

April — June 2018

# AGA Charleston Newsletter

## President's Message



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Happy Summer everyone. This was a busy quarter for our chapter – members from our team attended the Sectional Leadership Meeting (SLM) in Baltimore; held our annual awards ceremony; participated in a “Wish List” drive for the Ronald McDonald House; and raffled off a complimentary registration to AGA’s National PDT (congrats to our winner, Marcus Pollard).

Our chapter had a successful year as we were recognized by AGA National for our Citizen Centric Report (CCR), chapter website and member spotlights, Charleston Chapter PDT, and community service activities. So again, GREAT JOB to everyone who contributed and participated in those events!

Speaking of PDT, AGA’s conference is on the horizon in Orlando, July 22<sup>nd</sup> – July 25<sup>th</sup>. There are many great speakers on the agenda and it’s an easy way to obtain those CPEs (24 in total). If you plan to attend in Orlando please let me know, I’d love to catch up with our members. Also, I’ll be moderating a session providing a DoD Audit Update, Wednesday the 25<sup>th</sup> at 10:30 AM. If you can’t attend in person, consider the [virtual option](#) as well.

And while you’re in Orlando, instead of a beach read, how about a beach podcast?? I recently checked out the USCG Journey to Auditability session. There have been five sessions posted so far, but keep your eye out for new content in the coming weeks.

I also want to thank and welcome three new CEC members who have accepted positions:

Funke Olusesi and Tameka Watts, Co-Directors for the Newsletter  
Robert Parsons, Accountability Director

Finally, in the upcoming months our leadership team will be setting goals and our strategic plan for the new AGA year beginning July 1<sup>st</sup>. We will be coordinating our chapter’s PDT in November, brainstorming social events/young professional outreach programs, and developing networking opportunities.

Enjoy the Summer, AGA Charleston!

**Bryan Nelms, CPA, CISA**  
Charleston Chapter President





## New Members



We are pleased to introduce the following new members who have joined AGA Charleston Chapter!

**April**

N/A

**May**

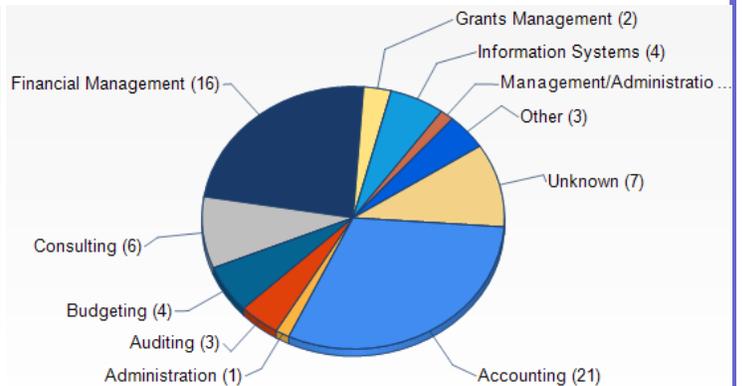
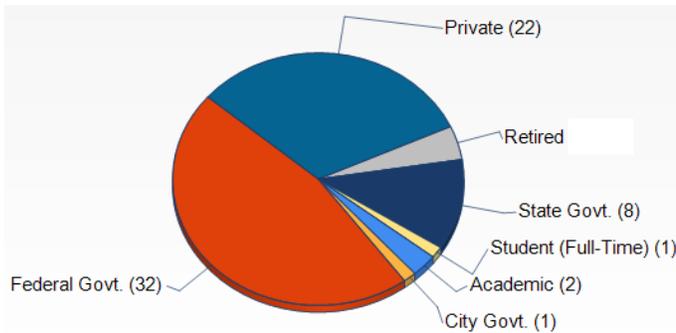
N/A

**June**

Jeffrey Cope

### OUR MEMBERS

The AGA Charleston, SC chapter currently has 69 members in various fields of study such as budgeting, auditing, consulting, management, and information systems. Membership ranges from all government levels as well as academic and private organizations. The chapter is proud to say that the membership retention has been steady and continues to expand in other areas of government and academia.



### Membership Benefit Opportunities

#### Upcoming Webinars:

**Jun. 13 | 2–3:50 p.m. ET (PD)**

Leadership

**July 22 | Professional Development Training (PDT)**

Orlando, FL., or Virtual | 24 CPEs

**September 20 | Internal Control and Fraud Prevention**

Washington, D.C., or Virtual | 14 CPEs

## Member Spotlight



Thank you Patty Fitzgerald for letting the AGA Charleston Chapter Members get to you know you!

