



The Washington Connection



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Up Next!

- October 2, 5pm-6pm**, CGFM Exam Updates Information Session, at BDO, McLean, VA
- October 5, 8:30am-12pm**, Community Service Event-St. Jude Walk-Run, at National Harbor.
- October 16, 11:30am-1pm**, AGA DC Monthly Luncheon. Guest Speaker: Gene Dodaro, Comptroller General, GAO, at Clyde's Gallery Place, DC. Register [in-person](#) or [virtually](#).
- October 16, 2pm-3:50pm**, AGA DC Chapter Webinar on "Uniform Guidance and Grant Accounting." See registration instructions [here](#).
- October 23, 6pm-8pm**, AGA DC Chapter Sponsor Committee Happy Hour at SPIN Washington DC. **For Sponsors only.* [Register here](#).
- November 13, 2pm-3:50pm**, AGA DC Chapter Webinar on "Ethics." See registration instructions [here](#).
- November 2024**, AGA DC Monthly Luncheon. None scheduled.
- December 4, 11:30am-1pm**, AGA DC Monthly Luncheon: Guest Speaker: Mike Wetklow, Chief Risk Officer, IRS, at Clyde's Gallery Place, DC.
- December 4, 2pm-3:50pm**, AGA DC Chapter Webinar on "Internal Control." See Registration instructions [here](#).

THANK YOU!

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

- June 20, AGA DC VIP Luncheon
- June 22, AGA DC Annual Gala
- July 14-17, AGA Professional Development Training (PDT)
- July 26, AGA & SDFM (ASMC) Annual Golf Tournament
- September 21, AGA Multi-Chapter (DMV) Network Lunch

President's Message

Dear AGA DC Chapter Volunteers, Sponsors, and Members,

Welcome to the new program year! I've been an AGA member since 2007, so it only took 17 years, but I made it to Chapter President! It truly is an honor to serve as the President of the AGA Washington DC Chapter and I am looking forward to exciting and educational activities for all our members this year.

We will kick off the year with our annual multi-chapter networking event where DC members will get a chance to connect with Northern Virginia and Montgomery/Prince George's County Chapters. We have already locked in wonderful speakers for our monthly luncheons, found a venue for our year-end Gala, enrolled in the webinar series from AGA National, and planned a host of training, community service and networking events for the 2024-2025 year.

This year's Plan focuses on providing the best possible services, training, and networking opportunities to our members. We will continue to standardize processes and documentation to better support succession planning and continuity of operations – something that is always a challenge due to chapter leaders changing every year, which is by design. Specifically, we have adopted the following strategic goals for the Chapter program year:

- Continue to focus on chapter financial controls, performance metrics, transparency, documentation, process standardization and accountability.
- Increase in-person participation in chapter activities while continuing to offer virtual access to events.
- Increase membership and retention by offering best-in-class events, training, volunteer and professional growth opportunities.
- Continue to support diversity, equity, inclusion, and accessibility efforts.
- Inject innovation into our luncheon, training, CGFM, Young Professionals and Community Service programs to increase participation and value delivered to our members.



- Increase collaboration with government leadership in efforts such as promoting government financial management careers and the value of AGA membership.

In terms of chapter leadership, we are excited to welcome Crystal Wolf as our President Elect, Mona Amatie as our Treasurer, and Wendy Allen as our Treasurer Elect. Wendy Morris will continue in her role of Secretary. Thanks again to our immediate Past President, Lal Harter, and Past Treasurer Shawn Syed for their leadership in 2023-2024. I learned a lot from them and they made the transition smooth. I'm looking forward to this new year and to hopefully meeting many of you at our wonderful events!

Sincerely,

Paul Marshall, President
AGA Washington DC Chapter

Vision

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

Mission Statement

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

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

🎃 Welcome, DC Chapter Members! 🎃

As the leaves turn and the nights grow longer, I welcome you to a spine-tingling new program year! This year will be a hauntingly exciting journey filled with opportunities that will make your professional skills sharper than a vampire's fangs.

As your spooky NCC representative, it is my responsibility to advise the National Governing Board (NGB) on strategic issues when they seek advice and to facilitate connections between the DC Chapter and AGA National. For more information on the AGA National governance structure, the NGB or NCC, please visit: [AGA Leadership](#)

It is also my responsibility to share with you the tools, resources, valuable information, or opportunities that AGA National shares with me at our quarterly NCC meetings. To that wicked end, I wanted to share with you the following:

- **Marketing Materials** - There are free AGA marketing materials available to you here: [My AGA](#). They included AGA branded give-aways, published materials, college/university flyers, etc.
- **Chapter Handbooks and Guides** - Valuable reference material for Treasurer, Webmaster, ACE Reporting, etc. Where can you find it? From here: [AGA Homepage](#), go to "My AGA," then "Chapter Resources," and finally "Administration & Operations."
- **National Collegiate Leadership Scholarship** - For Junior or Senior college students majoring in accounting, business, finance or an IT related field. Application window is October 21 - December 1. For more information, visit: [About AGA](#)
- **Datathon** - Another opportunity for students, this virtual program is for teams of 2 - 5 students who will use government agency data to solve real world problems. Application window opens January 13, 2025. See [2025 AGA Datathon](#).
- **Early Career Training Scholarships for the PDT** - If you are a government employee or contractor under the age of 35 (as of July 14, 2025), this is your chance to get complimentary registration and hotel for the 2024 PDT in Nashville! Application window is March 3 - April 13, 2025. For eligibility and more information please go to: [About AGA Early Career Training Scholarship](#).



