

**ASSOCIATION FOR THE
IMPROVEMENT OF
MINORITIES (AIM)**

**MID-ATLANTIC REGIONAL
CONFERENCE**



**20
24**

HOSTED BY: WASHINGTON, DC CHAPTER

Level Up



MAY 3, 2024 • UNIVERSITY OF NORTH AMERICA

12750 Fair Lakes Cir, Fairfax VA 22033

AGENDA

FRIDAY - MAY 3, 2024

2024 MID-ATLANTIC REGIONAL CONFERENCE

PRAYER

**OPENING KEYNOTE
SPEAKER**

**PHYLLIS GRIMMS
CHIEF PRIVACY OFFICER, PGLD**

Interactive session



**WORKPLACE #1: FINANCIAL
LITERACY**

DERRICK PARKER

**WORKPLACE #2: MENTAL
HEALTH**

DR. ROZ AKER-BLACK



Interactive session



**WORKPLACE #3: ARTIFICIAL
INTELLIGENCE IN THE
WORKPLACE**

**ROBERT SOPER
CHIEF, ARTIFICIAL INTELLIGENCE**

Interactive session



**WORKSHOP #4: JOURNEY
TO SUCCESS**

**CYNTHIA DUNN, MODERATOR, DEZMOND
EVANS, NICOLE YOUNG SCOTT,
SHELDERICK BAILEY, KAREEM CARTER**

FINAL WORDS

**PAULA MASON, PRESIDENT, AIM-IRS DC
CHAPTER**

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MAY 3, 2024

OPENING KEYNOTE SPEAKER



PRESENTER BIO:

Phyllis Grimmes
Chief, Privacy Officer, PGLD



Phyllis T. Grimes currently serves as the Acting IRS Chief Privacy Officer where she provides oversight of the policies and procedures that promote the proper protection, authentication, minimization, retention, and disclosure of taxpayer information. This encompasses responsibility over: Internal Revenue Code Section 6103, Freedom of Information Act (FOIA) and Privacy Act compliance, Federal Records Act responsibilities, IRS authentication activities, data exchanges with federal, state, and local government agencies, and safeguarding Federal Tax Information in the custody of those exchange partners. Previously, served as the Director, Governmental Liaison, Disclosure and Safeguards, within the Privacy, Governmental Liaison & Disclosure (PGLD) Division. Phyllis was responsible for providing timely public access to IRS records in accordance with applicable disclosure laws, partnering with federal, state, and local governmental agencies, and ensuring IRS employees and external partners protect confidential tax and privacy information. GLDS operations include Governmental Liaison, Disclosure, Safeguards and Data Services. She was responsible for increasing the transparency of IRS records by administering the Freedom of Information Act, as well as statutory provisions regulating the use and protection of tax information and sensitive data such as IRC 6103 and the Computer Matching and Privacy Protection Act.

Prior to this assignment, Phyllis directed the activities of the Communication and Stakeholder Outreach (CSO) function for the Small Business/Self-Employed (SB/SE) division. Under her direction, the CSO delivered education and outreach to more than 55 million SB/SE taxpayers, and internal communications to almost 25,000 SB/SE employees. Phyllis began her IRS career in 2000 in the Executive Development Program in Washington, D.C. Before joining the IRS, Phyllis enjoyed a long management and executive career in the financial services industry with Bank of America. She earned both an M.B.A. and B.S. in Finance from the University of Maryland, College Park.

MAY 3, 2024

FINANCIAL LITERACY WORKSHOP



TOPIC: MONEY MATTERS: WHAT'S IN YOUR WALLET

PRESENTER BIO:

Derrick Parker



Derrick embraced growing up quickly after losing his mother at the age of 7 and he observed his dad's great leadership of raising 3 boys and 1 girl while running a family business.

Derrick was on his way to a successful career in pharmaceutical sales when his plans were derailed with the loss of his oldest brother who played in the NFL and left his family broke.

Derrick jumped at the opportunity to be in business for himself in 2005 and started the Primerica business on a Part-Time basis. After earning the prestigious \$50,000 watch his 2nd year he knew it was time to take the business to another level.

Derrick became a Regional Vice President in 2010 and joined the Financial Independence Council in 13 months after his promotion. In 2016 he promoted his 1st RVP and in 2017 he was inducted into the African American Leadership Council. In 2019 Derrick was awarded ownership through Primerica where his business has been elevated Nationwide.

