



Happy holidays! I hope everyone had the opportunity to take a break and relax over Thanksgiving.

On December 8<sup>th</sup>, I hope to see you at our Annual Winter Workshop. The workshop will be held at the University of Maryland at Shady Grove. We have a fantastic program lined up that includes the

following topics: Artificial Intelligence – The New Frontier of Technology; OMB Update: COSO New Fraud Risk Management Guide; and Ethics, which qualifies for both Maryland and Virginia's CPE requirements. Many thanks to Carol Boothe and Yehuda Schmidt, our Education Directors, who have been working very hard to put on a wonderful workshop. I'm looking forward to attending. Please register to attend on our website (<http://www.marylandaga.com/events/workshops.cfm>).

As we go into the New Year, many of you will sit down to set your goals for FY 2017. I ask all of you to set a goal to find a way to participate in AGA. It can be attending a dinner meeting, workshop, social event, or any other way. If you would like to get involved, but aren't sure how, please reach out to me at [president@marylandaga.com](mailto:president@marylandaga.com) I am always happy to discuss with our membership on ways to get involved. Check out the events tab on our website ([www.marylandaga.com](http://www.marylandaga.com)), and you can see all of the upcoming events. More events are added every week, so check back often. Also, check us out on [Facebook](#) for updates as well! #AGAMoCoPG

I hope you all have a wonderful Holiday Season. See you in 2017!

Corinne Dougherty, CPA, CGFM, PMP  
Chapter President

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## Chapter News

Welcome to the December edition of the Montgomery/Prince George's County Chapter newsletter for the 2016—2017 program year. If you are new to the Chapter or it's been a while since you've looked through the newsletter, we have added a number of new features and Chapter programs this year, including:

- A Member Benefits section, which includes a listing of the discounts, sponsored events, scholarships, and free or discounted CPE that is available to you as AGA and MPGC Chapter members.
- Expansion of the Technical Updates Corner, which includes summaries of recent FASAB, FASB, GASB, GAO, and OMB Updates.
- The Chapter Calendar and the National Events sections include listings of both the current and next month's events to give you more advance notice of upcoming events.
- Board Meeting Minutes have been added each month and Chapter Financial Statements will be added when available to make Chapter and Board activities more transparent.
- A monthly contest or trivia question (see below), in which the winners will receive a complimentary pass to a monthly Chapter dinner meeting of their choice.
- Expanded social media— please visit us on Facebook @[AGA Montgomery/Prince George's Country Chapter](#).

We welcome your feedback! If there are any features or content that you would like to see in the newsletter, please contact me at [newsletter@marylandaga.com](mailto:newsletter@marylandaga.com).

- Michelle Merritt, Newsletter Editor

## Chapter Trivia Contest

### November Trivia Question

**Question:** When does each new section of Congress begin?

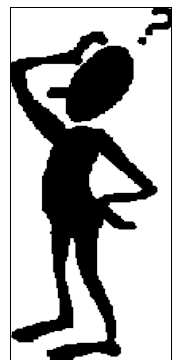
**Answer:** On January 3rd of odd numbered years.

### December Trivia Question:

In what month is the AGA Professional Development Training (PDT) Conference held?

Rules:

- Winners will receive a complimentary pass to a monthly Montgomery/Prince George's County Chapter dinner meeting of their choice for the 2016—2017 program year (September 2016—May 2017) .
- Please submit responses to [newsletter@marylandaga.com](mailto:newsletter@marylandaga.com) by the first of the following month (e.g., by January 1st for the December newsletter). Please submit all responses with a subject line of "Trivia Contest" and include your name, e-mail address, and phone number with your response.
- Winners will be selected at random from all correct responses received and will be chosen on the first of each month . If no correct responses are received, the winner will be selected at random from all responses received for that month.
- Answers will be provided in the following monthly edition of the newsletter.