In closing, as we embrace the crisp autumn air and the vibrant colors of the autumn, I look forward to fostering strong, fruitful relationships with members, committee Directors, and AGA National alike. If I may be of assistance, I would take ghoulish delight in helping, so don't hesitate to call on your NCC rep.

Who you gonna call?

AGA DC Training and Events

AGA DC Upcoming Events

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

Wednesday, October 16, 2024: Gene Dodaro, Comptroller General, GAO. Register [in-person](#) or [virtually](#).

Wednesday, December 4, 2024: Mike Wetklow, Chief Risk Officer, IRS

Wednesday, January 15, 2025: Karin Dasuki, Director, Office of Finance and Accounting, Department of Energy

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

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

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

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

You can earn 1 CPE from each monthly luncheon.

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

AGA National Training Events

2024 Technology & Transformation Summit (TTS): Nov 6, 2024 (6 CPEs; DC or virtual) | More information [here](#).

2025 National Leadership Training (NLT): Feb 19-20, 2025 (14 CPEs; DC or virtual) | More information [here](#).

2025 Performance Counts Summit: May 13, 2025 (4 CPEs; Virtual) | More information [here](#).

2025 Professional Development Training (PDT): Jul 27-30 (24 CPEs; Nashville or virtual) | More information [here](#).

**** SAVE THE DATE ****



AGA DC Sponsored - National Webinar Training Schedule

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

Dates & Topics:

- **October 16, 2024** — Uniform Guidance and Grant Accounting
- **November 13, 2024** — Ethics
- **December 4, 2024** — Internal Control
- **January 15, 2025** — Artificial intelligence (AI)
- **February 5, 2025** — GASB Update
- **March 5, 2025** — Enterprise Risk Management
- **March 26, 2025** — Robotic Process Automation (RPA)/Machine Learning (ML)
- **April 9, 2025** — Ethics
- **April 23, 2025** — Fraud/Data Analytics
- **May 7, 2025** — Risk Management
- **May 28, 2025** — Leadership

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

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

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

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

**** SAVE THE DATE ****



Award for Excellence in Fraud Prevention

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



Eligibility

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

Award Presentation

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

Nomination Procedures

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

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

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

Selection Criteria

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

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

The Joint Financial Management Improvement Program (JFMIP)

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



AGA Young Professionals

Young Professionals Spotlight - Christel Pico

Little did Christel Pico realize the many doors that would open before her when she joined the Young Professionals committee in AGA's Guam chapter.



Back in 2022 Pico (née Espiritu) was a senior majoring in accounting at the University of Guam – 12 time zones away from Washington, DC. An accounting advisor recommended she apply to become an AGA National Collegiate Leadership Scholar – which she did -- and won! As part of the award, she flew to Washington to participate with other student scholars in the National Leadership Training conference (NLT).

These successful scholars are paired alongside senior leaders in the field who mentor them throughout their NLT experience. Christel was mentored by Andrew Lewis, the partner-in-charge of KPMG's Federal Audit practice, who noticed her accounting potential and recruited her to join KPMG as an auditor. Andrew remarked, "Every year, the AGA's National Collegiate Leadership Scholars program attracts some incredible students from colleges and universities across the country, and is a great pathway for early career professionals to learn more about the government financial management profession. It was an honor to connect with Christel before, during, and after the conference, and I'm proud to be part of her career."

Following the event, Christel wrote about her experience in the Guam chapter monthly newsletter and encouraged other young professionals to pursue opportunities available to AGA members. Fast forward two years - now Christel works here in Washington with KPMG, and joined our DC chapter's Young Professionals committee to network and become more involved with activities here in our nation's capital. Christel shared *"AGA has unlocked so many amazing opportunities for me, both as an undergrad student and now as a young professional. I'm thrilled to pay it forward and inspire more young professionals to discover the incredible benefits of being part of AGA!"*

Welcome Christel and all our young and aspiring members!

College Visits Are Back!

Although waylaid by the pandemic, we are excited to announce college visits to local universities by the Young Professionals committee are back on the agenda again. As the number of young professionals who join the ranks of the public sector continues to decline, the chapter will collaborate with students across multiple disciplines to encourage them to consider a career in government. While students still attend class full-time, these aspiring, soon-to-graduate professionals qualify for free membership in AGA. Join us! Chapter members will meet with students to share details on the many unique and fascinating opportunities only available with government at the federal, state and local level along with best practices to pursue a job with a government agency or one of the supporting contract firms.



