



The Washington Connection



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Up Next!

- January 14, 7pm:** Washington Capitals Hockey Game, Capital One Arena. [Register here!](#)
- January 15, 12pm-1pm:** Hybrid Luncheon. Guest speaker: Karin Dasuki, Deputy CFO, Office of Personnel Management. Registration: [in-person](#) or [virtually](#).
- January 16, 4:30pm-7:30pm:** Register for the CGFM Study Group for Exam 1. Register for both [in-person](#) and [virtual](#) attendance.
- January 29, 6pm:** Young Professionals New Year's Kickoff. [Register here!](#)
- February 12, 12pm-1pm:** Monica Valentine, Executive Director, FASAB
- March 19, 12pm-1pm:** Deidre Harrison, Deputy Controller, OMB
- April 23, 12pm-1pm:** Westley Everette, ADCFO, Department of Labor
- April 28 & April 29, 2025:** 23rd Annual AGA DC Chapter Hybrid Training Event
- May 21, 12pm-1pm:** Jay Hoffman, CFO, Patent and Trademark Office
- June 7, 6pm:** Save the Date! AGA DC Annual Awards Gala.

THANK YOU!

A big thank you to those who participated in the following events:

- October 2, CGFM Exam Updates Information Session
- October 5, Community Service Event-St. Jude Walk-Run
- October 16, DC Monthly Luncheon
- October 16, AGA DC Chapter Webinar
- October 23, 6pm-8pm, Sponsor Committee Happy Hour
- November 13, DC Chapter Webinar
- November 2024, DC Monthly Luncheon
- December 4, DC Monthly Luncheon
- December 4, DC Chapter Webinar

President's Message

Dear AGA Washington DC Chapter Members,

It's hard to believe we are already at the end of 2024! The new year will be eventful to say the least with the transition of a new administration. Our job remains the same, to support the business of government with the highest quality budgeting, accounting, auditing, reporting, procurement, resource management, cybersecurity and financial system excellence. Let's keep that in mind in 2025 and make sure to participate in the panoply of upcoming DC Chapter events! Let's take a moment to survey what we have done so far:

- Three monthly luncheons with Joe Gioeli from the Treasury BFS, the legendary Gene Dodaro from GAO, and Mike Wetklow from IRS
- A multi-chapter get together with the Northern Virginia, Montgomery/Prince George's and Baltimore Chapters
- A VIP sponsors luncheon with Tonya Johnson-Simmons from DOI
- Several great webinars and a visit to students out in Salisbury University
- Several happy hours and a Member Services Virtual Bingo Night
- Community service events including the St. Jude Walk/Run, Wreaths Across America, and our Holiday Party!

In 2025, get ready for a lot more. We are re-energizing our Young Professionals program, bringing back our Mentorship Program, supporting CGFM, community



service and member/social events, holding our Spring Training – now back in DC – and moving toward awards season and our year-end gala. We have also booked our monthly luncheon speakers through the end of the year, all of which you should come see, have some lunch and earn some CPE. I hope everyone enjoys the wonderful Holiday season and happy New Year!

Sincerely,

Paul Marshall, *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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A Message from Lal Harter, Your National Council of Chapters (NCC) Representative

🎄 Happy Holidays and Seasons Greetings, DC Chapter Members! 🎄

As the temperature drops, my spirits rise, and I am cheered and warmed by the glow of holiday lights and festive gatherings. I am grateful for you, our many chapter members and volunteers and the success you bring to the Washington DC Chapter. We are the heart and soul of the AGA and you bring the heat! After a year of hard work and great accomplishments, I welcome time-off to celebrate the holidays, and take some long winter naps.

At our second quarterly NCC meeting of the program year, AGA National and Chapter leaders focused on succession planning and chapter leadership. Although not as much of a challenge for the DC Chapter compared to many, we were able to provide guidance and leading practices for other chapters that struggle with sustaining a leadership pipeline. We also discussed upcoming opportunities, including:

- LEAD 2025 - April 24 - 26, attendee Deadline: February 28, 2025
- Young Professionals Scholarship (PDT): Winter/Spring 2025
- PDT Hotel Scholarships: Winter/Spring 2025
- First Time Attendee (PDT): TBD
- Chapter Awards (PDT): Announced end of May 2025

If you would like more information about these and other opportunities and events, please visit the [National Events page](#).



As I conclude my part in the winter newsletter, I want to extend my sincere thanks and appreciation for your continued support for, and dedication to, the DC chapter. This festive season is a wonderful time to take in the warmth and camaraderie that makes our community so special. We wish you all a joyful holiday season filled with laughter, peace, and prosperity. Here's to another year of growth and success together. Stay warm and enjoy the magic of the holidays!

Lal Harter, NCC Representative



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 John Hooley
Ascella Vice President

 301-758-0366

 john.hooley@ascellatech.com

AGA DC Chapter Citizen Center Report (CCR)

Our Chapter has published the [Citizen Center Report \(CCR\) for the year ending June 30, 2024](#). The purpose of AGA's CCR initiative is to help simplify communication between the government and its citizens, who have a right to accurate information about the way their government spends their taxpayer dollars. AGA believes accurate government financial information should be provided to all citizens in a timely, simple, and readily accessible format.

The DC Chapter adopted this concept and is pleased to share our annual report with our members. We believe this [CCR](#) transparently shares our mission, vision, accomplishments, financials, and plans for the year ahead.

You can read this CCR by clicking the link [here](#).

As always, if you have questions or comments on the CCR, please contact us via president@agadc.org.



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Annual AGA DC Chapter Hybrid Training Event

The 23rd Annual AGA DC Chapter Hybrid Training Event, sponsored by the DC & Northern Virginia AGA chapters, will take place on **Monday, April 28** and **Tuesday, April 29, 2025**. **Save the Date!** Registration will begin in early 2025.

You can join us either in person or virtually and earn up to 16 CPE credits. This year's training will offer ethics training that meets VA, DC, and MD CPE requirements.

We are returning to Washington, DC, for our training! **Our in-person venue is Convene Hamilton Square, 4th Floor; 600 14th Street, NW, Washington, DC 20005.**

Convene is accessible from the Metro Center Station (Blue/Orange/Red/Silver lines), Federal Triangle Station (Blue/Orange/Silver lines), and McPherson Square Station (Blue/Orange Silver lines).

Nearby parking is located at:

- 607 14th St NW, Washington, D.C. 20005
- 675 14th St NW, Washington, D.C. 20005
- 1325 G St NW, Washington, D.C. 20005

Don't miss this opportunity to hear firsthand from top government leaders about current issues impacting Federal financial management and related functions!

Annual AGA DC Chapter Hybrid Training Workshop

Register Now

AGA
Washington D.C. Chapter

REGISTER TODAY

In-person and virtual training options available

MONDAY, APRIL 28 & TUESDAY, APRIL 29, 2025

CONVENE HAMILTON SQUARE,
600 14 TH STREET, NW,
WASHINGTON, DC 20005

In-person or virtually options are available. The training provides an opportunity to earn up to 16 CPE credits.

Don't miss this opportunity to hear firsthand from top government leaders about current issues impacting Federal financial management and related functions!

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AGA DC Training and Events

AGA DC Upcoming Events

All of the following Monthly Hybrid Luncheons will be held virtually and in-person at Clydes' at Gallery Place, DC from 11:30am to 1pm.

Wednesday, January 15, 2025: Karin Dasuki, Deputy CFO, Office of Personnel Management

Thursday, January 16, 2025: Register for the CGFM Study Group for Exam 1.

Wednesday, January 29, 2025: Young Professionals New Year's Kickoff, 6pm.

Wednesday, February 12, 2025: Monica Valentine, Executive Director, FASAB

Wednesday, March 19, 2025: Deidre Harrison, Deputy Controller, OMB

Wednesday, April 23, 2025: Westley Everette, ADCFO, Department of Labor

Monday, April 28 & Tuesday, April 29, 2025: 23rd Annual AGA DC Chapter Hybrid Training

Wednesday, May 21, 2025: Jay Hoffman, CFO, Patent and Trademark Office

You can earn 1 CPE from each monthly luncheon.

For questions regarding AGA DC events listed here, please contact us at agadc@agadc.org.

AGA National Training Events

2025 National Leadership Training (NLT): Feb 19-20, 2025 (14 CPEs; DC or virtual)

<https://www.agacgfm.org/Events/NLT/Home.aspx>

2025 Performance Counts Summit: May 13, 2025 (4 CPEs; Virtual)

<https://www.agacgfm.org/Events/PerformanceCounts/PIO-CFO-Home.aspx>

2025 Professional Development Training (PDT): Jul 27-30 (24 CPEs; Nashville or virtual)

<https://www.agacgfm.org/Events/PDT/PDT-Home.aspx>

**** SAVE THE DATE ****



AGA DC Sponsored National Webinar Training Schedule Program Year 2024-2025

AGA DC sponsored National webinars will continue to be offered in a virtual format. All webinars start at 2:00pm and end at 3:50pm ET. You can earn 2 CPEs for each webinar!

