

The Cleveland Times

SDFM Cleveland Chapter Newsletter



SDFM NATIONAL NEWS

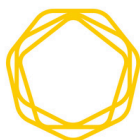
ASMC Rebranding - Introducing the Society of Defense Financial Management

We are thrilled to unveil a new era for our organization: the American Society of Military Comptrollers (ASMC) is now the Society of Defense Financial Management (SDFM)!

This rebranding is more than a name change; it's a renewed pledge to inclusivity and excellence in defense financial management. SDFM stands as a beacon for the diverse and skilled professionals dedicated to advancing the mission of national security.

Join us as we embark on this exciting journey, united in purpose and passion for service. Together, we are SDFM!

To read more about the transition, please visit <https://sdfm.org/news/society-of-defense-financial-management-launched-as-new-name-and-brand-at-premier-association-event/>. For more information about SDFM, its rebranding initiative, and the vital work of defense financial managers, please visit sdfm.org.



SDFM[®]

Society of Defense
Financial Management

Advancing the Mission of National Security

Inside This Issue

SDFM National News

Member News

CDFM Info

President's Message

Coming Events -
Save the Date!

Board Meeting Recap



SDFM Appoints Todd Tolbert as New COO

The Society of Defense Financial Management recently appointed Todd M. Tolbert, MBA, CAE as its new Chief Operating Officer. Find the full story at <https://sdfm.org/news/sdfm-appoints-todd-tolbert-as-new-chief-operating-officer/>.

Business of Defense Podcasts

On the latest episodes of [The Business of Defense](#):

- Want to make inroads in male-dominated world of IT? Perseverance and resiliency pay off, says [Sireesha Deena](#), CEO and President of Infopact,
- [Rich Brady](#), CEO of SDFM, speaks with [Sumner Lee](#), CEO and Founder of Fuse Integration about bringing data to tactical edge for warfighters in flight.

Use your personal device to access the podcasts at <https://federalnewsnetwork.com>.

MEMBER NEWS

June Member Appreciation Luncheon

Please join us for our annual Member Appreciation luncheon.

- Date: *** NEW DATE *** **Thursday, June 27, 2024**
- Time: 11:30 a.m. - 1:00 p.m.
- Place: Virtual via Zoom and In-Person at the AJC Federal Building.
 - Virtual: via Zoom: <https://us06web.zoom.us/j/82086708571?pwd=paYA6F53LZHSTjbs84mgNwllJgaYV.1>
 - Meeting ID: 820 8670 8571, Passcode: 943084
 - Dial In: +1-646-931-3860, Meeting ID: 820 8670 8571#, Passcode: *943084#
 - In Person: AJC Federal Building, Room 1785
- Cost: Free!!!
 - The Cleveland Chapter is providing pizza, salad, and beverages
 - We'll also have prizes and giveaways

Notes:

- DFAS Attendees must use leave or personal time beyond the allotted 30 minute lunch period.
- No CETs or CPEs will be offered.

Please RSVP to Stan Foster (earl.s.foster.civ@mail.mil), Erica Fleischer (erica.l.fleischer.civ@mail.mil), and Lillian Powell (lillian.powell9.civ@mail.mil) by COB Wednesday, June 26, 2024, if you would like to attend. An email response will be sent to you confirming your RSVP.

WELCOME

to the Chapter's
newest members:

Simone S. Coleman
Roderica L. Curbeam
Samya E. Ghaffari
Lisa Moxley

CONGRATS!

to our newest CDFM:
Alexandra Harvey, CDFM

June SDFM Cleveland No-Host Social

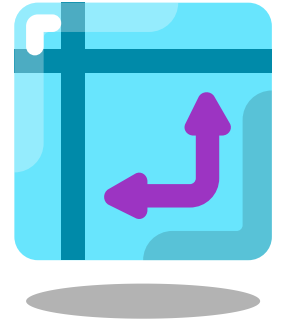
Join the Cleveland Chapter for a no-host social at Winking Lizard on **Thursday, June 27**, from 3:30-7:30 PM. We'll be at the Downtown Cleveland location, located at 1300 East 9th Street.

Teksouth Tips & Tricks

Teksouth held their monthly Tips & Tricks training on Thursday, June 20, 2024. Tips & Tricks is a free, hour-long educational series designed to improve the daily functions of DoD financial managers and data analysts. The sessions, offered in the morning and afternoon, cover features of Microsoft products used within the DoD workspace. The June session covered Excel - from Formulas to Pivot Tables.

