



# June 2004 Newsletter The Washington Connection

ASSOCIATION OF GOVERNMENT ACCOUNTANTS, WASHINGTON DC CHAPTER

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## AGA - DC Welcomes Ms. Karen Alderman as the 2004-2005 President

Karen Cleary Alderman is the Executive Director of the Joint Financial Management Improvement Program (JFMIP), an interagency organization sponsored by the General Accounting Office, Department of the Treasury, the Office of Management and Budget, the Office of Personnel Management, and the General Services Administration.



*Ms. Karen Alderman, President*

Her responsibilities include developing and directing interagency projects to improve financial management in the federal government, issuing government-wide financial system requirements, testing and qualifying financial system software for federal use, and maintaining an ongoing knowledgebase to communicate with all stakeholders.

## The Washington Connection

ASSOCIATION OF GOVERNMENT ACCOUNTANTS, WASHINGTON DC CHAPTER



*The AGA - DC is pleased to announce it's 1st Place Win in the 2003-2004 Chapter Newsletter Editor Contest - Electronic Version !*

*Thank you to Diane Wright and Kate Yalowitz of CGI-AMS who edited the content provided by various AGA members and to Wendy Papagjika (Production Editor) of Altum and her graphics team consisting of Altum, Estco Medical and Ivey-League Interactive.*

# President's Message

by Karen Alderman, President



Ms. Karen Alderman, President

Dear Chapter Members,

As I pick up the proverbial gavel from Bob Reid, my first order of business as the 2004-2005 Chapter President is to thank Bob for the great job he did as President in the last year. I hope to build upon his success in serving the AGA Chapter membership. This job is going to be much easier as the result of the Bob's leadership in putting the chapter on sound financial footing and the

accomplishments of the 2003-2004 officers and chairs.

I am very thankful for the opportunity to make a contribution as Chapter President and want to thank the many talented and thoughtful folks who have agreed to serve in key roles this year. Many of our long time leaders are coming back. Ann Davis of the Treasury Department agreed to continue as Chapter Treasurer with the help of Marianne Condon of the Department of Veterans Affairs. Coast Guard Commander Dan Christovich has agreed to continue as Secretary. Department of Labor's Pat Clark Duncan will continue to support administration, keeping track of all the accomplishments of the DC Chapter. Simcha Kuritzky of AMS will continue as our able scribe in the role of Publications. Harris Gofstein will again do his magic as Chapter webmaster and will be assisted by a new recruit Bill Black, both from Bearingpoint. FCC's Jim Swartz will play a key role as Meetings Director assisted by Wanda Carrington from the Treasury Department. LMI's Susan Johnson will serve as Education Director responsible for our annual conference, among other things. Marguerite Nealon from Treasury's Financial Management Service will take on the role of Membership and continue to facilitate Agency Liaison. KPMG's John Cherbini will continue coordinating Corporate Sponsors. Karl Boettcher, as our key guy in charge of fun and community building, continues in the role of Member Services. Judy Ochs, last year's "jack of all trades", will coordinate Chapter awards next year.

In addition to the generosity of "old hands" I would like to thank the new leaders who are stepping up to the plate this year. These include: Department of Commerce's Lisa Casias who will become the Chapter's President Elect. Karen Shaffer of LMI is taking over the "The Washington

Connection" as the DC AGA Chapter Newsletter Editor. Together with Wendy Papagika of Altum as Production Editor, they will serve as a key communicator with our chapter members. HHS's Scott Bell will be Director of Programs with the assistance of Phyllis Hunter who ably served last year in that role. USDA's Tonya Allen-Shaw will serve as Director of Community Service, assisted by Lloyd Farmer of the MIL Corporation. Ken Bresnahan of Grant Thornton will coordinate CGFM activities. Laura Glass of Metaformers will serve as Director of Early Careers, with the help of Chris McGrath of NCUA. The work of the DC Chapter relies on the team effort and I am grateful to have such a talented and committed team.

