

The Cleveland Times

ASMC Cleveland Chapter Newsletter



ASMC NATIONAL NEWS

St. Louis PDI a Huge Success!

With this year's theme, "Meet Us at the Gateway: The Future of Defense Financial Management," ASMC welcomed 7,500 combined (in-person and virtual) attendees for our largest PDI ever!

The recordings of general sessions and workshops will be available later this month to registered attendees and anyone who's interested in registering for the Post PDI On-Demand Program. Visit www.PDI2023.org to learn about CPE credits, recordings, and presentation files.

Listen to (and Watch) ASMC's Podcast Series

Videos: The Business of Defense, produced by WTOP. The latest installments include Dave Sterling, founder and CEO of Royce Geo and RJ Blake of the Blake Wilson Group.

- Find key insights from Season 1 [here](#).
- Access Season 1 videos [here](#).

Audio: All Things Financial Management, presented in partnership with Guide house. The latest episode features Mr. Carlos Rodgers, Principal Deputy Assistant Secretary of the Air Force for Financial Management and Comptroller.

- Subscribe to the podcast series on Podbean, SoundCloud, or Spotify.
- Explore ATFM episodes [here](#).

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MEMBER NEWS



AFC Journal Book Reviews

Are you interested in writing a book review for the Armed Forces Comptroller (AFC) Journal? ASMC is looking for submissions for the journal's new book review column. Reviews should run about 500-750 words, and cover any recently released book in finance, accounting, auditing, budgeting, management and leadership, data analytics, enterprise risk management, or strategic planning. If you have a book in mind and are willing to commit to submitting a timely review, ASMC is even willing to purchase the book for you! Please contact Jessica Ciccolini (jessica.k.ciccolini.civ@mail.mil) if you're interested in submitting a review.

A Message from the President

I am honored to be your incoming President of ASMC Cleveland Chapter. First, I want to acknowledge the leadership provided by Jessica Ciccolini and last year's board, the officers and their committees for an outstanding program year. I am excited and look forward to this new program year and working with all of you.

I am thankful for the members' continued support and participation in the program events, community service, and leadership opportunities. Over the last few years, we all experienced the challenges of the COVID-19 pandemic. Despite these challenges, the Cleveland chapter pivoted quickly and continued moving onward. We could not do this without all of you, chapter members.

We leveraged technology to bring luncheon speakers and the local professional development institution (PDI), volunteered at the Greater Cleveland Food Bank, Make-A-Wish Walk, Wreaths across America, and partnered with a local organization that allowed us to proudly serve our military/veterans community. Through your strong commitment, motivation, collaboration, and support, the chapter had a successful program year. Thank you all for your dedication

Members, we know that being a part of a professional organization offers many benefits and opportunities for professional growth and development such as education, training, and leadership. Let's share the benefits of membership with our colleagues.

- Continuing Education: Earn continued professional education (CPEs) credit for active participating at events like luncheons (lunch & learn) and Professional Development Institutes (PDI)
- Networking: Interact and connect with peers and upper-level managers



- Certifications: Earn your Certified Defense Financial manager (CDFM)
- Community Service: Join the efforts to make a positive difference in local NE Ohio communities

We welcome your colleagues to attend ASMC luncheons/events and social outings, and participate in community service with us. Through our efforts, we can continue to grow our ASMC Cleveland chapter.

I am humbled and grateful to have such an opportunity to lead this chapter and will be looking to my predecessor and other past presidents for inspiration. One of my goals is to demonstrate the type of leadership that will continue to encourage, motivate, and inspire members to participate, to learn something new, and to lead just as I was inspired by past presidents, officers, and members of the ASMC Cleveland Chapter. Let's have a fantastic program year and looking forward to seeing you soon!

Warm Regards,

Lillian

Lillian Powell
ASMC Cleveland Chapter/Incoming President

CERTIFIED DEFENSE FINANCIAL MANAGER (CDFM) FAQs

In our last several newsletters, CDFM frequently asked questions (FAQs) have covered certification benefits, basic CDFM program information, enrollment, certification timelines, and ways to prepare for the exam. We continue this series with a look at requirements candidates must meet to sit for the exams:

Do I have to be an Accountant or Financial Management Analyst in order to sit for the CDFM exam?

No. You may sit for the exam regardless of your series or position. You needn't be an Accountant, Financial Management Analyst, or 0500-series to enroll in the CDFM program or sit for exams. Check eligibility [here](#).

What are the educational requirements to sit for the exam?

You must have a high school diploma or equivalent. Check eligibility [here](#).

What are the financial management experience requirements to sit for the exam?

You do not have to satisfy the experience requirement in order to sit for the exam. However, after you pass the exam, you must satisfy one of the following experience requirements BEFORE being issued your CDFM certificate:

- Complete 4 years of federal government related financial management experience (with an associate degree or higher) -OR-
- Complete 3 years of Defense related financial management experience (without a degree) -OR-
- Complete 2 years of Defense related financial management experience (with an associate degree or higher)

Check Eligibility [here](#).

If I do not have any financial management experience, can I still enroll in the Enhanced Defense Financial Management Training Course (EDFMTC) class?