Derrick has been married to his lovely wife Tawanda of 16 years and they proudly raised 1 daughter Ashley. Together they harbor a successful partnership in building a God Fearing business.

MAY 3, 2024

MENTAL HEALTH WORKSHOP



TOPIC: MENTAL HEALTH: HEALTH MANAGEMENT AND MANAGING STRESS

PRESENTER BIO:

Dr. Roselyn V. Aker-Black

Dr. Roselyn V. Aker- Black, Psy.D (affectionately known as Dr. Roz) is a native of Rome, Georgia and currently resides in the Washington, DC metro area with her husband. Dr. Roz received a B.A. in psychology from Fisk University and completed a doctoral degree in clinical psychology at the American Schools of Professional Psychology at Argosy University in Washington, DC.

Dr. Roz is an award- winning mental health clinician and has over 17 years of experience in providing psychological services to children, families, and couples in the nonprofit, government, and private industry sectors. Currently, she is the interim Chief Executive Officer for the Goal Grinders Foundation, a nonprofit organization that provides Leadership and Entrepreneurial training with a STEM Focus for at risk middle and high school girls.

Dr. Roz's media experience includes psychological consults with the Anderson Cooper Talk Show (2012), the OWN's Network docuseries Unfaithful (2012), Huffington Post, Fox5DC, NBC4 and a regular guest appearance on Howard University's WHUR 96.3 as a relationship expert. Dr. Roz made history as the first African American Series Psychologist on TV One's limited series, "For My Woman". She is the host of the Dr. Roz Show podcast. Moreover, Dr. Aker-Black's work has also been published in International Journals.

She is the owner of the Dr. Roz Therapeutic and Coaching Services, a boutique organization that is dedicated to help people function properly in all relationships! Dr. Roz is also an author and co-author represented by 13th and Joan Publications. Dr. Roz is a charter member of the Prince George's County Women's Bureau Toastmasters Club and the Vice president and founding member of Black Door Society.



MAY 3, 2024

ARTIFICIAL INTELLIGENCE IN THE WORKPLACE WORKSHOP

TOPIC: ARTIFICIAL INTELLIGENCE IN THE WORKPLACE

PRESENTER BIO:

Robert Soper
Chief, Artificial Intelligence



Since April 2022, Randy Soper has been the Internal Revenue Service's Chief, Artificial Intelligence in Information Technology. He is the executive lead for the Advanced Analytics Platform, an Inflation Reduction Act modernization initiative supporting the scalability of AI and Trustworthy AI controls for all mission domains. He also leads the architecture of the Service's future-state AI technology and supports the alignment of IT and AI governance frameworks. Prior to joining the IRS, Randy supported the US defense and intelligence communities for nearly twenty years as a civilian employee and a contractor, including multiple roles related to digital transformation and data science. Randy is a thought leader in the areas of enterprise-scale and trustworthy AI implementation and human-machine teaming. He volunteers with the Computer Society and Standards Association of the IEEE and is currently an officer of the global IEEE AI Standards Committee. He holds degrees in engineering from Virginia Tech.

MAY 3, 2024



JOURNEY TO SUCCESS LEADERSHIP DISCUSSION

TOPIC: JOURNEY TO SUCCESS PANELIST DISCUSSION

PRESENTERS:

Cynthia Dunn, Moderator, Dezmond Evans, Nicole Young Scott, Shelderick Bailey, Kareem Carter



CYNTHIA DUNN



NICOLE YOUNG SCOTT



DEZMOND EVANS



KAREEM CARTER



SHELDERICK BAILEY

MAY 3, 2024

JOURNEY TO SUCCESS LEADERSHIP DISCUSSION



CYNTHIA DUNN

**DIRECTOR, TAX EXEMPT AND GOVERNMENT ENTITIES (TE/GE), OFFICE
OF EQUITY DIVERSITY & INCLUSION (EDI)**

Cynthia “Cin-dee” Dunn joined the Internal Revenue Service (IRS), Tax Exempt/Government Entities (TE/GE), Office of Equity, Diversity and Inclusion (EDI) as the EDI Director in 2004. She currently holds the record as the longest-serving EEO/EDI Director for the Services. Cin-dee started her government career in 1980 under the Stay-in-School Program and in the field of EEO and Diversity in 1988. She has over 40 years of government service.

