding services for our members. Our past Chapter Treasurer, Christy Beck, was on the stage at this year's Professional Development Training (PDT) to receive this highest honor on behalf of our past Chapter President, Al Pavot.

THANK YOU to all our Chapter's volunteers for their hard work and dedication! Congratulations!



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# AGA DC Training and Events

## AGA Sponsored Training & Events

**When:** 10/13/22, 7:30-9:30am, AGA DC Co-branding event: *“Future of Identity and Fraud Mitigation.”* Sponsored by JP Morgan. **Registration** TBA.

**When:** 10/18/22, 12-1:30pm, AGA DC Hybrid Luncheon: *“Marvelous Examples of Leadership and What Not to Do.”* Guest speaker: Doug Glenn, CFO CFO, OPM. **Register here.**

**When:** 10/20/22, 6-8pm, AGA DC Sponsorship Recruitment Happy Hour @ RARE Steakhouse & Tavern, Washington, DC. **Registration** TBA.

**When:** 10/26/22, 11am-1pm, AGA DC VIP Luncheon (*Diamond Sponsors Only*): Guest speaker: Doug Glenn, CFO CFO, OPM; **Registration** TBA.

**When:** 11/09/22, 12pm: Sponsored Training/Demo; hosted by Kearney & Co. **Registration**, Topic, and Speakers TBA.

**When:** 11/15/22, 12pm, Virtual: Sponsored Training/Demo; hosted by EY. **Registration**, Topic, and Speakers TBA.

**When:** 12/13/22, 12-1:30pm, AGA DC Hybrid Luncheon: Guest speaker: Tim Gribben, Commissioner, US Dept of Treasury; **Registration** TBA.

\*\*\*\*\*

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

For questions regarding Sponsor Training and Events, please contact Paul Marshall at [agadc@agadc.org](mailto:agadc@agadc.org).

**\*\* SAVE THE DATE\*\***



## AGA DC Webinar Training Schedule

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

**Cost:**

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

**When:**

- 10/19/22 — Internal Control
- 11/02/22 — Ethics
- 12/14/22 — Risk Management
- 01/11/23 — Uniform Guidance and Grant Accounting
- 02/01/23 — GASB Update
- 03/01/23 — RPA/AI
- 03/22/23 — Cybersecurity/ERM
- 04/12/23 — Ethics
- 04/26/23 — CARES Act/ARPA
- 05/10/23 — Fraud/Data Analytics
- 05/24/23 — Leadership

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

**\*\* SAVE THE DATE \*\***



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## CGFM Committee Updates

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

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

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

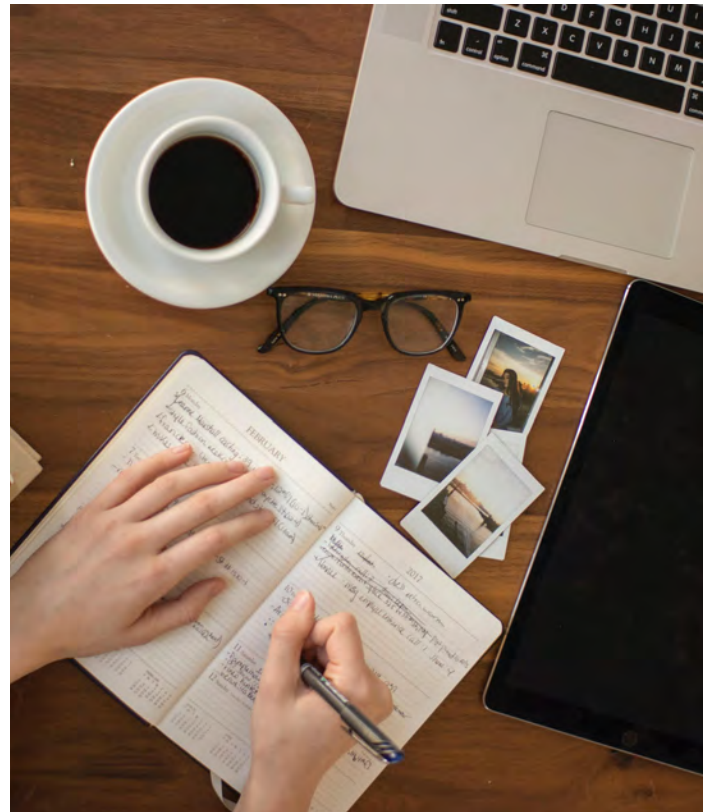
You must submit the following to qualify for exam rebate.