**Q) Where do you work and what is your role?**

A) I work at The Citadel in the financial services department. My official state title is Fiscal Analyst II. I handle all our external grants post award activity, loan reconciliations and collections for non-enrolled students.

**Q) Are you a CGFM? If so, why is that important to you? If not, do you plan on obtaining the certification and why?**

A) Not yet.

**Q) What do you enjoy about AGA?**

A) I am new to AGA and am trying to get to more events. I think the opportunity to get out and meet new people from different areas of government is great. So far, I have really enjoyed the lunch speaker meetings.

**Q) What are some of your hobbies and interests?**

A) I love to read, try new restaurants, spend time on the water and at the beach!! Charleston is the perfect place to live for me.

**Q) What advice do you have for other Government Finance employees and contractors?**

A) Do something you enjoy doing. We spend so much time at work we need to find something we enjoy doing and people we enjoy doing it with. I think teams and the people that you work with are incredibly important.

## Professional Development—Upcoming PDT 2018

PDT 2018



### 2018 Professional Development Training

July 22–25, 2018 | 24 CPEs  
Orlando, Fla. or virtual

PDT 2018

**2018 Professional Development Training**  
July 22–25 | Orlando, Fla. or virtual | 24 CPEs  
AGA's premier training and networking event

[Registration & Fees](#)

	<i>Online</i>	<i>Email/mail</i>
<b>AGA member</b>		
(by June 29)	\$875	\$900
(after June 29)	\$975	\$1,000
<b>Nonmember</b>		
(by June 29)	\$1,075	\$1,100
(after June 29)	\$1,175	\$1,200

### Three reasons you should attend:

1. Earn up to 24 CPEs!
2. Stay cutting-edge by enhancing your knowledge and skills.
3. Network and connect.

SAVE THE DATE!



Orlando World Center Marriott and Convention Center

## Young Professionals PDT Member Benefit

AGA will discount the 2018 AGA PDT at 50% off for the first 50 young professionals (YP) who register. A YP must be under the age of 30, a member in good standing, and first time participant. The 50% will be calculated based on the fees at the time of registration. This benefit will provide CPEs if applicable, great opportunities for meeting and networking with AGA Leaders.

### FUTURE PDT LOCATION and DATES:

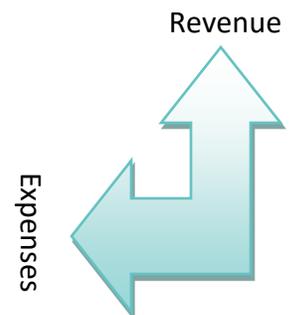
2019 - New Orleans, LA July 21 - July 24  
2020 - Grapevine, TX July 19 - July 22  
2021 - Nashville, TN July 18 - July 21

# Chapter Financials

AGA Charleston SC Chapter Profit and Loss Statement YTD as of May 31, 2018												
	July	August	September	October	November	December	January	February	March	April	May	Total
<b>Revenue</b>												
Membership Dues	154	-	-	25	-	-	73			348		601
Corporate Sponsors	-	3,000	-	2,000	-	-						5,000
PDT Registration	-	-	-	-	-	4,847	3,420					8,267
Non Member Events	-	-	-	-	-	-						-
Miscellaneous (t shirt sales)	-	-	-	-	-	-						-
<b>Total Revenue</b>	<b>154</b>	<b>3,000</b>	<b>-</b>	<b>2,025</b>	<b>-</b>	<b>4,847</b>	<b>3,493</b>	<b>-</b>	<b>-</b>	<b>348</b>	<b>-</b>	<b>13,868</b>
<b>Expenses</b>												
PDT Expenses	153	-	-	1,372	2,538	4,408						8,470
Community Services	-	-	-	-	-	92						92
Speaker Events	-	-	164	0	320	153			264			901
Post Office Box	-	-	90	-	-	-						90
Supplies	-	-	-	-	-	-		10				10
IT Fees and Maintenance	-	-	-	-	-	-						-
Social Media	-	-	35	-	140	-			50			225
Member Events	-	-	-	119	-	7			34		837	997
<b>Total Expenses</b>	<b>153</b>	<b>-</b>	<b>289</b>	<b>1,492</b>	<b>2,997</b>	<b>4,659</b>	<b>-</b>	<b>10</b>	<b>348</b>	<b>-</b>	<b>837</b>	<b>10,785</b>
<b>Net Income</b>	<b>2</b>	<b>3,000</b>	<b>(289)</b>	<b>533</b>	<b>(2,997)</b>	<b>187</b>	<b>3,493</b>	<b>(10)</b>	<b>(348)</b>	<b>348</b>	<b>(837)</b>	<b>\$ 3,082</b>

