Issue II – November/December 2022

AGA Washington D.C. Chapter

The Washington Connection

What's Inside

Up Next!

January 11th, 2023, 12-1:30pm, AGA DC Monthly Hybrid Luncheon at Clyde's: Guest speaker: Glen Lee, CFO, DC Office of the Chief Financial Officer (OCFO).

January 17th, 2023, 7:00pm, Join fellow members of the AGA DC Chapter as the Washington Capitals take on the Minnesota Wild at the Capital One Arena! *Limited number of tickets.* **Register here**.

January 24th, 2023, 11:30am-1:00pm, AGA DC VIP Luncheon at Old Ebbitt Grill (Diamond Sponsors only). With Guest Speaker Jon Rychalski, CFO at VA. Invitations TBA.

February 8th, 2023, 12-1:30pm, AGA DC Monthly Hybrid Luncheon at Clyde's: Guest speaker: Monica Valentine, Executive Director, Federal Accounting Standards Advisory Board (FASAB).

March 22nd, 2023, 12-1:30pm: AGA DC Monthly Hybrid Luncheon at Clyde's: Guest speaker: Deidre Harrison, Acting Controller, Office of Management & Budget (OMB)

April 27th, 2023, 11:30am-1:00pm: AGA DC VIP Luncheon at Old Ebbitt Grill (Diamond Sponsors only). With Guest Speaker Jolene Lauria, CFO at DOJ. Invitations TBA.

Thank You!

2nd Annual Virtual Bingo Night**,** hosted by Member Services, November 2022. Congrats to our winners: Allison Ritman, Chuck Messing, Dwaine Osborne, Hilda Gil, Janell James, Simcha Kuritzky, and Tameka Elliott.

We look forward to seeing you soon!

President's Message

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

We are now well into our program year and I hope our members have been able to take advantage of the many benefits of AGA and DC Chapter membership! This year has been action-packed with events, so far we've held:

- Three monthly luncheons with esteemed speakers
- Multiple AGA webinars
- A VIP sponsorship luncheon
- Member Services Virtual Bingo Night
- Holiday Happy Hour
- Speed Mentoring

And, we're just getting started! Our goal is to provide something for everyone with events that provide educational and networking benefits, both in person and virtually. Speaking of membership benefits, one benefit of the DC Chapter is that we support our members pursuing the CGFM. To learn more about how we can support you please reach out to the chapter at **agadc@agadc.org**.

As the year continues, please keep an eye out for more opportunities to get involved and attend events.

We have an exciting winter and spring planned, including community service events, more from member services, and our annual Spring Training event. I hope to see you all at one of these great events!

Sincerely,

Caitlin Holmes McGurn, *President*
AGA Washington DC Chapter

Vision

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

Mission Statement

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

National Council of Chapters (NCC) Update

November 1, 2022

The AGA National Council of Chapters (NCC) provides chapter and membership representation by furnishing critical input to the National Governing Board (NGB) on current topics, new initiatives, and governance decisions related to chapter growth and volunteerism. The NCC is composed of one member from each chapter, with eight regional leaders also serving on the NGB as Chapter Directors. The NCC held a virtual meeting on November 1, 2022, to discuss strategic goals, successes, challenges, and innovative ideas. Chapter representatives discussed membership growth, recruiting volunteers for chapter committees and leadership positions, succession planning, and chapter challenges.

Break out groups were utilized for open discussions on various topics, including strategies to successfully communicate the personal and professional benefits leadership roles can offer to potential volunteers. Selling points included:

- networking opportunities (including interactions with government leaders and executives),
- community involvement,
- career advancement,
- professional growth, and
- enhancing your expertise.

It was agreed that the most effective recruiting tactic is targeting people with applicable skills for specific roles and reaching out to them individually! A personalized "ask" yields more success than a blanket call out.

The importance of well thought out succession planning was discussed to retain chapter knowledge and experience as new volunteers transition into leadership roles. Suggestions included:

- proper timing of training and shadowing,
- checklists of duties,
- setting clear expectations for roles,
- providing mentors for new leaders,
- considering "elect" roles for multiple positions to allow for more transition time, and
- utilization of communication platforms for open discussions amongst leaders and access to documentation.

A key challenge among chapters continues to be low attendance for in-person events. This creates difficulty in estimating turnout and minimums when booking venues. A lack of live interaction leads to lower levels of genuine engagement and makes it more laborious to recruit new volunteers. Chapters will continue to brainstorm new ideas to create enticing events, attracting a larger number of in-person attendees.

A notable success over the last year was the effective promotion of the government case challenge to local schools. As a result of chapter outreach to local schools for dialogues on careers in government, this year we have more schools involved in the case challenge than in the last four to five years. There are currently 17 undergraduate teams and eight graduate teams registered. Chapter members and leaders are doing an amazing job preparing our next generation of incoming leaders!

New Member Contest

DO YOU LIKE MONEY? IF SO, PLEASE READ

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

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

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

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

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

Welcome New Members!

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

Stephanie Zianne Adams
Olayinka Anjorin
Jason Boberg
Thomaz Brandt
Edward Burns, CGFM
Jerry Chandler, II
Christopher Chin
Sydney Combs
Crystal Tarita Cook
Terri M. Dawson
Kevin Ebberts
Julia Ehrmantraut
Kellie Fedkenheuer
Aimee F. Fujikawa
Thea Star Gaillard
Patrick Lacomb
Deborah Lara
Rose A. Lloyd
Andy Neville
Allison Norris
Marvin A. Peterson
Eunice Pierre
Aryn Quander
Sarah S. Read
Henry Saliu
Jovandra L. Sanderlin
Kirsten Scheyer
Robert A. Streete
Veronica Taylor
Danielle Ventura
Hruta Virkar
Cody Michael Wolfe
Jasmine Wu
Yixuan Zou

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!


DIAMOND SPONSOR

AGA DC Chapter Monthly Luncheon

October 2022 HYBRID LUNCHEON

“Marvelous Examples of Leadership and What Not to Do”

On October 18, 2022, the DC Chapter welcomed our October hybrid luncheon speaker **Mr. Doug Glenn from the U.S. Office of Personnel Management (OPM)**. We are grateful for more than 168 both virtual and in-person attendees who joined us at Clyde’s of Gallery Place in downtown Washington, DC.

Mr. Doug Glenn is serving as the Chief Financial Officer (CFO) at the OPM where he provides expertise on all issues involving the amended CFO Act and related financial management and budget reforms. His portfolio includes budget, finance, audit performance, policy, reporting, and operations. His primary goals at OPM include financial excellence and maximizing the Office of the Chief Financial Officer’s value. Formerly, Mr. Glenn was the Deputy CFO at the Departments of Defense (DoD) and Interior as well as the General Services Administration (GSA), Finance Director at the National Aeronautics and Space Administration and Census Bureau.