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

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

### Available Study Resources

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



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

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

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



### Already Have Your CGFM?

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

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


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We will continually listen to the changing needs of our customers to determine the direction of our platform, service and support. We will never compromise on quality or their success.

Our vision is a world where finance departments leverage modern software applications that unify and streamline CPM processes across the enterprise, minimize system maintenance, and allow them to get back to business - and life.



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## Thought Leadership

# Future Trust: Making Grants Count—Driving Fiscal Stewardship and Transparency in Lean Times

*Brought to you by Guidehouse*



As the pandemic fades in our rearview mirror and we enter what could be a period of austerity, regulators will push agencies even harder on the need for grants management transparency and fiscal stewardship. In this edition of our GHFuture2030 series, we discuss how forward-looking agencies are addressing the many new regulatory updates, laws, sustainability headwinds, and focused management modernization efforts. With limited resources and a nascent grants competency model, reducing the administrative burden while driving efficiency will prove challenging. As US government grant obligations reached an astounding \$2 trillion-plus as of June 2022<sup>1</sup> (up from \$764 billion in FY 2019) since the start of COVID, agencies must begin to re-think their grants management processes.

While the government continues to make overtures to reduce the administrative burden of grants management, agencies continue to feel the pain. The 2021 Annual Grants Survey conducted by the National Grants Management Association found that administrative spending has grown from 10% to 17% of grants disbursed by federal agency respondents.<sup>2</sup>

Here we discuss how an agency can shift the paradigm of grants management from monitoring to driving impact through additional oversight.

### 1. Organizational transparency and more specific guidance can reduce administrative burden

For many grant applicants, one of the biggest hurdles is a lack of clear understanding of the various requirements of a grant program. Even within the same agency, applicants may encounter challenges where different programs have disparate requirements. And for an organization that deals with multiple agencies, this issue can be magnified. Additionally, grantees are required to consistently demonstrate fiscal responsibility, tangible outcomes, and increased return on investment, with no clear guidance.

An August 2020 Government Accountability Office report<sup>3</sup> found that technical assistance (TA), focused on grant management best practices, project monitoring and evaluation, and interactions with the stakeholders, etc., leads to program improvements or management of grant program recipients. This TA was designed to not only align with the requirements of each agency's grant programs, but also to meet the individual grantee's needs. The types of TA include (but are not limited to):

- a. 1:1 and onsite instructions.
- b. Live staff/group educational events.
- c. Web-based information/guidance.

These actions can provide administrative burden relief, while enabling grantees to spend more time focused on improving program outcomes.

#### Boosting agency transparency

Increased transparency and frequent communication between the agency and its stakeholders in the form of recorded webinars, detailed reporting guidance, etc., will help identify and resolve any bottlenecks/challenges/barriers within agency procedures and improve customer understanding and thereby enhance the overall customer experience.

1. USASpending.gov, "The federal government has spent \$3.79 trillion in response to COVID-19," <https://www.usaspending.gov/>.

2. Jeff Myers and Rujuta Waknis, "COVID-19 changed grants management, damaged performance of some grant programs," Federal News Network, July 7, 2020, <https://federalnewsnetwork.com/commentary/2022/07/covid-19-changed-grants-management-damaged-performance-of-some-grant-programs/>.

GAO@100, "GAO-20-580: Agencies Provided Many Types Assistance and Applied Recipients' Feedback," August 11, 2020, <https://www.gao.gov/products/gao-20-58>

Thought Leadership cont'd.