## Upcoming Chapter Events

**December 7| \*FREE\* AGA Audio Conference: “Ethics in the Workplace.” (2 CPEs)**

*Sponsored for our chapter’s members by corporate partners CliftonLarson Allen LLP*

**Time:** 2:00—3:50 PM

**Location:** CliftonLarsonAllen, 11710 Beltsville Drive, Ste. 300, Calverton, MD 20705

**RSVP:** Contact Katrina Lynch @ [Katrina.Lynch@claconnect.com](mailto:Katrina.Lynch@claconnect.com) or 301-931-2050.

December 2016						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	18	20	21	22	23	24
25	26	27	28	29	30	31

1	2	3	4	5	6	7
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**December 8| Winter Workshop (up to 8 CPEs) - see p. 4 for additional details**

**Location:** University of Maryland at Shady Grove, Camille Kendal Academic Center, 9630 Gudelsky Drive, Bldg. 3, Rm. 4230, Rockville, MD 20850

**Cost:** 100 per person

**Registration:** <http://www.marylandaga.com/cgfm/documents/CGFMClass2Invitationregistration.doc>

January 2017						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
28	30	31	1	2	3	4

**January 11| January Dinner Meeting (1 CPE)**

**Presentation by:** Robert Westbrooks, Inspector General, Pension Benefit Guaranty Corporation

**Time:** 6:30—8:30 PM, Reception 6:00—6:30PM

**Location:** TBD

**Cost:** \$35 per person for non-government employees, \$20 for state, local, and federal government employees. and \$15 for students (credit card payment required).

**Registration:** <http://www.marylandaga.com/events/meetings.cfm>.

**January 18| \*FREE\* AGA Audio Conference: “Getting Your Dollars to Work Harder: Blended and Braided Funding” (2 CPEs)**

*Sponsored for our chapter’s members by corporate partners CliftonLarsonAllen LLP*

**Time:** 2:00—3:50 PM

**Location:** CliftonLarsonAllen, 11710 Beltsville Drive, Ste. 300, Calverton, MD 20705

**RSVP:** Contact Katrina Lynch @ [Katrina.Lynch@claconnect.com](mailto:Katrina.Lynch@claconnect.com) or 301-931-2050.



## AGA/PGMC Winter Workshop

Our Winter Workshop will be held on **Thursday, December 8th** at the **University of Maryland Shady Grove campus** from **8 a.m. to 5 p.m.**

**Description:** An outstanding program is planned, with dynamic speakers from Professional Service Firms and Regulatory Entities, who will present new ideas in formation sessions, which offers you unparalleled opportunities to network. Workshop participants can earn up to **8 CPE** credits in Governmental Accounting, Information Technology, and Regulatory Ethics.

**Location:**

University of Maryland at Shady Grove  
 Camille Kendall Academic Center  
 9630 Gudelsky Drive  
 Building 3, Room 4230  
 Rockville, MD 20850

Topics will include the following:

Topic	Speakers
Artificial Intelligence - The New Frontier of Technology	Sunil Datt, U.S. Federal IBM Global Business Services
OMB Update	Michael Landry and Daniel Kaneshiro. OMB
COSO New Fraud Risk Management Guide	David Cotton, Cotton & Company Jeffrey Steinhoff, KPMG LLP
Ethics 2016: Your License Depends on it! (4 ethics credits)	Cheryl Hyder, Hyder Consulting Group

The pricing for the workshop is as follows:

Type	Price
AGA Members (Government Employees, Faculty, and Retirees)	\$ 90
AGA Members (Employees of Firms and Companies)	\$100
Non-AGA Members	\$130
Full Time Students	\$ 35

Register today at <http://marylandaga.com/events/workshops.cfm>! We hope to see you there!



## Chapter Event Retrospective



The Montgomery/Prince George's County Chapter hosted a joint Early Careers picnic at Haines point with the DC and Northern Virginia Chapters on September 25, with catering from Famous Dave's BBQ, games, and a great turnout.



