



VOL. 11
ISSUE 5



AMERICAN SOCIETY OF MILITARY COMPTROLLERS

San Diego Chapter Newsletter

COMMUNICATOR

MAY
2018



CHECK THIS OUT!

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ASMC San Diego
growth

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FMOnline Training

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SAVE THE DATE!

Lunch & Learn
Meeting:

July 18th
Location: TBD
Sponsor: Fed Advisors
Subject: Employee
Benefits

From the Executive Vice President:

Spring is in full swing, it's a great time to take care of some financial Feng Shui!

In a mindbodygreen.com article, titled "6 Feng Shui Tips for Healthy Financial Flow", Katie Rogers, a certified Feng Shui consultant provides some energy-moving advice, keeping us in the "flow".

Money is energy. When "currency" flows, the energy attracts more of it into your life.

Some helpful tips:

1. Fix Leaks/Clogs. Water represents money and emotions. If you have a dripping faucet a clog or a leak, get it fixed pronto. Fix your plumbing to fix your finances...unless you want your funds to "leak out".
2. Ensure a Feng Shui friendly entrance allowing opportunity to "knock" on your door. Fix broken door bells and ensure the numbers on your house are visible. A couple of perfectly placed plants won't hurt.
3. Symbolism. According to "Tibetan Black Hat School of Feng Shui", your money sector is located in the back left of your home (room, office or desk). If it's a mess, your finances may be too. Place some healthy, non-pointy plants in this area and keep this section clutter free.
4. Work on your Chi. Think about your beliefs about money and finance. How do you manage your finances? Do you pay your bills on time? Have you checked your credit? Keep positive and create a healthy balance of "spending, saving, giving and living in gratitude" and watch your abundance (and energy) grow.

Thanks to all of you who attended the April 2018 Lunch and learn event with our guest speaker, Martin Jimenez, Budget Officer, SPAWAR SSC PAC. We had an amazing turn out! I hope you'll continue to attend these great events as we've got a couple more wonderful speakers' in store for you.

Also, don't forget to register for the 2018 PDI (Professional Development Institute) at <http://pdi2018.org/>. The event is being held at Denver, Colorado, May 31-June 2. This wonderful training opportunity supports our core mission of promoting education, training and professional development in all aspects of military comptrollership!

Dawn M. Cano Medina, M.A., CDFM

ASMC San Diego Chapter Executive Vice President

dawn.canomedina@navy.mil

Nat'l Park Foundation - Andersonville



Ref: Reynolds, Katie. September 5, 2013: "https://www.mindbodygreen.com/0-10850/6-feng-shui-tips-for-healthy-financial-flow.html"

2004-2018 FIVE STAR CHAPTER





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ASMC San Diego 2017-18 Membership Drive:

We're excited to be offering this new Membership Drive for ASMC San Diego. Let's recruit new members to join our Chapter this year.

New Membership: The chapter will pay your ASMC membership dues for the first year of any new member who joins ASMC between October 1, 2017 and September 30, 2018. This only applies to anyone who has never been an ASMC member in the past. You will need to submit a copy of your receipt for payment.

ASMC San Diego Members: Every time an ASMC member attends an ASMC luncheon and brings a non-ASMC member to that same luncheon the ASMC member will receive entry to the luncheon for half price.

Rules for the FY-2017-18 ASMC Membership Drive: This membership drive is open to all ASMC San Diego members in good standing. -- Members transferring from other chapters do not qualify as a "NEW" member and members renewing membership do not qualify.

If you have any questions, contact the membership chair, Mike Ortiz at 619-532-8872 or mike.ortiz@navy.mil.

ASMC – Way to Grow San Diego!

San Diego (A-1), Cleveland (A), Utah (B), and Narragansett Bay (C) chapters had the highest rate of growth in their size categories from 30 Jun 2016 to 31 March 2018.

San Diego grew an amazing 12.7%!

Al Runnels, CDFM-A
ASMC Executive Director

Thanks to all for bringing in new members!

Brenda Meyer
ASMC San Diego Chapter President

Note: A-1, A, B, C reflect categories of chapter size



NEVER STOP LOVING THEM

HONOR • REMEMBER



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Come Join Us at Fisher House in 2018!

ASMC and DAUAA will be joining forces to prepare delicious meals for the residents of Fisher House in 2018. Here's how it works: A team of volunteers will spend 3-4 hours at the Fisher House kitchen preparing a meal. We need volunteers to plan the menu; do the shopping the day before the cooking event; meet at Fisher House to chop, slice, cook, bake, and have fun. We do this every month so there are plenty of opportunities to help. We have a great time and the Fisher House residents appreciate the home-cooked meals. It's a great way to help military heroes and their families. If you are interested in this rewarding volunteer opportunity, please contact Joanne MacDonald-Morrow at joanne.macdonald-morrow@dau.mil.