2. Data standardization and technology improvements can drive grants management efficiency

Outdated, aging, and inadequate systems/technologies are known detriments to streamlining grants management processes within agencies. Combined with the lack of structured grants data, agencies cannot develop key insights, leading to inconsistent risk analysis, potentially exposing agencies to fraud, waste, and abuse. Federal agencies are also being encouraged<sup>4</sup> to make a paradigm shift in grants management, establishing measurable program and project goals, and continuously analyzing data to improve results.

The Grant Reporting Efficiency and Agreements Transparency Act of 2019 promotes the application and adoption of new and existing technologies to: a) improve automation, b) reduce compliance costs and grantee burdens, and c) drive efficiencies within the overall grants process. Additionally, the act directs the Office of Management and Budget along with the Department of Health and Human Services (HHS) to issue guidance on applying revised data standards for grants reporting. These changes should not disrupt reporting practices or increase any reporting burden to the grantor or grantee.



**Solving data standardization to drive grants management efficiency**

The application of business intelligence tools to perform data analytics and visualization (dashboard) can help agencies quickly and more efficiently review grantee data to identify anomalies, validate grantee actions, and reduce opportunities for fraud, waste, and abuse.

**Where Can Agencies Start?**

Changes of this significance can be overwhelming to implement. A key is to start with quick wins and achievable tasks, such as:



Execute a pilot program for one program or cohort of a program to understand what works and where additional changes are needed before executing across the organization.



Establish meaningful and actionable performance objectives that drive decisions and key investments.



Consider opportunities with other grant-making agencies to leverage best practices, data, and technology to generate cost savings.


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## Thought Leadership

# Take Your ERM Program to the Next Level

*Brought to you by CohnReznick*

During these unprecedented times, risks continue to emerge and evolve across the government landscape. At the macro level, risk profiles are being altered by the pandemic, geopolitical conflicts, supply chain disruptions, cybersecurity threats, and new complex technologies.

Individually, federal agencies are increasingly focused on risk factors such as talent retention, fraud, and meeting and advancing their mission and strategic objectives.

Since the Office of Management and Budget (OMB) issued the July 2016 update to OMB Circular No. A-123, "Management's Responsibility for Enterprise Risk Management and Internal Control," agencies have utilized the guidance to modernize their risk management processes by implementing enterprise risk management (ERM). "This integrated governance structure will improve mission delivery, reduce costs, and focus corrective actions towards key risks," OMB wrote in the update.

A strong, enterprise-wide risk management program positions federal agencies to unify risk management processes, providing better ability to proactively identify priority risks and implement mitigation strategies, as well as allowing agencies to:

- Increase transparency and visibility into risk factors
- Predict and proactively adjust to emerging risks
- Achieve strategic goals and objectives
- Boost efficiencies to optimize operations and performance
- Make data-driven risk-informed business decisions
- Minimize business disruptions
- Improve employee engagement and morale
- Enhance the organization's reputation

Strong ERM practices provide a clear risk picture, enabling agencies to decide which risks need to be



mitigated, and which risks need to be monitored while pursuing their strategic objectives. ERM is an ongoing process that must be continuously reviewed and updated to manage a broadening array of risks – without impeding achievement of the agency's mission and goals.

## OPPORTUNITIES TO ENHANCE YOUR ERM PROGRAM

Although each agency's ERM needs will be different, the following recommendations can be leveraged to improve the overall ERM program for most organizations.

1. **Continue to strengthen buy-in from leadership and other stakeholders:** ERM programs rely on buy-in from leadership and other stakeholders to set the right tone, sustain engagement in risk management, and boost accountability. Leaders need to agree on the agency's risk appetite and understand top risks, the design of the ERM programs, and how they support mission objectives. It's critical that leaders drive the proactive implementation, reporting on, and sustainment of the ERM initiative. One approach to strengthening buy-in is establishing an ERM governance structure that builds a more risk-aware culture and allows key stakeholders to openly discuss risks and develop integrated solutions.
2. **Develop more comprehensive insight into risks:** ERM should address the full spectrum of risk. We recommend that agency ERM leaders adopt an approach that simultaneously considers multiple



## Thought Leadership cont'd.

high-level risks across the key risk areas: strategic, operational, financial, and compliance. Each category should be individually evaluated and addressed. Information should also be collected and presented comprehensively. Agencies new to the ERM process often focus too heavily on operational risk at the expense of the other critical risk areas, or take a siloed view of risks, which can obstruct visibility into the overall issues at hand. An effective ERM program should unite data so that the agency can glean meaningful, actionable insights and make data-driven decisions in all risk areas they face.

