

AGA Phoenix Chapter (www.agaphoenix.org)

PY 2018-2019

March 2019



Message From the President



Thank you to all of you who participated in our February events. It was great to have Lealan Miller, CPA, CGFM from the AGA Idaho Centennial Chapter speak again. He presented to the group on February 6th at Skysong, on the topic of Top Issues Facing State and Local Governments. On February 12th, we held the second event of the month, a community service event with Feed My Starving Children (FMSC). We had about ten people participate in this event, including some of the member's children, and it was a really positive experience. Thank you, volunteers!

For March we are happy to celebrate our CGFMs during CGFM month, and to present Governor Ducey's proclamation to the chapter, declaring March 2019 officially CGFM month. CGFMs will be honored as part of our meeting on March 1st. At this meeting we will also hold our annual officer election. This will be our annual Tax and Retirement Seminar at ASU Skysong. The event is worth four (4) CPE and will cover a variety of topics from IRS tax updates, to a discussion on long term care options. On March 6th, we will hold a webinar on the topic, Updates to the New Tax Reform. This event will also be at Skysong and will be worth two (2) CPE. The last event of the month, will be a webinar on March 27th, on the topic of Cybersecurity. Register for these events, and our annual PDT, which is coming up on 4/26/19, here: <https://www.agacgfm.org/Chapters/Phoenix/Training-Events/Event-Calendar.aspx>.

In March, we will also present scholarship awards during our 3/1/19 meeting to Aleesa Sells and Kylan Musgrave. Congratulations, to you both! We also added one new member and two new board members in March. We are pleased to welcome Ryan as a new member from the Arizona State Hospital, and Cindy from the City of Scottsdale, and Robert from Maricopa County, as two new board members. As always, if you would like to join the Board, or have any questions or feedback for us, please e-mail us at, contact@agaphoenix.org.

Also, don't forget that March 31st is the deadline to renew your AGA membership. You can renew, here: <https://www.agacgfm.org/home.aspx>. Thank you for your support!

Michelle Huckabay, CPA, CGFM
President
AGA Phoenix Chapter

Inside this Issue:

Message from the President	1
Executive Board Information, Purpose Statement	2
2018-2019 Goals, Budget	3
CGFM Month & Chapter Resources	4
Scholarship Winners, Election	5
Treasurers Reports Dec '18 —Jan '19	6-7
2018-2019 Education Plan	8-9
Job Opportunities	10
How to Join AGA	11

Reminders:

- Register for First Time National PDT Scholarship by 3/15:
<https://www.surveymonkey.com/r/PDT2019Scholarships>
- Renew Chapter dues by 3/31
- Register for Phoenix PDT, held on 4/26

AGA Phoenix Chapter Executive Board Program Year 2018-2019

PURPOSE: Consists of chapter officers, past president, committee chairs, and other members appointed by the chapter president. Responsible for all chapter business and planning.

OFFICERS:

President	Michelle Huckabay, CGFM, CPA
President Elect	Cindy Smith, CPA
Past President	Gergana Kovatcheva, CGFM, CPA
Secretary	Paola Matson
Treasurer	Gergana Kovatcheva, CGFM, CPA

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Phoenix, AZ 85082-4911

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Our Purpose

Mission Statement

AGA Phoenix Chapter serves Arizona professionals in the government financial management community by providing quality, low-cost continuing education, promoting professional development and interaction among members, and fostering a commitment to community involvement as well as a sense of responsibility for advancing government accountability.

Vision

AGA Phoenix Chapter actively creates an avenue for membership to share ideas with each other, to share knowledge and time with the community, and to promote the advancement of government standards and accountability within the profession.

We'd Love Your Input!

Please remember to send in any articles of interest, including any that you may have written on the subjects of management, accounting, or auditing. We welcome your comments and suggestions.

In addition, please send us any special announcements in relation to promotions, marriages, births, anniversaries, certifications achieved, or any other significant event for any of our chapter members. Any article submitted by the second week of the month will be included in the next month's newsletter.