The topic for July's session is yet to be announced, but registration for Tips & Tricks can always be found at <https://www.teksouth.com/vtt-reg/>.

Want to receive Tips & Tricks training reminders? Join the email list at <https://www.teksouth.com/join-our-mailing-list/>.



Cleveland's Annual PDI Draws Over 200

On May 2, 2024, attendees and speakers from across Northeast Ohio came together for a day of networking and professional education. Organizations represented included the American Society of Military Comptrollers, the Association of Government Accountants, the Defense Finance & Accounting Service, the National Aeronautics & Space Administration, Kearney & Company, the United States Coast Guard, the Internal Revenue Service, the Cuyahoga County Treasurer's Office, Cuyahoga Community College, and Notre Dame College. Joint sessions and breakouts focused around the theme of "Resilient Finances - Adapting to Change."

Special thanks to the joint ASMC / AGA PDI Planning Committee for putting together another great event! SDFM Cleveland Chapter members who wish to get involved in planning the 2025 Cleveland Professional Development Institute (PDI) should [email Elena Baykal](mailto:elena@teksouth.com). Planning will start in fall of 2024.

Left: Rich Brady, CEO of SDFM, addresses attendees during the PDI's opening session.

Below: Attendees face the main stage during a joint session.





Left: Speakers and PDI volunteers. Front row (L to R): Victoria Nord, Ivana Schiemann, Lillian Powell, Erica Fliescher, Jacqueline McKown, need name blue dress. Back row (L to R): Brad Cromes (Cuyahoga County), Stan Foster, Tim Baker (AGA), John Fitzpatrick (Kearney & Co.), Elena Baykal, Jessica Ciccolini.

Right: Dr. Terry Webb, Assistant Dean, Counseling, Psychological & Accessibility Services, Cuyahoga Community College, speaks on defeating self-imposed limitations.

PDI 2024 Recap

SDFM's premier training event, the National PDI, took place in Phoenix this year from May 29-31. The PDI featured Service and Defense Agencies workshops; general sessions with keynote speakers; mini-courses aligned to DoD Financial Management Certification Program competencies; and financial management, audit, acquisition, and workforce management workshops.

Several Cleveland Chapter members attended this year's PDI, whether to accept well-earned awards and recognition, to volunteer and support the conference, to soak up professional education and networking, or all of the above. Kudos to this year's **award winners!** Note: SDFM is in the process of converting and updating their website in line with rebranding, so it may take some time for winners to be updated from prior years.



Lillian Powell and Jessica Ciccolini at the 2024 PDI



Above Left: PDI 2024's Opening Session, where CEO Rich Brady announced the organization's rebranding to SDFM
Above: Jessica Ciccolini & Zuleika B. volunteering in the information booth
Right: Jessica Ciccolini, Victoria Nord, Shana Rose, and Elena Baykal check out Kearney and Company's booth in the PDI's exhibit hall

PDI 2024 Charity - Paralyzed Veterans of America

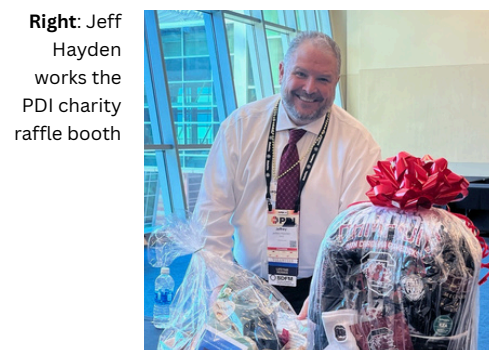
Each year, SDFM partners with a charity in the community chosen by the PDI host committee. This year's PDI charity is the Paralyzed Veterans of America. PVA's mission is to ensure that every Veteran of every age, every branch, and every conflict regains what they fought for: their freedom and independence. They are the only nonprofit Veteran Service Organization dedicated solely to helping Veterans with spinal cord injuries and disorders (SCI/D), and diseases, like MS and ALS. Their work impacts every aspect of a Veteran's life journey, from Day One of their injury or diagnosis. The Arizona chapter was at PDI 2024 to answer questions about their mission, how we can help them achieve it, and to accept PDI attendees' collective donation. To learn more about this 501©3, visit PVA.org. (information from www.pdi2024.org/PDI-Info)

The Cleveland Chapter supported the PVA by donating a raffle basket. The basket included Peterson's Nuts, a State of Ohio serving board, Roku Streamer, JBL Wireless Headphones, Candy Skull Portal Bluetooth Speaker, coffee, cocoa, and a stainless-steel travel coffee cup. Tina B., a member of Detroit's Motor City Chapter, won our basket.