3. **Integrate enterprise risk management with other management functions:** ERM should be integrated with agency management and individual program processes in order to build a risk awareness environment and to continue to make progress in managing the risks faced by the organization. Identification of key risks should inform the agency's strategic planning process, and discussions of allocation of resources to protect the agency from critical risks should be included in the budgeting process.
4. **Assess technology to support ERM efforts:** If your agency does not already do so, consider implementing technology as part of your ERM program. ERM technology assists in collecting and consolidating data from across the entire organization so that all stakeholders have clear and consistent visibility to identify, assess, and prioritize risks. This cohesive view also helps to illustrate risk relationships across business functions and aids in assigning risk owners to ensure responsibility and accountability. Lastly, ERM technology streamlines and simplifies reporting and analysis of risks, offering greater insight into program success and demonstrating the value of ERM.
5. **Increase the use of data analytics:** An avalanche of advanced technologies has made it difficult for organizations to implement and use modern solutions like

data analytics, automation, artificial intelligence (AI), and cybersecurity protection. Agencies that lack resources, expertise, and confidence to adopt emerging technologies may simply forgo deployment. However, data analytics is an important place to start, as it enables federal agencies to combine silos of data to better identify and analyze risks, provide transparency, support stakeholder decision-making, and track the ERM program's progress in responding to risks.

6. **Involving your people:** ERM touches every facet of an agency, and understanding risks across operational lines requires cross-functional teams. As key risks are identified, the ERM team should assign ownership of risks to specific roles or individuals. But it's also best to avoid relying only on a few key stakeholders and instead make risk management everyone's job: All employees, not just risk teams, should be given the proper knowledge, training, and resources to understand the ERM program's goals and methodologies. Establish standard definitions of risk and best practices using automated processes.

## STRATEGICALLY OPTIMIZE YOUR ERM PROGRAM

Identifying and managing risks across strategic, operational, financial, and regulatory domains should be seen as a continuous process that every member of your organization has a stake in.

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# Community Service

## Thrive DC | **Social Safety**

The Community Service Committee will be collecting donations for Thrive DC during the next AGA Chapter luncheon. As with our previous sponsorships, we want to make the biggest impact possible and ask the AGA National to help match our donations.

Founded in 1979, to serve dinner to homeless women, Thrive DC works to prevent and end homelessness in Washington, DC by providing vulnerable people with a wide range of services to help stabilize their lives.

Thrive DC has grown to be a comprehensive, professionally staffed, bilingual organization serving more than 2,000 men, women, and children each year.

We are a safety net for people experiencing homelessness, unemployment, housing instability, and food insecurity. With our help, our clients take the first steps toward independence and self-sufficiency.

You can participate in giving by going directly to the organization using this link ([Thrive DC Donations](#)). Once you give, please provide a screenshot evidencing your proof of donation to Maurice Preston ([mpreston@guidedhousefederal.com](mailto:mpreston@guidedhousefederal.com)) and LaVerne Mason ([lmason@bdo.com](mailto:lmason@bdo.com)) so we are able track and take advantage of AGA's matching!

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

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



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

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

Be well and stay safe!

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

## Member Spotlight

### Cherice Washington, CGFM

*Accountant, U.S. Department of Justice*

**AGA DC:** You had worked on various audits and financial management projects in the private sector for a while. What made you decide to join the Federal service?

**Cherice:** After working in the private sector, I wanted to continue gaining knowledge in Federal financial management. What better way than to work directly with a Federal agency? I was ready to become a full-time equivalent (FTE) and support the mission and goals of a Federal agency. I've always admired the benefits and flexibility the Federal government offers. I absolutely love having my every other Monday off due to my alternate work schedule (AWS).