Dates & Topics:

- **January 15, 2025** — Artificial intelligence (AI)
- **February 5, 2025** — GASB Update
- **March 5, 2025** — Enterprise Risk Management
- **March 26, 2025** — Robotic Process Automation (RPA)/Machine Learning (ML)
- **April 9, 2025** — Ethics
- **April 23, 2025** — Fraud/Data Analytics
- **May 7, 2025** — Risk Management
- **May 28, 2025** — Leadership

The DC Chapter will notify you via email of the open pre-registration period to participate in AGA webinars facilitated by AGA National. If you are interested in any webinar, look out for email from the DC Chapter as you must pre-register.

These webinars are limited to 60 DC Chapter members for each webinar. You will receive further instructions on how to obtain an access link to the webinar after the pre-registration period closes. After you successfully pre-register, you will receive two follow-up emails: (1) with instructions on how to finalize and confirm your registration; and (2) with the webinar access link, from customer care@gotowebinar.com, prior to the scheduled event date.

For more information on these webinars, please visit the AGA National website at AGA National Webinars.

For questions, please contact: Danielle Burrell at danielle.c.burrell@hud.gov

**** SAVE THE DATE ****

SAVE THE DATE!

AGA DC CHAPTER

*Annual Awards
Gala*

JUNE 7, 2025
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COCKTAILS AT 6PM
DINNER AT 7PM

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Award for Excellence in Fraud Prevention

This award is to recognize an employee, or a group of employees, in government that have developed, implemented, and/or subsequently had a positive impact in preventing fraud activity related to federal funds. The award is to highlight initiative, dedication, and the spirit of innovation that led to positive outcomes towards the prevention of fraud in federal funds programs.



Eligibility

All federal government employees, programs, or operations units actively involved with administering federal funds are eligible.

Award Presentation

The JFMIP Principals will present the award at the JFMIP Federal Financial Management Conference/Webinar Event.

Nomination Procedures

- 1 Complete the nomination form that can be accessed at the following link: [JFMIP Awards \(cfo.gov\)](https://www.cfo.gov/jfmip-awards/).
- 2 Submit the nomination form during the first quarter of calendar year 2025 to be eligible.
- 3 For further information, contact Dean Carpenter, (202) 512-5188, or by email to FraudPreventionAward@gao.gov.

To learn more about the JFMIP, visit <https://www.cfo.gov/jfmip/>

Image sources: photon_photo/stock.adobe.com (photo), JFMIP (logo), icons-Studio/stock.adobe.com (icons), Department of the Treasury, Office of Management and Budget, Office of Personnel Management (agency seal), Government Accountability Office (agency logo).

Selection Criteria

The Awards Committee will be looking for cases, initiatives, and projects that are innovative, thought-provoking, and that have delivered measurable results. Nominations will be judged against a number of variables, with particular emphasis on efforts that are crosscutting, such as those demonstrating effective collaboration across multiple agencies, programs, or levels of government, and that can be replicated and used by other organizations to further strengthen fraud prevention in government programs. The Awards Committee will give substantial weight to sustained, high-quality leadership in fraud prevention by considering the following:

- ✓ Effectiveness of the approach and how this was measured
- ✓ Benefits realized by the organization, which could include financial savings, increased efficiency, boosting the money available for services, and reputational enhancement
- ✓ Innovative nature of the approach
- ✓ Sustainability of the approach and potential for others to adopt it
- ✓ Approach's influence as a deterrent to or in disrupting further fraud attempts

The Joint Financial Management Improvement Program (JFMIP)

The JFMIP is a cooperative venture between the Department of the Treasury, the Office of Management and Budget, the Office of Personnel Management, and the U.S. Government Accountability Office.



Please find details on JFMIP Award for Excellence in Fraud Prevention at: <https://www.cfo.gov/jfmip/jfmip-awards/>

Please click this link for the [Nomination Form](#). Closing Date for Nominations: **February 1, 2025**

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Thought Leadership

Integration Of Enterprise Risk Management (ERM) Capabilities And Potential Challenges

By Alyssa Fusisi, Partner, Kearney & Company

Integration, as it relates to the maturity of agencies' Enterprise Risk Management (ERM) programs, has been a hot topic recently. According to the Chief Financial Officer's (CFO) Council and Performance Improvement Council (PIC), *Playbook: Enterprise Risk Management in the U.S. Federal Government (ERM Playbook)*, "Successful integration of ERM into agencies' day to day decision-making and management practices enables agencies to leverage opportunities and avoid, mitigate, and transfer risk, resulting in more resilient, effective, and efficient programs.¹" By including risk considerations as part of day-to-day decision-making, agencies can better identify and respond to risks. The Committee of Sponsoring Organizations (COSO) ERM Framework builds on this concept by indicating that integration of ERM with strategy-setting and performance management practices allows organizations to realize benefits related to value, including an increased range of opportunities, increase in positive outcomes, capability to identify and manage entity-wide risks, better resource allocation, and reduction of performance variability².



As risk management matures across the federal government, administrations have enacted a multitude of requirements to implement risk management frameworks at the program-level. The Office of Management and Budget's (OMB) Circular A-123, *Management's Responsibility for Enterprise Risk Management and Internal Control* requires an evaluation of fraud risks as part of the agency's annual Risk Profile. The Government Accountability Office (GAO) has released the *GAO Framework for Managing Fraud Risks in Federal Programs*, which provides leading practices for managing fraud risks within a Fraud Risk Management Framework. OMB Circular A-11, *Preparation, Submission, and Execution of the Budget*, requires agencies to assess and manage risk through strategic and data-driven reviews as part of the broader agency ERM framework, as appropriate to the agency's mission. Additionally, the National Institute of Standards and Technology (NIST) has established a *Cybersecurity and Privacy Risk Management Framework (RMF)* as a prioritized, flexible, repeatable, performance-based, and cost-effective approach to identify, assess, and manage cyber and privacy risks.

Agencies can integrate ERM capabilities to support strategic planning and organization performance by incorporating ERM into strategic planning processes and using ERM to improve information for agency decisions; however, they must consider potential integration challenges that can arise when planning and

¹ CFO Council and PIC, *Playbook: Enterprise Risk Management for the U.S. Federal Government*, 2016 – I. Introduction, C. Integrating ERM into Government Management Practices, pg. 7
² COSO ERM Integrated Framework, 2017 – 1. Introduction, Benefits of Enterprise Risk Management. pg. 3

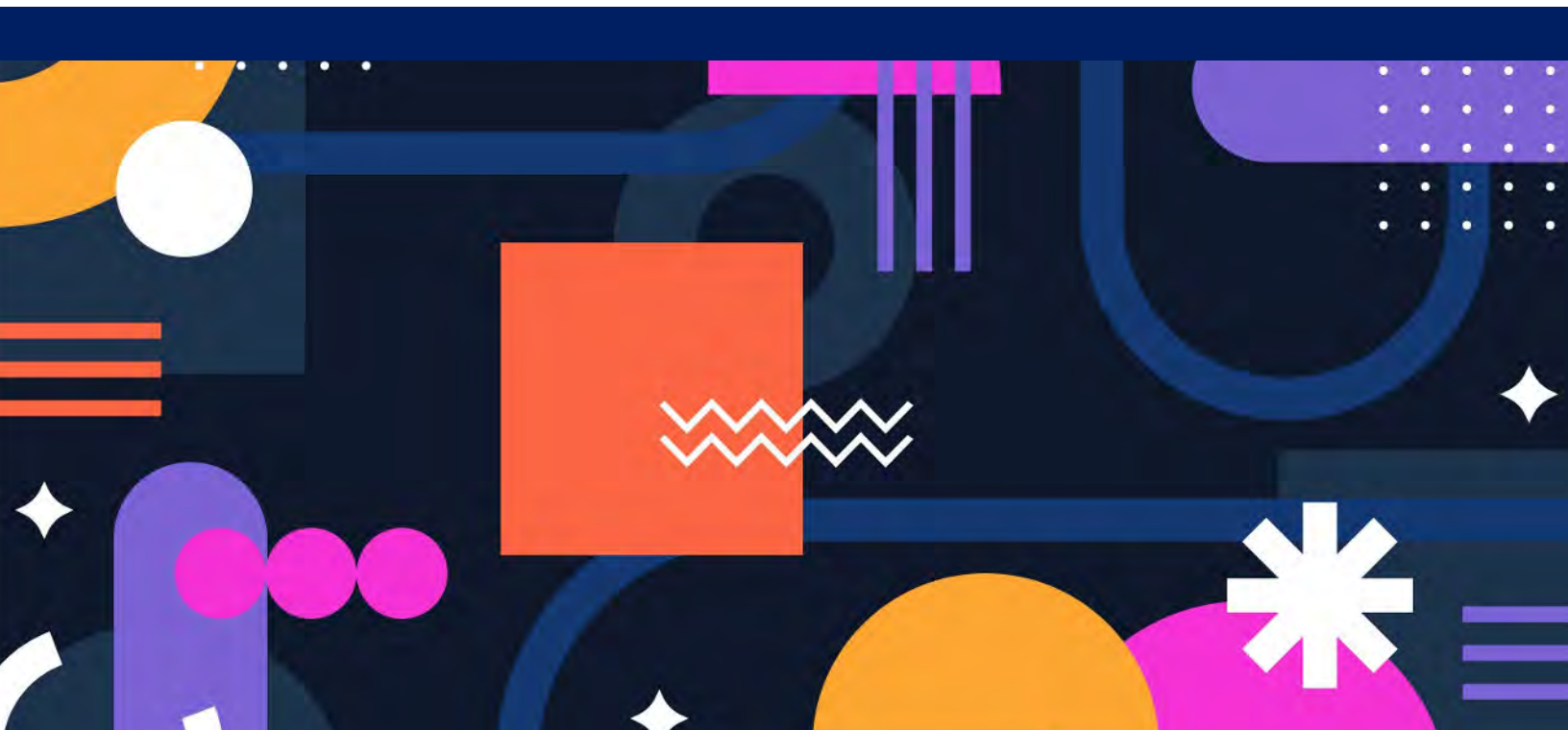
Thought Leadership cont'd.