A native of San Diego, California, Mr. Glenn holds a Bachelor’s of Science in Finance from the University of Colorado at Boulder. He is a former CPA (despite the American Institute of CPAs losing his exam on one occasion) and a former Certified Management Accountant. He has co-authored procedures listed in Office of Management and Budget (OMB) Bulletin No. 07-04, “Audit Requirements for Federal Financial Statements,” and portions of the OMB Circular A-123 Implementation Guide. In addition, he co-chaired OMB Circular A-136 committees from 2008 to 2010; served as President of the Washington, DC Chapter of AGA; served as AGA National President 2016 to 2017; and has landed on and been launched off an aircraft carrier at sea (prior to joining the DoD).

Mr. Glenn shared his insights and stories on leadership based on his experience in federal financial management. Key aspects shared by Mr. Glenn include:

- Remember everyone has something to contribute
- Seek first to understand
- Be decisive
- Acknowledge your role as leader
- Do not under-estimate your influence
- Give your team tangible opportunities for achievement
- Celebrate successes and acknowledge setbacks
- Provide positive and constructive feedback
- Focus on feeling and emotion as opposed to the words during communication
- Do not micro-manage
- Work on your self-esteem and emotional quotient

Mr. Glenn discusses “Marvelous Examples of Leadership and What Not to Do.”

October Luncheon cont'd.

Introduction by Paul Marshall, VP, MIL.

AGA DC Chapter President Caitlin Holmes McGurn addresses the attendees.

The presentation ended with a robust Q&A session as Mr. Glenn answered questions from both virtual and in-person attendees.

We sincerely appreciate the time Mr. Glenn spent with us to share his knowledge and experience. We would also like to thank our Corporate Sponsor, **The MIL Corporation (MIL)**, and **Mr. Paul Marshall**, Vice President, for his introductory remarks.

AGA DC also congratulates Lora Pickard, our new member raffle winner at the October luncheon!

Finally, 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!**

Member Luncheon Videos

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

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

AGA DC Chapter Monthly Luncheon

December 2022 HYBRID LUNCHEON

"Future Readiness: Turning Vision into Action"

On December 13, 2022, the DC Chapter welcomed our December hybrid luncheon speaker **Mr. Tim Gribben, Commissioner of the Department of the Treasury's Bureau of the Fiscal Service**. We are grateful for more than 125 both virtual and in-person attendees who joined us at Clyde's of Gallery Place in downtown Washington, DC.

Mr. Timothy "Tim" Gribben was appointed Commissioner of the Department of the Treasury's Bureau of the Fiscal Service (Fiscal Service) on May 13, 2019. Mr. Gribben provides leadership, policy direction, and guidance for Fiscal Service's efforts to transform financial management and the delivery of shared services in the Federal government and overseas bureau operations.

In his presentation titled "Future Readiness: Turning Vision into Action," Mr. Gribben talked about the Fiscal Service's Strategic Plan and its implementation. He shared with us the Fiscal Service's financial management vision, which is that Federal financial management seeks to meet Americas' expectations that its government is an efficient steward of financial resources; provides accurate financial information; and offers financial interactions that are modern, inclusive, seamless. Its 2022-26 Strategic Plan includes the following four aspects:

- **Operations:** business transformation; emerging technology and business practices; and operational integrity
- **Data:** data quality and data analytics
- **Customers:** customer experience practices; agency engagement; marketplace solutions
- **Workforce:** DEIA; workforce of future; workplace of future

Mr. Gribben mentioned that the Fiscal Service uses a strategic management framework to improve outcomes for customers. The framework consists of strategic and enterprise planning, program, and risk management, performance management, and evaluation. These areas interconnect and build on each other. Fiscal Service created an organizational model that positions Fiscal Service to achieve its vision and agility to meet future challenges:

Left to Right: Paul Lionikis, Paul Marshall, Crystal Wolf, Tim Gribben, and Caitlin Holmes McGurn.

December Luncheon cont'd.

Guest speaker Tim Gribben (center) with DC Chapter board members at the December luncheon.

- *Prepare the Bureau for the future:* transformation and modernization
- *Deliver excellence in operations:* government-wide services
- Unifying Administrative Resource Center (ARC) to promote shared service growth
- *Enabling our people to do the best:* human capital office

Mr. Gribben also discussed the following expected benefits:

- For agencies and the public: unified seamless service; more efficient Federal FM overall
- For Fiscal Service workforce: opportunity to gain broader FM experience; opportunity to have government-wide impact

The presentation ended with a robust Q&A session as Mr. Gribben answered questions from both virtual and in-person attendees. We sincerely appreciate the time Mr. Gribben spent time with us to share his knowledge and experience.

Finally, 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!**

Tim Gribben, and Caitlin Holmes McGurn.

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Honorary Mention

Remembering The Honorable Samuel T. Mok

Our Past National and Chapter President

The Federal financial management community lost a giant on September 21, 2022, when our beloved past National and Chapter President, **The Honorable Samuel Tinsing Mok**, passed away at the age of 77 after a short but valiant battle with cancer. Sam was a lifelong student of history, a military officer, a public servant, an entrepreneur and, most importantly, a man devoted to his family. He was an outstanding leader in the Federal financial management community and for the AGA, both at the National and Chapter level.

Sam moved with his family from Hong Kong to New York, where he studied accounting and joined ROTC at Fordham University. After graduating from college, Sam began his private sector career as an auditor in Manhattan. He then was called to service in the Army, where he served in the 7th Psychological Operations Group in Tokyo and Okinawa, Japan, as a commissioned officer. Sam completed his service as a Captain in Army Readiness Region 1 at the U.S. Military Academy at West Point. After Sam's military career, he became the director of accounting at Time-Life Books and subsequently the first controller and corporate treasurer of U.S. News & World Report. Sam later re-entered public service by joining the Department of State as a Senior Foreign Service officer in the Bureau of East Asian and Pacific Affairs. As appointed by President George H.W. Bush, Sam later became the Department of the Treasury's first CFO, and the CFO of the Department of Labor, as appointed by President George W. Bush and confirmed by the Senate. After his CFO role, Sam established his own consulting firm, Condor Consulting, and provided strategic business information and facilitated the development of critical relationships between his clients and senior Asian embassy officials in Washington DC.

Sam was an active member and leader for AGA. He served on numerous committees and was a frequent speaker at many AGA training events, both at the national and local level. Notably, Sam was our DC Chapter President in 1991-92, and the National President in 2008-2009. To recognize Sam's long-standing contribution to the public service and financial management community, Sam was awarded the Robert W. King Memorial Award - AGA's highest honor - in 2011. Sam's leadership and mentorship provided to our AGA members and future leaders had made significant positive impact. The newsletter team reached out to our current and past AGA leaders to reflect on Sam's contributions to AGA and profession.