Please email your news for forthcoming newsletters to:

contact@agaphoenix.org



Goals for 2018-2019 and Beyond

- Membership & Education:
 - Provide 42 education credits throughout the program year. Audio conferences and live speakers.
 - ✓ • Reach out to new members within first month of membership.
 - Reach out to all non-renewing members in May/June.
 - Provide social/recruiting event.
 - Establish sponsorship program.
- Accountability:
 - ✓ • Prepare chapter’s Citizen Centric Report (CCR) by September 30, 2018 and post to website.
 - ✓ • Submit chapter’s CCR to AGA’s Certificate of Excellence Review Program.
- CGFM Goals:
 - Continue reimbursements for chapter members who pass all three sessions of the CGFM tests. Reimbursement includes the cost of the three exams and application fee.
 - ✓ • Communicate and promote CGFM designation to Chapter members .
 - Provide CGFM study guides to members on a first come first serve basis. Purchase two new sets this year.
 - ✓ • Seek State proclamation for March as CGFM month and provide recognition to CGFM members.
- Young Professionals:
 - Reach out to college accounting clubs to present about jobs in governmental accounting and discuss what AGA is and how it can impact students’ careers.
 - ✓ • Annually award up to two scholarships for students enrolled in an Accounting, Finance or Public Administration curriculum.

2018 & 2019 Budget and Spend through 1/19			
Budget Category	'18 Spent	'19 Budget	'19 Spent
Education	\$18,534.98	\$21,000	\$8,168.53
Membership	\$410	\$1,000	\$0
Travel	\$0	\$3,500	\$1,707.56
Board Expenses	\$223.42	\$500	\$100
Scholarship	\$1,500	\$1,500	\$0
CGFM	\$15,390.08	\$1,550	\$0
Community Service	\$100	\$750	\$150
Website	\$0	\$0	\$0
Early Career	\$100	\$100	\$0
Audit	\$100	\$100	\$150
Misc.	\$12	\$200	\$130
Total	\$35,679.75	\$30,200	\$10,406.09

PY 2018-2019 Committee Members:

- Membership – Mary Adelman, CGFM, CPA
- Education – Keith Orr, CGFM, Jerry Snyder, CGFM, John Schutter, Anthony St. George, CPA
- Programs – Getzamany Aragon & Michelle Huckabay, CGFM, CPA
- Accountability—Kim Prendergast, CGFM, CPA
- CGFM – Gergana Kovatcheva, CGFM, CPA
- Young Professionals / Early Career – Getzamany Aragon and Marvin Mendieta
- Scholarship – Kelly Alkhoury, CGFM
- Community Service – John Schutter
- Communications Committee – Anthony St. George, CPA
- Sponsorship—Anthony St. George, CPA
- NCC Representative—Mary Adelman, CGFM, CPA

March 2018 - CGFM Month

March is CGFM month. We would like to congratulate Phoenix AGA's newest certifying members:

During this month we will recognize all of those who attained their CGFM license, attending the meeting, and will share the benefits of the CGFM license. Join us at the March 1, 2019 Chapter luncheon meeting at Skysong for the annual March as CGFM month celebration. There will prizes for all CGFM members in attendance. We look forward to seeing you there.

In conjunction with CGFM month, check out this proclamation from the Governor, proclaiming March CGFM month: <https://www.agacgfm.org/aga/chaptersites/phoenix/files/cgfm%202019.pdf>

Also, if you are interested in taking the CGFM certification exam, contact us at CGFM@agaphoenix.org. We have study guides available for check-out, and reimbursement opportunities for those completing their CGFM.

What is CGFM?

- CGFM is a professional certification recognizing the unique skills and special knowledge required of today's government financial managers.
- It covers governmental accounting, auditing, financial reporting, internal controls and budgeting at the federal, state and local levels.

For details on CGFM, go to the CGFM Certification section on AGA National's website.

<https://www.agacgfm.org/CGFM-Certification/About-CGFM.aspx>



CGFM Study Resources Available:

For AGA members interested in taking the CGFM please contact our CGFM chair at cgfm@agaphoenix.org for more information. Currently there is 3 complete set of materials available for check out.

Also, successful CGFM candidates can apply for reimbursement of the application and examination costs.

Contact our CGFM chair for step by step instructions on the CGFM process:

contact@agaphoenix.org

2018-2019 Scholarships Awarded

We are pleased to announce that we awarded two scholarships for 2018-2019. Aleesa Sells was awarded \$1,000 and Kylan Musgrave was awarded \$500.

