AGA Washington D.C. Chapter

In partnership with the AGA Northern Virginia Chapter

presents:

22nd Annual AGA Washington DC Chapter Spring Training Event

May 7 – 8, 2024

Advancing Government Innovation

Virtual and Live at Marymount University – Ballston Campus

Detailed Agenda – Tuesday, May 7

8:15am – 8:20am

Welcome Remarks/Introduction
- **Lal Harter,** AGA DC Chapter President

8:20am – 9:10am

T101 Chat with GAO
- **Taka Ariga,** Chief Data Scientist, GAO
- **Caitlin Holmes,** Partner, Guidehouse (Moderator)

Please join us as Taka Ariga, Chief Data Scientist provides a GAO update. Taka will focus his updates and discussion around the performance of cabinet-level agencies over the past fiscal year.

9:10am – 10:00am

T102 Enhancing Public Sector Customer Experience through Digital Innovation
- **Ronda Kent,** Assistant Commissioner for Payment Management, Bureau of Fiscal Service (Retired)
- **Matt Garber,** Chief Customer Officer, Bureau of Fiscal Service
- **Scott Lacharite,** Head of Government, Healthcare, Higher Education, and Non-Profit (GHHN), J.P. Morgan (Moderator)

In this transformative session, we delve into the dynamic world of digital innovation within the public sector, with a special emphasis on enhancing customer experience through advanced digital platforms and omnichannel strategies. As the lines between private and public sector service offerings continue to blur, the expectations for seamless, efficient, and user-centered services in the public domain has never been higher. We explore how public agencies can draw inspiration from the private sector to revolutionize their digital services, ensuring that citizen interactions are as intuitive, convenient, and satisfying as commercial experiences.

This panel will bring together a diverse group of experts, including customer experience officers from leading agencies, to share insights and successful case studies on integrating digital solutions such as APS, mobile applications, and online platforms to improve service delivery. Panelist will discuss strategies for leveraging these digital tools to achieve parity in customer experience, comparing citizens' experiences with commercial standards, and ensuring that public services are accessible, responsive, and tailored to meet the evolving needs of the community.

10:00am – 10:10am

Coffee / Networking Break - Lobby

10:10am – 11:00am

T103 Accounting for Loans is Risky Business
- **Bill Ellett,** Director for Financial Management, DFC
- **Amy MacHarg,** Director of Risk Management, DFC
- **Brandi Morgan,** Senior Auditor, RMA Associates (Moderator)

This panel will help provide an understand of the inherent risk with government loan programs. The conversation will cover the following topics:
-internal controls or preventative measures to mitigate the risk
-current day tools and methodologies to mitigate risk in loan programs
-planning and identifying risks and applying counter measures to inherent risk in loan programs
-impact of risk in loan programs to program operations
-how to apply tools and methodologies to monitor a loan portfolio.

11:05am – 11:55am

T104 Improving Data Quality for Usage with AI and Other Technologies
- **Kim Farington,** Assistant Executive Director and Chief Financial and Administrative Officer, FirstNet
- **Vinay Singh,** Chief Financial Officer, HUD
- **Keith Taylor,** Founder/CEO, 2ndWave LLC (Moderator)

To utilize Artificial Intelligence (AI) or any other new technologies (Data Analytics, RPA, etc.), these complex systems need sufficient and relevant data to function properly. In a lot of cases this data may be scarce, incomplete, or inaccurate. This panel will discuss strategies they employed to improve their agencies data to assist with the implementation of these new technologies.

Attendees will gain practical experiences from panelists on their experiences in improving data quality to support the implementation of new technologies. The panelist will share how they assisted their organizations in achieving their data quality objectives.

Detailed Agenda – Tuesday, May 7

11:55am – 1:00pm

Lunch Break – 2nd Floor Conference Room

1:00pm – 1:50pm

T105 CFO Advice to Help Avoid SFFAS 54 Implementation Pitfalls

- **Carole Banks,** Deputy Chief Financial Officer, Treasury
- **Jonathan Edelson,** Associate Chief Financial Officer for Corporate Accounting, IRS
- **Suzanne Yuter,** Director, Guidehouse (Moderator)

Join us for a candid discussion with members from the federal CFO community. We will share practical ways to navigate the SSFAS 54 implementation journey and learn about the big and small steps your organization can take to put measures in place to determine the best implementation approach for your organization.

1:55pm – 2:45pm

T106 GAO Cyber Trends in the Federal Government

- **Amber Simco,** Senior Advisor for Threat Hunt, Cybersecurity and Infrastructure Security Agency (CISA)
- **Nick Marinos,** Managing Director Information Technology and Cybersecurity, GAO
- **Phil Moore,** Partner, Kearney & Company (Moderator)

This panel will discuss the trends they are seeing as the government continues to respond to key cyber threats and an ever-changing technology landscape and obtain the following learning objectives:

- Understand key cyber threats facing the federal government
- Learn how DHS is addressing key cyber threats
- Learn the perspective of GAO on how the federal government is dealing with these key cyber threats.

2:45pm – 3:05pm

Coffee / Networking Break – Lobby

3:05pm – 4:45pm

T107 Virginia Ethics – Ethical Considerations in DEI 2024: Recruitment & Retention of Diverse Talent

- **Clare Levison,** VSCPA, Inspired Responsibility

When you complete this course, you will be able to:

- Recall the importance of DEI and how it relates to the ethical decision-making models.
- Recognize the recruitment techniques and various channels available for potential employees.
- Gain an understanding of retention techniques.
- Apply ethical DEI concepts to your employment practices.

4:45pm – 4:50pm

Closing Remarks

- **Paul Marshall,** AGA DC Chapter President-Elect

4:50pm – 6:30pm

Evening Networking Reception – Lobby

Detailed Agenda – Wednesday, May 8

8:15am – 8:20am

Welcome Remarks/Introduction
- **Annalena Winer,** Vice President, CGI Federal, AGA DC Conference Director

8:20am – 9:10am

W101 Building Trust in Government – Shaping the Future of Federal Financial Management
- **David Lebryk,** Fiscal Assistant Secretary, Treasury
- **Paul Lionikis,** Director of Outreach, Sikich (Moderator)

Please join Treasury's Fiscal Assistant Secretary Dave Lebryk as he gives a Treasury update and shares insights on the future of Federal financial management, data Integrity, fraud detection tools, and Treasury's use of Artificial Intelligence.