Left: MPGC President Corinne Dougherty, MPGC Secretary Mat Wenzel, and MPGC Meetings Co-Director Howie Simanoff talk with September dinner meeting guest speaker Matt Flick before his presentation on Phishing and Cybersecurity.

Right: MPGC AGA members attended the September dinner meeting at the Matchbox restaurant in Rockville, MD on September 14th.

## CGFM

### WHAT IS CGFM?

Certified Government Financial Manager® (CGFM®) is a professional certification recognizing the unique skills and special knowledge required of today's government financial managers. It covers governmental accounting, auditing, financial reporting, internal controls and budgeting at the federal, state and local levels.

To earn the CGFM, individuals must apply for the CGFM program and meet the following requirements:

**Ethics** — read and agree to abide by AGA's Code of Ethics

**Education** — have a bachelor's degree from an accredited college or university

**Examinations** — pass three comprehensive CGFM examinations

**Experience** — have at least two years of professional-level experience in government financial management

**CGFM Examination:** Applicants must take and pass three comprehensive examinations to become a CGFM:

- **Course 1:** Governmental Environment
- **Course 2:** Governmental Accounting, Financial Reporting and Budgeting
- **Course 3:** Governmental Financial Management and Control

Visit the [AGA National CGFM website](https://www.agacgfm.org/CGFM-Certification/About-CGFM.aspx) at <https://www.agacgfm.org/CGFM-Certification/About-CGFM.aspx> for more details.

**If you are considering taking the CGFM exams in 2016, why not sign up for AGA's Intensive Review Course with CGFM examinations included – it's a great opportunity to review the course material with a knowledgeable instructor and complete your CGFM!**

**The Intensive Review Course (IRC), offering up to 18 CPEs, will be held in Alexandria, VA on April 3 –4, 2017 (see p. 9). The class will run 8 a.m. – 5 p.m. both days. The cost of the course for qualified participants is as follows:**

\$375 for AGA members,

\$425 for non-members

**SPECIAL BONUS: The CGFM examinations are offered at no additional cost to course attendees — a \$375 savings!**

### Not yet a CGFM or do you know someone who wants to earn their CGFM?

Consider reaching out to colleagues who are not members but may be interested in certification. This may be a good opportunity to re-engage members with a CGFM study group!

Details on the program are available here: [www.agacgfm.org/cgfm/springpromo2015](http://www.agacgfm.org/cgfm/springpromo2015)

Questions about CGFM? Contact: [agacgfm@agacgfm.org](mailto:agacgfm@agacgfm.org)

- Additional information related to the CGFM, including (1) Reasons to become certified, (2) How to apply, (3) Testing locations, and (4) CGFM Proclamations, can be found on the Maryland AGA website at <http://www.marylandaga.com/cgfm/index.cfm>.

For additional questions or information about the CGFM, please contact Montgomery/Prince George's County CGFM Director Gabrielle Chapman at [cgfm@marylandaga.com](mailto:cgfm@marylandaga.com) or [gabriellechapman@kpmg.com](mailto:gabriellechapman@kpmg.com).



## Membership

Membership in AGA has many **benefits**, including education and networking opportunities, awards and scholarship programs, discounts for training, exclusive CPE opportunities, and access to our **resources**, some of which are offered at no charge or at a discounted rate for members. Members join a local **chapter**, through which they gain additional networking, leadership and education experiences.

### Membership Benefits—Local Chapters:

- **FREE\* AGA Audio Conferences and Webinars**—2 CPEs for participation in each sponsored audio conference
- **Monthly Dinner Meetings**
- **Workshops** featuring relevant and timely topics such as Cyber Security, FASAB Updates, Internal Control Requirements, and Ethics.
- **Networking Opportunities** and **Member gatherings** such as happy hours and sporting events.