New FMOnline Training Opportunities!

Virtual Training Pilot Program Instructor-led – offers multiple FM and leadership courses across eight time zones. Virtual classroom format allows participants to interact directly with instructors. CPEs will be awarded upon completion. All Course Times: 8 a.m. - 4 p.m. in the time zone that they are conducted

Central Daylight Time courses (can be made available for other time zones per leadership request)

Start Date	End Date	Sign Up Cut off date*	MCI Title	MCI Course Session Code	Course Type	FM MyLearn Course Code	Certification Level	Hrs
6/13/2018	6/14/2018	6/1/2018	Leadership and Management Skills for Non-Managers	4000-OOSD-18001	LM	L4301	1, 2	16

Eastern Daylight Time courses (can be made available for other time zones per leadership request)

6/5/18	6/8/18	5/25/2018	Appropriations Law Seminar	5111-OOSD-18007	FM-L	F5495	2	32
6/12/18	6/13/18	6/1/2018	Overview of Internal Control Guidance	5108-OOSD-18008	FM-Au	F7439	1, 2	16



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NEWS FROM NATIONAL:

ASMC Chapter Awards for 2017-18

The San Diego Chapter placed with:

Chapter Communications, A-1 Category
Distinguished – San Diego

Five Star Recognition*
San Diego

and Community Service
San Diego (150 hours or more)

<http://www.asmcnline.org/national-awards-program/2017-18-award-winners/chapter-award-winners/>

ASMC National 2018 PDI will be held May 30 – June 1 in Denver, Colorado!

Registration is now open. For more information, please visit the [PDI 2018](#) page.

PDI is the premier training event for resource/financial managers in the Department of Defense, US Coast Guard, and public and private sectors. This three-day training event features a full day of Service and Defense Agencies workshops; six general sessions with keynote speakers; 17 mini-courses aligned to the DoD Financial Management Certification Program competencies and associated proficiency levels; more than fifty financial management, audit, acquisition, and workforce management workshops; and other special activities.

Special Events at this years' PDI:

- Community Service Project
- Colorado Rockies Discounted Tickets
- US Denver Mint Tour
- Capital Tour
- Downtown Denver Scavenger Hunt
- Get FM Certification Help at National PDI
- CDFM Reception
- CDFM Pilot Testing (Active CDFM-As only)

Sponsors and Exhibits

We hope to see you there!



Metrosideros polymorpha flowers growing through dried lava in Kalapana, Hawaii.

Always remember – life has a way of overcoming adversity!



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Retirement Article - High 3 vs High 5

Welcome back to another installment on all things retirement. This month we'll take a look at a term most of you have heard at one time or another, the "High 3." What does it mean? How is it factored? What is this I hear about a "High 5" and is it better or worse?

Well, let us start with the basics – your High 3 refers to the three consecutive years of your highest earnings. In just about every case, this is the last three years of employment. By averaging your earnings during those three years, OPM then has an average salary that can be factored into your retirement pension calculation. Now that being said, there are several categories of pay, and not all of them contribute to the annual earnings considered by OPM. Which begs the question, what does count toward the High 3? Luckily, OPM has made that pretty easy for us, and its clearly outlined:

What DOES count toward your High 3 calculation:

- Regular pay
- Locality-based pay
- Environmental Differential Pay (Hazardous Pay)
- Premium pay for standby time
- Law enforcement availability pay
- Night differential pay for Federal Way System (Blue Collar) employees only
- Special pay rate for recruiting and retention purposes

What does NOT count toward your High 3 calculation:

- Lump sum pay for accrued/accumulated unused annual leave paid upon retirement
- Bonuses and overtime, holiday, Sunday premium and military pay
- General Schedule (GS) night differential and foreign or non-foreign post differential
- Travel allowances
- Recruiting or retention bonuses
- Payment for credit hours

The important take away from those two lists is this – The longer an employee is at a higher salary, the more effective (greater increase) it will have on the employee's average High 3 factor. Thus, postponing your retirement for an upcoming salary increase, step increase or government-pay increase, and then retiring soon after will ultimately have a negligible effect on the High 3 average salary. In a similar fashion, killing yourself for the last few months of your career working all the overtime you can get will have zero effect on your retirement take home pay.

So, what about the "High 5" that we've all heard about? It is exactly that, it takes the highest earnings of five consecutive years, versus three. By adding two more years of lower earnings to the average, OPM will use a lower average salary to factor your retirement earnings.