9:15am – 10:05am

W102 Fortifying Finance: Building Core Strengths for Tomorrow's Public Sector Financial Managers
- **David Baskin,** Director, Guidehouse
- **Mark Reger,** Deputy Controller of the United States (Retired)
- **Mike Little**, Head of Payments Advisory, J.P. Morgan

Please join us as our panelists discuss the importance of adapting to digital advancements to improve efficiency and future-proof financial operations. This session will focus on the criticality of cashflow forecasting, risk management and will discuss strategies for centralizing operations, navigating supply chain disruptions, and adopting data-driven decision-making. This discussion aims to equip public sector financial managers with the knowledge and tools to transform their roles, focusing on core fundamentals, embracing digitization, and emerging as value generators in their organization.

The aim of the session is to highlight:
1. How consolidating account structures and embracing digital tools can enhance operational efficiency and cash management
2. Insights into leveraging digital transformation, focusing on how technological advancements can drive efficiency and strategic value
3. Understanding the evolving role of financial managers in building and strengthening core financial assets, focusing on value generation, risk management, and data-drive decision-making.

10:05am – 10:25am

Coffee / Networking Break – Lobby

10:25am – 11:15am

W103 Financial Transformation Through Technology in Government (Federal, State, and Local)
- **Michael Pearson,** State Financial Officer, State of Idaho
- **Talmadge Seamen,** Director of Financial Operations/Comptroller, USCG
- **Paul Marshall,** Vice President, The MIL Corporation (Moderator)

Government CFOs must provide not only financial insights, but also data that drive operational efficiency, measure impacts of the mission, inform strategy, and provide long-term value to stakeholders. This session discusses the successful pathway to financial transformation and perspectives on transformative technologies and data analytics to drive better decision-making. This panel will provide the following insights:
- Key elements and critical success factors for financial transformation and system modernization
- Success stories of financial transformation and system modernization
- Technical challenges and pitfalls during transformation and how to avoid them

11:20am – 12:10pm

W104 Potential for Generative AI in CFO Organizations
- **Michael Barth,** Software Development Operations and Implementations Unit Chief, DOS
- **Kyle Brooks,** Vice President, The MIL Corporation (Moderator)
- **Paul Marshall,** Vice President, The MIL Corporation (Moderator)

Explore the latest developments in Generative Artificial Intelligence (GenAI) tools like large language models (LLM)/ChatGPT and how they are being piloted in the Federal Government. This discussion will cover the following topics:
- How can GenAI be used to advance innovation in the Federal Government?
- What are current use cases?
- How can GenAI benefit daily CFO functions?
- What are some complications or risks to consider with GenAI and how can they be mitigated? ChatGPT and how can they be mitigated?
- How GenAI can be used to help with core financial and procurement processes to deliver value.

12:10pm – 1:00pm

Lunch Break – 2nd Floor Conference Room

Detailed Agenda – Wednesday, May 8

1:00pm – 1:50pm

W105 How Rapid Expansion Can Drive Financial Management Innovation

- **Malena Brookshire,** Chief Financial Officer, AmeriCorps
- **Meshell Jones-Peeler,** Controller, EPA
- **Adam Krulewitz,** Senior Manager, Sikich (Moderator)

EPA and AmeriCorps will share ways that they became innovative to meet the challenges associated with rapid expansion. With the enactment of 2 supplemental appropriations EPA has increased their funding and program oversight from $10B to $100B and AmeriCorps funding doubled to $2B, a significant increase for a small agency. Participants will learn the importance of establishing clear strategic direction to build sustainable infrastructure and realize resource optimization to navigate the challenges of rapid expansion.

1:55pm – 2:45pm

W106 Getting ready for our new co-worker: Artificial Intelligence

- **Atisha Burks,** Chief Financial Officer, FPS
- **Hala Nsouli,** Assistant Inspector General for Technology Solutions, SBA
- **Joseph Roach,** Deputy Chief Financial Officer, HRSA
- **Ofolabi Ojumu,** Partner, Kearney & Company (Moderator)

This talk will discuss from a Federal employee's perspective 1) what AI will look like, 2) how it will change the work, and 3) ways to prepare for working in a world of AI. Attendees will hear discussion about what concerns employees have in the numerous AI implementations in their organizations, how that will affect the work they do, and how it will affect how we see skillset acquisition in the future.

2:45pm – 3:05pm

Coffee / Networking Break – *Lobby*

3:05pm – 3:55pm

W107 Designing Innovative Financial Management Organizations

- **Atisha Burks,** Chief Financial Officer, FPS
- **Asif Khan,** Director, GAO
- **Lloyd Farmer,** Director of Federal CFO Services, 2ndWave LLC (Moderator)

Emerging technologies like data analytics, artificial intelligence and robotic process automation are changing financial management organizations. This panel will discuss how to create and develop organizations that are productive and effectively utilize these technologies to produce positive benefits for their organization.

Attendees will gain insights from Federal leaders on their respective experiences on how to create an organization that can properly utilize these technologies. They will discuss how to employ strategies to use these new technologies, the benefits, the risks and show examples of how they are producing positive results for their organizations.

4:00pm – 4:50pm

W108: Embracing Diversity to Unlock Potential and Enhance Innovation

- **Raheel Baig,** Chief Financial Officer, Privacy and Civil Liberties Oversight Board
- **Nathan McCoy,** President, National Coalition of Federal Aviation Employees with Disabilities (NCFAED)
- **Jessica McClain,** Chief Financial Officer, Girl Scouts Nation's Capital
- **Kimberly Nevels,** Chief Human Capital Officer, HUD
- **Malena Brookshire,** Chief Financial Officer, AmeriCorps (Moderator)

The discussion will feature a panel of experts who will share their experiences, insights, and recommendations on the importance of diversity within the finance industry. The discussion will focus on strategies to break down barriers to inclusion and understanding how diverse teams contribute to enhanced innovation and decision-making. Attendees will come away with a deeper understanding of the significance of diversity in the finance community, as well as strategies for creating and empowering more inclusive workplaces. Discussion will include recognizing the value of diversity; sharing insights and proven practices; and looking to future opportunities for promoting diversity and inclusion.