**AGA DC:** Being previously on the audit and private sector side, what are your tips on strengthening the auditor-auditee relationship?

**Cherice:** First, remember that auditors are nice and kind people. I remember how intimidated or nervous people were when the "Auditors" were around. Auditors are there to assist with establishing better financial management processes. I believe that healthy financial management is the goal of the agency and the auditor. So, it's important to understand that everyone shares the same common interest.

**AGA DC:** Can you share with us your journey on obtaining your CGFM certification and providing a key suggestion for current CGFM candidates?

**Cherice:** My journey to CGFM was more of a pivot after being unsuccessful with the CPA exam. I remember a co-worker encouraging me to take the CGFM exam to build my confidence. I registered for a free CGFM review course. I remember studying hard and passing all parts on the first attempt. I believe having the CGFM allowed the same advancement in my career as the CPA. I always recommend the CGFM to co-workers needing a certification.

**AGA DC:** Leaders are often being asked "what keeps you awake at night?" However, I'm sure any positivity we can hear and learn is certainly welcome these days. With that, what keeps you motivated each day?



**Cherice:** My love for God and living a life of purpose keeps me motivated. Life is essentially about who we are and not what we do. After completing a day of work, I turn work off. I don't believe in taking my work stresses into my personal life. Also, I'm motivated by people and spending time learning and engaging with others. Hence, why you see me at the AGA social events!

**AGA DC:** Thank you for your time and insights, Cherice!

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

### Curriculum Vitae

#### Cherice Washington, CGFM

*Accountant, U.S. Department of Justice (DOJ)*

**Education:** Bachelor of Science in Accounting, Virginia State University

**Hometown:** Washington, DC

**Fun Fact:** I once met the G.O.A.T - aka Michael Jordan!

#### Professional Experience:

- Over 15 years of Federal audit and financial management advisory experience, includes performing OMB Circular A-123 internal control and Federal Managers' Financial Integrity Act reviews, financial management reporting, CFO Act financial statement and performance and compliance audits; program reviews and evaluations.
- Currently serves as an Accountant at the Department of Justice, Justice Management Division. Works with the Quality Control and Compliance Group providing audit liaison support for the Department's external financial statement audit and OMB Circular A-123 testing for the Offices, Boards, and Divisions. Also a recipient of the 2021 Justice Management Division's New Employee Award.
- Prior to joining the Federal service in 2020, Cherice served in the private sector to perform numerous Federal audits and financial management projects.
- DC Chapter member since 2006.

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## Member Spotlight

### Anthony Richards

*Senior Financial Management Consultant and Owner, DLR Fed Consulting, LLC*

**AGA DC:** You've been serving on the Member Service Committee for a while. Why did you volunteer for our Chapter?

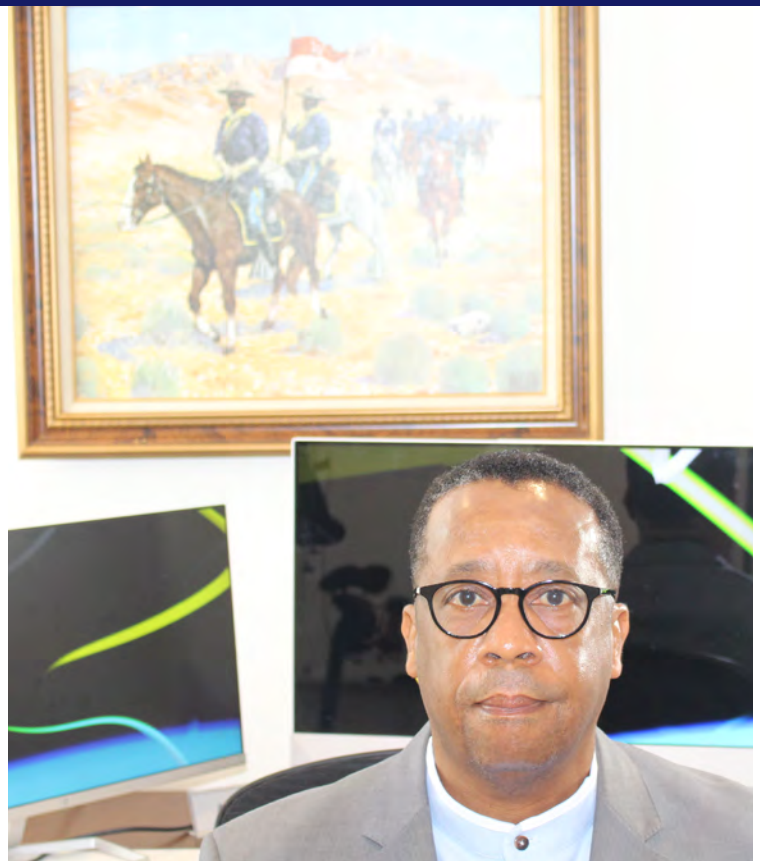
**Anthony:** I met Salim Mawani [editor's note: past DC Chapter President], and he introduced me to our Chapter and how much he was involved with the organization. Afterward, I went to one of the AGA functions, met the most interesting and kind people, and joined the organization. I started serving on the Committee after meeting David Baskin at one of the functions. I enjoyed working with Crystal Wolf, David Baskin, AGA leadership, and the other Committees during event planning activities. Most importantly, I enjoyed it very much when I received confirmation from members and non-members that they enjoyed the events!