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Retirement Article - High 3 vs High 5

This is not a new concept, and was proposed by Congress as early as 1992. Obviously, it has yet to be passed or approved, but given the budget and fiscal conditions that we face as a nation, it is only a matter of time until it does replace the High 3 as a standardization of salary averaging.

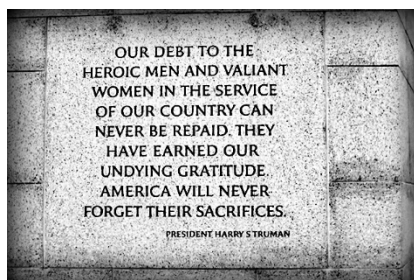
So, what happens then? Honestly, not much if you consider the big picture. Granted, each person's retirement scenario is unique, but I did various retirement scenarios, both for CSRS and FERS, to get a good idea of what the difference in monthly take home would be if/when the High 5 replaces the High 3. Surprisingly, it isn't drastic. Assuming 41 years and 11 months of CSRS service, and 40 years of FERS service – the average difference between High 3 and High 5 for CSRS was about \$1200/year less, or \$100/month. For FERS it was even less, an average of \$600/year less, or \$50/month. Not as bad as it seems at first. One obvious option to combat this potential change would be to nominally increase your bi-weekly TSP contribution. By increasing your TSP contribution, you would not only offset the monthly retirement income deficit, but also decrease your current annual taxable income (assuming those contributions were made to the Traditional TSP account, and not the ROTH.)

That is it for this month, for those of you who reached out with questions or concerns, I'm glad we were able to get some answers to your individual issues. I look forward to more, so keep them coming!

Be happy, be Safe, and be Kind.

Joe

Joe McGee is the Vice President of the Western US for Federal Employees First Alliance, a Chartered Federal Employee Benefits Consultant (ChFEBC), a member in good standing of the NEA (National Ethics Association) and a frequent speaker to Federal employee groups, unions and agencies nationwide. With over 17 years of experience in the Federal retirement sector, his straightforward approach has provided clarity and confidence for those looking to retire with a full understanding of their benefits and how to maximize them. Individual consultations at his San Diego office in Mission Valley are offered at no cost, and he can be contacted at (619) 886-5129 or at jmcgee@fefalliance.org





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ASK MAC!



Mac,

We're having a hard time awarding one of our contracts this fiscal year and it's impacting our obligation rates. We pulled together a team to work on the issue and brainstorm ideas for how to get it awarded. Someone recommended that we use a Letter Contract since it will get funding obligated quickly. Can you explain the use of Letter Contracts and if we can use it to help meet our obligation goals since we will be at risk of losing funds if we don't obligate our contract soon.

Roberto Nomyug

Dear Roberto,

A Letter Contract, which is an Undefined Contract Action (UCA), is a written preliminary contractual instrument that authorizes the contractor to begin work immediately to manufacture supplies or perform services. UCAs are contract actions for which the contract terms, specifications, or price are not agreed upon before performance commences. A letter contract may be used when:

1. the Government's interests demand that the contractor be given a binding commitment so that work can start immediately, and
2. negotiating a definitive contract is not possible in sufficient time to meet the requirement.

A Statement of Urgency from the requiring organization is required to support the need of issuing a Letter Contract, and the Letter Contract should be as complete and definite as feasible under the circumstances.

Per [FAR 16.603-3](#), a Letter Contract may be used only after the Head of the Contracting activity or a designee determines in writing that no other contract is suitable. A Letter Contract may not do any of the following:

1. Commit the Government to a definitive contract in excess of the funds available at the time the letter contract is executed;
2. Be entered into without competition when competition is required by FAR Part 6;
3. Be amended to satisfy a new requirement unless that requirement is inseparable from the existing letter contract. Any such amendment is subject to the same requirements and limitations as a new letter contract; or
4. Per [DFARS 217.7404-4](#) obligate more than 50% of the not-to-exceed (NTE) price before definitization.

However, if the Contractor submits a qualifying proposal before 50 percent of the NTE price has been obligated by the Government then the limitation on obligations before definitization may be increased to no more than 75%.

Your organization will have to decide if a Letter Contract is justified in this situation. However, a Letter Contract should not be used only because the program wants to meet its obligation goals.

Thanks for a great question!

Sincerely,
Mac



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If you are working on your exams,
keep up the good work!

ASMC ONLINE MEMBERSHIP LINKS:

Join ASMC:

<http://www.asmcnline.org/membership/join-renew/>

Update your Profile:

<http://www.asmcnline.org/membership/edit-profile/>

Renew ASMC Membership:

<http://www.asmcnline.org/membership/renew/>

The CDFM Program:

<http://www.asmcnline.org/certification/cdfm-information/>

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