4:50pm – 4:55pm

Closing Remarks

- **Lal Harter,** AGA DC Chapter President

Biographies

Taka Ariga

Taka Ariga is GAO's first Chief Data Scientist and Director of the Innovation Lab. As an integral part of the Science, Technology Assessment, and Analytics team, he will help GAO develop and implement advanced analytical capabilities for its auditing practices. Prior to joining GAO, he held executive positions at Deloitte, Ernst & Young, and Booz Allen Hamilton, where he worked with audit, compliance, legal, and regulated entities.

Taka earned a bachelor's degree in computer engineering from Johns Hopkins University. He is natively fluent in both Japanese and Mandarin Chinese. In his spare time, Taka is a serious amateur classical chamber musician (performing on cello throughout the Washington DC region), as well as a competitive tennis player.

Carole Banks

Carole Banks, CPA, MBA, began her public service career in 2010 when she joined the Department of the Treasury. Ms. Banks serves as Treasury's Deputy Chief Financial Officer (DCFO), responsible for the Department's compliance with financial management and reporting guidelines as mandated by Congress. She provides advice to the Assistant Secretary for Management and other executives on all Department-wide financial management, financial reporting, financial systems, internal controls, and credit modeling.

Prior to her role as DCFO, Ms. Banks served as a Senior Executive Director of Financial Reporting and Policy within Treasury's Office of the DCFO, responsible for setting forth Department-wide financial accounting and reporting policy and guidance; coordinating, planning and managing the Department-wide execution of financial closing cycles; and producing and disseminating Department-wide consolidated quarterly and annual financial reports to OMB, Congress, and to public constituents.

Prior to joining Treasury, Ms. Banks worked in the private sector where she led all aspects of financial management, including: (i) financial close cycles; (ii) external financial reporting to the Securities and Exchange Commission; (iii) designing, implementing, and monitoring financial reporting controls under Sarbanes-Oxley act of 2002; (iv) budgeting and forecasting; (v) business acquisitions financial modeling; and (vi) project management of business process re-engineering solutions.

Ms. Banks is a native of the Washington, DC metropolitan area and holds a Masters of Business Administration in International Finance from The George Washington University (Washington, DC), and a Bachelor of Arts in Accounting from Oglethorpe University (Atlanta, GA). She was licensed in the state of Maryland as a Certified Public Accountant.

Raheel Baig

Raheel Baig is the Chief Financial Officer at the Privacy and Civil Liberties Oversight Board and is responsible for the Board's financial, procurement, performance improvement and DEIA efforts. He has over 15 years of experience in financial management, strategic planning, budget administration and policy institution.

Prior to joining PCLOB, Raheel held positions at the Department of Homeland Security and the Pension Benefit Guarantee Corporation and provided consulting services to the Securities and Exchange Commission and Drug Enforcement Administration. Raheel obtained his B.S. in Accounting at George Mason University and is credentialed as a Certified Government Financial Manager and a Project Management Professional.

Michael Barth

Michael Barth is the Unit Chief for Software Development Operations and Implementations within Systems Development and Maintenance. Michael has been the department for 13 years working in various roles involving infrastructure, software modifications, and process improvements. Michael is currently leading a multiyear project to modernize the current development network and implement a multi-cloud hybrid solution as well as test emerging technologies such as AI for their use within CGFS. Prior to working for the Department Michael graduated from DePaul University in Chicago with a master's in information technology and a master's in Business.

David Baskin

Mr. Baskin is a Director in Guidehouse's Federal Financial Services (previously PwC Public Sector) practice and has been supporting US government and private clients for the past 12 years. Mr. Baskin provides financial management services including transforming internal control programs better rely upon and use data in real-time for enhanced decision making, business process re-engineering, and process improvement / transformation services. Mr. Baskin is a Certified Public Accountant (CPA), a Certified Internal Controls Auditor (CICA), and serves on the Board for the AGA DC Chapter.

Kyle Brooks

Mr. Brooks has over 20 years of experience working with federal financial management systems. He specializes in Business Process Reengineering (BPR), Robotic Process Automation (RPA), Artificial intelligence (AI), and IT driven Project Management. Over the past 5 years, he has been working within the Bureau of the Comptroller and Global Financial Services (CGFS) at DoS to establish and develop an RPA and Intelligent Automation program.

Malena Brookshire

Malena is an executive with nearly two decades of driving operational excellence. Malena has a reputation for cultivating diverse, cross-functional teams to promote organizational growth and transformation. Malena is currently the chief financial officer at AmeriCorps. Malena has held leadership roles at the U.S. Environmental Protection Agency and the U.S. Securities and Exchange Commission's (SEC) and has worked at the Office of Management and Budget. Malena is a proud member of the AGA DC Chapter and served in multiple capacities including Chapter President (2019). Malena was also a charter member for AGA's DEIA Council.

Malena earned her Master of Public Administration from The George Washington University Trachtenberg School of Public Administration and Public Policy and holds a B.S. in Economics and a B.S. in Mathematics from the University of Wisconsin.

Biographies

Atisha Burks
Atisha Burks is the Deputy Director (CFO) of the Financial and Program Management Directorate, Federal Protective Service. As Chief Financial Officer (CFO) for the Federal Protective Service, Ms. Atisha Burks, leads actions to sustain and improve business operations to meet FPS' goals. She provides executive leadership in financial management, acquisitions, and risk management, and ensures that the result of financial transactions are analyzed and interpreted to determine the impact upon FPS resources. She previously served as a Senior Leader (Financial Operations) with the Department of Navy, Chief of Financial Reporting, Policy, and Property with the U.S. Coast Guard and most of her career at the Department of Commerce where she served as the Department's Director Financial Reporting and Policy.

Jonathan Edelson
Jonathan (Jon) L. Edelson serves as Associate CFO for Corporate Accounting. In this role, he has responsibility for the administrative accounting of the $14 billion IRS operating budget, reporting of over $4 trillion in tax revenue, and oversight of both the Service's travel and credit card programs.