Jeff Hayden, a Cleveland Chapter Past President and PDI volunteer, assisted with the charity raffle. The charity raffle raised \$25,000 for the PVA Arizona Chapter. On the behalf of the Cleveland Chapter, a special "thank you" goes to Jeff for his support at the 2024 PDI. In addition, we recognize and appreciate Jeff's leadership and efforts in support of the Cleveland Chapter. Kudos to Jeff!



Left: Tina B. and SDFM Cleveland President Lillian Powell



Right: Jeff Hayden works the PDI charity raffle booth

CDFM INFO

What do you need to know about the Updated CDFM Exam? by Heather Ireland



ASMC's certification team, CDFM certificants, and subject matter experts have been working diligently to evolve these exams in recent months. We know you've got questions – luckily, we've got answers...

How long will I be able to take the old exams?

The "old" and "updated" exams will run concurrently from May 29, 2024, through September 30, 2024.

Is there a transition plan for candidates who have already started preparing for the previous version of the exam?

Any candidates who started preparing for the previous exams can test for those exams until September 30, 2024. After this date, only the updated exams will be available.

Is there a new format for the exam, such as different question types or a different number of questions?

No, there are still 80 multiple-choice questions on each exam.

Have more questions? Review our list of [FAQs related to the Updated CDFM Exam launch](#) for more details. If you don't find the answer you're looking for, contact certification@sdfm.org.

(from <https://sdfm.org/news/what-do-you-need-to-know-about-the-updated-cdfm-exam/>)

Why Become a CDFM™?



Demonstrate mastery

The CDFM is designed to show your mastery of financial management competencies in all areas of defense financial management.



Advance your career

As a highly-regarded credential in both the public and private sector, the CDFM equips you for the next step in your career.



Stand apart and lead

With its rigorous and thorough requirements, the CDFM demonstrates your preparedness to lead your organization into the future.



It's DoD-approved

The CDFM is one of the DoD-approved, test-based certifications recommended for individuals with DF MCP Certification Levels 2 and 3.

Want to become a CDFM?

Are you interested in becoming a Certified Defense Financial Manager (CDFM)? Have you read through the [CDFM Certification information](#) but want to talk to someone who has gone through the certification (or recertification) process? The Cleveland Chapter's CDFM Committee is here to assist you and answer your questions, whether you're still considering your professional development options or already progressing down the path to certification. Reach out to Kira Swanson (kira.swanson.civ@mail.mil) and/or Jessica Ciccolini (jessica.k.ciccolini.civ@mail.mil).

A Message from the President



Greetings members,

Many of you have heard the great news about our organization! For those who have not heard the great news! I am proud and excited to announce that the American Society of Military Comptrollers (ASMC) is now The Society of Defense Financial Management (SDFM). Wow, this was an exciting moment at the National PDI 2024 to learn about the updated name. Mr. Rich Brady, CEO of SDFM, unveiled the new name and brand to over 5,500 in-person and 1,500+ virtual attendees on 28 May 2024 during the opening session, the first day of the PDI. SDFM is committed to its member and their success.

I learned that “timing” is essential when making decisions for such a moment like this. Being a global organization, the SDFM National leadership believed this was the right time to update the name and brand to reflect the continuous evolution in the financial management profession that we serve in DoD. At the PDI, Mr. Brady communicated that “the defense financial management has grown and evolved remarkably in recent decades, and this change reflects the diversity we have in the profession today” (sdfm.org). Also, the re-branding allows the organization to “prepare for the next generation of Defense Financial Management professionals which reflect the boarder audience currently served” (sdfm.org/PPT).

As this re-branding is new for many of us, this is not the first time the name has changed to allow for membership growth, innovation, expansion opportunities, and meeting the demand of the financial management (FM) profession in the defense industry. For seventy-six years, our national organization has been in existence. In 1948, the Society of Military Accountants & Statisticians was founded in San Antonio and only open to active-duty officers. In 1955, the founders decided to expand membership to all DoD and Coast Guard (FM) personnel, and civilian contractors and updated the name to the American Society of Military Comptrollers until the recent update, now the Society of Defense Financial Management (SDFM). Our organization has always answered the call to remain relevant in the FM industry. Although the name has changed, the mission has not.