Caitlin Holmes McGurn (Current DC Chapter President): *I joined the AGA DC Board in 2006 as part of the Members Services team. At that time, one of the major events each year was a Chinese New Year celebration. Sam was a champion of this event*

Thought Leadership cont'd.

and I have very fond memories of working with him on this. Sam was very passionate about the details, menu, and authenticity of the experience for our members. Sam built quite a career and legacy and it was a pleasure to have the opportunity to work with him in this capacity.

Virginia Robinson (Past National President 1989-90; Past DC Chapter President 1984-85): *Sam was the embodiment of kindness, dignity and civility. Establishing and maintaining a friendship with him seemed so easy and natural, likely because he was so considerate of others' views and feelings in the workplace as well as in other venues. This was so evident in his leadership and also mentoring of young professionals. He'd tell them, for example, how much their career and well-being would be enhanced by meeting and getting to know us as accomplished leaders; thereby complementing us while encouraging us to take time to work with them while they proceeded to elevate themselves. Sam was exceptionally well-connected. When we wanted to produce the best ever international program at a PDT [Professional Development Training] in Nashville, we called upon Sam to get a high level official from China to speak in the auditing segment, and he produced. He got the Deputy Auditor General of China to participate and then organized a separate audit forum for a DC Chapter event for him to deliver the keynote address. His awesome public service extended beyond the Federal government. We could count on him and his wife Nancy to be at the polls in our precinct helping with voting too. He seemed to live to help others and he will be long remembered as truly a wonderful person.*

Evelyn Brown (Past National President 2012-13; Past National Treasurer 2003-04; Past DC Chapter President 1995-96): *Sam Mok was a consummate professional, a true gentleman and a grand human being. Sam was always willing to reach out to folks at the Federal, state, local and international levels to enhance financial management and improve conditions worldwide. As such, he routinely provided mentoring support to all ages in many locales, served with me at the AGA Chapter level to mentor young professionals, provided internship opportunities and was always inclusive in his endeavors. I worked closely with Sam at the chapter levels in many areas, including assisting with programs by obtaining speakers which gave me the opportunity at the junior level to get exposure to senior level officials. I also worked with him at the AGA National level on the International Affairs Committee and on the then National Executive Committee. He was always supportive, full of recommendations for helping in any endeavor and was an all around good man. I am very privileged to have known - and worked with him.*

Chinese New Year lunch in February 2009 (shown on far left: Sam Mok; far right: Caitlin Holmes McGurn)

Pat Wensel (Past National Treasurer 2014-15; Past DC Chapter President 1994-95): *Sam was a great supervisor when I worked for him at the [Department of the] Treasury. He is the one who got me really involved with AGA when he asked me to become Secretary of the DC Chapter while he was the Chapter President. His continuing encouragement is what kept me heavily involved in AGA both at the chapter level and the National level, and I will always be thankful for that. Sam was also a great mentor as he helped in advancing my career in the Federal government. He seemed to know everybody and was glad to connect you with them when you needed an introduction. I will miss his annual holiday letters detailing what was happening in his world.*

Karl Boettcher (Past RVP and SVP): *Sam Mok was an outstanding professional associate and mentor. Our relationship lasted over 40 years and was interwoven between my numerous Government-wide Treasury Department and AGA roles. His outstanding leadership and vision showed in my dealing with him as Comptroller/CFO of the Treasury Department and again as CFO of the Department of Labor. As the DC*

Thought Leadership cont'd.

Chapter President, Sam provided me, in my Early Career days, with outstanding visionary and financial support for my many activities to include a chapter boat ride on the Potomac for 120 of our members and guests. Years later he again was instrumental in helping me in my Member Services activities to include developing the very popular Chinese New Year dinner. During my years as AGA Capital Regional Vice President, Sam continued to provide me with many helpful mentoring advice and suggestions for dealing with our then three regional chapters. As AGA National President, Sam again provided outstanding leadership and support to me as a National Senior Vice president and to the entire AGA National Executive Committee. Following my retirement in 2014, Sam and I continued to foster a very positive and friendly relationship. I will miss Sam greatly.

Wendy Payne (Past DC Chapter President 2002-03): *Sam was a generous, thoughtful mentor to many including me. He shared his insights through his longstanding commitment to the AGA community as well as through service on many Federal Accounting Standards Advisory Board committees. Sam could be counted on to share his talent no matter how busy he was. Most importantly, Sam treated each of his colleagues as a personal friend first and as a professional associate second. I always looked forward to seeing Sam and his lovely wife, Nancy, at AGA events. He will be greatly missed.*

Doug Glenn (Past National President 2016-17; Past DC Chapter President 2010-11): *When I initially thought of what to write regarding Sam, I, like many AGA folks, thought "He was a great AGA president who did a LOT for our industry" but I have learned he was so much more. I could go on about Sam's contributions to a greater public good, which are many, but the memories I will treasure most about Sam are his contagious smile and his quickness to laughter. I remember he was walking out of a presentation I was giving to take a call. I couldn't pass up the opportunity to tease him, so I stopped my presentation and in front of a couple hundred people said: "Sam, tell your mom I said hi!" I wasn't entirely sure how he'd take my public teasing but without missing a beat he said: "I did and she says hello to you!" Needless to say, the crowd got a good laugh that afternoon thanks to Sam. The truth is, the state of the Federal financial industry is based on the contributions of others before us. I don't know where we'd be if Sam hadn't been part of our industry, but I suspect we just wouldn't quite be as far along as we are today. Good-bye Sam, you'll be missed by more than you know.*

John Lynskey (Past National President 2018–19; Current Senior Advisor to DC Chapter): *We were all touched and are all better people and leaders for having the honor of knowing Sam Mok. His enthusiasm and energy was amazing. Sam was always a champion of AGA and promoter of CGFM. He helped start the DC Chapters Chinese New Year's events that were held for many years. I especially enjoyed Sam's storytelling and kindness. Many years ago when I was the AGA National Treasurer, and attending CFO Council meetings for NSF [National Science Foundation], Sam would always come up to me afterwards to talk about AGA providing encouragement and support. Sam thought the best of everyone and treated everyone as a friend.*

DC Chapter Officers 1991-92 - Left to Right: Warren Cottingham, Treasurer; Mary Lee Mason, Director, Chapter Procedures and By-Laws; Pat Wensel, Secretary; Sam Mok, President.