Prior to this role, he served as the acting Associate Chief Financial Officer for Internal Controls in the IRS Chief Financial Officer organization. Before joining CFO, he served in several leadership positions in Research, Applied Analytics, and Statistics (RAAS), including acting Associate Director, Data Management Division; Initiative Director, RAAS-TE/GE Compliance Partnership; Initiative Director, RAAS-SB/SE Nonfiler Initiative; Chief, Modeling & Optimization Lab in the Data Exploration and Testing Division; and acting Director, Office of Program Evaluation and Risk Analysis.

Jon joined the Service in 1998 as an Operations Research Analyst. He earned his Master of Public Policy from The American University in Washington, D.C. and a bachelor's degree in government and politics from the University of Maryland at College Park.

William "Bill" Ellett
Bill Ellett is the Managing Director for Financial Management. Bill joined the U.S. International Development Finance Corporation (formerly the Overseas Private Investment Corporation) in 2012. At DFC, his team is responsible for managing all of DFC's accounting and financial reporting responsibilities, as well as the agency's core financial system and servicing the agency's $40 billion emerging market portfolio.

Bill began his federal career at the Small Business Administration's Office of the Inspector General and has over 25 years of experience in financial management and accountability in both the private and public sector. Bill earned a bachelor's degree in business administration from the University of South Carolina and a master's degree in accountancy from the George Washington University.

Lloyd Farmer
Lloyd Farmer, Director of CFO Services for 2ndWave LLC has over 30 years' experience in the management and operations of both large and small organizations. His specialty is Federal contracting. He is a subject matter expert on Federal contracting and has led teams that have provided a wide variety of financial management and information technology services for both DoD, Intel and Civilian Agencies. Mr. Farmer has served on the AGA's Washington DC Chapter executive leadership team in a wide variety of roles as the director of community service and director of corporate sponsorships. Additionally, Mr. Farmer is a part-time instructor for Government Procurement Innovators (GPI) teaching students about Federal contracting and served on the boards for Sherwood Crossing Condominium Association and ScreenThem Background Investigations, a company he co-owns with his wife.

Kim Farington
Kim Farington is the Assistant Executive Director and Chief Financial and Administrative Officer for FirstNet. Ms. Farington is a Certified Public Accountant (CPA), with more than 30 years of Federal government service. Ms. Farington joined FirstNet in 2015. She oversees all budget, financial, accounting, and reporting operations as well as human resources, facilities, security, and other administrative functions for the FirstNet Authority. Kim also led the development and implementation of FirstNet's Budget, Financial, and Costing Tool (BFACT).

Ms. Farington's extensive government career includes positions at the White House Office of Management and Budget, US Department of Agriculture, the US Office of Personnel Management, and the Office of the Secretary of Defense. In addition to being a CPA, Kim also is a Certified Telecommunications Network Specialist, a former Board member of Excelsior College's National Cybersecurity Institute in Washington, DC, former President of the Association of Government Accountant's (AGA's) Washington DC Chapter, and currently serves as a member of AGA National's Council for the Advancement of Women. She holds an Associate's degree from Indiana University, a Bachelor's degree in Accounting from Excelsior College and achieved a Harvard Kennedy School Executive Certificate in Public Leadership.

Matt Garber
Matt Garber is the Chief Customer Officer at the U.S. Department of the Treasury's Bureau of the Fiscal Service (Fiscal Service.) Fiscal Service is the financial management leader of the Federal Government, responsible for the mission critical functions of payments, collections, accounting, and debt financing. Matt is responsible for leading the creation and execution of an enterprise customer experience strategy, developing a customer-centric culture, understanding the needs of a wide variety of customer segments, and driving service delivery improvements for federal agencies and the public we serve.

Caitlin Holmes
Ms. Holmes is a Partner in Guidehouse's Public Sector Financial Services Practice (PSFS). Guidehouse was previously PwC Public Sector and Caitlin spent 15 years at PwC working across a variety of industries and areas. In total she has over 20 years of experience providing internal controls and financial effectiveness support to both commercial and public entities. At Guidehouse Caitlin is the co-lead of the firm's Finance Optimization Competency which brings together financial management practitioners across all industries.

Ms. Holmes has served on the AGA, Washington DC Chapter Board of Directors since 2006 in multiple roles and is currently the Immediate Past DC Chapter President. In addition to her involvement with AGA, she also sits on the Board of Directors for Washington Latin Charter School in DC.

Biographies

Meshell Jones-Peeler

Meshell Jones-Peeler serves as the Controller at the U.S. Environmental Protection Agency where she orchestrates financial management strategies navigating complex financial management and accounting issues for the agency. Her prowess extends to crafting robust financial policies, implementing internal controls, and spearheading risk management and audit processes. A visionary leader, Meshell champions the integration of metrics, data analytics and reporting mechanisms for informed decision-making. Meshell has seamlessly led intergovernmental and cross-agency initiatives, delivering impactful outcomes across diverse program landscapes.

Ronda Kent

Ronda Kent joined Visa, Inc.'s Government Solutions/Visa Business Solutions division as a Senior Account Executive in 2021, following a 30-year career in the Federal Government. As a leader in digital payments, Visa has long championed the efforts of federal and state agencies to reduce reliance on paper checks for the delivery of critical government payments in ways that foster financial inclusion. Ms. Kent works with financial institutions, fintechs, government agencies, non-profit organizations and others to support government-sponsored prepaid card programs, emerging payment solutions, and other public sector financial services initiatives.

Prior to joining Visa, Ms. Kent served as the Assistant Commissioner for Payment Management and Chief Disbursing Officer for the U.S. Department of the Treasury's Bureau of the Fiscal Service. During her career at Treasury, Ms. Kent served in various capacities and worked on programs and issues related to electronic commerce, privacy, debt collection, and improper payments. Before joining Treasury, Ms. Kent served as an attorney with the Federal Deposit Insurance Corporation, the Resolution Trust Corporation, and in private practice. Ms. Kent received a B.A. from the University of Connecticut and a J.D. from the University of Connecticut, School of Law.