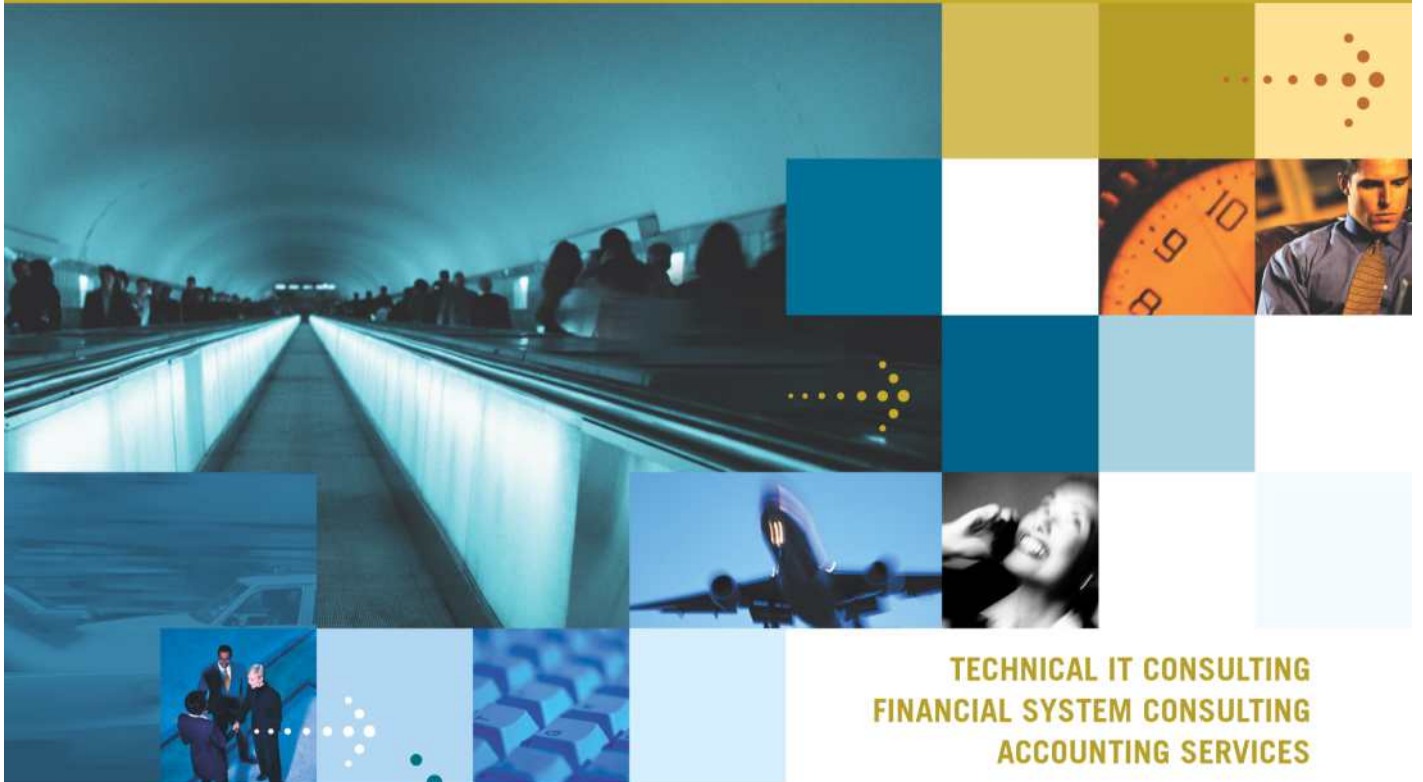
I believe in the KISS principle (keep it simple), focusing on quality, and communicating a lot. My priorities will focus on areas that the recent DC Chapter survey results indicated are most important to our active members. These include enhanced communications; well publicized programs designed to meet information and networking needs; engaging the next generation of financial management professionals; and giving back to the community. Per your feedback, our meetings will be lunch meetings. We will continue to communicate electronically using emails and our website, but will strive to make our materials available more in advance and easier to access. We will try to make sure the email lists are up to date and also work with agency leaders to gain support for employees to enhance their professional competence through AGA programs. We will partner with other local chapters to maximize the value of program and education opportunities as well as leverage community service.

In closing I thank you for the opportunity and privilege to serve as Chapter President this coming year, and I will rely heavily on your support in carrying out the job.

Yours Sincerely,  
Karen Alderman



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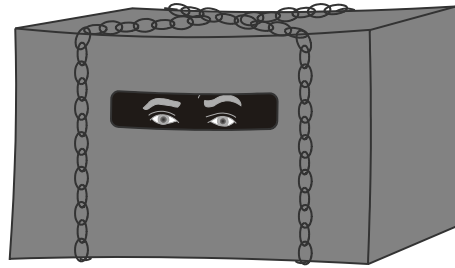
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# Inside the Black Box

by Simcha Kuritzky, CGFM CPA



## When Zero Doesn't Mean Nothing

Yes, that's a double negative, and no, it's not there for emphasis, but rather to be taken literally. We often assume that if an account has a zero balance then there is nothing in the account. Sometimes that assumption is wrong.

There is a new emphasis in agencies today on cleaning up old data, either for conversion to a new system or to better manage the current one. Funds which do not close, such as deposit and no-year funds, can have balances from long ago--even before agencies had implemented the Standard General Ledger or current posting logic.

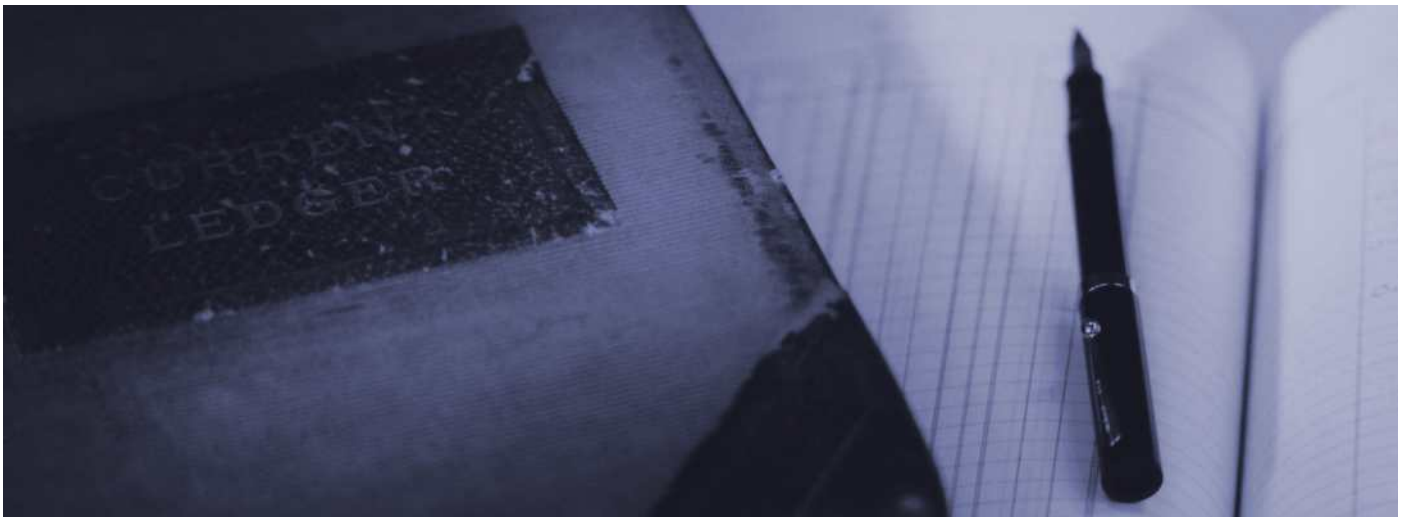
Reconciling an account with a decade or more of data in it can be quite daunting. Accountants, in the interest of efficiency, look for ways to cut down on the data that needs to be analyzed. If the balance of an account was ever zero, one can safely assume that all the entries were cleared out, and the balance only comes from transactions that occurred since that point, right?