## How the Chapter funds are generated and disbursed:

Date posted	Amount	Check number	Description	Date posted	Amount	Description
7/3/2017	\$ 152.59	1078	S. Kennedy - Headphones for PDT Raffle Donation	7/28/2016	\$ 154.16	Chapter Dues
9/27/2017	\$ 90.00	1079	R. Helms - PO Box Fee	8/14/2017	\$ 1,000.00	Haynes sponsorship
10/2/2017	\$ 140.08	1081	S. Kennedy - Gift Card for speaker (\$20), Publix - subs/cookies/thank you cards (\$105.50), Publix - chips (\$14.58) for speaker event	8/24/2017	\$ 1,000.00	STG sponsorship
10/10/2017	\$ 23.77	1127	R. Helms - Plates/utensils/soda water for speaker event	8/24/2017	\$ 1,000.00	IFAS sponsorship
10/10/2017	\$ 119.42	1082	S. Kennedy - Plates/drinks and pizza for open house	10/10/2017	\$ 1,000.00	CGI sponsorship
10/17/2017	\$ 34.96	1083	R. Helms - Facebook bump of website in September	10/20/2017	\$ 25.00	Chapter Dues
10/30/2017	\$ 1,372.09	1084	R. Helms - PDT favors	10/30/2017	\$ 1,000.00	MIL sponsorship
11/6/2017	\$ 89.94	1080	R. Helms - Meetup 6-month subscription	12/1/2017	\$ 90.00	PDT registration
11/24/2017	\$ 319.82	1085	R. Helms - Happy Hour Networking Event + \$25 Gift Card	12/19/2017	\$ 4,756.90	PDT registration
12/4/2017	\$ 448.00	1086	R. Helms - \$398 for PDT speaker gifts, \$50 for PDT Facebook Boost	1/22/2018	\$ 73.33	Chapter Dues
1/11/2018	\$ 2,139.56	1087	CSU Aramark Catering - PDT food (M. Jones)	1/22/2018	\$ 3,420.00	PDT registration
12/6/2017	\$ 105.58	1088	S. Kennedy - PDT Badge Inserts (\$13.41), CYDC Christmas Party (\$92.17)	4/27/2018	\$ 348.33	Chapter Dues
12/12/2017	\$ 182.70	1089	M. Jones - PDT Insurance (\$176), AGA HH Sharpies/Name Tags (\$6.70)	<b>Deposited total</b>	<b>\$ 13,867.72</b>	
12/15/2017	\$ 152.84	1090	M. Jones - Lunch with Ann Ebberts			
12/15/2017	\$ 320.00	1091	M. Jones - PDT Speaker Gifts & Raffle (16 \$20 Amazon Gift Cards)			
12/22/2017	\$ 490.76	1092	S. Kennedy - Printing Programs for PDT			
1/17/2018	\$ 1,750.00	1093	Charleston Southern University - PDT facilities			
1/16/2018	\$ 300.00	1094	AGA - Travel Expenses for Ann Ebberts (S. Kennedy)			
1/23/2018	\$ 1,357.61	1095	CSU Aramark Catering - PDT food (M. Jones)			
2/12/2018	\$ 10.00	1096	C. Bridges - Stamps			
3/21/2018	\$ 264.41	1097	M. Jones - Schlotzky's Catering (\$251.91) and DoS - Café - Drinks (\$12.50) for speaker event			
4/11/2018	\$ 33.97	1098	R. Helms - Recruitment lunch			
4/3/2018	\$ 50.00	1099	M. Jones - Amazon Gift Card (for New Member Liking FB page)			
5/9/2018	\$ 167.86	1100	S. Gunter - Trophies for Awards Ceremony			
5/15/2018	\$ 110.83	1101	S. Gunter - Table cloths, paper products, etc for Awards Ceremony			
5/17/2018	\$ 50.00	1102	R. Helms - Gift Card for Last-Minute Awards Presenter			
5/22/2018	\$ 125.45	1103	S. Gunter - Decorations for Awards Ceremony			
5/22/2018	\$ 382.99	1104	M. Jones - Food for Awards Ceremony			
Transaction balance	\$ 10,785.23					