Back in 2020 as part of the 70th Anniversary of DC Chapter celebration, our current Chapter Historian and past Chapter President, Eileen Parlow, did an interview with Sam to reflect on DC Chapter history:

***Q:** Would you describe your first involvement with the AGA?*

***A:** I was Comptroller [and later the first Chief Financial Officer (CFO)] of the U.S. Department of Treasury when I made my first official visit meeting the then Commissioner of the Financial Management Service (FMS), Ernie Douglas. After a very pleasant*

Thought Leadership cont'd.

meeting, I met two young FMS staffers (Doris Chew and Susan Lee) and they asked if I would like to join them at an AGA luncheon. Having just transferred from the Foreign Service, I wanted to make more friends in Civil Service and quickly accepted. They took me to my first AGA monthly luncheon at the Touchdown Club, where I met Warren Cottingham, Karl Boettcher, Virginia Robinson and her Joint Financial Management Improvement Program team, Bill Anderson, and many others. The rest is history.

Q: *What were some of the biggest changes that happened at the AGA during your career?*

A: *The creation of Certified Government Financial Manager (CGFM) certification and the related training, accreditation, and continuing education activities. Also, the professionalization of the Association, itself, and the institutionalization of its leadership process.*

You can read the entire interview **here** or visit our Chapter History webpage at: **"The First Chapter" (AGA DC)**

DC Chapter Awards Dinner in May 2008

The newsletter team reached out to some of our past leaders during the pandemic for check-in, when Sam shared his personal update and provided his wisdom to our young professional members:

Whether you're in the Federal service or service provider related, take maximum advantage of leveraging the employers current willingness to permit telecommuting to improve your quality of life and more time with family, or look for another employer that offers the flexibility. You can stay connected and enhance your network through AGA events or volunteering as these options are more flexible and solely self directed.

You can read the full articles **here** at page 29-30 from the December 2021 newsletter.

Sam is survived by his wife Nancy, two adult children, and six grandchildren. Sam was buried with a military guard in attendance and military honors at Columbia Memorial Park (12005 Clarksville Pike, Clarksville, MD). A reflection bench for visitors will be installed by early next year.

Sam will be deeply missed and remembered by the AGA and financial management community for his decades of work, leadership, mentorship, and service.

Special Events

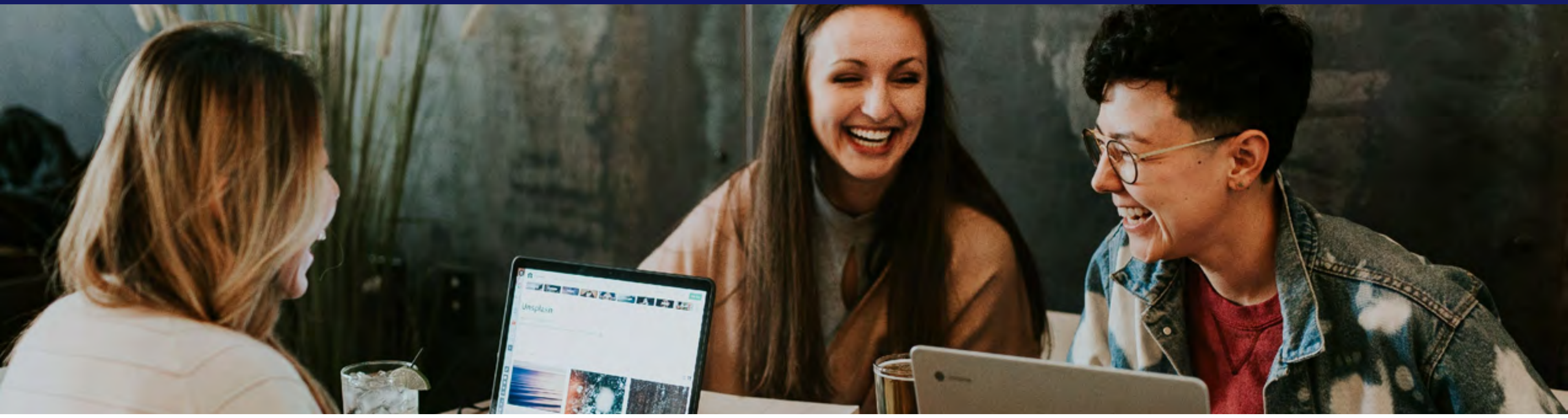
Member Services is very excited to kick off the new year with exciting in-person events! Please be on the lookout for familiar events like the hockey game, holiday happy hour, the return of some previous events, and even new events! Stay tuned!

Speed Mentorship Event

Our Chapter is bringing back the Speed Mentorship event! Thank you to participating mentors and mentees who joined this exclusive event on December 14 evening at the KPMG office in downtown DC. We had a very interactive session between mentors and mentees with strong connections made!

Thank you to KPMG for supporting and providing a venue for our Speed Mentorship Event. Special thanks to our Mentorship Committee members Stacey Ferris, Maura Russell, and Paterne Koukpesso for planning and organizing this event for our members!

Special Events cont'd.



AGA Young Professionals and Mentoring

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

AGA - Young Professionals

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

AGA - Mentoring Program

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

Special Events cont'd.

Member Happy Hour Event

More than 50 members gathered at the Elephant & Castle Pub & Restaurant in downtown DC on the evening of December 13, 2022, night for our annual chapter's holiday celebration. Our members were able to catch up and enjoy great food to celebrate this holiday season.

Many thanks to our Member Services Committee members (Crystal Wolf, Anthony Richards, Manoj Mirchandani, and David Baskin) for their hard work to organize this event!

NextWave Federal Finance Leadership Program 2022

Congratulations to all of the AGA 2022 NextWave Federal Finance Leadership Program (NextWave) inaugural cohort graduates, including our very own DC Chapter Treasurer, Chi Okonkwo, along with chapter members Lauren Bloom, Grace Hsu, and Jing Williams!

AGA 2022 NextWave Graduates:

- Lauren Bloom, Supervisory Budget Analyst at Department of Education
- Marcus Glasgow, Chief, Business Services & Operations, Office of Personnel Management
- Grace Hsu, Financial Analyst, Office of Personnel Management
- Noah Kaufman, Systems Accountant (Project Manager), Department of State
- Chidilim "Chi" Okonkwo, Director, Agency Financial Systems Office, National Aeronautics and Space Administration
- Jing Williams, Director, Division of Systems Policy and Compliance, Department of Health and Human Services

AGA National created NextWave for experienced Federal financial management professionals who have a goal of becoming a financial organization leader, SES, DCFO, or CFO. NextWave enhances program participant's own purpose to build the vision, teams, and infrastructure needed to realize the finance organization of the future. The Program provides a platform for transformative thinkers and leaders to reimagine the finance function within the Federal government.

NextWave includes three phases that each have an educational component as well as an interactive component where participants engage with Federal CFOs/DCFOs to challenge the status quo in a safe environment. The Program also includes a booklet with structured exercises to be used as a self-reflection tool. The Program's final component is a team capstone that is designed to simulate real-life transformation opportunity development.