### Membership Benefits—AGA National:

- **Community**—Networking through 100 AGA Chapters, Member and Vendor Directories, Leadership and Volunteer Opportunities, Awards and Scholarships
- **Professional Development, Training, and Career Resources**—complimentary webinars, discounted online CPE courses, member rates for national training events, discounted CGFM renewal fees, group training courses, Online Job Bank.
- **Research and Publications**—subscription to the *Journal of Government Financial Management* and the Topics weekly newsletter, Research and Executive Reports.
- **Free Tools**, including tips to Prevent Fraud, Reduce Improper Payments, Improve Outcomes, Mitigate Risk, and Enhance Collaboration.
- **Participation in Government Initiatives**—Input to standards-setting bodies, intergovernmental partnerships, and the Citizen-Centric Reporting (CCR) program.



### Unlimited Online CPE Courses from Becker Professional Education

Becker Professional Education, one of our chapter's esteemed corporate sponsors, and our chapter have joined forces to offer you an incredible new member benefit - discounts on online Continuing Professional Education (CPE) courses.

Becker Professional Education offers a wide variety of CPE courses, including courses that qualify for your CGFM or CPA CPE requirements. The cost is a flat rate of \$350 per year for unlimited CPE courses.

A catalog of the courses available through Becker Professional Education can be found at <http://www.becker.com/cpe/courses/course-catalog>.

To view of sample demonstration of the online courses that Becker Professional Education has to offer, please visit <http://www.becker.com/accounting/cpe/courses/preview-a-course.cfm>.

## New Members

The MPGC Chapter would like to welcome the following new members to our Chapter:

**Mr. Wilson Guo**

**Mr. Sonnie Oratokhai**

## Awards and Recognition

### Awards

AGA honors members for service both to the association and to the government financial management profession. We bestow awards based on peer nomination to those who have exemplified principles of leadership, transparency and financial stewardship.

### Scholarships

AGA grants scholarships to undergraduate and graduate students pursuing finance careers in an effort to grow the government financial management community and support current and future practitioners from the beginning of their careers.

### Nominations

AGA offers a variety of **leadership** positions at the chapter, regional and national levels. Learn more about our leadership structure and how you can get involved.

### Recognition

AGA celebrates the commitment and determination shown by members reaching several **membership milestones**. Lifetime Membership is conferred to individuals who have remained paid members for at least 40 consecutive years. The commitment and determination shown by these individuals has made AGA the strong, vital organization it is today. As a token of their achievement, each of these individuals was presented with a Lifetime Member certificate. As Lifetime Members, these individuals no longer pay AGA membership or chapter dues.

Go to <https://www.agacgfm.org/Membership/Connect/Awards-Recognition.aspx> to learn more about the individual programs.

## Submit an Article to the AGA Journal

The *Journal* team seeks original content to add to and create conversation about important topics in government financial management. To submit, email [journal@agacgfm.org](mailto:journal@agacgfm.org).

**Process:** AGA's Journal Editorial Board chooses themes for issues that it believes the government financial management community will find compelling, relevant and timely. However, we solicit and accept high-quality, thoughtful articles on a wide range of government financial management topics and may publish articles that do not relate directly to the themes. The Journal will accept material that provides practical insights into any aspect of government financial management. Authors are encouraged to submit articles for review. The Journal Editorial Board is particularly interested in articles from practitioners.

- **Summer:** March 1
- **Fall:** June 1
- **Winter:** September 1
- **Spring:** December 1

To be eligible for consideration, submitted material must be:

- no more than 2,500 words;
- original work that has not been previously published; submitted to the editor at [journal@agacgfm.org](mailto:journal@agacgfm.org);
- using endnote rather than footnote format;
- accompanied by a 50-word (or fewer) abstract and concise author biographies;
- accompanied (when applicable) by no more than four charts or graphs, which should be submitted as raw data; and
- accompanied (when applicable) by concise sidebars.

If you have any questions about the *Journal*, please contact [journal@agacgfm.org](mailto:journal@agacgfm.org).