This November the chapter will meet the members of Beta Alpha Psi at Salisbury University on the Eastern Shore to share experiences and opportunities in public sector accounting. Joining Crystal Wolf, the DC chapter President-elect, and Claire Chen, Strategy Committee member, respectively, will be Mark Reger. Mark brings a long career in state government before he transitioned to federal government and retired as OMB's Acting Controller. Thanks Mark for continuing to share your experiences, and to support AGA and the accounting profession!

For current students and early careerists, please let us know if there might be an opportunity to collaborate with your university. We're interested in expanding these visits to cover other fields such as policy, technology and data science. Contact us at: youngprofessionals@agadc.org

We look forward to hearing from you!

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CGFM Committee Updates

The AGA DC chapter would like to announce that there have been 2024 CGFM Examination updates starting on September 1, 2024 that will impact our members thinking of taking the exams or currently in-between taking the exams. A Job Analysis Study was conducted by AGA National in 2023, and prompted the following CGFM examination updates that are now in effect (the following is an excerpt directly from AGA National located [here](#)):

1. New 2024 editions of the three CGFM study guides are **now available!**
2. Starting on September 1, the CGFM examinations will follow the updated **content outlines**.
3. From **September 1 to October 31**, CGFM examinations will be in the initial (beta) period. The updated examinations will be administered through Pearson VUE. However, the scores will not be reported to the exam-takers until December 2024. CGFM examinations taken during this beta period will be offered at a discounted rate of \$105 per exam. Candidates who sign up for beta testing in September or October will receive FREE access to the 2024 **online study guide(s)**. Access to the 2024 online edition(s) will be issued automatically, on a weekly basis, starting August 1.
4. There will be no CGFM examinations administered in November or December 2024.
5. Starting on January 1, 2025, the updated CGFM examinations will resume (with immediate score reporting).

AGA-DC is proud to support our chapter members in obtaining the CGFM designation. We can pay up to \$135 per chapter member per program year to help offset the costs of training modules, study guides, practice exams, and/or exam fees. This subsidy is not available if your costs were already reimbursed by your employer. Rebates are available on a first come, first served basis until funds for the program year are exhausted.

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



Congratulations to the following new CGFMs who obtained their CGFMs from April 2024 to July 2024!

Robert L. Carter, II, CGFM
Stanford B. Carter, Jr., CGFM
Terri M. Dawson, CGFM
Kristian A. Dixon, CGFM
Serena Chiquita Jett-Williams, CGFM
Nikola Lojanica, CGFM
Madison C. Marchbank, CGFM
Edoghogho Dominica Omoruyi, CGFM
Elisa Reyes Spack, CGFM

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

Already Have Your CGFM?

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



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AGA DC Chapter DEIA Committee Update

Our AGA DC Chapter's Diversity, Equity, Inclusion, and Accessibility (DEIA) Committee is a great way to further champion the DEIA initiative, expand your professional network, and give back to our chapter! Whether you're working for the government, private sector, academia, or being a student, we welcome you to join our Committee!

Our Committee welcomes new members to bring their innovative ideas and experience to help our Committee grow as we engage with AGA DC Chapter members and the public to help bring awareness to DEIA initiatives. The table below highlights some of the diversity awareness designations we are considering for recognition in Fall 2024.

Month	Diversity Awareness
September	<ul style="list-style-type: none">Hispanic Heritage Month (9/15 – 10/15)
October	<ul style="list-style-type: none">LGBTQ+ History MonthNational Disability Employment AwarenessNational Depression and Mental Health Screening Month
November	<ul style="list-style-type: none">Native American Heritage MonthVeterans Day
December	<ul style="list-style-type: none">Universal Human Rights Month

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Inside the Black Box

by Simcha Kuritzky, CGFM, CPA

Upward Adjustments Causing Abnormal Balances in the Spending Chain

Background

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

Spending Adjustments

Back before 1990, one USSGL account was used for obligations (4800) and another for expenditures (4900), and that was that. Then Treasury wanted to track cash through the budgetary accounts, replacing the last zero with one for unpaid and two for paid; and OMB wanted to separate out deobligations and refunds from increases in spending from prior-year obligations, which changed the penultimate zero to seven for downward adjustments and eight for upward. So now this same activity is tracked through twelve USSGL accounts (plus an additional three for transfers, but I'm going to ignore those for this discussion).

Let us now look at an example where an upward contract modification has taken place for an order in an expired fund which is a legitimate adjustment to that fund (i.e., it is not necessary to cover the increase with current-year funding). The SGL has set up an entry for that purpose as follows:

D114 Prior-year unpaid undelivered orders upward adjustment not a prior-period adjustment

Debit 465000	Allotments - Expired Authority
Credit 488100	Upward Adjustments of Prior-Year Undelivered Orders - Obligations, Unpaid

So the balance of the obligation now sits in 488100, but it will be liquidated with this entry:

B402 Delivery of goods or services which accrues a liability

B134 Debit 480100	Undelivered Orders - Obligations, Unpaid
610000	Operating Expenses/Program Costs
310700	Unexpended Appropriations - Used
Credit 490100	Delivered Orders - Obligations, Unpaid
211000	Accounts Payable
570000	Expended Appropriations

This will cause a debit balance in 480100. In an unexpired fund with a lot of activity, this debit balance will be offset by other orders' credit balances, but in an expired fund there may not be much of that, and also, balances are now reported, not only at the Treasury Symbol, but also at the Object Code level. The debit balance is temporary, because annual close will take care of it as follows:

F330 Close upward adjustments to undelivered orders - obligations, unpaid

Debit 488100	Upward Adjustments of Prior-Year Undelivered Orders - Obligations, Unpaid
Credit 480100	Undelivered Orders - Obligations, Unpaid

In order to prevent the 480100 abnormal debit balance, one could change the B402 entry as follows:



Inside the Black Box Cont'd.