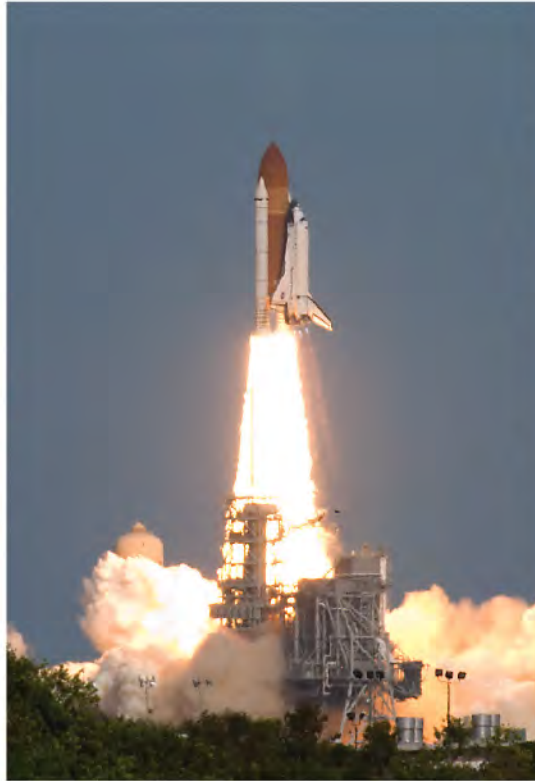
executing integration with the program-level risk management activities occurring across an agency. Potential integration challenges include:

- **Governance** – To ensure a clear understanding of how program-level risk data will be evaluated by oversight bodies, as well as ingested for consideration by these bodies, is integral to proper integration of agency risk management activities. If an agency's governance structure is not well-established or does not support the processes needed to facilitate communication flow, then the agency will have challenges establishing and obtaining the proper risk data needed from program-level risk management activities to inform the agency's ERM program.
- **Silos** – In large, decentralized agencies, it is common that many activities occur in silos across different areas of the agency. Program-level risk management activities are often focused on particular risk areas, such as fraud, improper payments, privacy, or cybersecurity, and it is challenging to determine what risk data is available if risk management activities have been built in silos and do not align with the agency's overarching ERM framework.
- **Program Maturity** – Similar to an agency-wide ERM program, program-level risk management activities typically also follow a maturity model. As many programs will continue to build on the risk

activities in place, there may be a need to revisit integration to determine if there are any changes needed among the communication frequency or other supporting tools used to facilitate integration. It may also be necessary to plan for a side-by-side "maturity" of the overarching ERM program, in conjunction with the programs planned for integration.

The successful integration of ERM into daily decision-making, management practices, and agency culture will allow agencies to take advantage of opportunities and avoid, mitigate, and transfer risks. An ERM Integration Framework can be developed to outline the integration strategy for the agency decision-making processes and outline the governance structure, roles and responsibilities, and communication strategies for integration with the broader ERM program. Agencies must take a thoughtful approach that considers the maturity of both the overall agency ERM program and the program-level activities planned for integration. A phased integration strategy leveraging an agile methodology, where risk management activities are phased in, will allow an agency to identify lessons learned and adjust future integrations. Additionally, the agency should determine the necessary outputs when determining the planned communication channels and reporting needs from program-level risk management activities.





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Thought Leadership

Embracing Innovation is Key to Payment Integrity

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Over the last 20+ years, since the enactment of the original Improper Payments Information Act in 2002, the federal government has reported over \$2.7 trillion in improper payments, the bulk of which come from a handful of federal programs (Medicare, Medicaid, EITC and Unemployment Insurance), as well as emergency spending like what we witnessed during the COVID pandemic.¹

In March 2024, the Government Accountability Office (GAO) released its annual governmentwide improper payments report. For FY23, the 14 agencies and 71 programs reviewed reported a total estimated \$236 billion in “improper payments” – payments defined as those that should not have been made or were made in the incorrect amount. This includes \$175.1 billion in overpayments, \$11.5 billion in underpayments, \$4.6 billion in “technically” improper payments, and \$44.6 billion in unknown payments. The FY23 total, while staggering, was actually \$11 billion less than the total reported in FY22. According to the report, agencies that “reported substantial decreases attributed the declines to factors such as terminating programs, implementing mitigation strategies, and suspending eligibility determinations for certain programs.” These drivers of increased payment integrity provide elements of a roadmap to address ongoing challenges.

With the incoming Administration’s increased focus on government efficiency, transparency and accountability, now is the perfect time to ramp up our efforts around payment integrity.

Manual Processes Create Risk

It’s no secret that the federal government continues to lag behind the private sector when it comes to technology modernization, continuing to rely on decades-old, manually intensive processes to accomplish business-critical tasks. At the same time, requirements for responsive, accountable government performance and spending continue to increase and complexify. This is a perfect formula for increased risk driven by human error, lack of data integrity, inconsistency in reporting, reduced transparency, enhanced security vulnerabilities, and overall inefficiency.



To effectively tackle today’s improper payment and payment integrity issues, we must leverage innovative technology available through commercial-off-the-shelf, cloud-based platforms. These technologies, powered by artificial intelligence, machine learning, and robust data analytics capabilities allow us to do things now that weren’t remotely possible even 5 years ago. For example, certain GenAI-powered applications can automate financial reporting processes by creating draft narratives for annual financial reports and streamlining the mapping of risks and controls as part of the OMB A-123 process.

Leveraging these technologies, agencies can now share and analyze information in real time that can identify when an improper payment is about to be made; or better yet, stop it before it goes out the door, resulting in massive gains in efficiency, reductions in the rate and amount of their improper payments, greater transparency, and an overall stronger system of payment integrity. These are the types of mitigation strategies that GAO highlighted in this year’s report that have greatly contributed to payment error reductions.

Payment Integrity is a “Whole of Agency” Effort

When we think of payment integrity we almost always think of the CFO and chief risk officer (CRO) first. Given their responsibilities this is probably the right place to start, but there are other officials who also play important roles in these processes – chief information officers (CIOs), chief performance officers

¹ GAO-24-106927 Improper Payments: Information on Agencies’ FY2023 Estimates

Thought Leadership cont'd.

(CPOs), chief data officers (CDOs) and the list goes on. In short, it's a team sport where a host of key individuals are working together toward a common goal. When observing the universe payment integrity resides in we observe CFOs and CROs charged with putting in place systems – both technology and management – that allow for effective risk mitigation and transparency. These systems of controls are essential to reducing risk and creating efficiency. In this universe, we also see CIOs working to ensure the agency has the right modern IT systems in place to identify, track and reduce errors, while CDOs are working across the organization to ensure that the data used is timely and accurate. Together, these organizations and others create the proper environment within which payment integrity and financial transparency is paramount. As we move quickly toward innovative technologies like AI, the roles of each of these organizations will become that much more important.

Transparency in Reporting Helps Restore Trust in Government

Over the last two decades, Americans' trust in government has fallen from 46% in 2004 to just 16% at the end of 2023, according to the Pew Research Center. Some, though certainly not all of the decline, comes as a result of the challenges discussed in this article, including a lack of transparency around improper payments. As a government we must do better, but how?

First and foremost, the government must be more transparent about the causes of improper payment and payment integrity issues. This means more information, not less, and information provided plainly enough that Americans can fully appreciate the problems and challenges. Second, we must set concrete goals to reduce the amount and rate of improper payments, not just report on what we know, as has been the case for most of the last 20 years. And lastly, we must improve the way citizens interact with the government, providing a customer experience (CX) on par with what they receive in the private sector – this is an all too forgotten piece of the puzzle.

Agencies Are Already Working to Change

As you read this, you might think some of this is a bridge too far for a federal government that's used to doing things the way they've always been done, but the truth is many agencies are already making significant strides toward implementing the types of innovation we are talking about.

Agencies are integrating data from their financial systems of record with benefits, financial assistance, audit, risk, and internal controls systems, as well as external systems such as the U.S. Department of the Treasury payment systems, Do Not Pay data sources, and USASpending.gov. Collaboration and integration solutions enable new ways of working across organizational boundaries to tighten controls and rapidly identify risks. We are truly on the verge of a new era of transparency, efficiency, and payment integrity.