**AGA DC:** Can you share with us your most memorable member service event that you planned and organized?

**Anthony:** The most memorable event was the first basketball game for AGA chapter members. I listened to what the members were requesting and contacted the Wizards sales representative. I was also able to get the club lounge that offered food and unlimited drinks for our fellow members. The fun members hang out at the lounge for the entire game.

**AGA DC:** As a financial system guru, what're your tips to financial accounting and auditing professionals when they work with financial system professionals?

**Anthony:** I believe in providing excellent customer service to the clients. It's so important to always be professional on-site or off-site. However, this means always being honest with the clients and ensuring they follow GAAP or government regulations, such as Federal Acquisition Regulations (FAR). The important



thing is not that the customer is always right, but being professional with the clients and following the accepted accounting guidance.

**AGA DC:** Leaders are often being asked "what keeps you awake at night?" However, I'm sure any positivity we can hear and learn is certainly welcome these days. With that, what keeps you motivated each day?

**Anthony:** What keeps me awake at night is absolutely nothing, and I love my rest. I believe that being kind and honest allows me not to worry, or I just like sleeping. I'm not sure what keeps me motivated, and since COVID, I have enjoyed being with myself. I enjoyed biking and going to the golf range alone. However, I'm not a selfish person, according to my family and friends. I do enjoy working with clients and improving business practices. Final point, I love being an uncle.

**AGA DC:** Thank you for your time and insights, Anthony!

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

Member Spotlight Cont'd.

### Curriculum Vitae

**Anthony Richards**

*Senior Financial Management Consultant and Owner, DLR Fed Consulting, LLC*

**Education:**

- MBA, Management Control Systems, Averett University
- BS, Accounting & Finance, Shaw University
- Master Certification in Theology, Liberty University
- University of Virginia (Summer Program)
- “Who’s Who Among Students at American Universities and Colleges”

**Hometown:** Culpeper, Virginia

**Fun Fact:** I enjoy biking and reading.

**Professional Experience:**

- More than 25 years of experience in supporting the Department of Defense (DoD) and other government agencies on accounting and finance.
- Certified in SAP Project Systems, expert knowledge, and experience in DoD Systems Applications Products Implementations for various Army and Navysystems.
- Support clients' business process areas, including financial accounting, fund management, accounts receivable, reimbursable accounting, human resources, plant, property & equipment, and generating business intelligence reports.
- Created business process reengineering, project controller, enterprise resource planning, and data modeling for process improvements and organization development. Created documentation for training, testing requirements for identification and validation, monitoring, and reporting.
- Started a professional career as a Corporate Accountant with a Fortune 500 company in Detroit, Michigan.

**Honors:**

- Serving on the Member Service Committee since 2008.
- DC Chapter member since 2008.