New Delivery of goods or services from an upward adjustment which accrues a liability

Debit	488100	Upward Adjustments of Prior-Year Undelivered Orders - Obligations, Unpaid
	610000	Operating Expenses/Program Costs
	310700	Unexpended Appropriations - Used
Credit	498100	Upward Adjustments of Prior-Year Delivered Orders - Obligations, Unpaid
	211000	Accounts Payable
	570000	Expended Appropriations

This would necessitate a similar entry when the funds are disbursed. There actually is such an entry in the USSGL guidance, the only example of transferring adjustments between GL accounts, which has the following (abbreviated) entry:

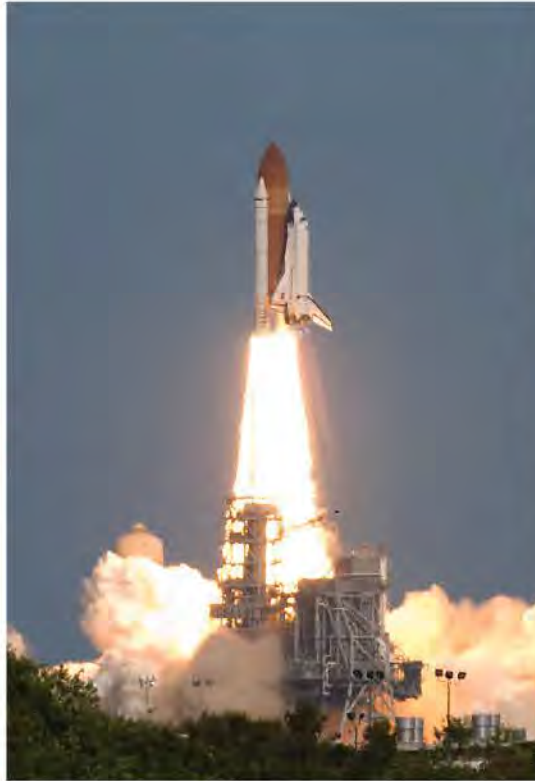
B115 Debit	498100	Upward Adjustments of Prior-Year Delivered Orders - Obligations, Unpaid
B235 Debit	211000	Accounts Payable
	310710	Unexpended Appropriations - Used – Disbursed
	570000	Expended Appropriations - Accrued
Credit	498200	Upward Adjustments of Prior-Year Delivered Orders - Obligations, Paid
	101000	Fund Balance with Treasury
	310700	Unexpended Appropriations - Used – Accrued
	570010	Expended Appropriations - Disbursed

On the one hand, it is not clear why this is the only example, because this situation can occur with 488100 (as shown above) and 488200 as well, which would lead to debit balances in 480100 and 480200. On the other hand, it is not clear why this entry is needed at all, because for FY2024, Treasury added to both the 480100 and 490100 account definitions the line “Although the normal balance for this account is credit, it is acceptable in certain instances for this account to have a debit balance.” The one account where it is needed is 488200 Upward Adjustments of Prior-Year Undelivered Orders - Obligations, Unpaid, because Transaction D122 credits it, but the liquidation Transaction B604 debits 480200, which does not allow debit balances (because it is one of the outlay accounts, and outlays can only spend funds; a negative outlay would have to be reclassified as a positive collection).

Conclusion

The Treasury needs to add an entry to liquidate 488200 by transferring the balance to 498200. The Treasury also should either remove B115 as it is not needed, or add similar optional entries to move 488100 to 498100 and/or 498200 for consistency.

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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Calling All Members to Share Memories for the Chapter's 75th Anniversary Essay

Please help us commemorate the DC Chapter's 75th Anniversary coming up in July 2025 by volunteering to participate in writing a 75th Anniversary Essay AGA-DC from 1990 through 2025, which will form part of our 75th Anniversary Essay.

- The existing essay, covering 1950 through 1990, is posted on the DC Chapter website at: [AGA DC Chapter History 1950-1990](#)
- There's a wealth of information and photos in various PowerPoint slides on the main Chapter History page at: [The First Chapter](#), as well as lots of DC Chapter Newsletters at [AGA DC Chapter Newsletter](#).

Our Chapter would love to hear your ideas and incorporate them into the 75th Anniversary Essay. If you would like to contribute to the 75th Anniversary Essay, please send an email to Historians Alicia Pelikan and Bradley Grams at agadc@agadc.org.