Asif Khan

Asif Khan is a Director in GAO's Financial Management and Assurance team. He focuses on financial management issue areas on GAO's High Risk List. His current focus is on improving financial management at the Department of Defense and the Department of Homeland Security. He supports oversight of these departments' financial management transformation efforts through financial and performance audits and recommendations for removing impediments to financial statement auditability, strengthening internal controls, and modernizing business processes.

Asif joined GAO in January 2009, after almost 20 years in public accounting, most of it with major firms auditing and advising U.S. government agencies. Asif earned a bachelor's degree in management sciences with a concentration in economics from the University of Lancaster, England, and a professional accounting qualification from the UK Association of Chartered Certified Accountants. He is a Certified Public Accountant, a Certified Government Financial Manager, and a Certified Information Systems Auditor.

Adam Krulewitz

Adam Krulewitz CPA, PMP is a Senior Manager at Sikich (formerly known as Cotton & Company). Sikich is a certified public accounting firm providing a full range of public sector audit, accounting, information assurance, and consulting services. With 17 years of financial management and business transformation consulting experience for public and private organizations, Mr. Krulewitz has led process optimization and risk management initiatives in and outside of federal CFO offices. Mr. Krulewitz has significant experience leading teams and collaborating with clients to develop innovative operations and readiness solutions. He holds a Bachelor of Science in Accounting from DeSales University and of Bachelor of Liberal Arts in Business & Economics, with a concentration in Finance, from Muhlenberg College.

Scott Lacharite

Scott Lacharite has been a part of J.P. Morgan Chase & Co. for 18 years. He is currently the Head of Government, Healthcare, Higher Education, and Non-Profit (GHHN) for merchants' services. Scott leads a specialized business development team focused on servicing this unique segment. Scott has overall responsibility for the strategic growth and development of these important vertical markets.

During his tenure with J.P. Morgan, Scott has held several roles across the firm. These roles have included Business Development, Relationship Management and technology Partnerships.

Scott gives back to his community by acting as Chairman of the New England chapter of the J.P. Morgan Veterans Business Resiliency Group (BRG). In his free time, he enjoys playing sports and coaching his three boys.

David Lebryk

David A. Lebryk was appointed the Fiscal Assistant Secretary for the U.S. Department of Treasury on June 30, 2014. The Fiscal Assistant Secretary is the Department's most senior career position. As the Fiscal Assistant Secretary, Mr. Lebryk is responsible for developing policy and overseeing the operations of the financial infrastructure of the federal government in the areas of payments, collections, debt financing, cash management, reporting and accounting, delinquent debt collection, and shared services. This includes responsibility for the world's largest collections, payments, cash management, and financing operations.

Mr. Lebryk has served the Department of the Treasury with distinction in numerous policy and operations positions during his 30 plus years of federal service. In 2012, Mr. Lebryk was named the first Commissioner of the Bureau of the Fiscal Service, which was established with the consolidation of the Bureau of the Public Debt (BPD) and the Financial Management Service (FMS). He joined FMS in December 2007, after serving in the roles of Acting Director and Deputy Director of the United States Mint, the world's largest producer of coins, between 2002 and 2007. He also was responsible for standing up the Office of the Deputy Assistant Secretary for Human Resources and served as its first Acting Deputy Assistant Secretary. He has served under 11 Secretaries of the Treasury and has been an advisor to two Deputy Secretaries and three Undersecretaries for Domestic Finance. Mr. Lebryk joined the Treasury Department as a Presidential Management Intern.

Mr. Lebryk has received numerous awards for leadership including American University's 2014 Roger W. Jones Award for Executive Leadership; The Association of Government Accountants' (AGA) 2018 Elmer Staat's Award for outstanding leadership, high ethical standards, and innovation; the AGA's 2020 Frank Greathouse Distinguished Leadership Award; and three Presidential Rank Awards. He was recently included in Federal Computing World's (FCW) list of 100 outstanding individuals. He is an elected Fellow of the National Academy of Public Administrations.

Mr. Lebryk graduated with an A.B. in Economics from Harvard University and a Master of Public Administration from Harvard University's John F. Kennedy School of Government.

Biographies

Clare Levison

Clare Levison, CPA, CGMA, is the owner of Inspired Responsibility, a consulting company dedicated to delivering continuing education via positive messages and meaningful content that inspires change. She strives to help bridge gaps in continuing professional development with inspiring programs and meaningful experiences that deliver the message — as well as the WHY behind the message — to propel professionals from good to best.

In addition to founding Inspired Responsibility, Clare spent more than 20 years in the aerospace and defense industry involved in all aspects of management, project and financial accounting, as well as government compliance. Within her extensive breadth of finance experience, she particularly enjoyed creating competitive proposal volumes, with a focus on producing compelling, compliant content and providing cost analysis and risk mitigation.

Clare is a member of the American Institute of CPAs (AICPA) and the Virginia Society of CPAs (VSCPA) and is licensed in the state of Virginia. She has served on the Board of Directors of the VSCPA and the Board of Directors of the VSCPA Educational Foundation and currently serves as a member of the AICPA Consumer Financial Education Advocates group.

For over a decade, Clare has designed and delivered learning content for CPAs, including Virginia Board of Accountancy-approved ethics courses required to be taken annually by all licensed Virginia CPAs. In addition to her passion for professional ethics, Clare is a fervent financial literacy advocate. She is the author of "Frugal Isn't Cheap: Spend Less, Save More and Live Better," and has appeared on major radio and television networks across the country discussing personal finance. She has been a contributor to numerous publications including Family Circle, Fox Business, Glamour, Kiplinger's, Redbook, The Wall Street Journal, USA Today and U.S. News & World Report.

Paul Lionikis

Paul Lionikis is the Director of Outreach at Sikich (formerly known as Cotton & Company). Sikich is a certified public accounting firm providing a full range of public sector audit, accounting, information assurance, and consulting services. Mr. Lionikis also serves as a Past President and Advisor for the Washington D.C. Chapter of the Association of Government Accountants (AGA). Prior to joining Sikich Mr. Lionikis held a similar role at Crowe LLP, the ninth largest accounting firm in the U.S.