Aleesa Sells is currently a junior at ASU majoring in Accounting. She is very involved with clubs; organizations such as SPARKS and BP @ West; participating in Changemaker Days of Service; and has also held several campus positions. Aleesa values the small actions one can do in life, every day, to make a difference. With noble character and strong ethics within, she believes anyone can contribute to the big picture as a government financial worker. Her interest is in auditing and she believes she can make a significant difference in this world by exhibiting those core values in her everyday work.

Kylan Musgrave is a sophomore at ASU majoring in Accounting. She is in Beta Alpha Psi, part of the Honorary Accounting Program, and member of the WBLA (Women's Business Leadership Association). Kylan has a strong emphasis on promoting ethical accounting practices and believes being honest and transparent is key to success. We are honored to have her as one of our scholarship winners, and a part of our organization.

2019-2020 Election Results

Congratulations to those elected to represent the chapter during 2019. Members, thank you for voting!

Vice President—Cindy Smith

Treasurer—Gergana Kovatcheva

Secretary—Paola Matson

AGA Phoenix Chapter, Treasurer's Reports - Dec 2018

Treasurer's Report

Book Balance 11/30/2018	\$8,676.42
Receipts	\$1,017.91
Disbursements	\$598.74
Book Balance 12/31/18	\$9,095.59
Outstanding Checks	\$50.00
Outstanding Deposits	\$0.00
Adjusted Book Balance	\$9,145.59
 <u>Account Balance</u>	
Cash on Hand	\$50.00
Savings Balance	\$5.00
Checking Balance	\$9,090.59
	\$9,145.59
Difference Adjusted Book vs Bank	(\$0.00)

Balance Sheet

12/31/2018

Cash and Bank Accounts	
Cash on Hand	\$50.00
Savings Balance	\$5.00
Checking Balance	\$9,090.59
TOTAL Cash and Bank Accounts	\$9,145.59
Inventory	\$0.00
Speaker Gifts	\$0.00
TOTAL ASSETS	\$9,145.59
Outstanding Check	\$50.00
TOTAL Liabilities	\$50.00
TOTAL Equity	\$9,095.59

AGA Phoenix Chapter, Treasurer's Reports - Jan 2019

Treasurer's Report

Book Balance 12/31/2018	\$9,095.59	
Receipts	\$3,730.48	
Disbursements	<u>\$4,556.24</u>	
Book Balance 1/31/19	<u>\$8,269.83</u>	
Outstanding Checks	\$50.00	
Outstanding Deposits	\$0.00	
Adjusted Book Balance	<u>\$8,319.83</u>	
<u>Account Balance</u>		
Cash on Hand	\$50.00	
Savings Balance	\$5.00	
Checking Balance	<u>\$8,264.83</u>	
	\$8,319.83	
Difference Adjusted Book vs Bank	<table border="1" style="display: inline-table; vertical-align: middle;"><tr><td style="text-align: center;">(\$0.00)</td></tr></table>	(\$0.00)
(\$0.00)		

Balance Sheet

1/31/2019

Cash and Bank Accounts	
Cash on Hand	\$50.00
Savings Balance	\$5.00
Checking Balance	<u>\$8,264.83</u>
TOTAL Cash and Bank Accounts	<u>\$8,319.83</u>
Inventory	<u>\$0.00</u>
Speaker Gifts	<u>\$0.00</u>
TOTAL ASSETS	<u>\$8,319.83</u>
Outstanding Check	<u>\$50.00</u>
TOTAL Liabilities	<u>\$50.00</u>
TOTAL Equity	<u>\$8,269.83</u>