Conclusion

As we look ahead to the next five years, the issues of improper payments and payment integrity are likely to remain front and center. As agencies plan to address these issues head-on, let's hope they keep in mind the critical issues raised in this article:

Automate whenever and wherever possible. Manual processes create unnecessary risk and there are technologies available today that we couldn't have even dreamed of 10-years ago – leverage them.

- Payment integrity is a team sport. CFOs and CROs as the agency officials charged with leading the fight against improper payments can and should involve CIOs, CDOs, CPOs and other key officials to ensure the entire agency is focused on the right things.
- Transparency is critical to restoring and ensuring trust in government. This, coupled with real plans to reduce improper payments, and effective planning to improve CX goes a long way toward changing the narrative.
- Lastly, remember, this isn't far-fetched: federal agencies are already making significant strides in reducing improper payments and restoring payment integrity.

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Thought Leadership

Holiday Season Fraud: How Public Sector Agencies Can Stay Safe

By Anna Fomina, Lindsay Calvert, Orterio Villa, and Katie Wilson from CohnReznick

The holiday season brings heightened fraud risk for the public sector. Learn about your possible vulnerabilities – and steps to take to address them.

During the holiday season, the public sector faces heightened vulnerability to fraud as reduced oversight and heightened pressures create opportunities for bad actors. It's critical for agencies to recognize these vulnerabilities and to implement preventive, detective, and responsive measures.

Causes and types of holiday season fraud

From Thanksgiving through the new year, watch for these risk factors and areas of increased vulnerability:

1. Increase monitoring and oversight.

- Get creative to maintain coverage: Make sure that there is sufficient staff coverage by hiring temporary workers or rotating staff schedules to maintain alertness, especially in critical areas like finance, procurement, and IT security. If internal resources are limited, consider utilizing third-party fraud monitoring services to oversee high-risk areas during the holiday season.
- Leverage data analytics: Use advanced data analytics tools to monitor for abnormal patterns or anomalies in financial transactions, benefits claims, and vendor payments. Flag and investigate high-risk transactions in real time.
- Activate fraud alerts: Implement automated fraud detection systems that trigger alerts when suspicious activities are detected. These systems can be customized based on historical fraud patterns common during the holiday period.

2. Strengthen internal controls.

- Enforce key control mechanisms: Even during holiday rushes, core controls like segregation of duties, regular reconciliations, and dual approvals should be strictly enforced to prevent both internal and external fraud.
- Limit access: Temporarily limit system access (especially for staff on leave) or increase security around sensitive systems and databases to reduce the risk of unauthorized access.



- Conduct and learn from post-holiday audits: After the holiday season, conduct comprehensive audits of transactions, claims, and contracts processed during the holiday period, to help identify any suspicious activity that may have been overlooked. Use audit findings to improve internal controls and fraud detection mechanisms in preparation for the next high-risk period.
- Audit vendor contracts and strengthen diligence: Conduct a thorough review of all vendor contracts and procurement processes before the holiday season to provide transparency and prevent potential conflicts of interest or fraudulent activity. Implement stringent due diligence protocols when selecting or approving vendors, especially for high-value contracts that may be rushed through during year-end procurement activities.

3. Update and fortify critical IT and security systems.

- Strengthen IT security: Increase cybersecurity vigilance by implementing multi-factor authentication (MFA), regularly updating software patches, and running penetration tests to identify potential vulnerabilities.
- Plan for 24/7 IT monitoring: Schedule continuous 24/7 cyber security monitoring throughout the holiday season, with a particular focus on critical systems such as payment processing and benefits administration.
- Automate identity verification: Implement automated systems for verifying the identities of individuals claiming benefits or engaging with public services. Automation helps reduce human error and can flag discrepancies faster.
- Use blockchain for transparency: Some agencies have started exploring blockchain technology to improve transparency in transactions and reduce the opportunity for tampering or fraud.

4. Conduct training on cyber threats and fraud detection.

- Fraud awareness campaigns: Conduct focused

Thought Leadership cont'd.

training sessions or refresher courses for employees to remind them of the risks of fraud and the importance of adhering to security protocols during the holiday season.

- Scam awareness for citizens: Launch public awareness campaigns to educate citizens about common holiday scams, such as phishing attempts and fraudulent claims related to public services. Providing tips for citizens to protect themselves can reduce the impact of fraud.

5. Implement cross-agency collaboration and program safeguards.

- Support information-sharing: Facilitate collaboration between various state and federal agencies by sharing fraud intelligence and reporting trends in fraud activity. This allows for a unified response to fraud schemes targeting multiple public services.
- Collaborate with law enforcement: Maintain clear communication and collaboration with law enforcement agencies to report and act swiftly on identified fraud cases, particularly those involving organized fraud rings.
- Pre-screen claims and verify identities: Apply enhanced scrutiny to claims for government benefits, unemployment, and welfare during the holidays. Use fraud detection software to flag unusual claims for closer review. Require that claimants and beneficiaries go through strict identity verification processes, such as providing multiple forms of identification or using biometric verification.

6. Conduct fraud risk assessments.

- Risk assessment prior to holidays: Conduct a fraud risk assessment prior to the holiday season to pinpoint the most vulnerable areas within your operations, such as benefits distribution, vendor payments, and procurement. Following the assessment, allocate resources to these high-risk areas accordingly.
- Scenario-based planning: Anticipate potential fraud scenarios that are more likely during the holidays, such as benefit fraud, cybersecurity attacks, and procurement fraud. Develop and implement response plans to mitigate these specific risks effectively.

7. Encourage a culture of vigilance and reporting suspicious activities.

- Solicit and monitor whistleblower reports: Set up or reinforce confidential and anonymous channels, such as hotlines or online platforms, for employees and citizens to report suspected fraud. Encourage whistleblowing by promoting a culture of accountability. Actively monitor and respond to whistleblower reports, initiating fraud investigations promptly to address any suspected issues.

By implementing a mix of these strategies, government and public sector agencies can significantly lower their fraud risk during the holiday season, safeguard public funds, and preserve the public's trust in government programs and services.



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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 \$135 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.

Please visit the [AGA DC Chapter website](#) for more information.



Congratulations to the following new CGFMs who obtained their CGFM between August 2024 and December 2024!

Seth Saleem
Oguz Saltik
Clyde Springfield, Jr.
Solomon Tekle

Have questions? Check out our CGFM chapter [webpage](#) or contact [Debbi Thomas](#)

Already Have Your CGFM?

CPE Reminder – Make sure your continuing professional education (CPE) is current by completing at least 80 hours of CPE in government financial management topics or related technical subjects within each designated two-year cycle (including 4 hours in ethics per cycle).



Don't miss out on this upcoming **CGFM Exam Study Group** opportunity!

See details in the flyer below.



GGFM STUDY GROUP

Exam 1

We will discuss government environment, going over this topic at a high level and tackling and answering questions. This is a joint study group with the NOVAGA and DC AGA Chapters. Available to AGA members of the DC, Northern Virginia and Montgomery/ Prince George's Chapters.



Thursday, January 16, 2025
4:30 PM-7:30 PM



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AGA DC Chapter Community Service Updates

By LaVerne Mason, Niko Lojanica, Maurice Preston

St. Jude Walk/Run

Our very first community service event of the year for the AGA DC chapter was on Saturday, October 5 at the National Harbor. Because of your generous support, together we raised a total of \$1,301 as we help kick childhood cancer.



LaVerne Mason with her daughter at St. Jude Walk/Run

Wreaths Across America Day

Our DC Chapter members were part of the annual Wreaths Across America Day 2024 on December 14 at the Arlington National Cemetery. Wreaths Across America is a nationwide initiative that aims to remember, honor, and teach about the brave men and women who have selflessly served our country. By coming together, we can make a powerful statement of gratitude and remembrance.

Thank you to our DC Chapter members who joined us at the Wreaths Across America Day!



Community Service Update cont'd.



From left to right: Alexander Bruno, Joslyn Marshall, Salim Mawani, Niko Lojanica, and non-member guest (Niko's fiancée Laura)



So Others May Eat (SOME)

The Community Service Committee will be collecting donations for So Others May Eat (SOME). As with our previous sponsorships, we want to make the biggest impact possible and ask the AGA National to help match our donations.

SOME has been a care provider and a beacon of hope to residents in our nation's capital. SOME's services are available to individuals, families, senior citizens, veterans and those affected by physical or mental illness. Every day, the organization is working to break the cycle of poverty and homelessness through our comprehensive approach, which the organization refers to as "Whole Person Care".

Many of SOME's clients come with urgent needs—a meal, a shower, a toothbrush. After meeting their short-term needs and establishing trust, SOME focuses on their long-term needs. The organization customizes individual care pathways that meet their physical, emotional, social, financial, spiritual and behavioral needs holistically. The organization's team of social workers, clinicians, instructors and volunteers work together to put their clients on the path to success.

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

For questions about SOME, please contact the Community Service Committee: Maurice Preston (mpreston@guidedhousefederal.com), LaVerne Mason (lmason@bdo.us) or Niko Lojanica (nlojanica@bdo.us)!