## AGA National Events and Updates

### 2017 Financial Systems Summit (up to 7 CPEs)



**January 13, 2017**  
**Walter E. Washington Convention Center, 801 Mt. Vernon Place NW**  
**Washington, D.C.**

The Financial Systems Summit (FSS) unites federal financial managers and private-sector executives to discuss the near-term and future prospects of federal financial management systems in a budget-constrained environment. The summit will provide new insights into the burgeoning federal financial systems modernization strategy over the coming decade — and beyond.

FSS offers live audience participation! Summit speakers will post questions and attendees can text their response allowing for real time conversation and engagement. For more information, go to <https://www.agacgfm.org/FSS-2016.aspx>.

### National Leadership Training (up to 14 CPEs)



**February 15—16, 2017**  
**Ronald Reagan Building and International Trade Center, 1300 Pennsylvania Ave., NW,**  
**Washington, DC**

NLT provides cutting edge information from highly respected and distinguished industry leaders as well as an unparalleled program in two formats: in-person and virtually. Both formats offer the opportunity to earn 14 CPEs. The agenda is the same for both in-person and virtual attendees.

For more information, go to <https://www.agacgfm.org/NLT-2017/Program-Schedule.aspx>

### CGFM Intensive Review Course (up to 18 CPEs)



**April 3—4, 2016**  
**Alexandria, VA**

Sign up for AGA's Intensive Review Course with CGFM Examinations *included* – it's a great opportunity to review the course material with a knowledgeable instructor and complete your CGFM.

The cost of the course is \$375 for AGA Members and \$425 For additional details, go to <https://www.agacgfm.org/Certification/Candidates/Preparing-for-Exams.aspx>.

You can register at <https://www.agacgfm.org/Training-and-Events/Event-Registration.aspx?ID=237>

The registration deadline is March 22, 2017, unless the class has been filled prior to this date.

### 2017 CFO/CIO Summit (up to 4 CPEs)



**May 4, 2017**  
**Washington, DC**

Join AGA and AFFIRM in Washington for this free\* educational event and listen to an insightful dialogue on the intersection of policies and management issues that impact CFOs and CIOs and how they are working together to improve efficiency and transparency, reduce risk and strengthen their workforce.

\*Complimentary for individuals who work for government. Private-sector participation is available via sponsorship. Are you a small business? [Contact AGA](#) for special sponsorship pricing.

## Technical Updates Corner—FASAB and GASB

### Federal Accounting Standards Advisory Board (FASAB)

#### October 17, 2016—Patrick McNamee Appointed to the FASAB

The chairman of the Federal Accounting Standards Advisory Board (FASAB), D. Scott Showalter, announced that Patrick McNamee has been appointed to the FASAB. Mr. McNamee's term will begin January 1, 2017, when current member Sam McCall completes his term.

Mr. McNamee, a recently retired partner of PricewaterhouseCoopers (PwC), is well known for his contributions to standard setting. Early in his career, he supported the AICPA's Auditing Standards Board and the Government Accountability Office's Government Auditing Standards. For the six years prior to his retirement from PwC, he worked in the national office on development of policy, guidance, and training. In addition, Mr. McNamee has extensive experience serving as engagement partner on the audits of federal agency financial statements. He led the audits of agencies such as the Social Security Administration, NASA, the Department of Justice, the General Services Administration, and the House of Representatives.

Mr. McNamee is a CPA and Certified Government Financial Manager (CGFM). He earned a bachelor's degree in accounting from the University of Southern California and a master's degree in management information systems from the University of Virginia.

#### November 15, 2016—FASAB Issues its Annual Report and Three-Year Plan

FASAB has published its *Annual Report for Fiscal Year 2016* and *Three-Year Plan*. The combined report allows stakeholders to consider FASAB's progress and invites them to advise the Board about its plans. The report reviews the Board's efforts and accomplishments during fiscal year 2016 and provides information about current projects, as well as potential projects the Board considered in past agenda-setting discussions.