Unfortunately, this may not be correct. Take, as an example, a deposit fund used to hold stray deposits and IPAC disbursements until they can be properly assigned. If one looks at the remaining transactions and uncovers one or more deposit or disbursement transactions that were backed out, but no evidence they were ever put in, then the zero balance does not mean the account had been cleared out. Look at the entry which brought the balance to zero; if it was a journal voucher or some miscellaneous posting, then it is masking all the open transactions that are still sitting in the account. It will be necessary to include older transactions in the reconciliation.

If it is easy to get a listing of all journal vouchers that posted to the account, those balances can be compared to the account balance to see if the remaining balance (which presumably is composed solely of collections and deposits) ever was zero. If so, analysis can begin from that point in time.

While Treasury does not require that deposit and no-year funds be subdivided, it has been my experience that splitting out such funds by budget year makes them easier to reconcile. Any transactions that are modified or cancelled come out of the original budget year, while all new documents go into the current budget year. Sometimes a balance in one budget year offsets a different year (which reduces the usefulness of this tactic), but more often balances in old budget years are reduced to zero and so can be excluded from the reconciliation process.

*The SGL concepts in this column represent the opinions of the Author and are not endorsed by AMS, the AGA, the USSGL Board, or the Treasury Financial Management Service. Please send comments, suggestions, and critiques to [Simcha.Kuritzky@cgi-ams.com](mailto:Simcha.Kuritzky@cgi-ams.com).*





# Local Happenings

WASHINGTON DC, CHAPTER

## National Cathedral Tour

March 7th 2004



Left to right: Rose Mundell, Tom Mundell, Jullie Conard, Karl Boettcher, Tonya Allen-Shaw, Mary Allen and Tyrone Shaw Jr.



### AGA Washington Chapter Membership Services Events 2003-2004

In an effort to provide our membership with a variety of social activities, Members Services is scheduling the following events for the coming membership year. These events represent some new initiatives and repeats of our most successful prior year's activities. We will again attempt to partner our activities with local

AGA chapters and other professional organizations. Also, watch for our participation in additional partnership activities being planned by other regional AGA chapters and by our own Community Service and Early Careers.

Date	Event	Partnership
May/June, 2004	Attend Baltimore Orioles or Northern Virginia Cannons Baseball Game	Baltimore Chapter NVA Chapter Early Careers
June 15, 2004	Golf Tournament	ASMC/KPMG

Additional event information will be provided as the activity draws near and more information becomes available. Some of the activities may be subject to change due to our partnership with the GWSCPA, ASMC and the AGA - NVA, PG and Baltimore chapters. Please check your newsletter, web site or agency liaison for the latest event update. Due to advance notification

requirements and space limitations, most activities will have a response cut off date. If you are interested in an activity please let us know as soon as possible. Send your responses or direct any questions to our Chapter Member Services Director, Karl Boettcher at [karl.boettcher@fms.treas.gov](mailto:karl.boettcher@fms.treas.gov) (202.874.6131).

## Baseball Game - June 5th

Membership Services is sponsoring a Potomac Cannons Baseball game. This minor league game will be played against the Myrtle Beach Pelicans on Saturday June 5 at 7 p.m. Grand Stand ticket prices are \$7 for adults, \$6.00 for children 6-12, free for children under 6. There is plenty of free parking. We will meet around 6:45 p.m. past the ticket booth by the food court tables. There will be fireworks at the conclusion of the game around 9-

9:30 p.m. In order to get to the G. Richard Pfitzner Stadium: Take I-95 south past Woodbridge to Exit 158B, Prince William Parkway towards Manassas. Continue on the Parkway for about 5 miles and take a right into the County Complex Court. If you are interested in attending this activity, please contact AGADC - [karl.boettcher@fms.treas.gov](mailto:karl.boettcher@fms.treas.gov) (202.874.6131)

## Golf Tournament - June 15th

AGADC Membership Services in partnership with the Association of Military Comptrollers (ASMC) is sponsoring a golf tournament at Andrews Air Force Base, Maryland. The tournament will be at the West Course on Tuesday, June 15. Format for the 18 holes will be Captain's Choice with a shotgun tee time start at 8:00 a.m. Entry fee is \$75.00 per person including picnic style lunch, golf cart, green fee & prizes. Foursomes are created as needed. If you have a group of 2, 3 or 4, please ensure that they all pay with the same registration. Early arrival is suggested to clear base security and to warm-up on the driving range (opens at 7:00 a.m.). To

register, please contact (KPMG/ASMC) Latisha Jones at 202.533.5666, [ljones@kpmg.com](mailto:ljones@kpmg.com), or Craig Silcox at 202.533.4296, [csilcox@kpmg.com](mailto:csilcox@kpmg.com). Make checks payable to ASMC and send to KPMG, LLP attn: Latisha Jones - 9th Floor, 2001 M St., NW, Washington D.C. 20036. If you would like more information on this activity, you can contact AGA /DC - Member Services Director - Karl Boettcher at 202.874.3611, [karl.boettcher@fms.treas.gov](mailto:karl.boettcher@fms.treas.gov). A detailed description of the golf course can be found at [www.aafbgc.com](http://www.aafbgc.com).