NextWave participants gathered at the Professional Development Training (PDT) in early July 2022 to celebrate graduation from the Program (see picture below). Special congratulations to Marcus Glasgow who was part of the team to win the "Foresight Award" as well as Chi Okonkwo and Noah Kaufman who were part of the team to win the "Innovation Award."

AGA National is currently reviewing the **2023 Program** applications. For more information on the 2022 NextWave Program, please visit **here**.

DIAMOND SPONSOR

OneStream Software is an independent corporate performance management (CPM) software company backed by private equity investor KKR. Our primary mission is to deliver 100% customer success.

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

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

AGA DC Training and Events

AGA Sponsored Training & Events

1/11/23, 12-1:30pm, AGA DC Monthly Hybrid Luncheon at Clyde's: Guest speaker: Glen Lee, CFO, DC Office of the Chief Financial Officer.

1/17/23, 7:00pm, Join fellow members of the AGA DC Chapter as the Washington Capitals take on the Minnesota Wild at the Capital One Arena! *There are a limited number of tickets.* **Get Tickets Here**.

1/24/23, 11:30am-1:00pm, AGA DC VIP Luncheon at Old Ebbitt Grill (Diamond Sponsors only). With Guest Speaker Jon Rychalski, CFO at VA.

2/8/23, 12-1:30pm, AGA DC Monthly Hybrid Luncheon at Clyde's: Guest speaker: Monica Valentine, Executive Director, Federal Accounting Standards Advisory Board (FASAB).

3/2223, 12-1:30pm, AGA DC Monthly Hybrid Luncheon at Clyde's: Guest speaker: Deidre Harrison, Acting Controller, OMB.

4/19/23, 12-1:30pm, AGA DC Monthly Hybrid Luncheon at Clyde's. Guest speaker: TBD

4/27/23, 11:30am-1:00pm, AGA DC VIP Luncheon at Old Ebbitt Grill (Diamond Sponsors only). With Guest Speaker Jolene Lauria, CFO at DOJ.

5/17/23, 12-1:30pm, AGA DC Monthly Hybrid Luncheon at Clyde's: Guest speaker: Margaret Schaus, Chief Financial Officer (CFO), NASA.

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

For questions regarding Training and Events, please contact us at **agadc@agadc.org**.

**** SAVE THE DATE****

AGA DC Webinar Training Schedule

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

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

When:

01/11/23 — Uniform Guidance and Grant Accounting

02/01/23 — GASB Update

03/01/23 — RPA/AI

03/22/23 — Cybersecurity/ERM

04/12/23 — Ethics

04/26/23 — CARES Act/ARPA

05/10/23 — Fraud/Data Analytics

05/24/23 — Leadership

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

**** SAVE THE DATE ****

CGFM Committee Updates

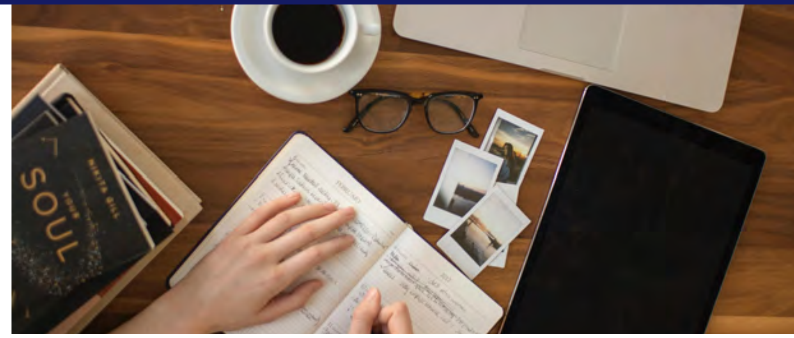
AGADC is proud to support our chapter members in obtaining the CGFM designation. We can pay up to $125 per chapter member per program year to help offset the costs of training modules, study guides, practice exams, and/or exam fees. This subsidy is not available if your costs were already reimbursed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

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

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

You must submit the following to qualify for exam rebate.

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



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

Available Study Resources

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

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

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

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

The following member obtained her CGFM in June 2022!

Ms. April M. Johnson, CGFM

Check out our CGFM chapter **webpage** or contact **Debbi Thomas**

Already Have Your CGFM?