SDFM will continue to bring “Unity in the FM Community” as this was the theme for this year’s National PDI 2024 through relevant FM topics, learning and development, innovation, upskilling, educational opportunities, certifications, and more. For instance, the National PDI attendees, both in-person and virtual, had the opportunity to select from over 100+ sessions to attend to earn CETs.

A wide range of topics included RPA and AI: DON’s journey with Predictive Modeling; Execution of a Two-Year Audit from the Management Perspective – How the USMC was Successful!; Current Issues in Financial Operations; Navigating Change in Turbulent Times; and Navy/Marine General Session #01, and G-Invoicing to name a few. Over 65+ exhibitors attended the conference, including Kearney & Company, were you can learn new information about innovation, financial management, etc from various agencies, auditing firms, and other business in the industry.

While at the National PDI 2024, the Cleveland Chapter was recognized for the outstanding community service and as a Five Star Chapter, these are two of the four chapters awards given at the National PDI. I applauded the membership body and the executive board for your outstanding support. This marks the chapter’s 15th consecutive year that the Cleveland Chapter received these national awards. It was my honor to lead the chapter in having another year of excellence service. It’s all because of the members’ commitment to support the chapter. Congratulations, SDFM Cleveland Chapter!!! Well-deserved.

Next, the Cleveland Chapter members are invited to join the chapter program committee and the executive board for the Members’ Appreciation hybrid luncheon on 27 June 2024. Both the executive board and I want to say thank you and show our appreciation to all of you for supporting this program year. The chapter will provide pizza and beverages for all who attend the luncheon “in-person”. Also, there will be prizes and swag giveaways. In addition, the program committee will like members to join us for the “after-work social event” on June 27. It’s a great opportunity to come together to socialize, network, and meet new people. Members are welcome to invite co-workers to attend, we just ask members to provide a total count when you RSVP with the program committee.

I encourage members to get involved with the chapter as we start a new journey through this name and brand transition. As this program year coming to a close, I ask you all to consider joining any of our six committees. I and the other officers are more than happy to talk with you and welcome you aboard. It is the members who are the backbone of the Cleveland Chapter and continues to move the chapter onward. Also, members can invite your colleagues to any chapter luncheons and social events. I look forward to seeing at the luncheon and the after work social event!

Warm Regards,

Lillian

Lillian Powell
SDFM Cleveland Chapter President

BOARD MEETING RECAP

May 17, 2024

Attendees: Kim Williams, Rosemarie Hammond, Kira Swenson, Victoria Nord, Alex Kearney, Jessica Ciccolini, Jeannine Anderson
Schedule conflict: Shana Rose, Elena Baykal, Tiffany Douglas, Stan Foster, Paul Cotton, Erica Fleischer

VP of Nominations / Victoria Nord

- Officers-elect announcement
 - Outgoing officers schedule turnover mtgs with newly elected officers
 - Reach out to membership to recruit committee members for next program year 2024 – 2025
- CDFM: Kira Swenson, CDFM Chair -
 - EDfMT Course - Most recent class ended May 10, 2024. No add'l classes listed for DFAS this FY.
 - CDFM Exam change: September 30, 2024, is the cut-off for administration of old CDFM exam.
 - New Exam: Starting Oct. 1, new CDFM new format will be rolled out.
- ASMC Cleveland Chapter/ Kearney & Company Scholarship Award winner is Balwinder Beasley.

President-Elect / Elena Baykal

Community Service

- Volunteer opportunities at the Greater Cleveland Food Bank:
 - Wednesday, June 12, 2024, 6:00 pm – 8:00 pm
 - @ at 13815 Coit Rd, Cleveland, OH 44110
 - Saturdays, June 8 & 22, 2024, 8:30 am – 12:30 pm
 - @ 15500 South Waterloo Road, Cleveland 44110
 - Saturday, July 13, 2024, 8:30 am – 12:30 pm
 - @ 15500 South Waterloo Road, Cleveland 44110
 - Elena taking over as interim volunteer coordinator mid-June; will ask community service committee members if one of them would like the opportunity to coordinate. Thanks to Jennifer Gutierrez for serving in this capacity for the past several years!