Association of Government Accountants					
Phoenix Chapter					
Education and Meeting Plan					
2018-2019 Program Year					
Date	Event	Topic	CPE Credit	Registration Deadline	Location
9/12/18	Chapter Meeting-Lunch 10:30am-11:00am, Audio Conference 11:00am-12:50pm	Communications	2	9/7/18	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
10/10/18	Chapter Meeting-Lunch 10:30am-11:00am, Audio Conference 11:00am-12:50pm	Leveraging IT to Detect Fraud, Waste and Abuse	2	10/5/18	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
11/14/18	Chapter Meeting-Lunch 11:30am-12:00pm, Seminar 12:00pm-1:50pm	Blockchain	2	11/9/18	AZ Department of Education Room 312 1535 W Jefferson St. Scottsdale, AZ 85007
12/19/18	Chapter Meeting-Lunch 11:30am-12:00pm, Seminar 12:00pm-1:50pm	Managing Resources Through the Budget	2	12/14/18	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
1/9/18	Chapter Meeting-Lunch 11:30am-12:00pm, Audio Conference 12:00pm-1:50pm	Grants Management	2	1/4/19	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
1/18/19*	8:00am-8:30am Continental Breakfast 8:30am-12:00pm-Class	Ethics—ASCPA	4	1/11/19	MCCCD Governing Bd Rm 2411 W. 14th Street, 2nd Floor Tempe, AZ 85281
2/6/19	Chapter Meeting-Lunch 11:30am-12:00pm, Seminar 12:00pm-1:50pm	Top Issues Facing State and Local Governments—Lealan Miller, CPA, CGFM	2	2/1/19	ASU Skysong Global Room 201 1475 N Scottsdale Rd. Scottsdale, AZ 85257
3/1/19*	Chapter Meeting-Lunch 11:30am-12:00pm, Seminar 12:00p-12:50pm	ASRS	1	2/25/19	ASU Skysong Bldg. 3, Synergy I #130 1475 N. Scottsdale Rd. Scottsdale, AZ 85257
	1:00pm-1:50pm	Deferred Comp	1		
	1:50pm-2:40pm	Federal Tax Update	1		
	2:40pm-3:30pm	State Tax Update	1		
	Total		4		
3/6/19	Chapter Meeting-Lunch 11:30am-12:00pm, Audio Conference 12:00pm-1:50pm	Finance	2	3/1/19	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257

Association of Government Accountants					
Phoenix Chapter					
Education and Meeting Plan					
2018-2019 Program Year					
Date	Event	Topic	CPE Credit	Registration Deadline	Location
3/27/18	Chapter Meeting-Lunch 10:30am-11:00am, Audio Conference 11:00am-12:50pm	Cybersecurity	2	3/22/19	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
4/10/19	Chapter Meeting-Lunch 10:30am-11:00am, Seminar 11:00am-12:50pm	FBI: White Collar Crime and Following the Money	2	4/5/19	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
4/26/19*	8:00am-4:00pm PDT	AGA National President John Lynskey	1	4/21/19	Rio Salado College 2323 W. 14th St. Tempe, AZ 85281
		Yellow Book—Auditor General	1		
		GASB Update	1		
		Municipal Bonds	1		
		Treasurer	1		
		Panel Discussion on Economic Development	2		
		Audit Updates, Including Cybersecurity in Financial Statement Audits	1		
Total	8				
5/15/19	Chapter Meeting-Lunch 10:30am-11:00am, Audio Conference 11:00am-12:50pm	Fraud Data Analytics	2	5/10/19	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
5/29/19	Chapter Meeting-Lunch 10:30am-11:00am, Seminar 11:00am-12:50pm	Robotics Process Automation	2	5/24/19	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
6/12/19	Chapter Meeting-Lunch 10:30am-11:00am, Seminar 11:00am-12:50pm	Topic— TBD	2	6/7/19	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
			40		

Prospective members are welcome to learn more about us by attending a monthly chapter meeting. Registration per monthly chapter meeting date, which includes lunch, is as follows:

Members:

\$25 each monthly chapter meeting, or package deal—\$220 for all sessions*

Non-Members

\$40 each monthly chapter meeting

*excludes special events (Ethics and Professional Development Training—PDT)

To RSVP, please go to our online registration site: <http://agaphoenix.eventbrite.com> . Thank you for your interest!

Announcements - Job Postings

Accounting Manager—Finance Department, Bisbee. Salary \$55,500—\$85,000. (Illustrative Only) Manages and supervises a major component of the financial system in the county Finance Department. Applies principles of accounting to analyze financial information and prepares financial reports by performing the following duties: Compiles and analyzes financial information to prepare and review journal entries for all general ledger accounts, documenting transactions; analyzes financial information detailing assets, liabilities, and capital, and prepares balance sheet and other reports to summarize current and projected financial position; may audit contracts, orders, and vouchers, and prepares reports to substantiate individual transactions; establishes, modifies, documents, and coordinates the implementation of accounting and accounting control procedures; recommends changes for the financial system and assists with the implementation of such changes, ensuring that the financial system provides efficient and effective financial information for decision making; assists in departmental budget process; may assist with County budget process. Prepares County wide annual financial statements, both fund and GASB. Prepares financial statement schedules and footnotes. Manages the annual audit and prepares entire set of documents required by auditors.