From 2009 through 2017 Mr. Lionikis was the Strategic Agency Relations Director at the Federal Reserve Bank of Boston for U.S. Treasury's Invoice Processing Platform (IPP). He was previously J.P. Morgan's DoD Treasury Services Relationship Manager and has an extensive consulting background in systems and software development, e-commerce, and FinTech. He holds a Bachelor of Science in Computer Science with minors in Finance and Mathematics from the Illinois Institute of Technology.

Mike Little

Mike Little is the Head of Payments Advisory North America for J.P. Morgan Payments. Mike's team is responsible for identifying and analyzing evolving structural trends across industries and providing recommendations and implications for clients and for J.P. Morgan through thought leadership, external events, and speaking engagements.

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Mike joined J.P. Morgan after more than ten years of banking and payments strategy consulting with IBM and Accenture. Prior to consulting, Mike worked with Royal Bank of Scotland and Citigroup from the US, UK, and EMEA. Mike is based in New York and holds an M.S. and B.S. from Syracuse University

Amy MacHarg

Amy MacHarg is the Director of Risk Management. Amy joined the U.S. International Development Finance Corporation (formerly the Overseas Private Investment Corporation) in 2014. At DFC, her team is responsible for managing credit and portfolio risk for the agency's $40 billion emerging market portfolio. As a key component of that work, Amy developed and now manages DFC's stress testing program, ensuring that the agency's portfolio remains resilient in the face of ever-changing global risks.

Amy began her federal career serving as a Small Business Development Volunteer for the Peace Corps in Guinea, West Africa, working with local entrepreneurs to improve business practices and support local development. Before joining DFC, she also worked at the U.S. Export Import Bank in positions covering portfolio risk and loan monitoring. Amy earned a bachelor's degree in economics from Colorado College and a master's degree in international development from the University of Denver.

Nick Marinos

Nick Marinos is the Managing Director of GAO's Information Technology and Cybersecurity team. He oversees work on federal IT practices, including IT management, acquisitions, and operations; privacy and sensitive data, and cybersecurity.

Nick joined GAO in 2002. He has led major reviews of efforts by the executive branch to implement the National Cyber Strategy; data protection practices at the Department of Homeland Security, Centers for Medicare and Medicaid Services, Federal Student Aid office, and key financial regulatory agencies; the Census Bureau's efforts to implement and protect IT systems critical to the 2020 Census; and the cybersecurity of critical infrastructure.

Nick earned an MBA in information systems and technology and a bachelor's degree in business information technology, both from Virginia Tech. He serves on the Virginia Tech BIT advisory board at the Pamplin College of Business. Nick is a certified information privacy professional.

Paul Marshall

Mr. Marshall, CPA, CGFM, CIA, CICA, PMP, Vice President at the MIL Corporation, has over 25 years of experience in the federal financial community with expertise in technical, business, and leadership development. Mr. Marshall serves as one of MIL's robotic process automation (RPA)/Artificial Intelligence (AI) practice leads. Mr. Marshall's experience includes business transformation, accounting practices, financial reporting, enterprise risk management, as well as business and financial systems. Mr. Marshall began his career as an Auditor for the U.S. Department of Education, Office of Inspector General. Over the span of his career, he has supported Federal government clients including the Department of State, Department of the Treasury, Department of Justice, Federal Trade Commission, Department of Defense and the Intelligence Community.

Biographies

Jessica McClain

Jessica E. McClain serves as the Chief Financial Officer for Girl Scouts Nation's Capital. In this role, she has strategic responsibility for finance, property, product program, retail merchandise, and business operations. Prior to transitioning to the not-for-profit industry, Jessica spent over 11 years in public accounting.

Jessica is passionate about the accounting profession. She is a Council Member-At-Large with the AICPA and serves on the Boards of the Greater Washington Society of CPAs and the Towson University Accounting Advisory Board. Lastly, Jessica gives back to the community as the National Treasurer for Omicron Delta Kappa Honor Society.

Jessica's accomplishments include being named a 2023 Association Forum Forty Under 40 honoree, 2023 Non-Profit CFO of the Year- Rising Star, a 2023 CPA Practice Advisor Most Powerful Women in Accounting, a 2022 Washington Business Journal 40 Under 40 honoree, the 2022 NABA DC Chapter Outstanding Accounting Leader of the Year, a Maryland Association of CPAs 2021 Women to Watch- Emerging Leader, a Black CPA Centennial's 40 Under 40 Black CPA Award honoree, a 2021 AICPA Outstanding Young CPA Award recipient, and a 4x CPA Practice Advisor 40 Under 40 Professional.

Jessica earned her bachelor's degree in business administration from Towson University and her master's degree in accounting from George Washington University. Jessica is a Certified Public Accountant licensed in Virginia.

Nathan McCoy

Nathan became the President, National Coalition of Federal Aviation Employees with Disabilities (NCFAED) in March 2023. He aims to help people with disabilities access resources, promote self-advocacy, and support Civil Service employees in achieving career goals.

Nathan is the Division Manager of Service Delivery for the Office of Finance and Management (AFN) Information & Technology Service. In this role, he responsible for the integrity of the FAA's Information Technology environment, which includes planning, scheduling, communicating, packaging, and deploying software, patching, and security releases that keep the Agency effective and secure. As a goal in FY24, Nathan is working across the Agency to improve Assistive Technology delivery and technical support for Persons with Disabilities.

Before his current position, Nathan managed Air Traffic Simulation and Training management software as the Support and Delivery Manager for the Air Traffic Organization's Technical Training Directorate (AJI).

Nathan began as an Electrical Technician at the Federal Aviation Administration (FAA) in 2004, following a career as an Avionics Technician for a Part 145 Repair Station. He also served as a Quality Assurance Inspector, Avionics Technician, and Avionic Supervisor in the U.S. Marine Corps, Oklahoma Air, and Army National Guard. Nathan holds a bachelor's in aviation management with a Minor in Safety. Nathan volunteers as a Scout Master with Scouts BSA units and is a lifetime member of the Disabled American Veterans (DAV).