FASAB requests written comments by January 30, 2017 regarding the content of the annual report and the Board's project priorities for the next three years. The report is available at <http://www.fasab.gov/our-annual-reports/>.

#### Exposure Draft Comments are due for the following:

- *Federal Financial Reporting—01/06/2017*
- *Conforming Amendments to Technical Releases for SFFAS 50, Establishing Opening Balances for General Property, Plant, and Equipment—01/09/2017*

### Governmental Accounting Standards Board (GASB)

#### Norwalk, CT, November 16, 2016—Post-Implementation review (PIR) Report on GASB Statement No. 54, Fund Balance Reporting and Governmental Fund Type Definitions

GASB Statement 54 was issued in 2009 to improve the usefulness of information provided to financial report users about fund balance by providing clearer, more structured fund balance classifications, and by clarifying the definitions of existing governmental fund types. The PIR team received broad-based input from GASB stakeholders including auditors, preparers, financial statement users, and academics.

Based on its research, the review team concluded that:

- Overall, Statement 54 resolved the primary issues underlying its stated need—it introduced fund balance classifications that are easier to understand and clarified fund type definitions. Although some stakeholders have indicated that it is difficult to distinguish between committed and assigned fund balances, the Statement was an improvement over prior literature.
- Statement 54 provides users of financial statements with decision-useful information.
- Overall, Statement 54 is operational because it is understandable, can be applied as intended, and enables fund balance and governmental fund type information to be reported reliably.
- The changes made to financial and operating practices as a result of Statement 54 were not significant or unexpected.
- There were no significant unanticipated consequences as a result of the adoption of Statement 54.
- Overall, implementation and continuing application costs associated with Statement 54 were not significant and were consistent with the GASB's expectations.
- Overall, Statement 54 achieved its expected benefits.

The report is available at [http://www.accountingfoundation.org/cs/ContentServer?c=Document\\_C&pagename=Foundation%2FDocument\\_C%2FFAFDocumentPage&cid=1176168610406](http://www.accountingfoundation.org/cs/ContentServer?c=Document_C&pagename=Foundation%2FDocument_C%2FFAFDocumentPage&cid=1176168610406)

### Office of Management and Budget (OMB)

#### Recent Revisions and Publications:

##### Climate Change: The Fiscal Risks Facing the Federal Government, A Preliminary Assessment (11/15/16)

The Office of Management and Budget (OMB), in collaboration with the Council of Economic Advisers (CEA), recently embarked on an effort to assess what we can quantify today with regard to the fiscal risks posed by climate change for the Federal Government. To date, this effort has yielded two primary conclusions: first, that our current understanding of the fiscal risks of climate change is nascent, limited in scope, and subject to significant uncertainty; and second, that the evidence available thus far indicates the fiscal risks to the Federal Government could be very significant over the course of this century without ambitious action to reduce greenhouse gas emissions (GHGs) and adapt our communities to a changing climate.

This report outlines the contours of fiscal risk through five program-specific assessments: crop insurance, health care, wildfire suppression, hurricane-related disaster relief, and Federal facility flood risk. These programs were assessed because they are directly influenced by climate change, they have strong links to the Federal Budget, and quantitative scientific and economic models regarding the likely magnitude of impacts were available. This report also considers potential impacts to Federal revenues.