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# Inside the Black Box

by Simcha Kuritzky, CGFM CPA

## Federal Vendor Receivables



### Background

Agencies are generally not allowed to count public receivables as budgetary resources, but they are allowed to do so for federal receivables. Mostly these receivables are for reimbursements or fund transfers, but what about refunds on inter-agency expenditure transactions? The U.S. Standard General Ledger (USSGL) guidance on that is not so clear.

### Current Posting Models

When an agency receives a refund, whether by depositing cash or a check, or an IPAC from another agency, the entry reduces expenditures:

**C134** Refunds collected (not previously accrued as receivables) for assets purchased and expenses incurred in the current year.

Debit	490200	Delivered Orders - Obligations, Paid
	101000	Fund Balance with Treasury
Credit	461000	Allotments - Realized Resources
	610000	Operating Expenses/Program Costs

If appropriations were used for the original purchase, then the agency would also record:

**B234'** Back out appropriations disbursed this fiscal year.

Debit	570010	Expended Appropriations - Disbursed
Credit	310710	Unexpended Appropriations - Used - Disbursed

The latter entry is needed for Tie Point 19 because the 310710 balance has to offset 461000 in an appropriated fund.

When refunds are due from the public, the following entry is posted, with no updates to budgetary account balances (although the entry description says it is for prior-year expenditures, it is clear from other guidance that this entry is to be used for refunds of current-year expenditures as well):

**D128** Downward adjustment to prior-year paid delivered orders with no refund collected.

Debit	131000	Accounts Receivable
Credit	679000	Other Expenses not Requiring Budgetary Resources

Since most agencies can use IPAC to request and receive refunds, the USSGL Board probably assumed C134 would be the first entry an agency would make for refunds. But what if the contract allows time for review of a refund request, or the request is made right at the end of a quarter? The requesting agency should reduce expenses (or purchases) under the rules of accrual accounting, but what about expenditures?

## Inside the Black Box Cont'd.

When paying an invoice, a payable is first recorded with the following entry:

**B406** Goods and services delivered in the same year the order was placed and accrue a liability.

Debit	610000	Operating Expenses/Program Costs
	461000	Allotments - Realized Resources
Credit	211000	Accounts Payable
	490100	Delivered Orders - Obligations, Unpaid

So when the process is being reversed, should one post the following?

Debit	131000	Accounts Receivable
	490100	Delivered Orders - Obligations, Unpaid
Credit	610000	Operating Expenses/Program Costs
	461000	Allotments - Realized Resources

There is no such entry in the USSGL's transaction listing, so the short answer is no. The definition of account 428700 Other Federal Receivables includes the phrase "refunds receivable from federal sources because of overpayments." There are also no such examples in Treasury's transaction listing, though this one comes close:

**C416** Accrued revenue from federal sources.

Debit	131000	Accounts Receivable
	428700	Other Federal Receivables
Credit	590000	Other Revenue
	407000	Anticipated Collections from Federal Sources

This assumes that the funds were originally anticipated using this transaction:

**A140** Anticipate anticipated collections including refunds from.

Debit	407000	Anticipated Collections from Federal Sources
Credit	449000	Anticipated Resources - Unapportioned Authority and would be posted along with:

**A123** Realize previously anticipated authority.

Debit	449000	Anticipated Resources - Unapportioned Authority
Credit	461000	Allotments - Realized Resources

### Proposed Posting Model

Combining these transactions (assuming the refund was not anticipated, and since the collection will relieve expenditures, it doesn't need to be anticipated), we would come up with:

Debit	131000	Accounts Receivable
	428700	Other Federal Receivables
Credit	610000	Operating Expenses/Program Costs
	461000	Allotments - Realized Resources

This entry passes tie points 02 for budgetary versus proprietary cash and 15 for receivables, as well as 24

## Inside the Black Box Cont'd.

for funding resources versus equity, but it does run afoul of tie point 04 which compares funded expenses with expenditures. An exception would have to be made for federal receivables, perhaps using a special subaccount. If this is an appropriated fund, it will cause problems for tie point 19 comparing equity and available funding. Posting B234 (above) would satisfy tie point 19 but then the difference between expenditures and expended appropriations would cause an issue in tie point 07, so again, an exception would need to be made.