VP of Programs / Jeannine Anderson (update provided by Lillian)

- June Luncheon - Member's Appreciation Luncheon [Possible dates: 6/12, 6/13, or 6/18; will be hybrid
- June Social
 - Ideas- After work social event, Corner Alley, Sausalito on Ninth, Winkling Lizard in Mid-June
 - Top Golf – Will reach out to AGA Cleveland Chapter to partner in social event. Ms. Jackie, AGA officer, mentioned this option previous conversation.
- Local PDI was a success - 11 speakers, over 200 attendees

VP of Membership / Tiffany Douglas (update provided by Lillian)

- Welcomed 3 new members to ASMC chapter (2 in Apr, 1 in May) with Welcome Package and event announcements including luncheons, community service events, and newsletters. Total of 16 new members for 2023 -2024 program year.

Secretary / Shana Rose (update provided by Jessica)

- May Newsletter Edition - Work in progress

Treasurer / Alex Kearney

- Alex plan to have the financials updated through Apr 2024 by 5/28/24
- Local PDI Financial Report
- National PDI assistance approved for officers is recorded.

President / Lillian Powell

- Briefed on ASMC / CDFM @ DFAS MilPay All Hands May 8

Save the date

Community Service

@ the Greater Cleveland
Food Bank

**Saturday, June 22, 2024,
8:30 AM – 12:30 PM**

What: Food Bank Resource Center – Food Pantry
Where: 15500 South Waterloo Rd., Cleveland 44110
RSVP: To volunteer, [email Elena Baykal](#) by close of business on Friday June 21. Elena will forward registration link.

**Saturday, July 13, 2024,
8:30 AM – 12:30 PM**

What: Food Bank Resource Center – Food Pantry
Where: 15500 South Waterloo Rd., Cleveland 44110
RSVP: To volunteer, [email Elena Baykal](#) by close of business on Friday July 12. Elena will forward registration link.



SDFM Cleveland volunteers Rosemarie Hammond, Monroe Kidd, and Lillian Powell at the Food Bank on June 12th.

BOARD MEETING RECAP

June 13, 2024

Attendees: Lillian Powell, Victoria Nord, Erica Fleishcer, Alex Kearney, Jessica Ciccolini, Elena Baykal
Schedule conflict: Shana Rose, Jeannine Anderson, Tiffany Douglas, Stan Foster, Paul Cotton, Kira Swanson

VP of Nominations / Victoria Nord

- New CDFM recipient: Ms. Alexander Harvey (Congratulations!)
- New Test Exams coming soon! Effective Sept. 30, 2024

President-Elect / Elena Baykal

- Volunteer opportunities at the Greater Cleveland Food Bank:
 - Wednesday, June 12, 2024 - 3 volunteers // Rosemarie Hammond, Monroe Kidd, Lillian Powell
 - Saturday, June 22, 2024, 8:30 am – 12:30 pm
 - @ 15500 South Waterloo Road, Cleveland 44110
 - Saturday, July 13, 2024, 8:30 am – 12:30 pm
 - @ 15500 South Waterloo Road, Cleveland 44110

VP of Programs / Jeannine Anderson (update provided by Lillian)

- June Luncheon (6/25 - hybrid) - Announcement sent out June 12
- Social @ Winking Lizard (6/25), 3:30-7:30 PM

VP of Membership / Tiffany Douglas (update provided by Lillian)

- Welcomed 1 new member to SDFM chapter with Welcome Package and event announcements including luncheons, community service events, and newsletters.

Secretary / Shana Rose (update provided by Jessica)

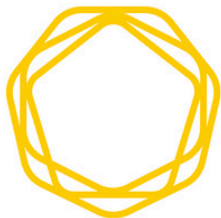
- May/June Newsletter Edition - Work in progress

Treasurer / Alex Kearney

- Plan to have the financials updated through May 2024 by 6/21/24
- Local PDI Financial Report
- Preparing to reconcile financial reports for June 2024 and close out program year 2024 - 2025

President / Lillian Powell

- President message for the month of June 2024 [send to Jessica]
- ASMC National PDI, May 28 -31, 2024
 - New name / brand announced
 - Cleveland Chapter recognized, Community Service & Five Star Award
 - Lillian received Chapter Leadership Award
 - Four ASMC officers volunteered
 - Cleveland Chapter supported PDI Charity Raffle benefiting Paralyzed Veterans of America (AZ Chapter)
- Planning July luncheon – Hybrid; swearing-in officer installation ceremony Program Year 2024 – 2025
 - Contact Past President to swear in new officers
 - Contact personnel for July speaker
 - Schedule a room for the luncheon
- Planning Summer Picnic Joint with AGA (transitioning to VP of Programs)



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