Phil Moore

Phil is a Partner and the IT Assurance Practice leader at Kearney & Company. Phil has over 22 years of professional Information Technology (IT) assurance, financial, and consulting experience, including work in both civilian and defense federal agencies. Phil is a Certified Public Accountant (CPA), a Certified Information Systems Auditor (CISA), and Project Management Professional (PMP).

Brandi Morgan

Brandi Morgan is an accomplished Senior Auditor at RMA Associates, with two years of experience in delivering top-tier financial statement and performance audit support services to various branches of the federal government. Throughout her career, Brandi has collaborated with several federal government agencies, including but not limited to the United States International Development Finance Corporation (DFC), the United States Department of Agriculture Rural Development (USDA RD), the Department of Defense Office of Inspector General (DoD OIG), and the Railroad Retirement Board (RRB). Utilizing her expertise, Brandi actively serves on the FASAB task force for Public-Private Partnerships (P3s) and collaborates with agencies on various initiatives, leveraging her expertise as a credit reform specialist for RMA. Brandi holds a bachelor's degree in accounting and management from Davis & Elkins College in Elkins, West Virginia.

Kimberly Nevels

Kimberly Nevels is in HUD's Office of the Chief Human Capital Officer (OCHCO) as the Chief Diversity Officer, where she and her team are working on spreading the principles of Inclusion, Diversity, Equity and Accessibility (IDEA) throughout HUD. Prior to joining OCHCO, Kim was with the Office of Field Policy & Management where she served as the first national Director of Equity. Kim began her HUD career in the Office of Fair Housing and Equal Opportunity (FHEO) where she served for 21 years. Her last position in FHEO was as the Region V (IL, IN, OH, MN, MI & WI) Program Center Director. Kim earned her B.A. from Illinois Wesleyan University in Bloomington, IL and her J.D. from the University of Illinois College of Law in Champaign, IL. Kim and her husband have been married for 25 years and are the parents to two teenagers and 1 fur baby. In her spare time Kim enjoys reading, watching tv and movies (even though the book is always better) and traveling.

Biographies

Hala Nsouli

Dr. Hala Nsouli is the Assistant Inspector General for Technology Solutions at the U.S. Small Business Administration (SBA), Office of Inspector General (OIG). In this capacity, she leads the implementation of a comprehensive digital roadmap to prevent and detect fraud within SBA's programs and operations, which includes oversight of over a trillion dollars of lending authority aimed at stabilizing the nation's economy and providing vital capital to the nation's small businesses.

Prior to her current appointment, Dr. Nsouli served as SBA OIG's Data Analytics Director where she led the integration of data analytics into the heart of oversight operations. Her leadership has been instrumental in supporting and enabling oversight of SBA pandemic assistance programs, to include fraud detection and investigation. Dr. Nsouli has over 18 years of experience and has held multiple positions in the Federal data analytics space leading high-energy, cross-functional teams who harness the power of human-centered technologies to drive organizational growth and improve the human experience.

Dr. Nsouli holds a Doctorate degree in Epidemiology and a Master's degree in Public Health from The George Washington University, and a Bachelor's degree in Nutrition and Dietetics from The American University of Beirut. Dr. Nsouli is also a certified Executive Coach from Georgetown University and is certified in Executive Leadership and Leadership for a Democratic Society from OPM's Federal Executive Institute.

Afolabi Ojumu

Mr. Ojumu is a Partner with Kearney & Company and the Managing Director of the Kearney's Technology Group. He has experience in Federal and commercial data sets, analytics, robotics, process automation, artificial intelligence and cloud engineering. He is a Advanced Certified Scrum Master (ACSM) and an Advanced Certified Product Owner (ACPO) as well as a Certified Information System Auditor (CISA) and a Certified Public Accountant (CPA). He has expertise as well in information systems, financial management, risk management, accounting, and auditing business processes.

Michael Pearson

Michael is the State Financial Officer for the State of Idaho, in charge of oversight of the financial operations and policy for Idaho's Executive Branch. Prior to this role, he spent twelve years as CFO at the Department of Fish & Game where he was instrumental in the bonding and construction of a new headquarters for the Department that was completed on time and under budget during the Coronavirus pandemic. Michael also serves as the National Treasurer for AGA, a 13,000+ member nonprofit committed to government accountability and transparency. His term ends in June 2024. In 2022, he was elected as a Trustee for his alma mater, the College of Idaho. In his spare time, Michael enjoys gourmet cooking, golf, and spending time with his amazing kids.

Mark Reger

Mark retired from Federal Service December 2017 as the Deputy Controller of the United States of America working in the Executive Office of President. Prior to this position Mark was the Deputy Assistant Secretary for Accounting Policy at the US Treasury Department. While at Office of Management and Budget and at the Treasury Department Mark was the administration representative to FASAB having served a total of 8 years. When Mark first moved from Treasury to the EOP in early 2014, there was no Controller, so Mark served as Acting Controller of the United States. Several months later Mr. Obama nominated, and the Senate confirmed Mr. David Mader as Controller. Mr. Mader served a year before resigning and Mark was again appointed Acting Controller. While at Treasury Mark helped create the Office of Financial Innovation and Transformation which lead to numerous advances in federal financial management over several years.

Prior to his work in the Treasury Department Mark served as the CFO of the Office of Personnel Management and the Federal Communications Commission. Before his federal service, he was the Chief Deputy Treasurer of the State of Maryland, a Deputy Treasurer of DC, a Deputy CFO of Baltimore County Public Schools and CFO of the Maryland Department of Agriculture.

Mark is a CPA, Graduated from Loyola College with a BA in Accounting, a graduate of executive programs at Oxford. He is a graduate of the Federal Executive Institute and a Henry Toll Fellow from the Council of State Governments. Mark was the chairman of SECUMD (a Maryland based $5b Credit union from 2018 to 2020 where he served as a Director from 1986 through 2023. Mark Served as a FASAB (Financial Accounting Standards Advisory Board) for 8 years. Mark has his own Accounting Practices and serves as contactor to AGA (former Assoc of Governmental Accounting).

Mark lives just outside Annapolis with his wife. They have 3 daughters and currently 10 grandchildren.