The collection would then require an entry like this:

Debit	490200	Delivered Orders - Obligations, Paid
	101000	Fund Balance with Treasury
Credit	428700	Other Federal Receivables
	131000	Accounts Receivable

Again, the agency would also record the following if appropriations were used for the original purchase:

**B234'** Back out appropriations disbursed this fiscal year.

Debit	570010	Expended Appropriations - Disbursed
Credit	310710	Unexpended Appropriations - Used - Disbursed

The current USSGL transaction listing never offsets a 4900 series expenditure account with a 4200 series funding source account, except when one combines A712 and B610 below, but that is only because OMB decided that prior-year refunds of funding sources should be recorded as expenditures:

Debit	461000	Allotments - Realized Resources
	425300	Prior-Year Unfilled Customer Orders with Advance – Refunds Paid
	231000	Liability for Advances and Prepayments
Credit	490200	Delivered Orders - Obligations, Paid
	422200	Unfilled Customer Order with Advance
	101000	Fund Balance with Treasury

### Conclusion

The USSGL Board should issue clear guidance as to how to record federal expenditure receivables, both in appropriated and non-appropriated funds. In the meantime, agencies can use the proposed posting logic for vendor receivables from other federal agencies.

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



## AGA DC Newsletter Survey

You ask, we listen!

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

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

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

Please visit the survey site at: [AGA DC Chapter Newsletter Survey](#) to rate and provide any feedback on our newsletter!

Thank you again for your support!

**AGA DC Newsletter Team**

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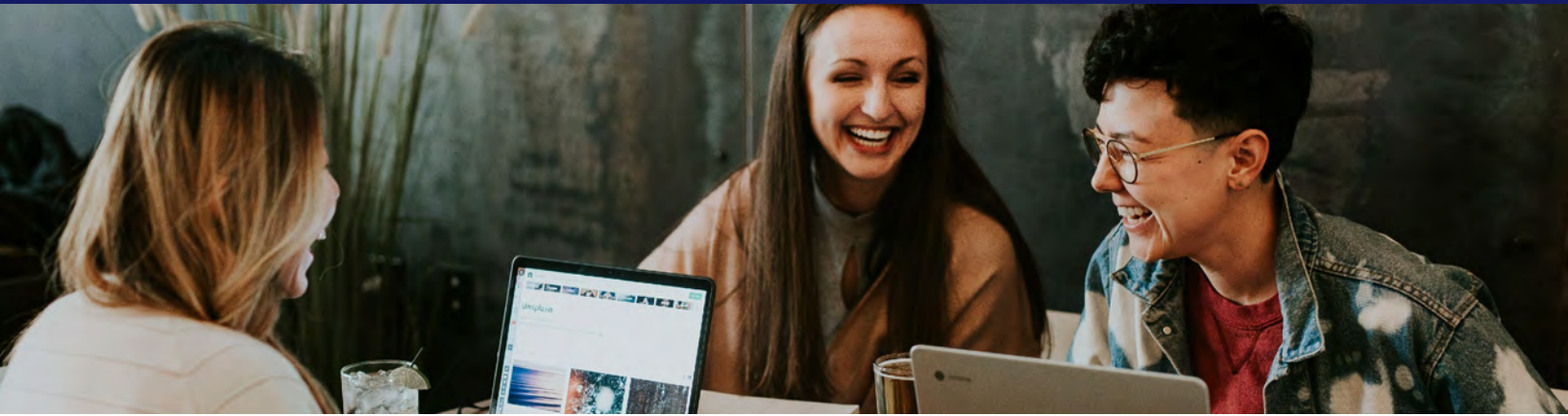


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## AGA Young Professionals and Mentoring

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

### AGA - Young Professionals

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

### AGA - Mentoring Program

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

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To contact any of the AGA DC Chapter Officers please send an email to: [agadc@agadc.org](mailto:agadc@agadc.org)

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### Areeba Rizvi

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## Contact Us

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

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