**Check out
Accountability Talks, hosted
by the DC Chapter's very own
Paul Marshall!**

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AGA DC 64th Annual Awards Gala

Our Chapter celebrated another successful program year as more than 150 volunteers, members, sponsors, and guests gathered at the JW Marriott in Washington, DC on the night of June 22, 2024. We held the awards ceremony to recognize our outstanding members and volunteers who contributed much to the success of our financial management profession and chapter, conducted the chapter presidential gavel exchange between outgoing Chapter President **Lal Harter** and new Chapter President **Paul Marshall**, and of course enjoyed dancing with the band **Gotcha Covered**, featuring our very own past Chapter President **Scott Bell**!

During this year's Annual Awards Gala, we recognized and celebrated our DC chapter members who made long-standing and significant contributions to our financial management profession and/or contributed to the success of our DC Chapter in a sustained period of time. Congratulations to all 2024 Founder's and President's Award winners!

Founder's Award

- Government Innovator of the Year Award: **Taka Ariga**
- Advancing Government Accountability Award: **Christy Beck**
- Enhancing the Prestige of the Government Accountability Profession Award: **Wendy Morton-Huddleston**
- The James W. Saylor Chapter Service Award: **Salim Mawani**

President's Award

- **Orinda Basha** (Awards Committee Director)
- **Thomas Chin** (Newsletter Director and Chief Editor)
- **Leigha Kiger** (Webmaster)
- **Monique Llanos** (Newsletter Senior Editor)
- **Lydia Tamblyn (Miller)** (Assistant Communication Director)
- **Annalena Winer** (Annual Training Program Director)



Scan this QR Code for details of each winners' bios!

First-ever William J. Anderson Lifetime Achievement Award

During this year's Annual Awards Gala, DC Chapter posthumously dedicated the Lifetime Achievement Award to **William J. Anderson, Jr.** in recognition of and appreciation for a lifetime of contributions to governmental financial management and the DC Chapter.

Jeff Steinhoff (Past National President), Director of the Awards Selection Committee, and other Awards Selection Committee voting members **Evelyn Brown** (Past National President, Past National Treasurer, and Past DC Chapter President), **Virginia Robinson** (Past National President and Past DC Chapter President), **Pat Wensel** (Past National Treasurer and Past DC Chapter President) made remarks on Bill Anderson's significant contributions to the accountability profession at GAO and AGA as Past National President, Past DC Chapter President, and a Lifetime AGA member.

People who knew Bill admired his unflinching dedication and ability to take charge and make things happen, with the highest integrity and ability to make a difference. Bill was a great person and friend, who is sorely missed by all who were privileged to know him.

AGA DC Annual Awards Gala cont'd.

The DC Chapter is honored to present the first-ever William J. Anderson Lifetime Achievement Award to Bill Anderson, which was accepted on Bill's behalf by Eva Williams, his loving partner of 25 years, who emulated Bill's values and dedication to AGA, including Eva's time as the Past DC Chapter President.

Learn more about Bill's contributions to AGA and the profession here in the [Winter 2024 Edition of the chapter newsletter](#).

This year's Annual Awards Gala was made possible by our wonderful and hard working volunteers. Thank you to all our volunteers from the Annual Awards Gala Committee including **Cherry Ung** (Director), **Izzie Yi** (Assistant Director), **Leslie Phillips** (Volunteer); the Awards Committee including **Orinda Basha** (Director), **Nicole Bailin** and **Alicia Pelikan** (Committee Member); and the Selection Committee including Director **Jeff Steinhoff**, Voting Members **Evelyn Brown**, **Virginia Robinson**, **Pat Wensel**, Senior Advisors **Scott Bell** and **Julia Duquette**!

Special thanks to the band **Gotcha Covered** featuring our very own past Chapter President **Scott Bell** and special guest **Paul Marshall**!

Thank you for coming to the Annual Awards Gala! We hope you had a great time!



William J. Anderson, Jr.



Band Gotcha Covered performed at Gala - with Scott Bell (on keyboard) and Paul Marshall (right)



Mrs. & Mr. Karl Boettcher



Nicole Bailin (left) and Alicia Pelikan



Cherry Ung, Director of Annual Awards Gala Committee



Leigha Kiger (President's Award)

AGA DC Annual Awards Gala cont'd.



Annalena Winer (President's Award)



Thomas Chin (President's Award)



Orinda Basha (President's Award)



Taka Ariga (Government Innovator of the Year Award - Centered)



Christy Beck (Advancing Government Accountability Award)



Wendy Morton-Huddleston (Enhancing the Prestige of the Government Accountability Profession Award)



Eva Williams (Past DC Chapter President - Accepted William J. Anderson Lifetime Achievement Award on Bill's behalf)

AGA DC Annual Awards Gala cont'd.