## E-mail Mailing List

Would you like to receive e-mail reminders of our monthly meetings and conferences? If so, please go to <http://www.agadc.org> to sign up for our mailing list in the Member Services section of the website.

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## Job Announcements

Job Type	Series	Agency	Announcement Number	Application Close Date	Contact
Staff Accountant	SK-0510-14/16	Securities and Exchange Commission	ESHA-04-092-SF	07/01/2004	202.942.4081
Accountant	GS-0510-05/12	Agency for International Development	AID-04-1063A-MT	06/10/2004	202.712.0191
Accountant	ZA-0510-01	Commerce, Bureau of Economic Analysis	BEA-04-145-AW	06/11/2004	202.482.1751
Lead Accountant	ZA-0510-03	Commerce, Bureau of Economic Analysis	BEA-04-145B-AW	06/11/2004	202.482.1751
Accountant	ZA-0510-02	Commerce, Bureau of Economic Analysis	BEA-04-145A-AW	06/11/2004	202.482.1751
Accountant	GS-0510-13/13	Health and Human Services, Centers for Medicare and Medicaid Services	HHS-CMS-R3-2004-0014	06/11/2004	410.786.5434
Accountant	GS-0510-09/12	Health and Human Services, Centers for Medicare and Medicaid Services	HHS-CMS-R3-2004-0010	06/11/2004	410.786.5434
Accountant	SK-0510-13/13	Securities and Exchange Commission	ESHA-03-060-DP	06/30/2004	202.942.4150
Controller	GS-0505-GS-15/ GS-15	Treasury, Financial Management Services	M-04-075	07/12/2004	202.874.8090
Supervisory Plan Controller	PG-0501-15	Government Printing Office	04-107	06/17/2004	202.512.1124
Supervisory Customer Services Controller	PG-0501-15	Government Printing Office	04-109	06/17/2004	202.512.1124

If your organization would like to list job announcements in the newsletter, please send announcement information to [diane.wright@ams.com](mailto:diane.wright@ams.com).



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# Notes from the May 13th Luncheon Meeting

Ms. Gwendolyn Sykes Brown - Chief Financial Officer, NASA



Ms Gwendolyn Brown

The Honorable Gwendolyn Sykes Brown, NASA's Chief Financial Officer, was the guest speaker at AGA-DC's May luncheon meeting at Pier 7. Ms. Brown came to NASA from the office of the Under Secretary of Defense (Comptroller) in November 2002, when she was selected as the Deputy Chief Financial Officer for Financial Management. She was confirmed by the Senate as NASA's Chief Financial Officer in November 2003.

Ms. Brown opened her talk with a video on the new initiatives for NASA's mission, including robot exploration devices and manned Moon bases. She made the central part of her talk a dialogue with the audience, which was eager to hear her describe the challenges and rewards of her past year as CFO. Under her leadership, NASA integrated 10 different financial systems into one agency-wide system. NASA's new financial system was designed to optimize resources for the new mission and to support the upgrade of policies and procedures under NASA's improvement plan. The CFO office was also involved with providing cost analysis information when program changes were discussed.

The first step of the systems conversion was implementing the core financial module. This effort was done in one year, with the centralized financial management system replacing 10 different systems, each with its own unique data conversion effort. Data cleanup was done prior to the conversion, but continued after the conversion as well. The level of detail in the old systems often wasn't sufficient for the new system and required considerable research and rework. Although NASA had received a clean opinion on its financial statements in FY 2002, bringing up the new system resulted in an audit disclaimer in FY2003.

Ms. Brown said she recognizes that it takes two to three years to stabilize a new system and decommission the old systems. She said that one key element in a systems conversion is getting staff comfortable with the change and retraining personnel to move away from transactions processing to data analysis. This conversion was a lot of work for everyone involved. As staff retired or got tired and departed, her office had to add new personnel to take up the slack.

The systems integrator is a key to a conversion success. The COTS package (commercial off-the shelf software) had to be substantially modified to handle federal accounting requirements and Congressional and OMB requirements. The new system also contained a cost accounting module, which will require training managers in managerial cost accounting.

NASA's prior two attempts to implement a new financial system failed. In these previous efforts, NASA tried to migrate all 10 centers or systems at the same time. A difference with this effort was that the conversion was made in three stages, which were three months apart. The integrator was key to this. One suggestion Ms. Brown made to others planning systems change is to hire a change management specialist to help employees deal with the change and adapt to the new system, procedures, and work.

A non-systems question inspired by the video was whether the public could make donations to help fund NASA's mission. Ms. Brown said that Congress has passed legislation to allow public donations to NASA, but not if the donation was made for a specific program.

The audience appreciated Ms. Brown's honest and compelling story about the transformation being made in NASA's financial management and hearing not only about the successes they enjoyed but also the challenges they had to address.





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# Washington DC Chapter AGA Board Meeting Minutes from Tuesday May 11th, 2004

Ten Members of the board participated. The following topics were discussed:

- *Meetings*
  - a. We have completed the meetings for this program year.
- *Volunteers are needed for the PDC in June, here in Washington DC.*
  - a. Contact Tonya Allan-Shaw if you want to volunteer. Still looking for volunteers for Saturday, Sunday, Tuesday's President's Reception, and Wednesday through Thursday.
  - b. Volunteer Meeting is at 9 am on April 24th at AGA National HQ in Alexandria.
  - c. Chapter leadership should plan to attend the National Board of Directors meeting on Sunday June 27th (Part of PDC).
- *Community Service Activities:*
  - a. There will be a bike race coming up as Community Service for the American Lung Association in June. It's a 40-mile ride, Salisbury to Assateague. There is a \$30 entry fee plus \$80 in pledges. The 2-day event will include an overnight stay, breakfast, and dinner. If you are interested, contact Eva Williams.
- *Member Services:*
  - a. Wolf Trap event Sunday May 23rd, 8 pm, President's Own Marching Band. There is no charge for this concert. Meet at 6:30 for 7 pm open gates. Fireworks at 9 pm.
  - b. The Chapter will be attending the Prince William Cannons baseball game on June 5th.
  - c. The golf tournament with ASMC will be at Andrew's AFB on Tuesday June 15th.
- *Early Careers (Chris McGrath)*
  - a. Happy Hour Scheduled for Capitol City Brewing Company (Union Station) on Thursday 20 May from 5-7 pm.
- *Regional Vice President Comments (Pat Wensel)*
  - a. There will be regional chapter officer workshop Saturday, May 15th. Need as many chapter officers as possible to attend at Embassy Suites in Crystal City.
- Are you interested in serving on the Washington Chapter Board for the 2004-2005 Program Year? If so please contact President Elect Karen Alderman at [karen.alderman@gsa.gov](mailto:karen.alderman@gsa.gov).

The next Director's Meeting will be held at JFMIP on June 8, 2004.

Anyone who wants more information concerning items discussed at the Board meeting please contact Dan Christovich at [dchristovich@comdt.uscg.mil](mailto:dchristovich@comdt.uscg.mil) or (202) 267-1257.

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## AGA Annual National Board of Director's (NBD) Meeting Sunday, June 27, 2004 from 9 to 11 a.m.

Everyone is welcome - NBD members especially encouraged to attend! The NBD consists of: NEC, RVPs, RVPs-Elect (ex officio), Immediate Past RVPs (ex officio), Chapter Presidents (student chapter presidents are ex officio), Past National Presidents (immediate past five with vote, remaining are ex officio), Past National Treasurers (immediate past five with vote, remaining are ex officio) Note: If the RVP cannot attend the NBD meeting, the RVP-Elect can officially take his/her place. In the absence of both, the Immediate Past RVP can officially take his/her place. Likewise, if a Chapter President cannot attend the NBD meeting, the Chapter President-Elect can officially take his/her place. (And if the Chapter President-Elect is unable to attend, the Chapter President may designate in writing an official chapter delegate.) Contact Lisa Thatcher at [lthatcher@agacgfm.org](mailto:lthatcher@agacgfm.org) with any questions.

# DC AGA Chapter Survey Results: Shaping the 2004-2005 Agenda

In February and March of 2004, the D.C. Chapter of AGA conducted a survey of members to obtain feedback so that Chapter leadership could target our local activities to better serve your needs and interests. We also sought your suggestions on how to better connect with our members, improve our monthly meetings and mini-professional development offerings, enhance professional development, and enhance community services efforts.

**Who Responded?** About 160 members answered the survey—about 11 percent of our members. Fifty-five percent of respondents were from civilian executive branch agencies, 9 percent from Department of Defense, and 10 percent from the GAO or IG organizations. The remaining twenty five percent were from private sector or retired. Over half had worked in or served the government sector for over 20 years and an additional third had worked 10 to 20 years. The majority belonged to other professional associations in addition to AGA. The occupations listed by respondents included financial management (28 percent); accounting (24 percent), auditing (19 percent) consulting (10 percent), and systems (7 percent). Less than 2 percent of respondents listed budgeting as their primary occupation. Three fourths of the respondents held CGFM certification; 42 percent were CPAs. Eighty percent of respondents indicated that they required 80 hours of continuing professional education in order to maintain a professional certification. About 45 percent of respondents indicated that all CPE hours were paid for by their employer, and additional 47 percent indicated that CPE hours were partly paid by employers.

Compared to demographics for the approximately 1500 DC Chapter members, holders of CGFM certificates, federal employees, and long-term members of AGA were more likely to have responded to the survey.

**What DC Chapter Activities are most Important to Respondents?** The most important purposes of the DC Chapter listed by respondents was networking and professional relationships, continuing professional education, and communication and information. (Figure 1).

**Figure 1**

*What purposes of the DC Chapter are the most important to you?*

Continuing Professional Education	76 %
Networking/Professional Relationships	81 %
Recognition/Awards	5 %
Community Service	8 %
Social Events	9 %
Communication and Information	50 %
Early Career Activities	3 %

The most important topics identified for meetings and seminars included accounting and financial reporting (65 percent), financial management system issues (62 percent), Best practices/benchmarking (52 percent), and strategic direction and emerging trends (50 percent).

While respondents had clear ideas regarding topics of interest for meetings and seminars, **less than half had attended a DC chapter meeting or seminar last year.** The two most important factors that would increase willingness or ability to attend DC chapter meetings was agency support (42 percent indicated with was very important) and more advanced notice (38 percent indicated that this was very important). Holding seminars at lunch time was cited as the time that they would most likely attend, as opposed to breakfast or dinner seminars. Over half of respondents indicated that they would be interested in jointly sponsored seminars, citing the Northern Virginia Chapter as the likely partner.

**Community Service.** While less than one in ten respondents indicated that community service was the primary purpose for participating in the DC chapter, almost half of respondents indicated an interest in one or more community service activities. The AGA DC Chapter website was identified as a key communication channel to learn about community service opportunities, followed by the DC chapter email list serve. Thus it appears that communications will be the key to tapping a latent interest in contributing to the community.

**Communications.** The survey asked questions about how well members are informed about chapter activities using the DC chapter website, email, the DC Connection newsletter, and colleagues. In no case did the majority of respondents strongly agree that they were fully informed about chapter activities through any source, however, the strongest source was email, followed by the Newsletter, and the DC Chapter website. Over one third of respondents were unaware of the annual conference devoted to financial management systems, accounting and auditing issues.