Joseph Roach

Throughout Joe's 20+ year Federal career, he has held various roles within the financial management and technology domains. Currently serving as the Deputy Chief Financial Officer at the Health Resources and Services Administration (HRSA), Joe brings a wealth of experience garnered from previous positions, including Chief Information Officer (CIO) and Deputy CIO at the HHS Office of the Inspector General and HRSA, respectively.

In his capacity as Deputy CFO, Joe spearheads the Agency's financial management oversight functions, overseeing day-to-day operations pertaining to internal controls, enterprise risk management, improper payments, and financial reporting. At the onset of the COVID-19 pandemic, Joe was tapped to lead and establish a program integrity team for the Provider Relief Programs. This $175 billion relief initiative aimed to assist health care providers grappling with solvency challenges brought about by the public health crisis.

Furthermore, Joe is at the forefront of HRSA's financial data and intelligent automation endeavors which includes initiatives related to financial data warehousing, robotic process automation, and intelligent automation such as AI/ML/NLP. Joe has assembled a team equipped with advanced data science and visualization proficiencies, enabling rapid data dissection, anomaly detection, trend analysis, and root cause investigations. In his official duties, Joe oversees a comprehensive data analytics and visualization training program.

Biographies

Talmadge Seaman

Talmadge Seaman, MBA, MPA, MASP, CICA, CGFM, PMP, CISA is the Director of Financial Operations/Comptroller for the United States Coast Guard. He served 21 years in the Coast Guard with eleven years in afloat operations and five assignments in sequential financial management assignments including program fund manager, internal controls, financial management and reporting, appropriation fund manager, DHS CFO staff assignment, and National Defense University faculty. He served as a consultant for 15 years for federal financial management engagements within 10 different federal agencies. He also served as the voluntary Treasurer of the Army Historical Foundation during its $200M capital campaign to build the US Army's national museum and served on the board of directors for several non-profit organizations.

Amber Simco

As a Senior Advisor for Threat Hunt at the Cybersecurity and Infrastructure Security Agency (CISA), I lead and coordinate the agency's efforts to identify, analyze, and mitigate cyber threats to the nation's critical infrastructure and federal networks. I leverage my expertise in cyber policy, cyber risk management, and insider threat detection to provide strategic guidance and technical support to CISA's leadership, partners, and stakeholders.

With more than a decade of experience in the federal government, I have served in various senior-level positions in cybersecurity, information security, and risk management at the National Institutes of Health (NIH) and the Department of Health and Human Services (HHS). I have also been the agency-level Senior Liaison Officer to the National Security Agency (NSA) facilitating collaboration and information sharing between CISA and NSA on cyber-related matters. Additionally, I hold a M.A. in National Security and Strategic Studies from the Naval War College and multiple professional certifications in cybersecurity, contracting, and emergency medical services. My mission is to protect and enhance the security and resilience of the nation's cyberspace and critical infrastructure.

Vinay Singh

Vinay Singh is the Chief Financial Officer for the Department of Housing and Urban Development (HUD). Prior to joining HUD, Mr. Singh has been in numerous leadership roles in the private sector for over 25 years, spanning accounting, finance, technology, and operations management spheres. He is a Certified Public Accountant (CPA). He joined the U.S. Department of Housing and Urban Development as Chief Financial Officer in July 2022 from the Small Business Administration where he helped implement a new mission for the Office of Disaster Assistance. Prior to this he was a Partner and Chief Operating Officer for KPMG in India where he led many teams all aligned to achieving operational excellence

Keith Taylor

Keith Taylor, founder and CEO of 2ndWave LLC, is a CPA Technologist and Certified Government Financial Manager (CGFM) who has spent the last 30 years managing the delivery and implementation of large enterprise technology solutions for civilian, defense, and international government organizations and private sector clients. He is a former consulting partner at Deloitte and PriceWaterhouseCoopers and is a veteran who previously served in the U.S. Air Force. Mr. Taylor specializes in delivering Enterprise-Wide financial management and HR systems (Oracle, PeopleSoft, SAP), grants management, and other enterprise-wide technology solutions. He provides federal accounting and financial subject matter expertise to help government clients excel in financial management and systems solutions.

Suzanne Yuter

Ms. Yuter is a Director in Guidehouse's Defense and Security Practice. She has more than 20 years of expertise serving clients across federal financial management disciplines, specializing in complex accounting challenges, including the implementation of Statements of Federal Financial Accounting Standards (SFFAS 54). She brings expertise across accounting, auditing, internal controls, project management, system implementations and process improvement. Representing Guidehouse, she is a member of the AGA's CPAG Accounting and Auditing Committee. Ms. Yuter is a proud graduate of the University of Maryland, College Park.

Navigation and Other Information You Need to Know

How to Attend:

Our 22nd Annual AGA DC Chapter Training will be hosted in a hybrid format:

- In person at Marymount University's Ballston Campus: 1000 N Glebe Rd, Arlington, VA 22201
- Virtually via BroadcastMed.

Stay Engaged and Earn CPEs:

Training participants are eligible to receive up to 16 CPE credits across a range of fields of study.

Note the following:

- Your attendance in each session is being tracked and failure to participate will result in denial of CPE credits.
- You must attend for the entirety of each session. For in-person attendees, your badge must be scanned to track your attendance. For virtual attendees, you must participate in alertness checks throughout the session to be eligible for CPEs.

Questions during the session:

- Registration questions: Please direct questions related to AGA registration to thampton@guidehouse.com
- Technical questions: If you are experiencing technical issues joining the AGA Event on the day of training, refer to the attendee support at this link https://aga.digitellinc.com/support. If you are experiencing issues after joining a virtual session, click the Request Support button in the lower left corner of the player.
- Content Questions for the Speaker:
  - All questions will be done using Conferences IO at this link https://agadc.cnf.io.

Washington D.C. Chapter
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Thank you to our Volunteers!

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Annalena Winer, CGI Federal (Co-Program Director, Co-Director – Technical Committee, Private Sector)
Brittany Hopwood, KPMG (Advisor, Technical Committee)
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Tonya Baker, Guidehouse (Co-Program Director, Technical Committee)
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