Minimum Qualifications: A Bachelor's Degree in Accounting, Economics, Business Administration, Public Administration, or a closely related field; five (5) years of experience as an accountant, three (3) years of which must have been in fund accounting, preferably in government fund accounting; prefer two years (2) in supervision of an accounting function; OR, an equivalent combination of the previously stated education and general accounting experience which training provides the desired knowledge, skills, and abilities of this classification; must possess and maintain a valid Arizona driver's license if position duties require.

Apply online at: <https://www.governmentjobs.com/careers/cochise>

Accounting/Finance Intern—Arizona Department of Administration, GAO. \$18 / Hour. The General Accounting Office is currently recruiting for several accounting or finance interns. An intern in this position may perform a variety of accounting tasks, including:

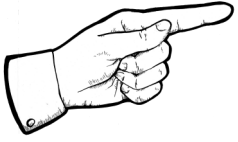
- Entering transactions in the State's accounting system, AFIS (Arizona Financial Information System); transactions may include: cash receipts, payment requests, encumbrances, fixed asset entry, program setup, etc.
- Assisting in aspects of the fixed asset life cycle
- Completing or assisting with account reconciliations, for a given time period
- Creating custom reports and/or accrual basis reports, or running system generated reports for an end user
- Performing data analysis, and recommending improvements to accounting processes
- Participating in specialized projects

Selective Preference: Candidate must be in a Junior or Senior at an accredited 4-year College or University with a focus in accounting or finance, and have completed their intermediate accounting/finance coursework. The ideal candidate should maintain a GPA of 3.0 or better. Candidate must have the unrestricted right to work in the US without requiring sponsorship.

Apply online at: <https://azstatejobs.azdoa.gov/>

Would you like to post your organization's job postings on our website?

Please email AGA Phoenix Webmaster, contact@agaphoenix.org



Check out AGA's Free Toolkits & Guides:

- Sub-recipient vs. Contractor Checklist
- Blended and Braided Funding
- Leveraging Government Resources in Challenging Financial Times
- Risk Assessment Monitoring Toolkit
- Cooperative Audit Resolution and Oversight Initiative
- Fraud Prevention Toolkit
- Candidate Assessment Toolkit for Grant Managers
- How Federal, State and Non-Profit Collaboration Improved Efficiencies in Delinquent Debt Collection
- Citizen Centric Report: How To

<https://www.agacgfm.org/Tools-Resources/Intergov/Home.aspx>

Membership Referral Program

Did you know that you can gain \$50 if you get two individuals who are not currently members to join our chapter? All you have to do is have them put your name down on the sponsor section of the membership form.

It is always nice to have new faces become members to our growing organization!

Board Members Wanted

If you are interested in volunteering for a committee and to be on the Board, please contact AGA at the following e-mail: contact@agaphoenix.org

We Are Always Looking For People Interested In Joining Our Organization

NOTE: Excerpts and links below are from AGA's national website at www.agacgfm.org.

What is AGA?

Briefly, AGA has been serving the government financial management profession for over 50 years. As a not-for-profit educational organization, AGA serves the professional interests of financial managers from the local, state and the federal governments, as well as public accounting firms, responsible for effectively using billions of dollars and other monetary resources everyday. Members are accountants, auditors, contract, financial and performance, budget analysts, chief financial officers, information systems managers, finance directors, inspectors

general, professors, students. Membership in AGA is like tapping into a reservoir of actual real-world knowledge and experience of government financial management experts.

Benefits of Joining

If you asked a member which of the benefits they value the most, they probably would say education and networking, which often occur at the same time and place. Here are some of our members' favorites:

- Continuing Professional Education and Networking Opportunities
- Keep Up-to-Date on Current Issues
- Keep Abreast of the Latest Technologies and Financial Systems
- Professional Guidance and Certification

How Can You Join?

Click the links below to access the Membership Application and to find out membership types and dues.



Click <https://www.agacgfm.org/Membership/Learn-About-AGA/Join-or-Renew.aspx>

to complete the online AGA Membership Application.

****Did an AGA member inspire you to join? Don't forget to enter your AGA Sponsor's Name and Member ID on the application.****