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

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

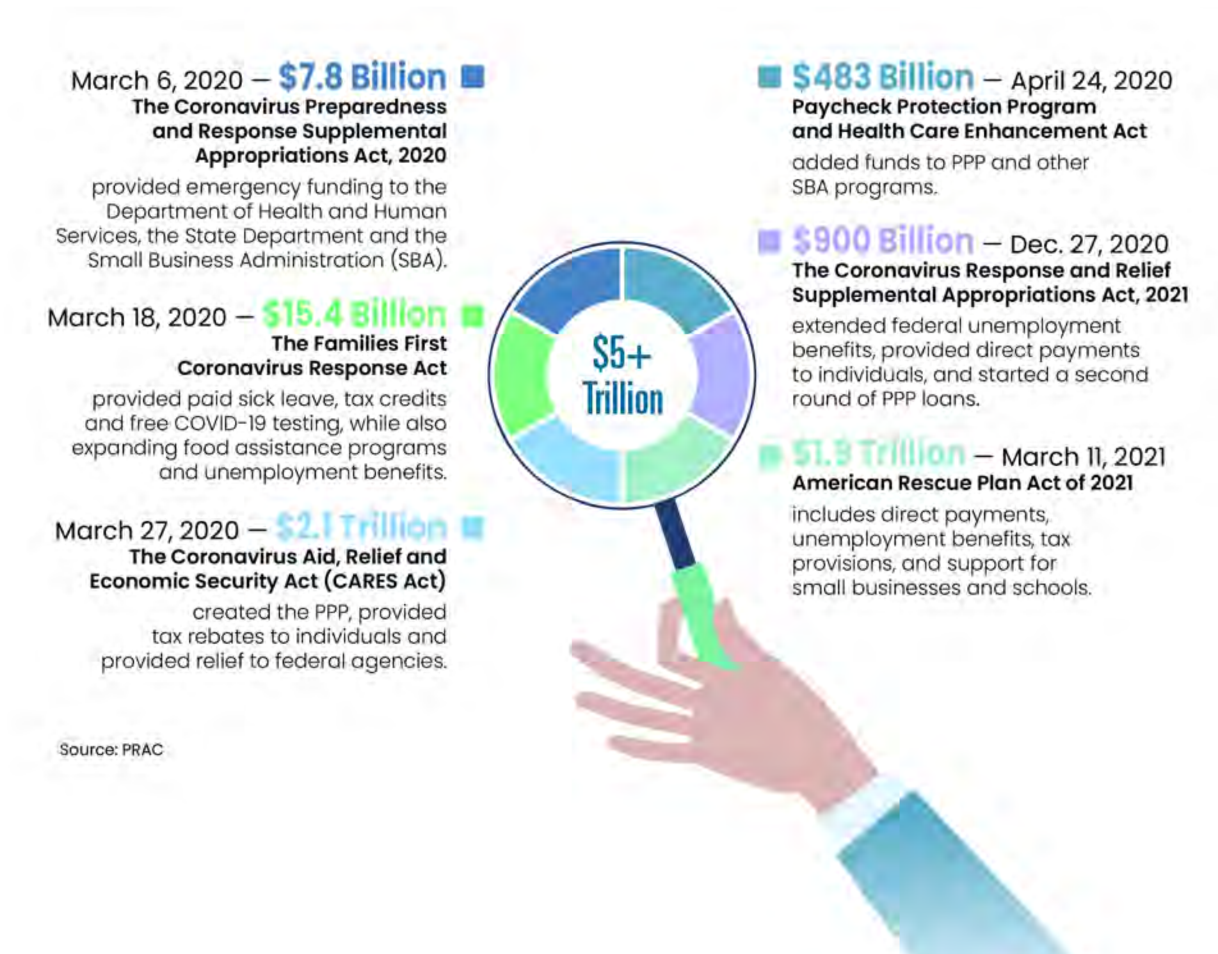
CGFM™ Corner

Thought Leadership

AGA 2022 Inspector General Survey: *Sustaining Change*

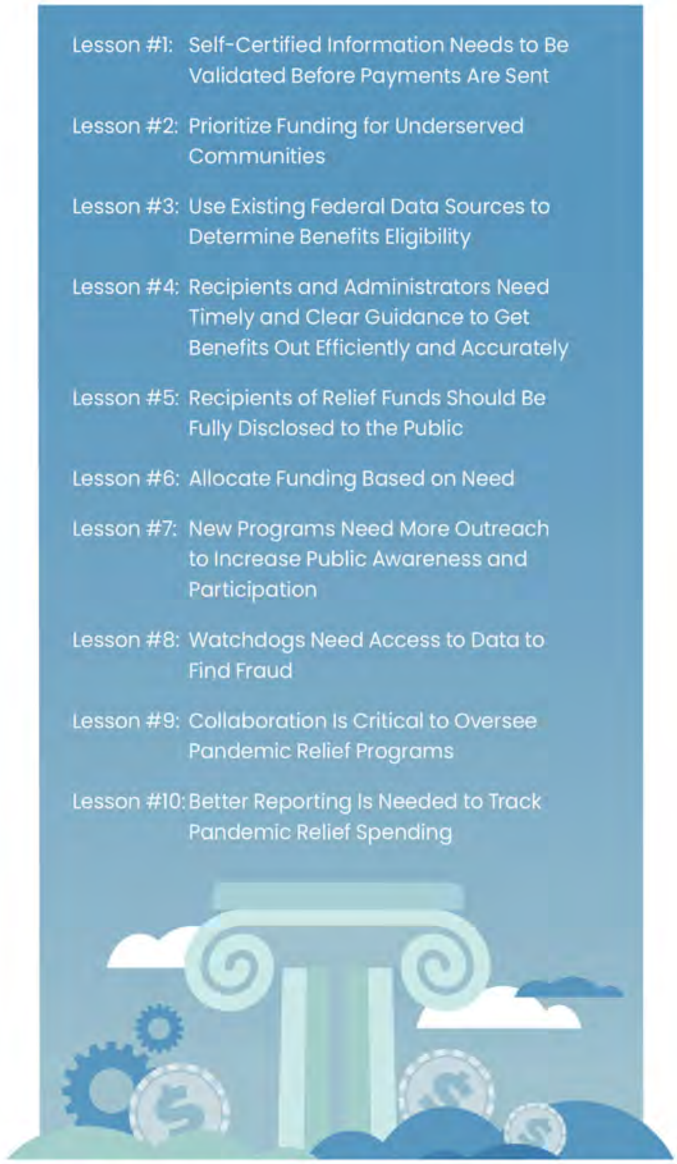
Brought to you by the AGA and Kearney & Company

In conducting this year's AGA Inspector General (IG) Survey, AGA and Kearney & Company, P.C. (Kearney) recognized a wave of change occurring within the oversight community. During the last few years of this survey series, the Council of Inspectors General on Integrity and Efficiency (CIGIE), the federal IG organization, encouraged greater collaboration and sharing among federal IGs. In addition, IGs shared their prior experiences in collaborating after the enactment of American Recovery and Reinvestment Act of 2009 (AARA), intended to deter fraud, waste and abuse in its wake. These actions helped prepare the IG community for the pandemic and oversight challenges associated with the more than $5 trillion in pandemic relief programs.



Thought Leadership cont'd.

The creation of the Pandemic Response Accountability Committee (PRAC) in April 2020 set collaborative efforts in motion again, and auditors increased cooperative and innovative approaches to conduct oversight. The PRAC, a component of CIGIE led by 21 IGs and an Executive Director, received a $120 million multi-year appropriation to accomplish four objectives: 1) promote transparency, 2) enhance collaboration across the IG community, 3) use data to detect fraud, waste and abuse, and 4) hold wrongdoers accountable. The challenge of a national crisis sparked innovation and problem-solving as the PRAC collaborated with the IG community, state and local audit communities, the Government Accountability Office (GAO), the U.S. Office of Management and Budget (OMB) and the White House to unleash the full force of the community and its resources to oversee the unprecedented amount of pandemic relief.



The PRAC lessons learned report was identified as an overarching resource for improving program operations during a crisis.

Source: PRAC

Survey participants identified several significant areas of concern in the oversight of pandemic relief programs. Broadly, these areas include the lack of controls in delivering benefits, particularly early on, reliance on self-certification in lieu of program controls and, in retrospect, the unanswered questions about overall effectiveness of pandemic relief programs. Interviewees cited examples of fraud and improper payments in the Unemployment Insurance (UI) program, Economic Injury Disaster Loan Program, and the Paycheck Protection Program (PPP).

The PRAC is using new approaches, different from traditional oversight methods of the past. By breaking down traditional barriers and opening doors, PRAC leaders are applying a “best and brightest” approach, with ongoing collaboration, data analytics, resource sharing, better communication, and proactive and more concise reporting and spending transparency, all largely in a remote work environment. This wave of change is forcing a shift in the practice of oversight toward more collaborative, data-driven, clearly communicated, timely and effective methods. Sustaining the momentum of this change and maintaining for the foreseeable future a capacity to deliver ongoing value in the oversight of future crisis responses is the priority of many in the oversight community.