Cin-dee joined AIM-IRS in 2000. One of the founding members of the AIM-Career Assistance Mentoring Program (CAMP), Cin-dee continues an active role by serving as a CAMP mentor annually. She currently serves as a mentor for the 2024 CAMP. She participates each year as a workshop presenter (or other active roles) in the AIM-IRS ABMTS and Regional Chapter Training Programs. She is serving as the moderator at this year’s Mid-Atlantic Regional Conference that is being held at the University of North America in Fairfax, VA.

In 2023, AIM-IRS awarded Cin-dee the “Invictus” Award.

Cin-dee resides in Waldorf, Maryland. She has two sons and five grandchildren.

MAY 3, 2024



JOURNEY TO SUCCESS LEADERSHIP DISCUSSION



NICOLE YOUNG SCOTT

DIRECTOR, SB/SE, BUSINESS SUPPORT OFFICE

Nicole is currently serving as the Director of the Business Support Office in the Small Business/Self Employed (SB/SE) organization. In this capacity, Nicole provides leadership and direction for the development and financial management of approximately \$2.3 billion, and oversight for Servicewide organizations of Penalties and Interest. Nicole began her IRS career in 1991, as a Writer-Editor in Tax Form and Publications and has held many positions throughout the IRS. Nicole began her management career as the Chief, Collection Operations Support overseeing hiring, budget, and training programs. She then became the Director, HCO Resources Management Division overseeing HCO's budgetary resources. Nicole has worked on many service-wide initiatives such as Project Manager, Return Preparer Review Team and as the Project Manager that implemented the IRS certification program for Professional Employer Organizations (PEOs). She also served as the RPO Director, Strategy & Finance. Nicole has served in other executive acting roles such as Assistant Project Director in the Taxpayer First Act Office, Assistant to the Director, Specialty Exam where she had oversight of the following field operations of Employment Tax, Excise, Estate & Gift, and the Bank Secrecy Programs and also as the Acting Director, SB/SE Research. Nicole has a bachelor's degree in Business Management from Morgan State University, is a recipient of 3 IRS Commissioner Awards, and is a graduate of the 2022 Candidate Development Program.

MAY 3, 2024



JOURNEY TO SUCCESS LEADERSHIP DISCUSSION



SHELDERICK BAILEY

**DIRECTOR, MAINFRAME SUPPORT AND SERVICES INFORMATION
TECHNOLOGY**

Shelderick Bailey began his IRS career in IT as an IT Specialist in the Washington, DC area in 2019. He transitioned into management by serving as the Manager / Section Chief of the Unisys Tax Processing Mainframe Operating Systems Support team in 2021, and ultimately in 2023 became the Chief Division Management Officer to the Director of the IT Enterprise Operations – Enterprise Server Division.

Shelderick received his Bachelor of Science degree in Information Technology from the Strayer University, Washington D.C. He is a member of the Project Management Institute (PMI) holding the Project Management Professional (PMP) credential. He lives in Alexandria, VA with his wife Lisa. When he isn't spending time with family and friends, he can be found playing basketball and gardening.

Prior to joining IRS, Shelderick spent more than 10 years as a trusted partner and advisor to senior business leaders, clients, and stakeholders, contributing experienced, broad-based, integrated approaches to facilitate information technology transformation and modernization efforts to include several large scale ServiceNow implementations via requirement assessments and overseeing the conceptualization, design, implementation, and operation of short- and long-term IT documentation, capabilities, strategies, and solutions efficiently and effectively to maximize IT business value at Private Sector System Integrators Accenture and CSC/GDIT in support of mission critical work at the Department of Homeland Security, Department of Transportation, and the Department of Justice.

MAY 3, 2024



JOURNEY TO SUCCESS LEADERSHIP DISCUSSION



KAREEM CARTER

EXECUTIVE SPECIAL AGENT – CRIMINAL INVESTIGATION

Kareem Carter is the Executive Special Agent in Charge of the Washington DC Field Office. In this role Mr. Carter oversees staff of approximately 120 employees covering Washington DC, Maryland, Virginia, and West Virginia along with specialized groups in Cyber Crimes, International Tax and Financial Crime, Global Illicit Finance, and Alcohol Tobacco and Tax.