The full report is available at [https://www.whitehouse.gov/sites/default/files/omb/reports/omb\\_climate\\_change\\_fiscal\\_risk\\_report.pdf](https://www.whitehouse.gov/sites/default/files/omb/reports/omb_climate_change_fiscal_risk_report.pdf)

#### Recent OMB Publications:

- [OMB Circular A-136](#), Financial Reporting Requirements - Revised (10/7/2016)
- [OMB Bulletin No. 16-01](#), Apportionment of the Continuing Resolution(s) for Fiscal Year 2017

### U. S. Government Accountability Office (GAO)

#### December 1—Enterprise Risk Management: Selected Agencies' Experiences Illustrate Good Practices in Managing Risk

Federal leaders are responsible for managing complex and risky missions. ERM is a way to assist agencies with managing risk across the organization. In July 2016, the Office of Management and Budget (OMB) issued an updated circular requiring federal agencies to implement ERM to ensure that federal managers are effectively managing risks that could affect the achievement of agency strategic objectives. GAO's objectives were to (1) update its risk management framework to more fully include evolving requirements and essential elements for federal enterprise risk management, and (2) identify good practices that selected agencies have taken that illustrate those essential elements.

GAO reviewed literature to identify good ERM practices that generally aligned with the essential elements and then validated these with subject matter specialists. GAO also interviewed officials representing the 24 Chief Financial Officer (CFO) Act agencies about ERM activities and reviewed documentation where available to corroborate officials' statements. GAO studied agencies' practices using ERM and selected examples that best illustrated the essential elements and good practices of ERM.

GAO identified six good practices to use when implementing ERM:

- 1) Align ERM process to goals and objectives - Leaders guide and sustain ERM strategy,
- 2) Identify Risks—Develop a risk-informed culture to ensure all employees can effectively raise risks,
- 3) Assess Risks—Integrate ERM Capability to support Strategic Planning and Organizational Performance Management,
- 4) Select Risk Response—Establish a customized ERM program integrated into existing agency processes,
- 5) Monitor Risks—Continuously manage risks and monitor selected risk responses with performance indicators to track results,
- 6) Communicate and Report on Risks—Share information with internal and external stakeholders to identify and communicate risks.

Twelve CFO act agencies, including the Department of Veterans Affairs, the Social Security Administration, the National Institute of Standards and Technology, and the Department of the Treasury, provided technical comments, which GAO included as appropriate; the others did not provide any comments.

The full report is available at <http://www.gao.gov/assets/690/681342.pdf>

## MPGC Chapter Minutes

The AGA MPG Board Meeting was held on Wednesday, November 30, 2016 at 12:00pm via Conference Call. The Meeting was called to order at 12:01 PM by Corinne Dougherty.

### **I. WELCOME AND OPENING REMARKS**

- Corinne welcomed everyone to the meeting and turned the discussion over to Mat Wenzel, Secretary, to perform the roll call.

### **II. REVIEW/VOTE ON MINUTES**

- Corinne moved for a motion to approve the meeting minutes from the September 28, 2016 board meeting. Kathleen Sobieralski made a motion to approve the minutes and Yehuda Schmidt seconded the motion. The minutes were unanimously approved by the Board members.

### **III. PRESENTATION OF BUDGET/WORK PLANS:**

**A. Membership:** Natalie Samuels, Michael Smith, Helena Clemons—Corinne Dougherty informed the board there is a happy hour at Society Restaurant and Lounge in Silver Spring on December 1, 2016.

#### **B. EARLY CAREERS:** Erica Williams and Dhiren Patel

- Erica informed the board that the happy hour on December 1, 2016 is a joint event with Membership and Early Careers and that 26 people had RSVP thus far.
- Erica informed the board that they are working on having a bowling event in January and Corinne recommended not having the event the weeks of January 2<sup>nd</sup> or 9<sup>th</sup>, 2017.
- Erica informed the board that they are looking to do a mentorship event in February and will be reaching out to the NOVA and DC chapters as a possible join event or possible setting up a CGFM social event.
- Erica informed the board that they are considering a Washington Wizards game on Wednesday March 15, at 7 PM or Wednesday March 22 at 9 PM.
- Erica informed the board that they are looking to do a community service project in April and asked for suggestions for organizations to serve.