This is an excerpt of the AGA 2022 IG Survey, which was conducted by AGA and Kearney. To read the survey’s full insights, visit ***https://www.flipsnack.com/FCAA7CF569B/aga-ig-survey-2022.html****.*

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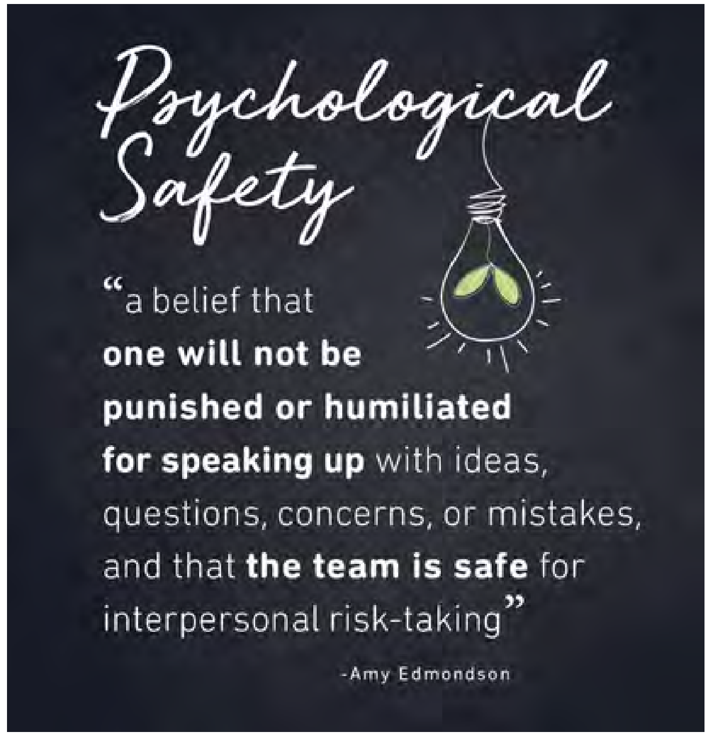
Thought Leadership

Psychological Safety in the Workplace - Building Trust and Innovation

By: Hollyann Morton, The MIL Corporation (MIL)



Psychological safety might sound like a new post-Covid, self-care term, but indeed the concept has been around for a little longer. **Dr. Amy Edmundson** coined the term back in 1999. The concept is fairly self-explanatory, but the presence or lack of psychological safety in an organization greatly impacts a team's productivity. A Psychologically Safe environment (at home or work) is defined as one in which you are free to be vulnerable and share without fear of judgment, dismissal, or contention. No one would willingly accept a job in an organization where they felt their ideas would not be welcomed. It is often after joining a new team the presence or lack of psychological safety becomes visible. Leaders wanting to promote productivity, innovation and a general 'esprit de corps' with employees are best served by fostering a psychologically safe work environment.

Fear-based work environments “counter cultivate” innovation and employee engagement. These environments are a buzzkill and easy to spot if you look closely. Think back to a meeting where no one spoke up (including the perfunctory nods of agreement at whatever was being discussed), a teammate's new idea was publicly disregarded, or no space was left in the meeting for candid dialogue or diversity of thought (I call this the “monologue meeting effect”). **Techniques**, such as Setting the Stage, Inviting Participation and Responding Productively, to encourage a workplace not based on fear can be carried out by leaders as well as independent staff members. Exercising these techniques is a cocktail combination of active and thoughtful facilitation, using emotional intelligence to prevent knee-jerk reactions and triggers, and checking egos at the door to ward off the need to always be right.

In a safe environment, candid conversations are encouraged and those dialogues strengthen us individually and as a team. In a psychologically safe workplace, mistakes get corrected more quickly because “interpersonal risks feel doable” as **Adam Grant** says. Employees admit errors without concern of reprimand or diminishment - and do so to strengthen the whole team. They speak frankly, generate more ideas, and question norms. Psychologically safe workplaces thrive and buzz. Employees are more productive and have **higher performing teams** as a result.

The next steps for leaders and individual staff members are a call to action. Critically evaluate your professional style and team culture. Do a gut check, you probably already know if you are in a psychologically safe or fear-based workplace. If employee engagement, disruptive problem solving (mistake reduction) through idea generation and diversity of thought feel missing, they probably are. Jump in with both feet and call a team meeting to generate ideas on how the team can work together to move towards a more psychologically safe workplace. Reading Dr. Amy Edmundson's **Fearless Organization** is also a great place to start.

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Thought Leadership

Action Toward Budget Optimization

By: Francisco Rodríguez and Andrew Kleine, EY

New market demands and greater government emphasis on performance and outcomes are driving the impetus for budget reform. With citizen expectations increasing, government leaders and stakeholder demands for more outcomes and better value, and calls for improved accountability, coupled with decreasing budgets and unpredictable emergence of new technology and trends, governments are expected to “do more with less” while managing the increasing number of priorities. Addressing these challenges and priorities requires an enhanced governmental budgeting approach than the current state of traditional budgeting being used. In a recent survey conducted during the 2022 AGA conference, approximately 85% of federal, state and local governments are utilizing traditional budgeting, while less than 15% are using some form of performance data with traditional budgeting. The biggest obstacle to a new way of budgeting is resistance to change. However, governments need to reform their budget processes to provide greater value and outcomes to their customers, citizens and the public.

Traditional government budgeting is:

- **Backward looking:** Traditional budgeting locks in status quo spending by using last fiscal year’s budget as a starting point.
- **Incremental:** By leaving the base budget largely unquestioned, traditional budgeting becomes disconnected from changing priorities.
- **Arbitrary:** Traditional budgeting protects lower-value programs and punishes those that deliver results through across-the-board budget cuts.
- **A black box:** By funding budget line items instead of services and capabilities, traditional budgeting obscures what taxpayers are getting for their money.

Outcome-based budgeting (OBB) turns traditional budgeting on its head. It is:

- **Strategic:** Starting with next fiscal year’s priorities, OBB is guided by future state objectives and desired outcomes; it is not stuck in the past.
- **Dynamic:** By allocating funds into desired outcome pools instead of organizational silos, OBB promotes collaboration, competition and innovation.
- **Value driven:** Setting a premium on data and evidence, OBB funds services and capabilities based on their strategic alignment with performance in delivering results.
- **Clear and transparent:** By breaking down the budget into services and capabilities, OBB shows clearly how resources are turned into results.
- **Accountable:** By measuring outcomes, OBB cultivates a culture of accountability around the impacts of long-term decision-making, as well as analyzes value and results.

How Governments Can Get Started

Governments at the federal, state and local levels can get started with OBB by implementing the following to deliver greater value and results.

Strategize: OBB starts with the end in mind — the strategic plan — and measurable goals. Departments need to clearly identify their strategic priority outcomes and key indicators of success.