Salim Mawani (James W. Saylor Chapter Service Award)



Monique Llanos (President's Award)



Lydia Tamblyn (Miller) (President's Award)



From left to right: Virginia Robinson, Evelyn Brown, Jeff Steinhoff, Eva Williams, Pat Wensel, Lal Harter



President Gavel Exchange: Paul Marshall (left) and Lal Harter



President Gavel Exchange: Paul Marshall (left) and Lal Harter



Paul Marshall (DC Chapter President)

AGA DC Annual Awards Gala cont'd.



Group picture at Annual Awards Gala 2024



AGA DC Annual Awards Gala cont'd.



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Program Year 2024-25 Chapter Planning Brunch

We held our annual Chapter Planning Brunch on August 24, 2024 at the Lauriol Plaza restaurant in Washington, DC. Our Chapter President, Paul Marshall, kicked off the Planning Brunch to thank our volunteers and introduced all Chapter Executive Committee (CEC) members in attendance.

Paul Marshall discussed the new program year's chapter strategic objectives, operational plan, and expectations. Each Committee representative then provided their Committee overview and planned activities for the new program year.

Our Chapter Officers and all volunteers in attendance were able to catch up with each other. It was an enjoyable kick-off to the new program year!



Paul Marshall, Chapter President



Lal Harter, Immediate Past Chapter President



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DC Chapter Recognized for Outstanding Operation at 2024 PDT

DC Chapter once again received the Platinum Achievements in Chapter Excellence (ACE) Award! The Platinum level of ACE Award recognizes our Chapter's highest level of performance for maintaining a well-rounded operation for the professional growth of its members. Our Chapter is proud to continue to provide outstanding services for our members.

Our Immediate Past Chapter President, Lal Harter, was on the stage at this year's Professional Development Training (PDT) in Denver, CO to receive this highest honor. Our Past Chapter President, Salim Mawani, accepted the Volunteer of the Year Award.

Lal Harter also led the DC Chapter to host a happy hour during the PDT for our chapter members to celebrate a successful program year. Thank you to all our Chapter's volunteers for their hard work and dedication! Congratulations!



Lal Harter accepted ACE Award for DC Chapter



Salim Mawani accepted the Volunteer of the Year Award

DC Chapter Recognized at PDT 2024



**Past National Presidents and DC Chapter Members (from right to left):
Virginia Robinson, Gwen Sykes, Evelyn Brown**



DC volunteers and members celebrated at DC Chapter dinner at PDT

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AGA National President Gavel Exchange Speech

Delivered by Frank Petersen

Notes from Newsletter Editor: Our very own DC Chapter member, Frank E. Petersen III, CGFM, began his term as AGA National President on July 1, 2024. During this year's Professional Development Training (PDT) in Dener, CO, Frank delivered his President gavel exchange speech to more than 3,000 PDT attendees. The newsletter team thanks Frank for his permission to share his President gavel exchange speech, as presented below, with all chapter members.



Frank E. Petersen, III, AGA National President 2024-25

I stand before you today humbled by this tremendous honor taking the helm of such an awesome organization. This is the culmination of hard work, dedication, and commitment to excellence. I am proud and privileged to stand before you as your President. Standing here before you reminds me of my first AGA PDT, years ago in Washington, DC. Engaging with leadership, participants, and attending presentations, I dreamed about one day landing on this stage. I have always navigated my career based on what so many great leaders had instilled in me. I knew that if I strove for excellence and pursued the highest heights that I would be able to reach this point. I thank the folks that mentored me and helped build the foundation on which I stand. I encourage each of you to reach for the highest heights, invest in yourself, and strive to achieve excellence. You all are the most valuable part of AGA, and the next generation of AGA leadership could be at your table or a few clicks away.

I would like to take a moment to recognize and formally thank a few of the people that have helped make this possible. Behind every successful soul is a great soul mate. I have been blessed with my beautiful wife Jasline Petersen, who has been a driving force by encouraging and supporting me in achieving this honor. My wife and I have three children (Frank IV, Johnny, and Jenifer) and five

grandchildren. I would also like to thank my parents -- my mom Ellie Anderson and dad Lt Gen Frank E. Petersen Jr. USMC who always encouraged me that I am "no less than". Both of my parents lifted me up to the sky and gave me the confidence that I could accomplish anything. In fact, dad demonstrated that as the first black aviator in the Marine Corps and the first person of color to lead Marines into combat and first black Marine Flag Officer rising to the rank of three-star General. Dad flew over 350 combat missions in Korea and Vietnam. His legacy is so revered that the US Navy named a Guided Missile Destroyer (DDG 121) in his honor - the USS Frank E. Petersen Jr. Thank you to all the veterans for your service. By the way, our very own Ann Ebberts worked on the DDG program earlier in her career. Ann, thank you for your patriotism and all that you and your fantastic team do for AGA. You all are ever-present leading by example.

I also want to thank my mentor Terry Bowie who first hired me into civil service. Later, Terry while working as the NASA Deputy CFO under the leadership of then NASA CFO Gwen Sykes brought me to NASA. In 2010, we earned the first of what has now become 13 consecutive unmodified financial statement opinions. Anyone who has seen me speak in the past, knows I always shout out to my NASA Family. Can my NASA family please stand

AGA National President Gavel Exchange Speech cont'd.

for a special applause. NASA continues to be leaders in financial management and the best place to work in the Federal government for 12 years in a row!!!! I would like to thank the AGA National Office, National Governing Board, Past Presidents, Treasurers, and my AGA DC Chapter. I would like to acknowledge a specific national past president that I will always remember, Mr. Jullin Renthrope who persisted that I run for AGA National President starting at PDT in 2003.