**Conclusions.** The survey responses were informative both about who responded, what was said, and specific comments that were provided separately. Regarding who responded, it clear that long time federal civil servants were more likely to engage than recent hires and AGA members who work in the private sector. Outreach to the young and to the blended work force presented opportunities to build our community. Respondents are interested in meetings and seminars, but would like more advance notice and more support from their agencies. Also they want to be educated at LUNCH. These responses underscored the need to engage agency leadership to support employee participation in professional association as a cost effective means to gain competencies and be better informed. Communication strategies can improve. Members now rely on email and the website. However, not all members know that reliance on mail has been eliminated as an economy move. Email lists need to be maintained and improved. There is an untapped interest in community service that could be engaged through organized communication.

# Notes from the April 21, 2004 AGA Awards Dinner

*Speaker: Sallyanne Harper CFO office of GAO*

- Governmental accounting is extremely important. "The concept of accountability for public resources is key in our nation's governing processes."
- Auditor credibility has been damaged in the view of major stakeholders, including Congress. There are unprecedented challenges in the accounting profession, but we can restore public trust. Scandals and bankruptcies we have seen over the past few years would have been unimaginable earlier.
- In the public sector, we also have problems, such as long-term trade imbalance and increasing budget deficits.
- What the Sarbanes-Oxley Act does for private sector auditing may foreshadow what will be for the public sector. Its four major points are:
  1. Oversight of auditing profession--new entity, Public Company Accounting Oversight Board, responsible for audit standards and registering and inspecting companies.
  2. Auditor independence--limits on non-audit services, requires rotation of audit firms and partners, and distances employment between company being audited and the auditors.
  3. Corporate responsibility--audit committee independence, CEO and CFO certification of financial statements, makes it a crime to mislead auditors.
  4. Enhanced financial disclosure--adequate internal control structure, internal management assessment of internal controls over financial reporting.
- The Comptroller General declared that this Act reinforces proper accounting practices, so the scandals will not be allowed to happen in the public sector. Immediate implications include a push for competent, accurate, fair accounting reporting. Be extremely familiar with GAO's Yellow Book and use their standards. We should not try to comply with just the minimal standards--use best practices instead. Guard and protect your auditor's independence and objectivity. Be mindful of financial reporting pressures, consider their impact, choose substance over form, encourage good governance and issues should be reported to an audit committee. Auditors not currently required to render an opinion on internal controls as per the Sarbanes-Oxley Act. Stay involved in proposed changes to accounting standards and requirements and comment on drafts.
- There will be additional cost and effort to better fulfill the duty to be accountable to the public. Accountability profession must do their best, or 'accountability' will be only a word. "Go forth and do good"

— Simcha Kuritzky



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*Thanks in advance for helping AGA provide charitable contributions and scholarships.*

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## AGA Announces 2004 National Award Recipients

AGA is pleased to announce the recipients of the 2004 National Awards. The awards will be presented during the Professional Development Conference & Exposition, June 27-30, in Washington, D.C. The recipients are:

**Robert W. King Memorial Award:** Richard V. Norment, CGFM, CIA, Assistant to the Comptroller for County Audit, Comptroller of the Treasury, State of Tennessee

**Einhorn-Gary Award:** Francis E. "Gene" Reardon, CGFM, CPA, CIA, Deputy Inspector General for Auditing, Office of Inspector General, U.S. Department of Defense

**Frank Greathouse Distinguished Leadership Award:** R. Schyler Leshner Jr., CGFM, Deputy Chief Financial Officer and Director of the Office of Financial Management, U.S. Department of the Interior

**Achievement of the Year Award:** Terry L. Bowie Sr., CGFM, CPA, Director, Financial Management Operations, Office of the Chief Financial Officer, U.S. Department of Education

**Educator Award:** Robert H. Werner, Ph.D., CGFM, CPA, Director, Master's Program in Governmental Accounting, Rutgers University

**Cornelius E. Tierney/Ernst & Young Award:** John H. Engstrom, Ph.D., CGFM, CPA, KPMG Professor of Accountancy, Department of Accountancy, Northern Illinois University

**Author Award:** Marianne Jennings, JD, Professor of Legal and Ethical Studies at the W.P. Carey School of Business, Arizona State University, for her article "Preventing Organizational Ethical Collapse," in the Spring 2004 issue of the Journal of Government Financial Management

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### Chapter Education Awards

**Group A:** New York Capital Chapter, Raymond H. Harris, CGFM, CFE, Vice President for Programs and Education

**Group B:** Richmond Chapter, Melinda M. Barbish, CGFM, CPA, Audit Manager, Division of Unclaimed Property, Treasury Department, Commonwealth of Virginia

**Group C:** Portland Chapter, Katrina Price Moore, CPA, Education Director

**Group D:** Silicon Valley Chapter, Martin J. Krone, CGFM, President/Education Director; City Auditor, City of San Jose

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### Chapter Service Awards

**Group A:** Jackson W. Hufnagle, CGFM, Assistant Director, Financial Management and Assurance, U.S. General Accounting Office; and Roger C. Mazula, CGFM, CIA, CFE, Vice President for Communications, NY Capital Chapter; Office of the State Comptroller, State of New York

**Group B:** Nauri D. Ahmed, CGFM, CFE, CPA, Financial Management Analyst, Department of Mental Health, Mental Retardation and Substance Abuse Services, Commonwealth of Virginia

**Group C:** Sandra A. Lawrence, CGFM, Senior Auditor, Defense Contract Audit Agency

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### Chapter Community Service Awards

**Group A:** Northern Virginia Chapter, James B. Davis Jr., Community Service Director; U.S. Army Audit Agency

**Group B:** Baton Rouge Chapter, Pam Berthelot, Department of Environmental Quality, State of Louisiana

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- \* **Phil Bryant, State Auditor, State of Mississippi**
- \* **David S.C. Chu, Undersecretary of Defense for Personnel Readiness, U.S. Department of Defense**
- \* **Douglas R. Carmichael, Chief Auditor and Director of Professional Standards, Public Company Accounting Oversight Board**
- \* **John Hamre, President and CEO, Center for Strategic and International Studies (CSIS)**
- \* **Gwendolyn Sykes-Brown, Chief Financial Officer, National Aeronautics and Space Administration**
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## Training Opportunity - June 9th 2004, "What Keeps a CFO Up At Night?"