# AGA Charleston Events

## AGA Charleston SC Chapter 11th Annual Awards Ceremony.

Award recipients for the AGA Charleston Chapter Awards Ceremony



Megan Jones  
Chapter Service Award  
AGA Charleston Chapter  
May 2018



Kevin Pickering  
Advancing Government Accountability Award  
AGA Charleston Chapter  
May 2018



Jeanine Otto  
Advancing Government Accountability Award  
AGA Charleston Chapter  
May 2018



Shana Gunter  
Chapter Service Award  
AGA Charleston Chapter  
May 2018



Deanna Wilson  
Career Achievement Award  
AGA Charleston Chapter  
May 2018



Rebecca Helms  
Achievement of the Year Award  
AGA Charleston Chapter  
May 2018

Not Pictured  
Georgia Middleton  
Career Achievement Award  
AGA Charleston Chapter



## AGA Charleston Events continued

AGA Charleston attended the Sectional Leadership Meeting in May 2018 in Baltimore, MD. Megan Jones, Shana Gunter, and Bryan Nelms were in attendance. During the SLM, the Charleston Chapter was recognized for our many efforts (CCR, website, member spotlights, PDT, awards, etc.). Aspects such as chapter benefits, leadership ideas, chapter improvements as well as a focus on CGFM certification were discussed. Check out the AGA Charleston [Instagram](#) for some photos of the SLM.



## AGA Charleston Survey Results

In June our chapter issued a survey in an effort to understand our membership's interests. Below are the results based on the responses we've received. Thank you to those who took the time to participate in the survey as we will consider the feedback we have received in our goal setting and strategic plan for the upcoming year.

Key Question	Member Rating	Rating Indicator
Primary reason for joining AGA?	91.67%	Professional Networking
Primary hindrance for attending meetings?	41.67%	Meeting is on Federal Complex
	50%	Time or date is not convenient
How important is obtaining a CGFM certification?	58.33%	Slightly important, would benefit my career
Which would be more convenient: TWO PDTs per year, or ONE PDT per year and monthly speaker meetings?	91.67%	TWO PDTs per year
How do you rate your chapter's CEC communications with its members?	66.71%	Excellent
	33.00%	Good
Are you interested in community service and networking events through the chapter?	66.67%	Yes, I wish there were more

## CGFM

Interested in earning your Certified Government Financial Manager (CGFM) certification? Contact the CGFM Director Peg Kendra at KendraPM@state.gov.



Join the many members who have obtained their CGFM. Take advantage of potential study group and classes!

Current AGA Charleston CGFMs	
Name	Employer
Beth Da Re, CGFM	U.S. Dept. of State
Brett Green, CGFM	U.S. Dept. of State
Charles Maloney Jr., CGFM	Self-Employed
Emily Gable, CGFM	U.S. Dept. of State
Eugenia Bell, CGFM, CPA	U.S. Dept. of State
Georgia Middleton, CGFM	U.S. Dept. of State
John Buchholz, CGFM	U.S. Dept. of State
Kathryn Robinson, CGFM	U.S. Dept. of State
Kevin Pickering, CGFM	U.S. Dept. of State
Lisa Willett, CGFM	U.S. Dept. of State
Lynne Baronoff, CGFM-Retired, CPA	Retired
Michele Deneau, CGFM	Reliable Accounting
Olufunke Olusesi, CGFM	U.S. Dept. of State
Paul McVicker, CGFM	U.S. Dept. of State
Peg Kendra, CGFM	The MIL Corporation
Randy Stanley, CGFM, CPA	U.S. Dept. of State
Robert Maki, CGFM	U.S. Dept. of State
Robin Faass, CGFM	CGI Federal, Inc.
Shari Clark, CGFM, CPA	U.S. Dept. of State
Sheena Kennedy, CGFM, CMA	The MIL Corporation
Stacy Johnson, CGFM	U.S. Dept. of State
Vicki Chupas, CGFM	Department of the Navy SPAWAR SSC Atlantic
Ward Logan, CGFM	The Citadel Military College of South Carolina
Wilbur Spearin, CGFM-Retired	Retired

Interested in hearing what others want to know about obtaining the CGFM Designation? Visit the AGA site for CGFM frequently asked questions @

<https://www.agacgfm.org/CGFM-Certification/Candidates/Candidate-FAQs.aspx>

## Additional News

Each month your Charleston AGA Chapter Executive Committee meets to share updates on events, best practices, and plan for future events. If you have any questions or would like to see the meeting minutes, please click here.