As I embark on my year as President, I will work to continue the great legacy of prior National Presidents, most notably the momentum Gwen has achieved post-COVID to bring us back in person and to put us on an upward trajectory. My presidential theme is “A’s Without B’s”! Achievements without Boundaries and Accomplishments without Borders. One boundary we must overcome is the perception that AGA is only for accounting and financial management. The work we do is the lifeblood of any viable organization and we touch on all facets of the business enterprise including IT, Human Capital, Procurement and many others.

To accomplish my goals as President, we need to engage and inspire everyone including the early career workforce to join in and be active. We value the input and contribution of our agencies, our

firms, and members. We need to grasp A.I. and other emerging technologies that enhance the work we do. We must also recognize that there will always be a key role for humans and genuine intelligence, creative thinking, visioneering and real-life problem solving. Be the one that writes the paper that A.I. uses, rather than the one that merely uses A.I.

In closing, I am excited and look forward to working together to do amazing things. It’s all about the people. My legacy will be for people to understand the integral part they play in ensuring we uphold the public’s trust through being vigilant and maintaining our fiduciary responsibility to the citizens of this great country.

As we work together, please remember this quote from Dr. Martin Luther King Jr.:

“If you can’t fly — then run. If you can’t run — then walk. If you can’t walk — then crawl. But whatever you do, you have to keep moving forward.”

Also remember this quote from the lesser-known Inspirator Frank E. Petersen III:

Take the chance to **Advance**. Get up and go to **Grow**. Activate to **Accelerate**.....**AGA!**

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AGA DC Chapter Monthly Luncheon

September 2024 Hybrid Luncheon

Department of the Treasury, Bureau of Fiscal Service's Financial Management Vision

On September 11, 2024, the DC Chapter kicked off the first monthly luncheon of this new program year, as we welcomed our September hybrid luncheon speaker **Mr. Joseph "Joe" Gioeli, Deputy Commissioner for Transformation & Modernization, Bureau of the Fiscal Service, Department of the Treasury.**

We are grateful for more than 100 virtual and in-person attendees who joined us at Clyde's of Gallery Place in downtown Washington, DC. **Mr. Steve Koons, Sikich**, a proud AGA-DC Chapter corporate Diamond sponsor, introduced our speaker at the luncheon.

Mr. Joe Gioeli is a results-driven leader who is a key enabler in accomplishing the Bureau of Fiscal Service's strategic goals and in strengthening the defenses and resiliency of the U.S. financial critical infrastructure. As the Deputy Commissioner for



Steve Koons, Sikich

Transformation & Modernization, Mr. Gioeli oversees the Bureau's Chief Officers and is charged with driving transformation across people, process, technology, and data while improving the way the bureau delivers experience to its customers. Mr.



Joseph "Joe" Gioeli, Deputy Commissioner for Transformation & Modernization, Bureau of the Fiscal Service, Department of the Treasury

Gioeli joined the Bureau of Fiscal Service in 2017 and served as its Chief Information Officer in his prior role.

In his presentation, Mr. Gioeli provided an update on the Bureau of Fiscal Service's financial management vision. He also covered the C-Suite's role in enabling transformation for the Bureau of Fiscal Service, including the involvement in the Financial Management Quality Service Management Office (FM QSMO). The presentation ended with a robust Q&A session as Mr. Gioeli answered questions from both virtual and in-person attendees. We sincerely appreciate the time Mr. Gioeli spent with us to share his knowledge and experience.

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

September Luncheon cont'd.



Paul Marshall, Chapter President, welcomed luncheon speaker and attendees



Luncheon speaker Joe Gioeli



DC Chapter Board members in attendance at the luncheon



DC Chapter Board members and sponsors

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Multi-Chapter Networking Lunch

On September 21 our Washington, DC Chapter joined two other Chapters (Northern Virginia and Montgomery/Prince George's County Chapters) for a multi-chapter networking lunch. Our members with their guests gathered at The Perch, Starr Hill in Tysons, VA to enjoy food, drink, and company. The event was a success and huge shout out to the volunteers from the three AGA Chapters in the DMV. Special thanks to our volunteer Cherry Ung who led the efforts to organize this great event!



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

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New Member Contest

DO YOU LIKE MONEY? IF SO, PLEASE READ

During the 2024-2025 Program Year, the Membership Committee of the AGA DC Chapter is continuing to award a **CASH PRIZE** (\$100 in the form of an Amazon gift card) at the end of each quarter (i.e., September, December, March, June) to the member who sponsors and/or recruits the most new members during the quarter. Quarterly new member referral contest winners will be announced in the newsletter.

► **April-June 2024: N/A**

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

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

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

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

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

Welcome New Members!