Mr. Carter has also served as the Acting Director for Global Operations overseeing IRS-CI's international and domestic operations by overseeing policy, oversight, and support to the field offices in program areas to include tax and money laundering, special investigative techniques, seizure, forfeiture, narcotics, and national security. Prior to this role, Mr. Carter served as the Deputy Director for Global Operations and prior to that Mr. Carter served as the Special Agent in Charge, Oakland Field Office.

Mr. Carter began his career with Criminal Investigation as a Student Trainee in 2001, Denver Field Office and was promoted to a special agent in 2002. In 2007, Mr. Carter was assigned to the North Texas High Intensity Drug Trafficking Area taskforce in Dallas, TX. Since 2010, Mr. Carter has held the increasingly responsible positions of Supervisory Special Agent; Financial Crimes Enforcement Network Liaison; Assistant Special Agent in Charge and Chief of Staff to the Chief of Criminal Investigation.

Mr. Carter has a Bachelor's of Science Degree in Finance from Metropolitan State University of Denver.

MAY 3, 2024



JOURNEY TO SUCCESS LEADERSHIP DISCUSSION



DEZMOND EVANS

SUPERVISORY IT SPECIALIST - IT/CYBERSECURITY

Dezmond Evans began his IRS career as an IT Specialist within Cybersecurity in January 2020, right before the onset of the Covid pandemic. Dezmond received his bachelor's in Business Management from the illustrious Howard University, Washington, D.C. Soon after, he received his Masters in Business Administration (MBA) from American University, in Washington D.C. Prior to joining the IRS, Dezmond held several roles from being a financial analyst for The Boeing Company, a big data analyst for a federal healthcare contractor, Managed Care Advisors, prior to receiving his Security plus and transitioning to the IT Help Desk for the Department of Defense. From there, his IT Journey began. He eventually got promoted into performing Security Change Management for Department of Defense prior to transitioning to the IRS for his first role as the Security Change Management lead. At the IRS, he served as the team lead for various groups including Security Change Management, Cybersecurity Supply Chain Risk Management, and more prior to transitioning into Management for the IT Information System Contingency Planning and Testing group.

Outside of work life does not slow down for Dezmond, as he is very involved in the community and growing his own business. He serves as a proud member of Alpha Phi Alpha Fraternity, Inc., and as a Director for the Mu Lambda Foundation non-profit organization, and as one of two graduate advisors for his undergraduate chapter. Additionally, he owns Fire & Ice Mixology, which is his own Mixology and event staffing business, where he delivers craft cocktails and exceptional experiences to events across the DMV. He also is very active by spending lots of time shooting pool, bowling in tournaments across the U.S. and going on all types of adventures with friends and family to keep life entertaining.

AGENDA

SATURDAY - MAY 4, 2024

2024 MID-ATLANTIC REGIONAL CONFERENCE

WELCOME

Interactive session

“LEVEL UP” MOTIVATIONAL MOMENT

Jeffrey Cooper
Retired IRS Executive and
Motivational Speaker

REMARKS

Nurel Storey
AIM-IRS Regional Vice-President

CLOSEOUT

Paula Mason
AIM-IRS DC Chapter President

BUSINESS MEETING

Nurel Storey
AIM-IRS Regional Vice-President

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MAY 4, 2024

MOTIVATIONAL SPEAKER

TOPIC: LEVEL UP - MOTIVATIONAL SPEAKER

PRESENTER BIO:

Jeffrey Cooper
CEO, Ivana Global FinTech Solutions,
LLC.

Jeffrey Cooper a former IRS Senior Executive with more than 30 years of federal government service and leadership. His international tax expertise and established network of trusted relationships have been used to harvest a global view of tax administration, trends, challenges, and how to best solve them with the aid of machine learning and strategic artificial intelligence solutions. Recognized as a global expert in tax administration and visionary embracing technology solutions to solve "Real World Problems".

Current positions:

Jeffrey is currently the Executive Vice President at Chevo Consulting, leading all business development and service delivery for the Department of the Treasury, overseeing business development and delivery of services.

Jeffrey is currently the CEO of Ivana Global FinTech Solutions, LLC.

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Level Up



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