AGA, in conjunction with NASACT, is pleased to announce the next audio conference scheduled for 2 – 3:50 p.m. EDST. Please join Sam Mok, CGFM, chief financial officer of the U.S. Department of Labor for a stimulating 100-minute discussion. The CFO is a key provider of the strategic outlook of any organization. The focus for financial management in the future will be performance information and customer support. Participants can expect a lively discussion on:

- ~ The Chief Financial Officers Act vis-à-vis the Clinger-Cohen Act, etc.
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- ~ How to motivate non-performers, how to restrain "loose cannons," how to neutralize "arsonists," how to build and keep momentum, how to recruit and keep good people.
- ~ How to effect a lasting legacy.

Cost is \$249 per phone line (toll-free to caller, unlimited attendance), if you register on or before June 4, and \$299 afterward. To register visit: [www.agacgfm.org/education/audioconferences/CFO0604.aspx](http://www.agacgfm.org/education/audioconferences/CFO0604.aspx)

## FASAB Releases Research Report on Capital and Operating Leases

The Federal Accounting Standards Advisory Board (FASAB) has released its research report on capital and operating leases, which will serve as a reference for future board discussions. The objectives of the research were to produce a summary that allows FASAB staff and the board to familiarize themselves with lease accounting under various standard-setters and to determine if

new uses of leases by federal entities create different and/or more urgent needs for FASAB guidance. The research report is for discussion purposes; it is not intended to reflect FASAB's authoritative views.

Read the report at [www.fasab.gov/reports.html](http://www.fasab.gov/reports.html)



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## AGA To Publish Book on Internal Controls

*A Primer on Internal Controls and Auditing: Crucial to Government and the Economy*

By: Wanda A. Wallace, Ph.D., CPA, CMA, CIA  
John N. Dalton Professor of Business Administration, College of William and Mary

Internal control has never been optional, and now an easy-to-read resource directed to a wide audience is available to understand both what is meant by "internal control" and how an "audit" is conducted.

As an educational initiative, the AGA has published this book for boards of directors, council members, managers, auditees, employees and the broader community. Here is an easy read that

is well worth the investment next time you find yourself on an airplane, on a commuter train or simply in an easy chair for an hour or two.

*A Primer on Internal Controls and Auditing: Crucial to Government and the Economy* by internationally known, award-winning author Wanda A. Wallace, Ph.D., CPA, CMA, CIA, is a "quick read" and covers the rudiments of internal control and auditing in a friendly and enjoyable fashion, capable of building foundational knowledge among those you work with and to whom you provide services.

## Federal Accounting Corner by Simcha Kuritzky, CGFM, CPA

*Appropriation Corrections in the Journal and on the SF-224 (Part I)*

With continuing resolutions lasting longer and longer, many agencies get taken by surprise when the appropriation finally gets passed. Not only do the amounts vary, but the funding structure itself may differ from what they had anticipated and, more important, loaded into their financial system. What can you do if you thought your funding would come in on a single-year fund but Congress moved it to a multi-year fund? I will give two possible

scenarios. It is important to note, though, that making the change in your agency's accounting system may not be sufficient; if other agencies disburse on your behalf you will also need to make special postings to fix Treasury's records on their cash balance statement (TFS-6653).

Read the entire article at [www.agacgfm.org/publications/agatoday/articles/050304.aspx](http://www.agacgfm.org/publications/agatoday/articles/050304.aspx)



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## Three Federal Programs Tapped as Finalists for Innovation Awards

Federal programs addressing health care research, opportunities for small manufacturers and problems in the juvenile justice system are among the finalists for this year's prestigious Innovations in American Government awards. The three federal efforts join 12 programs operated by state and local agencies as finalists in the awards program of the Ash Institute for Democratic Governance at Harvard University's John F. Kennedy School of Government. The program is administered by the Council for Excellence in Government. The federal finalists are:

- ~ [ClinicalTrials.gov](#), administered by the U.S. Department of Health and Human Services, provides straightforward information about clinical research involving human volunteers. "Clinicaltrials.gov helps patients and families face very difficult health situations armed with the very best information," said Patricia McGinnis, president of the Council for Excellence in Government.
- ~ [The Manufacturing Extension Partnership](#), administered by the U.S. Department of Commerce, is designed to help small manufacturers compete with their larger counterparts. Under the program, Commerce has set up centers nationwide—employing 2,000 people—to provide technical assistance and support services to small manufacturers.
- ~ [Performance Standards for Juvenile Corrections](#), administered by the U.S. Department of Justice, collects and analyzes data from juvenile facilities on injuries, suicidal behavior, assaults, time in isolation and academic performance.

Each of the 15 finalists is now in competition for one of five awards; each award carries a \$100,000 prize. The finalists were chosen from among nearly 1,000 applicants. The winners will be named in July at the annual Excellence in Government conference. Government Executive sponsors the conference.