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Inside the Black Box

by Simcha Kuritzky, CGFM, CPA

The Debit/Credit Indicator on the SF-133

A Source of Confusion

Last year, I wrote about cases where an expenditure refund causes a debit balance in the U.S. Standard General Ledger (USSGL) account with a designation of a normal balance. But what about abnormal balances caused by upward adjustments earlier in the spending chain?

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

BUDGETARY RESOURCES (Section 1)

Unobligated balance:

- 1010 Unobligated balance transferred to other accounts (-)
- 1011 Unobligated balance transferred from other accounts
- 1081 Expired unobligated balance transferred to other accounts (-)
- 1082 Expired unobligated balance transferred from other accounts

Budget authority (Discretionary):

- 1120 Appropriations transferred to other accounts (-)
- 1121 Appropriations transferred from other accounts
- 1172 Advance appropriations transferred to other accounts (-)
- 1173 Advance appropriations transferred from other accounts

Budget authority (Mandatory):

- 1220 Appropriations transferred to other accounts (-)
- 1221 Appropriations transferred from other accounts
- 1272 Advance appropriations transferred to other accounts (-)
- 1273 Advance appropriations transferred from other accounts

Contract authority (Discretionary):

- 1510 Contract authority transferred to other accounts (-)
- 1511 Contract authority transferred from other accounts

Contract authority (Mandatory):

- 1610 Contract authority transferred to other accounts (-)
- 1611 Contract authority transferred from other accounts

Spending authority from offsetting collections (Discretionary):

- 1710 Spending authority from offsetting collections transferred to other accounts (-)
- 1711 Spending authority from offsetting collections transferred from other accounts

Spending authority from offsetting collections (Mandatory):

- 1810 Spending authority from offsetting collections transferred to other accounts (-)
- 1811 Spending authority from offsetting collections transferred from other accounts

STATUS OF BUDGETARY RESOURCES (Section 2)

CHANGE IN OBLIGATED BALANCE (Section 3)



Inside the Black Box Cont'd.

Unpaid obligations:

- 3030 Unpaid obligations transferred to other accounts (-)
- 3031 Unpaid obligations transferred from other accounts

Uncollected payments:

- 3080 Uncollected payments, Federal sources transferred to other accounts
- 3081 Uncollected payments, Federal sources transferred from other accounts (-)

To or From

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

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

SGL Account	Unexpired Funds		Expired Funds	
	Credit	Debit	Credit	Debit
417600	1010	1011	1081	1082
419000	1010	1011		

The next section maps SGL Accounts between five quadruplets of lines. Each quadruplet includes transfers of discretionary authority to other funds, discretionary authority from other funds, mandatory authority to other funds, and mandatory authority from other funds. The five types of authority are prior-year (lines 1010-1 similar to what is above), appropriated (lines 1120-1, 1220-1), advance (1172-3, 1272-3), contract (1510-1611), and offsetting collections (1710-1811), as shown in the chart below. For about half of the SGL Accounts, Authority Type is also needed to determine on which line to report the transfer, whereas the others are only associated with one Authority Type. For 423100, it is Year of Budget Authority that is needed, although that is a special transfer account that will also be covered in the next chart.

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

SGL Account	Authority Type	YBA	Discretionary Funds		Mandatory Funds	
			Credit	Debit	Credit	Debit
413700			1510	1511	1610	1611
415300					1610	1611
416600	P		1120	1121	1220	1221
416600	S				1810	1811

Inside the Black Box Cont'd.

SGL Account	Authority Type	YBA	Discretionary Funds		Mandatory Funds	
			Credit	Debit	Credit	Debit
416612			1010	1011		
416700	P		1120	1121	1220	1221
416700	S				1810	1811
416712	P		1010	1011		
416800			1120	1121	1220	1221
417000	D		1172	1173	1272	1273
417000	P		1120	1121	1220	1221
417000	S		1710	1711	1810	1811
417300			1120	1121	1220	1221
417312					1010	1011
417500	D		1172	1173	1272	1273
417500	P		1120	1121	1220	1221
417500	S		1710	1711	1810	1811
419300	D		1172	1173		
419300	P		1120	1121	1220	1221
419300	S		1710	1711	1810	1811
423100		BAL	1010	1011	1010	1011
423100		NEW	1710	1711	1810	1811

Similarly, section three tracks transfers of obligations, unfilled customer orders, and other budgetary receivables. Transfers are reported on lines 3031 and 3081, while transfers out are on lines 3030 and 3080 (the debits and credits are reversed because 48x100 and 49x100 have natural credit balances while the rest of the accounts have natural debit balances). Since 423100 records transfers of paid authority, it uses the section one lines shown in the above chart.

Inside the Black Box Cont'd.

SF-133 Line Numbers for Non Expenditure Transfers of Obligated Balance

SGL Account	Associated SGL	Credit Line	Debit Line
419900	422500	3080	3081
423000	422100	3080	3081
423100	422200	See above	
423200	422500	3080	3081
423300	425100	3080	3081
423400	428700	3080	3081
423500	422300	3080	3081
483100	480100	3031	3030
493100	490100	3031	3030

All of these shifts are between adjacent lines on the SF-133. The second way the Debit/Credit Indicator is used is to require a number of accounts to have either a debit or credit balance on a particular line, but switching between debit and credit does not move the balance to another line; it is simply prohibited.

Anticipated or Unavailable

Back in 2017 when I last ran this column, Treasury also used the Debit/Credit Indicator to map anticipated authority to a budgetary resource in section one if the net total was a debit, and to a budgetary status in section two if the net total was a credit, effectively approving the appropriation of anticipations if realizations exceeded the recorded appropriation. Treasury changed that mapping effective with Fiscal Year 2020, so all but 421000 Anticipated Reimbursements are now required to have debit balances, and 421000's balance is reported on line 1840 (Anticipated collections, reimbursements, and other income) regardless of whether it is a debit or a credit.

Conclusion

My records go back to 2002, when the Treasury only used debit and credit restrictions to move anticipated balances between budgetary resources and statuses. Today, it is used (in conjunction with GTAS edits) to prohibit accounts from having either a debit or credit balance, and to separate to/from activity on adjacent lines of the SF-133.

Comments and critiques, as well as specific questions or suggestions for future topics, are always welcome. Please send them to Simcha.Kuritzky@CGI.com, and not to the AGA.

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AGA DC's 75th Anniversary Celebration

HELP UNCOVER THE HISTORY OF AGA DC!

Calling all AGA DC Chapter Volunteers,
Sponsors, Members, and Non-Members:

We've been around a long time - 75 years to be exact!
- and AGA DC wants to collect memories from
everyone to celebrate the 75th Anniversary of our
organization this summer!

Do you have photos, videos, other multimedia, or
written stories to share?! We would love to hear from
you! Also, if you would like to help the Historian
Committee organize and curate the information, we
would love to have you on board!

**SUBMIT YOUR MATERIAL TO
AGA DC'S HISTORY
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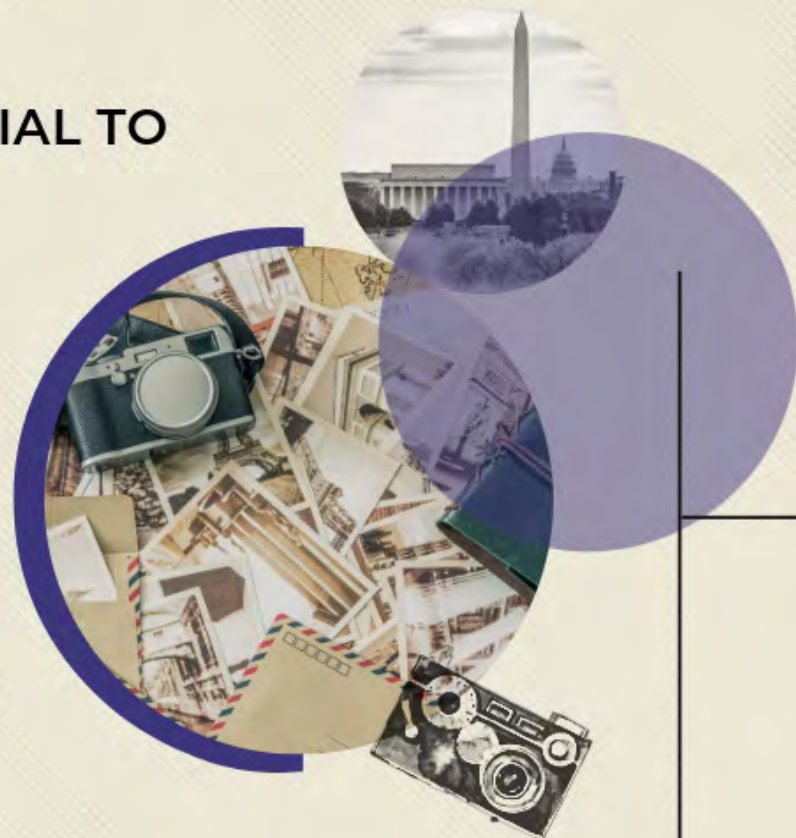
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We Need YOU! DC Chapter Leadership Nominations

The DC Chapter needs leaders like you! We are now accepting nominations for the 7/1/26 - 6/30/27 Chapter President, Treasurer, and Secretary positions.