#### **C. PROGRAMS:** Jimmy Hauer and Scott Binder

- Corinne informed the board that they are currently looking for speakers for January through April 2017 and any suggestions should be sent to Scott, Jimmy, or herself.
  - Marlon informed the board that he is talking to his client's OIG about possibly speaking
- #### **D. MEETINGS:** Howie Simanoff and Wilson Kayo
- Howie informed the board that he will look into scheduling a meeting in Prince Georges.
  - Howie informed the board that Matchbox still had similar complaints as before, specifically, noise and seating factors.
  - Wilson suggested to the board to possibly invest in a wireless microphone.
  - Corinne informed the board that they are looking to set up 1 meeting in Prince Georges County, possible at Mulligan's restaurant at the University of Maryland Golf Course.
  - Marlon suggested reaching out to the Greenbelt Marriott as a possible location for the Prince Georges location.

#### **E. EDUCATION:** Carol Boothe and Yehuda Schmidt

- Carol informed the board that there were 34 individuals registered so far for the Thursday December 8 workshop at the University of Maryland Shady Grove location. The workshop will consist of an ethics course which would qualify for Maryland, Virginia, and DC. Further, Carol asked the board to send out reminders to try and get the head count up to 50.
- Yehuda informed the board that they will be making a donation on behalf of the speakers.
- Jared Zaideman suggested sending the donation to Manna Food Centers.

#### **F. CERTIFICATION:** Gabrielle Chapman

- Corinne read the notes provided from Gabrielle Chapman and noted that a lot of chapter members have reserved CGFM study guides. Additionally, Corinne informed the board that we budgeted a lot of money for AGA National's Intensive CGFM Review course and can redirect that money.

#### **G. ACCOUNTABILITY:** Holly Donley and Brett Parris

- Holly informed the board that they are possibly setting up a scholarship and Corinne was going to look to see how to get that started.

#### **H. NEWSLETTER:** Michelle Merritt

- Corinne informed the board that the December one is currently being worked on.

#### **I. WEBSITE:** Denise Reyes

- Denise asked the board to send anything for the website to her. She will send a reminder email for the workshop.
- Denise informed the board that the new website will be hosted by AGA National beginning around February 2017.

#### **J. SOCIAL MEDIA:** Ozo Nnamadim

- Ozo informed the board that he will post the link for the workshop to the Facebook page and asked for photos from events to highlight what the chapter is doing.

- Ozo informed the board that he posted a link about the happy hour.

#### **K. COMMUNITY SERVICE:** Jared Zaideman and Renwei Shi

- Jared informed the board that we will continue to do 50/50 raffles at dinner meetings and is currently looking to add more events with the Manna Food Center and the Capital Area Food Bank.

#### **L. AWARDS:** Jonathan Deboer and Anu Sharma

- Jonathan informed the board that they are continuing to discuss possible locations for the awards dinner.

#### **M. CORPORATE SPONSORSHIPS:** Eric Rasmussen, Omar Marquez, and Kathleen Sobieralski

- Eric informed the board that there is nothing to report at this time.

#### **N. RECOGNITION:** Jillian Manning

- Jillian informed the board that they were be sending out a spreadsheet in Mid-December requesting recognition points.
- Corinne suggested that the points should be submitted in the early part of the week of December 19, 2016.

#### **O . HISTORIAN:** Jeff Cole

- Jeff did not have anything new to report.

#### **P. SPECIAL PROJECTS:** Dawn Beatty

- Dawn informed the board that she reached out to Early Careers and is working on the mentoring plans, but had no specific updates.

#### **Q. BUDGET/FINANCIALS:** Alex Dickey and Alex Williams

- Corinne asked the board for suggestions on cutting costs and mentioned cutting the CFM costs.
- Corinne suggested that we hold off until January to approve the budget until we see if we can cut additional costs.

### **IV. COMMENTS FROM REGIONAL OFFICERS:**

- Eric Rasmussen: Eric informed the group that there was a regional AGA meeting at 3:00 PM today, but had no updates at this time.

### **V. CLOSING COMMENTS—**The meeting was adjourned at 12:47 p.m.



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