Prioritize requirements: Finding opportunities to achieve better results with available funds requires breaking down the budget to gain insight about

Thought Leadership cont'd.

the value of every requirement and prioritizing against strategic goals and performance.

Implement performance measures: Telling the story of how a service or capability is meeting its mission means answering five questions: How much did we do? How well did we do it? Is anyone better off? Did we accomplish the strategic priorities for the budget year? What did we achieve with the budget allocated?

Establish results teams: Budgeting should be a process of purchasing results, not just funding line items. In OBB, the "buyers" are teams of employees and community members who are involved with budget proposals and recommend funding strategies to achieve goals.

Develop better budget proposals: OBB requires departments to compete and collaborate for funding programs in ways they're not used to. Departments need to craft budget proposals responsive to strategic priorities and deliver greater value and enhanced outcomes.

Improve and inform the decision-making process: OBB shines a light inside the black box of budgeting. It gives leadership information it has never seen before. Every requirement is rated for its priority and performance, presenting clear budget options.

Engage with customers: OBB is driven by what departments, agencies and communities want and need. Governments need to collaborate and engage with these groups to gather their inputs.

Improve budget presentations: OBB makes government budgets more informative and accessible than ever before. Departments should present their budgets outlining the fiscal "big picture," clearly show how budgets executed become results achieved, and provide details about the requirements.

Implement performance management: OBB should be part of a governance cycle that includes strategic planning and performance management with emphasis on monitoring, analyzing, discussing progress toward goals, and finding innovative approaches to performance challenges.

Develop a change management plan: OBB disrupts the status quo and changes the traditional way of doing things. Governments should develop a roadmap for the transition to OBB, including the preliminary groundwork necessary for change.

Final Note

The bottom line is value — outcomes and results per funds executed. Agencies can improve value by:

- Getting more results for the same budget
- Getting the same results for a lower budget

  Or

- Getting more results for a lower budget — true budget reform!

The views reflected in this article are the views of the authors and do not necessarily reflect the views of Ernst & Young LLP or other members of the global EY organization.

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Community Service

GOODProjects | Social Safety

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

GOODProjects is empowering youth and their families to develop fulfilling lives free from poverty, while helping them develop the growth mindset to thrive in their own communities. The organization's mission is to eliminate the roadblocks to basic needs so families can define success for themselves on their pathway to achieving the American Dream.

GOODProjects work focuses on creating the place-based, sustainable model to turn poverty-dense communities defined as Opportunity Zones into GOODZones where 100% of our families sustain incomes at or above $80k a year. The organization is working to achieve this vision, first for Washington, D.C., and then expanding their model to help other communities nationwide become positive and empowered GOODZones. Your support provides GOODProjects the resources to continue to co-create with communities and their leadership in defining the future of social impact.

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

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

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

GOOD

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

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

Be well and stay safe!

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


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Inside the Black Box

by Simcha Kuritzky, CGFM CPA

Custodial Bad Debts

Background

Some of the activities agencies bill for, the agency will not be allowed to keep. These go into a General Fund Receipt Account such as 1435, but the agency still reports this activity in Treasury's Governmentwide Treasury Account Symbol Adjusted Trial Balance System (GTAS) and in their financial statements. Although bad debts are defined only as the inability to collect revenue earned due to credit losses, there are two different models for their accounting: exchange and nonexchange.

Exchange Versus Nonexchange

The Statement of Federal Financial Accounting Standards 7 defines revenue as either exchange or nonexchange. The public pays for exchange revenue to get goods or services. For example, if someone pays the entrance fee to go into a federal park, that is exchange revenue. Presumably this person pays the fee because they value the money less than spending time in the park. However, if they litter while in the park and are fined, the fine is considered to be nonexchange because that comes from a government's inherent ability to demand payments from the public. When a government charges interest on a debt (or overdue payment), it is considered exchange if the underlying transaction is exchange (e.g., if the debtor is late, by accident or choice, in paying a government bill for goods or services rendered), but it is considered nonexchange if the underlying transaction is nonexchange (e.g., a taxpayer who pays interest for not withholding sufficient income taxes).

Exchange Posting Model

Say we have custodial interest receivable and want to accrue the allowance for bad debts. If the interest is exchange revenue, then the activity will be reported on the Statement of Changes in Net Position (SCNP) with the following postings:

D420 Accrue estimated uncollectible exchange revenue due to credit losses in a General Fund Receipt Account.

Debit	672000	Bad Debt Expense
Credit	134700	Allowance for Loss on Interest Receivable - Not Otherwise Classified

C405 Reduce custodial liability by the amount of estimated uncollectible revenue.

Debit	298500	Liability for Non-Entity Assets Not Reported on the Statement of Custodial Activity
Credit	599400	Offset to Non-Entity Accrued Collections - Statement of

Changes in Net Position

So the expense in 672000 will be reported on line 1 of the Statement of Net Costs, which in turn is reported on line 21 of the SCNP, and the offset in 599400 will be reported on line 20 of the SCNP.

Inside the Black Box Cont'd.

Nonexchange Posting Model

If the revenue is nonexchange, the activity will be reported on the Statement of Custodial Activity (SCA) with the following postings (if material to the agency):

D424 Accrue estimated uncollectible nonexchange revenue due to credit losses in a General Fund Receipt Account:

Debit	531900	Contra Revenue for Interest Revenue - Other
Credit	134700	Allowance for Loss on Interest Receivable - Not Otherwise Classified

D422 Reduce custodial liability by the amount of estimated uncollectible revenue:

Debit	298000	Custodial Liability
Credit	599100	Accrued Collections for Others - Statement of Custodial Activity

Both 134700 and 531900 are reported on line 7 of the SCA (Miscellaneous Cash Collections), so they will net to zero. Only 134700 is reported on line 9 (Accrual Adjustments), so this will increase line 10 Total Custodial Revenue. This is offset by 599100 on line 12 (Decrease in Amounts Yet to be Transferred), which increases line 15 (Total Disposition of Collections). For the SCA to balance, the amounts on lines 10 and 15 must equal.

Conclusion

OMB Circular A-136, Financial Reporting Requirements, allows agencies to append an abbreviated SCA to their SCNP if custodial amounts are small. Agencies with immaterial amounts of activity can also disclose it in a footnote rather than a full statement.

*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 Newsletter Survey

You ask, we listen!

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

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

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

Please visit the survey site at: **AGA DC Chapter Newsletter Survey** to rate and provide any feedback on our newsletter!

Thank you again for your support!

AGA DC Newsletter Team

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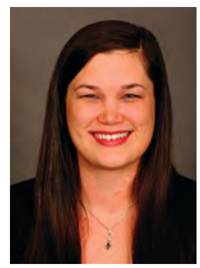

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