Yes. No previous experience is required to prepare or sit for the exams, though FM experience requirements must be met before the CDFM certificate will be conferred.

Have questions about CDFM Certification?

- Visit the ASMC website to learn about all things CDFM (and CDFM-A) at <https://asmconline.org/cdfm/about-cdfm/>.
- Contact Kira Swanson (kira.swanson.civ@mail.mil) or Jessica Ciccolini (jessica.k.ciccolini.civ@mail.mil) for additional answers to frequently asked questions.



BOARD MEETING RECAP

June 2023

Attendees: Victoria Nord, Lillian Powell, Jessica Ciccolini, Stan Foster, Jeannine Anderson, Alex Kearney, Elena Baykal

President / Jessica Ciccolini

- Action (Jessica) - Publish newsletter before end of presidency
- Agreed to take on newsletter next year - along with DCAP Meaghan
- Action (Jessica) - Get Bill/Motor City contact info to Shana
- Action (Jessica) - find prior Prior Pres to swear in new officers at July Luncheon

Pres-Elect / Lillian Powell

- Upcoming community service opportunities:
 - Food Bank on Tues., 7/11, 8/3, 8/19

VP of Programs / Jeannine Anderson

- June Luncheon - still trying to confirm speaker for last week of June. Following up with speakers we reached out to. Jessica asked her to prioritize.
- Social/picnic with AGA - Jeannine to follow up.

VP of Nominations / Tori Nord

- No updates
- Action (Jeannine) - Send Victoria slides from local PDI Tri-C speaker

VP of Membership / Tiffany Douglas

- Not present - no updates

Treasurer / Alex Kearney

- Working on May financials.
- April Financials - coded giveaways to Conferences vs. promo materials budget. Will revise.
- Q from Pearl B. - Alex to look into whether we can pull paid invoice from Square.
- Action (Jessica) - Make payment to chapter charity after verifying \$ in debit acct.
- Final budget from local PDI - Still need to split proceeds with AGA. Alex will make sure promo items are not charged to PDI budget.

Secretary / Shana Rose

- Not present - no updates

Save the date

Lunch & Learn

Join us for our July luncheon!

Speaker: Mr. Patrick Giger, Decision Lens

Date / Time: Thursday, July 27, 11:30 AM - 12:30 PM

Topic: "Empowering Finance to Focus on Data Analysis Versus Data Validation"

Location: [Zoom](#)

Attendees can earn 1 CPE. RSVP by COB on Wednesday, July 26 to Lillian Powell and Earl Stanley Foster.

During this luncheon, officers for the 2023-2024 program year will be officially sworn in. This year's officers are:

President: **Lillian Powell**
 President-Elect: **Elena Baykal**
 VP Membership: **Tiffany Douglas**
 VP Programs: **Jeannine Anderson**
 VP Nominations: **Victoria Nord**
 Treasurer: **Alex Kearney**
 Secretary: **Shana Rose**



BOARD MEETING RECAP

July 2023

Attendees: Victoria Nord, Lillian Powell, Jessica Ciccolini, Alex Kearney, Elena Baykal, Tiffany Douglas

President / Lillian Powell

- Thanks to board! Excited for this year.
- July Luncheon - Announcement went out today.
 - Thurs, 7/27, 1130-1230, Patrick Giger, Decision Lens
 - Jason/Frankie swearing in new officers prior
 - May have another chapter join us - Motor City Chapter
- Board Meetings - If officers are unable to attend, let Lillian/Elena know and provide any status updates or advise if a subcommittee member will give updates on your behalf.
- Subcommittee members - Will send out last roster
 - Want board firmed up by 8/3 so we can go out to members to solicit add'l committee members.
 - ACTION (Lillian) - Confirm whether Kristen G will be webmaster.
- To Tiffany/Membership - Did Tiffany reach out to recently expired members? Yes, sent emails; working backwards on list.
- Shana working to update Board listing with new officer info
- Budget - will send out draft after this mtg. ACTION (all) - review budget and be prepared to vote during Aug board mtg.
- Lillian and Elena attended Jubilee meeting last week - HQ wanted to know how chapters are faring, challenges, a lot of chapters are experiencing decreased engagement due to TW. Lillian shared our success with in-person PDI, community service events.
- Upcoming foodbank events - Thurs. 8/3 (6-8pm), Sat. 8/19 (9am-12pm)

Pres-Elect / Elena Baykal

- Need to review board listing to review committee members

VP of Programs / Jeannine Anderson

- not present / scheduling conflict
- July Luncheon Tech Check - sent out meeting invite
- ACTION (Jeannine) - provide status update on summer outing with AGA

VP of Nominations / Tori Nord

- No updates

VP of Membership / Tiffany Douglas

- No updates

Treasurer / Alex Kearney

- Annual audit coming up and need to file taxes

Secretary / Shana Rose

- Not present - no updates
- ACTION (Shana) - update officer listing with ASMC

Past Pres / Jessica - still have a couple due-outs

- ACTION (Jessica) - review local PDI execution

Save the date

Community Service

@ the Greater
Cleveland Food Bank

Thursday, August 3, 2023,
6:00 PM-8:00 PM

Saturday, August 19, 2023,
9:00 AM-12:00 PM

**KEARNEY &
COMPANY**