<https://www.agacgfm.org/Chapters/CharlestonSC/Our-Chapter/Meeting-Minutes.aspx>

### CEAR Program Award Ceremony

There were 22 government agencies and departments that were recognized for producing high quality Performance and Accountability Reports (PARs) or Agency Financial Reports (AFRs) during our annual Certificate of Excellence in Accountability Reporting (CEAR) Program Award ceremony held May 22 in Washington, D.C. The CEAR program was established in collaboration with the Chief Financial Officers Council and the U.S. Office of Management and Budget to improve accountability by streamlining reporting and demonstrating what the agency accomplished with tax payer dollars and the challenges that remain.



## Chapter Executive Committee

### President

Bryan Nelms  
HelmsRD@state.gov

### Treasurer

Colleen Bridges  
BridgesCK@state.gov

### Secretary

Timmy Van Parys  
VanParysTG@state.gov

### Membership Director

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### CGFM Director

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### Education Director

Stacy Johnson, CGFM  
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### Events and Community Director

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### Webmaster

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### Accountability Director

Robert Parsons  
Robert.Parsons@kearneyco.com

### Young Professional Director

Jerica Adkins  
AdkinsJB@state.gov

### Social Media / Marketing Director

Rebecca Helm  
HelmsRD@state.gov

### Newsletter Co-Directors

Funke Olusesi  
OlusesiOA@state.gov  
Tameka Watts  
WattsTD@state.gov

## Thank You to our Platinum Sponsors!



### The MIL Corporation

The MIL Corporation provides federal government agencies with outstanding professional services in the areas of financial management and systems, information technology, engineering services, and cybersecurity. We pride ourselves on fostering long-term partnerships with our clients and constantly seek innovative methods to achieve results. Our company culture embraces continuous improvement and we are CMMI Level 3 and ISO 9001 certified. We have over 170 employees in the Charleston area and have supported our Charleston clients for more than 20 years.

We are never satisfied with simply meeting the challenge. We strive to exceed our customers' expectations. For more information about our services, please contact Peg Kendra at [pkendra@milcorp.com](mailto:pkendra@milcorp.com) or 843-343-3702.



### Haynes Incorporated

Haynes, Inc. is a financial services and management consulting firm, with specializations in accounting transactions, process improvement, information technology, and network support. The firm has offices in Maryland, Virginia, and South Carolina.

For more information about our services, please contact Floyd N. Haynes at [fhaynes@haynesinc.com](mailto:fhaynes@haynesinc.com).

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### IFAS, LLC

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IFAS is an accounting and management consulting firm with experience providing Global Financial Services Support, Budget and Resource Management, A-123, IT Support Services and Business Process Improvement services to our federal clients.

For more information regarding IFAS, LLC, please contact Tabatha Turman at [turman@ifas-llc.com](mailto:turman@ifas-llc.com) or Tim Ceschin at [tceschin@ifas-llc.com](mailto:tceschin@ifas-llc.com).



### STG

STG is a leading provider of mission-critical technology, cyber and data solutions to more than 50 US Federal Agencies. Applying decades of experience, our experts work to ensure the security of the digital domain, the effectiveness of complex IT systems and the delivery of quality intelligence to decision makers. We provide performance-oriented solutions in cyber security and secure information systems, software development, systems and services and intelligence and analytics. We serve our customers at more than 250 locations at home and overseas. For more information about our services, please contact [stg.bd@stg.com](mailto:stg.bd@stg.com).

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# CGI

### CGI

A global leader in IT, business process and professional services, CGI partners with federal agencies to provide end-to-end solutions for defense, civilian and intelligence missions. Since 1976, we have delivered quality services to help clients achieve results at every stage of the program, product and business lifecycle. For more information about our services, please contact Bryan Hall at [Bryan.Hall@cgifederal.com](mailto:Bryan.Hall@cgifederal.com).



If your organization is interested in sponsoring the AGA Charleston chapter, please visit <https://www.agacgm.org/Chapters/CharlestonSC/Our-Chapter/Corporate-Sponsorship-Program.aspx>.