If you are interested in serving in one of these roles, please email the Chapter Nominating Committee Chair, Crystal Wolf, at cwolf@akela-llc.com and include a brief summary of your professional background, qualifications, and Chapter leadership experience.

Please keep in mind that you must be a DC Chapter member in good standing to be eligible. If you have any questions, feel free to contact Crystal or any of our Chapter Officers. **Nominations must be received by January 24, 2025.**

We look forward to hearing from you!

**Check out
Accountability Talks, hosted
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Paul Marshall!**

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Unlocking Potential: *The Unexpected Benefits of Being a Mentor*

By Mentorship Committee

Are you an accountant, auditor, IT specialist, consultant or other professional from the Washington D.C. metro area? If yes, then becoming a mentor with the AGA DC Chapter could be a great opportunity for you!

To many, the concept of mentoring is often seen as a selfless act, a generous contribution of time and expertise to guide and nurture the next generation. But delve a little deeper, and you'll discover that mentoring is a two-way street, presenting an investment that will yield dividends, not just for the mentee, but also for the mentor.

Strengthening Leadership and Communication

One of the cornerstones of effective mentoring is COMMUNICATION. Mentors refine their ability to translate complex ideas into digestible nuggets of information. Alongside this, guiding a mentee necessitates patience, understanding, and the art of motivation—all pivotal leadership qualities. Thus, a mentor inadvertently polishes the leadership and communication skills, assets that are invaluable in any professional setting.

Expanding Networks and Career Opportunities

Mentoring is a door to expanded professional networks. Interactions with mentees introduce mentors to a wider array of professionals and can potentially pave the way for collaborations, partnerships, and even unforeseen career opportunities.

Personal Growth and Continuous Learning

Mentoring propels mentors towards personal and professional growth. By teaching and sharing knowledge, mentors are indirectly encouraged to stay on top of their game, ensuring they remain updated



and relevant in their respective fields.

Embracing Diversity and Broadening Perspectives

In today's globalized world, mentors often find themselves interacting with individuals from diverse backgrounds. This confluence of cultures and experiences broadens a mentor's perspective, fostering an environment of inclusivity and mutual respect.

Job Satisfaction and Renewed Enthusiasm

There's something incredibly rewarding about witnessing the growth and success of another, knowing you played a role in that journey. Many mentors express heightened job satisfaction, with the mentoring process rekindling their own passion and love for their profession.

Leaving a Lasting Legacy

Every professional hopes to leave an indelible mark in their field. Mentoring provides just that avenue, enabling experienced professionals to pass down their hard-earned wisdom, ensuring their insights, experiences, and teachings continue to bear fruit long after they've moved on.

Final Thoughts

Mentoring, while undeniably beneficial to the mentee, is equally, if not more, rewarding for the mentor. It's an investment of time, energy, and expertise that yields rich dividends in personal growth, professional advancement, and personal satisfaction. Whether you're considering becoming a mentor or are already one, know that the journey is filled with opportunities for self-discovery, learning, and immense fulfillment. Embrace the role, and watch as it enriches not just

Membership Committee Cont'd.

your professional journey, but your personal one as well.

If you've ever benefited from a guiding hand, a word of advice, candid feedback, or a shared insight, now is your chance to pay it forward! Join our mentoring program and make a lasting impact on the future of government financial management. The bedrock of our profession lies in knowledge, integrity, and a commitment to excellence. Now, more than ever, there's a pressing need to usher in the next wave of government financial management professionals, ensuring they're equipped with the skills, knowledge, and ethics to carry our legacy forward.

AGA DC is currently seeking mentors for its mentorship program. Mentors can come from all backgrounds. Whether you're an accountant, auditor,

IT specialist, consultant, or other professional in the Washington D.C. region with an interest in "developing others," your participation is invaluable. Together, we can build a more open, inclusive profession that serves all. Make a commitment to use your knowledge and experience to mentor the next generation of accounting and auditing professionals.

At AGA DC, we believe that everyone should have access to mentorship opportunities and be able to benefit from the experiences of others. Join us now and become part of a community that is dedicated to helping each other grow and succeed by staying tuned in for additional information and a survey. **Feel free to contact the committee at: Mentorship@agadc.org.**

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AGA DC Chapter Monthly Luncheon

October 2024 Hybrid Luncheon *Opportunities and Challenges in Government Accountability*

On October 16, 2024, the DC Chapter held the monthly luncheon with our October hybrid luncheon speaker **Mr. Gene L. Dodaro, Comptroller General of the United States, Government Accountability Office (GAO)**.

We are grateful for more than 110 virtual and in-person attendees who joined us at Clyde's of Gallery Place in downtown Washington, DC. **Mr. Marc Hebert, RMA Associates**, a proud AGA-DC Chapter corporate Diamond sponsor, introduced our speaker at the luncheon. We also welcome AGA CEO **Ann Ebberts** and AGA National President **Frank Petersen** who were present at the October monthly luncheon.



**Mr. Marc Hebert, RMA
Associates**

Mr. Dodaro became the eighth Comptroller General of the United States and head of the GAO on December 22, 2010. Mr. Dodaro has testified before Congress dozens of times on important national issues, including the nation's response to the coronavirus pandemic, the federal government's long term fiscal outlook, efforts to reduce and



**Mr. Gene L. Dodaro, Comptroller General of the
United States, Government Accountability Office
(GAO)**

eliminate overlap and duplication across the federal government and GAO's "High Risk List" that focuses on specific challenges - from reducing improper payments under Medicare and Medicaid to improving the Pentagon's business practices.

As Comptroller General, Mr. Dodaro helps oversee the development and issuance of hundreds of reports and testimonies each year to various committees and individual Members of Congress. These and other GAO products have led to hearings and legislation, billions of dollars in taxpayer savings, and improvements to a wide range of government programs and services. Mr. Dodaro, who holds a bachelor's degree in accounting from Lycoming

October Luncheon cont'd.

College in Williamsport, Pennsylvania, is a fellow of the National Academy of Public Administration and a member of the AGA. Mr. Dodaro has received recognition from numerous outside organizations throughout his career, including, but not limited to, the National Public Service Award from the American Society for Public Administration and the National Academy of Public Administration; and The Katharine B. Gebbie Lifetime Achievement Award from the Arthur S. Flemming Commission and George Washington University.

In his presentation titled "Opportunities and Challenges in Government Accountability," Mr.

Dodaro discussed the Nation's fiscal challenges, highlights from the GAO's "High Risk List," GAO's recent actions/initiatives. The presentation ended with a robust Q&A session as Mr. Dodaro answered questions from both virtual and in-person attendees. We sincerely appreciate the time Mr. Dodaro spent with us to share his knowledge and experience.

Our October 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!



Paul Marshall, Chapter President, welcomed luncheon speaker and attendees



Marc Hebert from RMA Associates introduced luncheon speaker



Luncheon speaker Gene Dodaro, Comptroller General of the US



DC Chapter members (left to right): Jenny Schneider, Katie McGuinness, Grace Hsu, Thomas Chin



DC Chapter Board members with Ann Ebberts (AGA CEO) and Paul Marshall (Chapter President)

AGA DC Chapter Monthly Luncheon

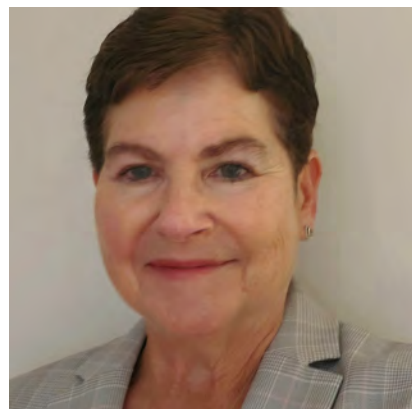
December 2024 Hybrid Luncheon Reimagining Risk Management and Accounting's Need for STEAM

On December 4, 2024, the DC Chapter held the monthly luncheon with our December hybrid luncheon speaker **Mr. Mike Wetklow, Chief Risk Officer (CRO) at the Internal Revenue Service (IRS)**.

We are grateful for more than 120 virtual and in-person attendees who joined us at Clyde's of Gallery Place in downtown Washington, DC. **Ms. Nancy Sieger**, Partner (Financial Services) from **Guidehouse**, a proud AGA-DC Chapter corporate Diamond sponsor, introduced our speaker at the luncheon.

Mr. Wetklow began his career in audit positions at KPMG, the Government Accountability Office (GAO), and the Maryland Legislative Auditor's Office, auditing federal, state, and local governments.

His first leadership position was at the Department of Homeland Security (DHS), where he led efforts to eliminate material weaknesses and secure the agency's first audit opinion. After DHS, Mr. Wetklow worked at the Office of Management and Budget (OMB) as a branch chief, advising on government-wide policies related to financial systems, risk management,



Ms. Nancy Sieger



Mr. Mike Wetklow, Chief Risk Officer (CRO) at the Internal Revenue Service (IRS)

and internal controls. While at OMB he also updated OMB Circular A-123 to introduce Enterprise Risk Management (ERM) into government-wide policy. Next, Mr. Wetklow served as the Deputy Chief Financial Officer at the National Science Foundation (NSF), managing ERM, internal controls, and financial reporting for the agency's \$9 billion budget. He was instrumental in implementing NSF's first ERM profile and exploring Fintech innovations.