By: Membership Committee

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

Lauren Adler
Sandra Alvarez
Adalberto Arze
Aderinsola Bademosi
Taimur Bajwa
Michael Ronderek Barron
Dominique Bean
Sara Bertram
James Biggins
Fernandez O. Boards
Frank D. Brizzi, III

Cherita M. Carey
Robert L. Carter, II, CGFM
Viral Chawda
Sarah Comstock
Virginia Rose Cooney
Christopher Cooper
Nancy Corsiglia
Katherine Covino
Kathryn B. Craig
Sofia DeBlanc
Vladimir Desiatkin

Angel Estrada
Felice Fava
Diene Faye
Liza Fitzgerald
Jeffrey Flak
Diane Fleming-Coker
Victoria Gaffney
Josh Goldberg
Marcus Gullett
Douglas Hamelberg
Ava L. Hammond

New Members cont'd.

Thomas A. Herndon
 Jasmine Holliday
 Lisa Jason
 Valerie L. Johnson-Jones
 Crannough E. Jones
 Marie Jones
 Paulette Kaffee
 James Kilpatrick
 Olga Krough
 Kristen Mary Landry, CGFM
 Scott Ledee
 Lillie M. Lee
 Kysha Tee Lewis
 Michael Lodico
 Paul Lyons
 Shamona Mack
 Kathryn McAlpine
 Tristan Alexander McCauley
 Seanna M. McGee
 Kristian Mckenzie

Lena McMillan
 Sonya L. Morehead
 Britney Munn
 Mai Ngo
 Dai Nguyen
 Allison Norris
 Edoghogho Dominica Omoruyi, CGFM
 Ryan V. Orme
 Samuel Patterson, III
 Matt Porembski
 Seth Ragin
 Michael Stephen Rose
 Anna Rusakova
 Stephanie Sahagun
 Jenny Schneider
 Dr. Solomon S. Scholz
 Mikayla Shawver
 Elijah Scott Fu Solomon
 Tim Springer

Mary Stauffer
 Laurel P. Suchsland
 Manjapra V. Sudhir
 Charles S. Tapp, II
 Ebony Tennille Bostick Taylor
 Victor A. Thomas, Jr.
 Lucas Thompson
 Tiffany Tran
 Megan Valentine
 Tyeshia Watkins
 Brent Wesley Watson
 Lisa M. Weimern
 Jennifer Wells
 Kristine Whittaker
 Elvis C. Williams
 Yolanda Monique Williams
 Travis N. Wiseman
 Heather Woodard
 Derek Yost

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

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Final Words

The Newsletter Team hopes you had a great summer! Welcome (or welcome back) to the first edition of The Washington Connection of this new program year 2024-25!

Our Chapter President, Paul Marshall, and all our volunteers have been working hard for you to plan and organize various training, networking, and entertainment events. We hope you will take the advantages of actively participating in many of these chapter events, as presented in this fall edition of the newsletter, to further benefit your professional needs.

Understanding the Federal fiscal year-end activities and annual audit season is around the corner, the Newsletter Team will keep our message brief here. The Newsletter Team wishes you all good luck for the busy season, and appreciates all the hard work you have made to advance financial management excellency. Our sincere THANKS!

AGA DC Chapter Newsletter Team

Thomas Chin

Guy Hadsall

Monique Llanos

Hao Nguyen

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

AGA DC Chapter Officers & Directors



Paul Marshall
President



Crystal Wolf
President-Elect



Lal Harter
Immediate Past President



Mona Amatie
Treasurer



Wendy Allen
Treasurer-Elect



Wendy Morris
Secretary



Thomas Chin
Chapter Director (Appointed)



Bo Shevchik
Chapter Director (Appointed)



David Baskin
Chapter Director (Appointed)

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

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

AGA DC Chapter Volunteer Roster

Evelyn Brown

Senior Advisor
Awards Committee

Salim Mawani

Senior Advisor
Diversity, Equity, Inclusion, and
Accessibility

Paul Lionikis

Senior Advisor
Monthly Luncheon
Program

John Lynskey

Senior Advisor

Paterne Koukpeso

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Mentorship

Melanie Geeseman

Admin and Communications

Lydia Tamblyn (Miller)

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Social Media

Veronica Baird

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Annual Training Program

Tonya Baker

Annual Training Program

Jennifer Torres

Annual Training Program

Ellie Harris

Annual Training Program

Julia Duquette

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Citizen Centric Reporting

Lauren Peck

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Brad Grams

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Giovanni Leon

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Makia Robertson

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Membership
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Jamison Howell

Member Services

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Aubrey Harris
Mentorship

Sherri Legall Daly
Mentorship

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Program

Peter Moore
Monthly Luncheon
Program

Daniel Lange
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Victoria Abril
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Emma Pollock
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Chad M. Willhite
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Craig Freeman
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Alexis Alfaro-Trejo
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Areeba Rizvi
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Katherine Rexroad
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Howie Simanoff
Webmaster

Brent Watson
Webmaster

Christel Pico
Young Professionals

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

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

Contact Us

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

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

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

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