Read more at [www.govexec.com/dailyfed/0404/042804ts1.htm](http://www.govexec.com/dailyfed/0404/042804ts1.htm)

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## Overtime Rules Likely to Have Little Effect on Federal Work Force

Proposed new rules from the U.S. Department of Labor on overtime policy likely will have relatively little effect on the federal work force, where overtime policy is set by a separate set of rules and, in some cases, by statute. The Labor rules, which will go into effect in four months unless blocked by Congress, are aimed at the private sector and guarantee overtime eligibility for certain lower-income workers while changing definitions of who is ineligible for overtime pay for various reasons. The final version adds some protections not in the earlier version for certain categories of employees, including firefighters and law

enforcement officers. In the federal sector, changing overtime policy for those employees would have required legislation in any event. The main effect in the federal workplace may be to make certain higher level wage grade supervisors ineligible for overtime under the Fair Labor Standards Act. However, those employees could remain eligible for overtime under separate law.

—*FedWeek*. Read more at [www.fedweek.com](http://www.fedweek.com)

## JFMIP Publishes the Framework for Federal Financial Management Systems

The JFMIP has announced that the new *Framework for Federal Financial Management Systems* is available for review at [www.jfmip.gov](http://www.jfmip.gov). The new framework document is the result of a collaborative effort between the CIO and CFO communities, and representatives from 17 federal agencies. The framework is the foundation document for the Federal Financial Management System Requirements series published by JFMIP. Together with all JFMIP requirements documents, the framework illustrates an integrated financial management infrastructure that financial applications must be designed to support. Integrating financial management data and applications across the enterprise stands

out as the single biggest challenge to improving financial management in the government, and many initiatives are under way to address how to better integrate financial systems. The new framework for the first time describes the financial environment based on the vision for federal financial management systems as "a single integrated financial infrastructure with standardized applications and services that are supported by integrated financial management data and information." The document will provide a valuable basis and insight for future financial system integration efforts at both the agency and government-wide levels.



# Innovation

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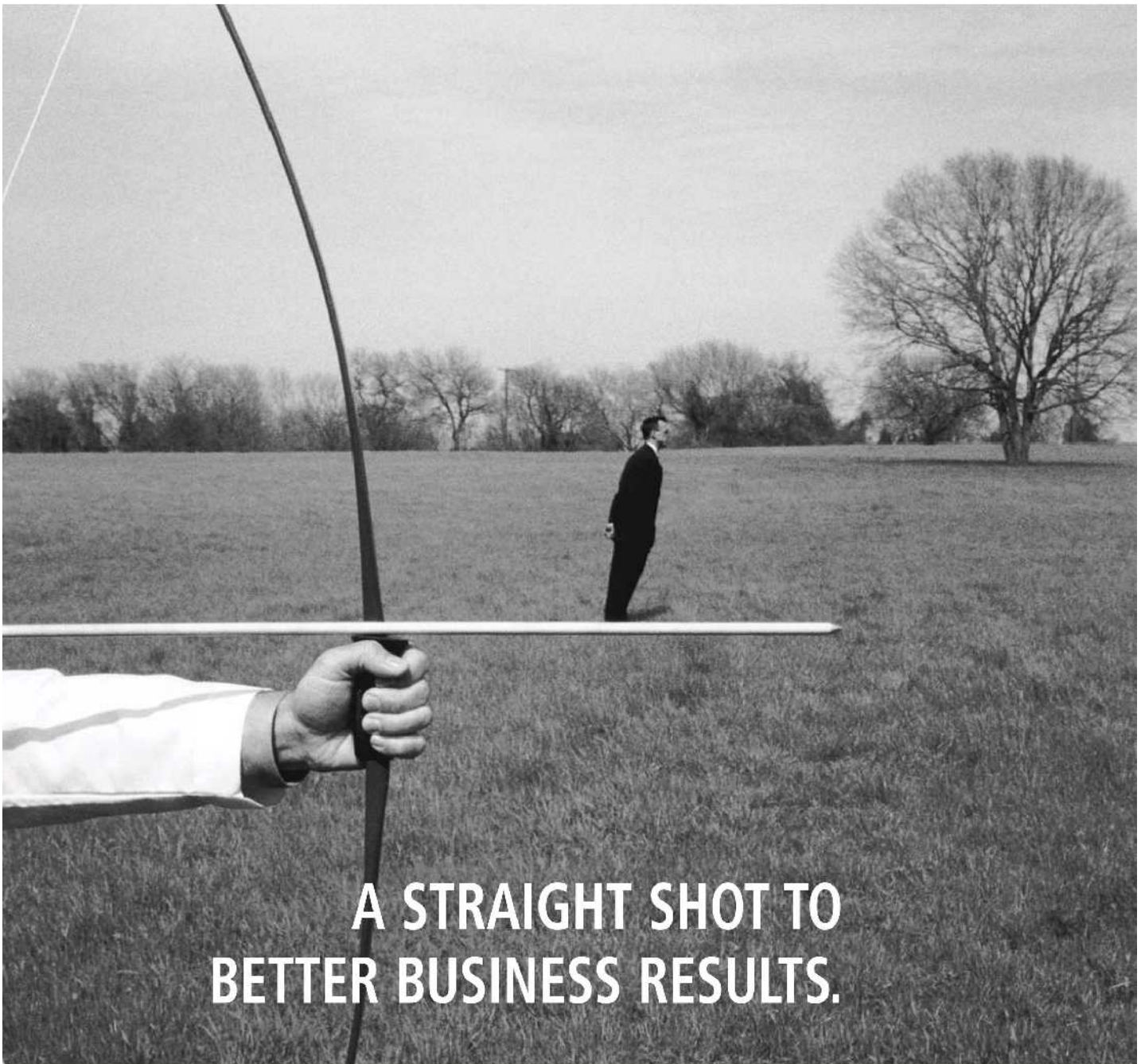
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