Currently, Mr. Wetklow is the Chief Risk Officer at the Internal Revenue Service, where he oversees Enterprise Risk Management and audit relations by focusing on promoting innovation, leveraging data, reducing compliance burdens, and fostering innovative environments that help organizations and people thrive.

December Luncheon cont'd.

Mr. Wetklow is also an Adjunct Professor at George Mason University, where he teaches Federal Accounting and Advanced Accounting Analytics. Additionally, he serves as a volunteer member of the Accounting Advisory Board at Northern Virginia Community College. He holds a BS in Accounting and an MPM in Public Sector Financial Management from the University of Maryland (UMD) and an MS in Data Science from the University of Virginia (UVA). Mr. Wetklow is also a licensed CPA. Outside of his professional career, Mike enjoys spending time with family and friends.

In his presentation titled “Reimagining Risk Management and Accounting's Need for STEAM,”

Mr. Wetklow discussed his takes on organizational risk management, suggestions on managing new positions, and current/future state of the financial management profession. The presentation ended with a robust Q&A session as Mr. Wetklow answered questions from both virtual and in-person attendees. We sincerely appreciate the time Mr. Wetklow spent with us to share his knowledge and experience.

Our December 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!



Paul Marshall, Chapter President, welcomed luncheon speaker and attendees



Nancy Sieger from Guidehouse introduced luncheon speaker



Luncheon speaker Mike Wetklow



DC Chapter Board members with Paul Marshall, Mike Wetklow, and Nancy Sieger at luncheon



DC Chapter Board members at luncheon



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Wendy Morris / Public Sector Partner, Federal Civilian Services Leader / wmorris@bdo.us

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VIP Luncheon

**Guest Speaker, Ms. Tonya R. Johnson-Simmons,
Department of Interior (DOI)**

Our Chapter hosted the first VIP Luncheon of this program year at The Hamilton in downtown DC on December 5. **Ms. Tonya R. Johnson-Simmons, Deputy Chief Financial Officer (DCFO) of the Department Office of the Secretary, U.S. Department of Interior**, was our guest speaker.

During the VIP Luncheon, Ms Johnson-Simmons also answered questions from our Diamond sponsor representatives. Thank you Ms. Johnson-Simmons for her insights, our Diamond sponsors for the participation and support, and our sponsorship committee for organizing this in-person VIP Luncheon!



Ms. Tonya R. Johnson-Simmons



DC Chapter Sponsorship Committee Happy Hour

The Corporate Sponsorship Committee held a happy hour on October 23 evening at Spin DC. It was a fantastic evening filled with great conversations, food, and some friendly ping pong competition among 22 current Chapter corporate sponsors, prospective sponsors, and Chapter Executive Committee (CEC) members!

To our current corporate sponsors, we appreciate your support and look forward to another successful program year ahead!

To our prospective sponsors, we hope you've learned more about the benefits of becoming a sponsor for the DC Chapter. We would love for our prospective sponsors to join us as an official sponsor of the DC Chapter. Becoming a sponsor provides an excellent opportunity to enhance your organization's visibility within the federal financial management community, connect with potential clients, and support the Chapter's mission of advancing government accountability.

Please reach out to **Cherry Ung**, Director of the Corporate Sponsorship, at cherry.agachapters@gmail.com if you're interested in how to become a sponsor today!

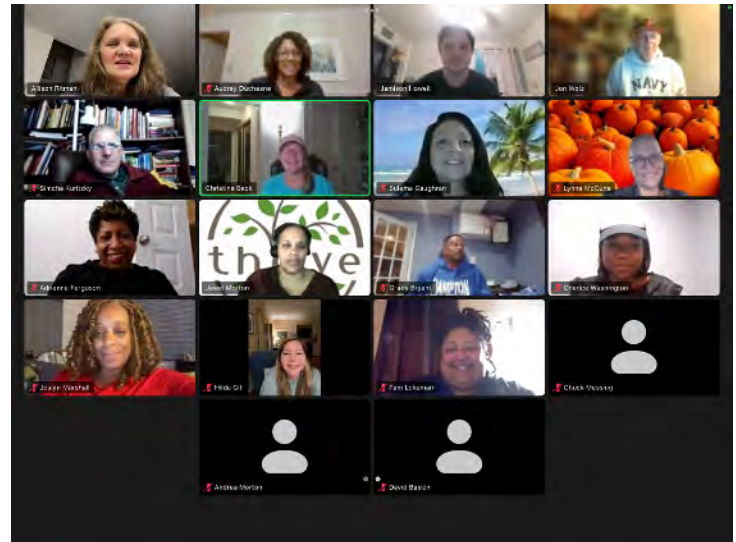


Special Events

BINGO Night

Bring back by popular demands! DC Chapter held the member-only and favorite virtual BINGO Night on November 21, 2024! During the early evening hours, our DC Chapter members joined together virtually and yelled out their Bingos! Everyone had a great time! Congratulations to all our winners who receive gift cards on BINGO Night!

Thank you to those members who attended this free event. Special thank you to the Member Services Committee volunteers, led by Jamison Howell and David Baskin who organized and hosted this event!



DC Chapter Volunteer Appreciation Happy Hour

On December 10 DC Chapter celebrated our volunteers' hard work and dedication as we got together at SPIN DC. Our volunteers enjoyed food, drink, and table tennis together for fun and connections. It was a great opportunity to unwind, socialize, and connect with fellow volunteers in a relaxed atmosphere. Thank you to all our DC Chapter volunteers for your contributions!



From left to right: Paul Marshall, Crystal Wolf, Lal Harter, Wendy Morris



From left to right: Lal Harter, Thomas Chin, Salim Mawani

Special Events cont'd.



Paul Lionikis (left) and David Baskin showed their table tennis skills



Power couples Gio Leon and Veronica Baird dominated their table tennis games



Joslyn Marshall (left) and Claire Chen



From left to right: David Baskin, Paul Marshall, Crystal Wolf, Cherry Ung, Paul Lionikis



AGA-DC Volunteers had a great time!



Former table tennis district champion failed miserably at the table

Special Events cont'd.

Fiscal Year-End Social Event and Annual Holiday Party

DC Chapter members rocked out twice at the Hard Rock Café in the heart of downtown DC! First on November 6, the DC Chapter held the Fiscal Year-End social event to celebrate all the hard work done with great food and company. Then again on December 18, the DC Chapter co-hosted the Annual Holiday Party with the Northern Virginia Chapter. Chapter President Paul Marshall (and the Santa Claus of the night) hosted the Santa gift exchange session, where Chapter President-Elect, Crystal Wolf provided our members with the awesome AGA shirts and wine glasses. We thank our members who joined us at our events and hope you enjoyed the gift exchange, karaoke, dancing, food and drinks, and made some new friends!

Thank you to Cherry Ung and the Northern Virginia Chapter President, Jake MacDonald, for coordinating between DC and Northern Virginia Chapters to make the Annual Holiday Party possible. Last but not least, many thanks to our Member Services Team, David Baskin, our lead, Tony Richards, and Manoj Mirchandani for their hard work to organize these events!



Chapter President Paul Marshall (left) and Tony Richards hosted Santa gift exchange session



Member Services Team from left to right: David Baskin, Manoj Mirchandani, Tony Richards



Special Events cont'd.





Happy New Year

AGA Young Professionals

The Young Professionals (YPs)* Committee is geared up and ready to jump into 2025 feet first! We have some exciting initiatives planned for the new year and have set our goals for 2025 and beyond to include:

Increasing YP membership, involvement in chapter events and activities, and participation in chapter committees,

Supporting YP members in navigating the dynamics of professional networking and the many benefits that AGA has to offer, and

Supporting AGA National Board efforts to pilot student AGA chapter programs with local universities to build the pipeline of future AGA leaders.

Please reach out to the YP committee (Michelle Paul, Christel Pico, Nicole Balin, Cherice Washington, Joslyn Marshall) at youngprofessionals@agadc.org if you have questions or feedback, or if you'd like to support any of our upcoming initiatives!

*** YPs are defined as professionals with 3 or fewer years of work experience.**

We Need You!

Are you a YP?

Come out to DC Chapter events, meet our YP team, and network with the outstanding DC Chapter community. Get entered into a YP raffle at selected events and win!

Not a YP but know a YP?

Invite a YP to attend events with you – and show them the ropes!

Are you a current Chapter Sponsor?

Get a pulse on your current YP members and encourage others to join AGA and participate!

Save the Date!

Young Professionals New Year Happy Hour

Looking for a way to beat the cold and have some fun doing it?! Join us for the Young Professionals New Year's Kickoff on Wednesday, January 29!

We would love to see you all there... not just YPs but our Veteran AGA members too. Note that this event is for members only. Young Professionals will have a chance to enter a raffle and win a \$100 Amazon gift card. All attendees will be provided two free drink tickets and free food. Join us at Yard House, 812 7th St NW, Washington, DC 20001, at 6:00 PM on Wednesday, January 29. **Please Register here by January 24th.** Hope to see you all there!



DC Chapter Leaders Promoted AGA During College Visits

The DC Chapter joined the Philadelphia Chapter in October 2024 to visit the Accounting Club at Temple University. Our Chapter President-Elect, Crystal Wolf, shared insights into the value of AGA and careers in government. Many students signed up to join AGA and several plan to work in the DMV area also joined our DC chapter!

In November 2024, our President-Elect Crystal Wolf, Mark Reger, and Claire Chen, visited the Beta Alpha Psi chapter at Salisbury University. The DC Chapter promoted the value of joining AGA, shared insights into careers in government, and gave advice to students on how to be successful in their accounting careers.

This is just another step the DC Chapter is taking to expand our outreach to local colleges and universities. If you are a student or professor at a local DMV school and would be interested in a visit from AGA, please reach out to Michelle Paul, Director of our Young Professionals Committee.



New Member Contest

DO YOU LIKE MONEY? IF SO, PLEASE READ

During the 2024-2025 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. Quarterly new member referral contest winners will be announced in the newsletter.

► **July-September 2024: Veronica Baird and Cory Johnson**

With your help and dedication, we can achieve our Chapter's 10% growth goal of new members this year! **Don't miss out on the great chance to win a CASH PRIZE, and help our Chapter! Make sure your name and AGA ID are included in the membership form of new recruited members!!**

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!

By: Membership Committee

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.

Lisa A. Boothe
Daphne Branche
Ryan P. Collins
Debra Conner
Yasmina Convolbo
Antoine Cooper
Joseph P. DiMartino
Eric Abdul Dunbar
Stephanie Espinosa
Ronel N. Fokou
Sheana Foster

Patricia Gallagher
Raj Gnanarajah
Nick Grice
Bezawit Hailu
Spencer Ham
Bradley J. Honkus
Anna Irvine
Makiyah Jones
Leontaye Kamara
Thomas Karalus
Thomas Kraemer

Anthony Appiah Kubi
Esayas G. Lemma
David Luscombe
Yolanda Mack
Sara Mahaffey
Alicia W. McNair
Kathy Mealy
Michael Mihlfried
Eric M. Miller
Andrea Morton
Brian P. Murphy

New Members cont'd.

Nick Parsons
Lakia Pendergrast
Eric Rose
Justin Tae Yong Shin

Alexander Solosko
Shannon E. Steinbauer
Alfonso Torres
Christina Tripodo

Timothy Uy
Nalita A. Viney

Attention to all new members! Join us at the next monthly chapter luncheon and you will be entered in the raffle for a gift card!



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Final Words

HAPPY NEW YEAR from the Newsletter Team! As we conclude this issue of the newsletter, it's an ideal time to acknowledge the contributions that our members have made to the financial management community, and look ahead to the opportunities 2025 holds. Your expertise ensures financial accountability, promotes transparency, and supports the effective management of organizational resources. These principles are the cornerstone of the profession, shaping our responsibilities and reinforcing the trust placed in us by the taxpayers we support.

The past year has brought a unique set of challenges and opportunities. From implementing new regulatory standards to navigating an evolving technological landscape, we have continued to adapt and excel. These changes remind us that professional development isn't just a career milestone; it's an ongoing journey. By sharpening our skills and broadening our knowledge, we not only enhance our personal growth but also contribute to the broader mission of improving government accountability. Our DC Chapter worked tirelessly last year to offer you various educational and networking opportunities. Our Chapter, alongside our volunteers and sponsors, will continue to partner with you addressing your professional needs.

As we move forward in the new year, consider the themes highlighted in this issue—whether it's strategies for risk management integration, embracing innovation, or emerging security trends and technologies. We hope to continue to offer insights and tools to help you excel in your role, and foster professional growth into the coming year.

Finally, we encourage you to stay engaged with our professional community. Attend our events, participate in discussions, and share your own expertise. Together, we can continue to strengthen our field and inspire the next generation of financial professionals to uphold the values that define our profession.

THANK YOU for your dedication, and here's to another year of excellence in service. See you at the next event and/or in the next issue!

AGA DC Chapter Newsletter Team

Thomas Chin

Guy Hadsall

Monique Llanos

Hao Nguyen

PS: Our newsletter team invites you to provide quick feedback about this newsletter via a two-question survey. [Please click here to visit the survey site](#) today!

AGA DC Chapter Officers & Directors



Paul Marshall
President



Crystal Wolf
President-Elect



Lal Harter
Immediate Past President



Mona Amatie
Treasurer



Wendy Allen
Treasurer-Elect



Wendy Morris
Secretary



Thomas Chin
Chapter Director (Appointed)



Bo Shevchik
Chapter Director (Appointed)



David Baskin
Chapter Director (Appointed)

See a complete list of Chapter leadership at: [AGA DC Chapter Leadership](#).

To contact any of the AGA DC Chapter Officers please send an email to:
agadc@agadc.org

AGA DC Chapter Volunteer Roster

Evelyn Brown
Senior Advisor
Awards Committee

Salim Mawani
Senior Advisor

Paul Lionikis
Senior Advisor
Monthly Luncheon
Program

John Lynskey
Senior Advisor

Paterne Koukpesso
ACE Reporting
Mentorship

Melanie Geeseman
Admin and Communications

Lydia Tamblyn (Miller)
Admin and Communications
Social Media

Veronica Baird
Admin and Communications

Nicole Bailin
Admin and Communications

Cherry Ung
Annual Gala/Special Events
Corporate Sponsors

Elizabeth (Izzie) Yi
Annual Gala/Special Events
Corporate Sponsors

Orinda Basha
Awards Committee

Virginia Robinson
Awards Committee

Jeff Steinhoff
Awards Committee

Pat Wensel
Awards Committee

Scott Bell
Awards Committee

Brittany Hopwood
Annual Training Program
Strategy Committee

Annalena Weiner
Annual Training Program

Tonya Baker
Annual Training Program

Jennifer Torres
Annual Training Program

Ellie Harris
Annual Training Program

Julia Duquette
Annual Training Program

Jeff Ledford
Annual Training Program
Webmaster

Christy Beck
Annual Training LiveOps
Bylaws/CPE Coordinator

Joslyn Marshall
Citizen Centric Reporting

Lauren Peck
CGFM

Debbi Thomas
CGFM

LaVerne Mason
Community Service

Niko Lojanica
Community Service

Maurice Preston
Community Service

Michelle Paul
Corporate Sponsors
Young Professionals

Britney Munn
Corporate Sponsors

Shepherd Brown
Monthly Luncheon
Program

Carl Biggs

Mbalu Tunkara

Malena Brookshire

Wendy Allen
Finance Committee

Terri Dawson
Finance Committee

Rachel Bright
Finance Committee

Alicia Pelikan
Historian

Brad Grams
Historian

Giovanni Leon
Membership

Makia Robertson
Membership

Cherice Washington
Membership
Young Professionals

David Baskin
Member Services

Anthony Richards
Member Services

Jamison Howell
Member Services

Manoj Mirchandani
Member Services

Ryan Phillips
Mentorship

Megan Curtis
Mentorship

Aubrey Harris

Chapter Volunteer Roster cont'd.

Mentorship

Sherri Legall Daly
Mentorship

Bo Shevchik
Monthly Luncheon
Program

Peter Moore
Monthly Luncheon
Program

Daniel Lange
Monthly Luncheon Live Ops

Victoria Abril
Monthly Luncheon Live Ops

Emma Pollock
Monthly Luncheon Live Ops

Chad M. Willhite
Monthly Luncheon Live Ops

Craig Freeman
Monthly Luncheon Live Ops

Alexis Alfaro-Trejo
Monthly Luncheon Virtual

Areeba Rizvi
Monthly Luncheon Virtual

Katherine Rexroad
Monthly Luncheon Virtual

Lal Harter
NCC Representative

Simcha Kuritzky
Publication Columnist

Thomas Chin
Newsletter

Monique Llanos
Newsletter

Hao Nguyen
Newsletter

Guy Hadsall
Newsletter

Matt Gorman
Strategy

Claire Chen
Strategy

Jennifer Meade
Strategy

Danielle Burrell
Webinars

Michelle Bowers
Webinars

Tyler Gall
Webinars

E. Marie Butler
Webmaster

Christina Low
Webmaster

Howie Simanoff
Webmaster

Brent Watson
Webmaster

Christel Pico
Young Professionals

See a complete list of Chapter leadership at: [AGA DC Chapter Leadership](#).

To contact any of the AGA DC Chapter Volunteers please send an email to:
agadc@agadc.org

Contact Us

Whether you're looking for more information, or you'd like to give us your suggestions or comments, you'll find easy ways to contact us right here.

The most direct way to get your question answered is to send an email to: agadc@agadc.org.

See a complete list of Chapter leadership at: [AGA DC Chapter Leadership](#).

NEW ADDRESS

AGA DC Chapter
1640 Boro Place, 4th Floor
McLean, VA 22102

Website: <http://www.agadc.org>

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