

AGA Phoenix Chapter (www.agaphoenix.org)

PY 2018-2019

February 2019



Message From the President



January was a busy month, with two events. The first event was held on Friday, January 18th, and was our annual Ethics Update for Arizona CPAs. The second event was Wednesday, January 23rd. It was a webinar on the topic of Grants Management, which was originally scheduled for earlier in the month, but had to be rescheduled due to the Federal government shutdown.

Inside this Issue:

Message from the President	1
Executive Board Information, Purpose Statement	2
2018-2019 Goals, Budget	3
CGFM Study Tips & Chapter Resources	4
Treasurers Reports July—November '18	5-9
2018-2019 Education Plan	10-11
Job Opportunities	12
How to Join AGA	13

In February, we are pleased to again welcome Lealan Miller, CPA, CGFM, from the AGA Idaho Centennial Chapter. He will be speaking on February 6th on the Topic of, Top Issues Facing State and Local Governments, at ASU Skysong. To register for this event, visit our website event calendar: <https://www.agacgfm.org/Chapters/Phoenix/Training-Events/Event-Calendar.aspx>. One other event to mention for the month of February is our community service event on February 6th from 6 PM to 8 PM, with the organization Feed My Starving Children, at their Mesa campus. To get more information, or to RSVP for this event, please e-mail us at, contact@agaphoenix.org.

This month we added one new member to our ranks. We are pleased to welcome Guadalupe from REDW. Additionally, we would like to welcome Marvin from the Arizona Game and Fish Department to the Board of the Phoenix AGA. We are always looking for additional participation on the Board, so that we can, (1) accomplish the work of the chapter, and (2) get wide participation from the different sectors of our organization, in order to truly plan events that meet the needs of all of our members. If you would like to join the Board, or have any questions or feedback for us, please e-mail us at, contact@agaphoenix.org.

As part of your membership with the AGA, there are always opportunities to attend various educational events at the National level. This month the National Leadership Training event will be held in Washington, D.C. between February 27th and 28th, but you may also attend this event virtually. The event focus is to help develop and enhance the leadership skills that are necessary in today's unique environment. You can register here: <https://www.agacgfm.org/NLT/NLT-Home.aspx>.

We would like to thank you for your continued support of the Phoenix Chapter, and we hope to see you soon!

Michelle Huckabay, CPA, CGFM
President
AGA Phoenix Chapter



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

ADDRESS: AGA Phoenix Chapter, PO Box 64911
Phoenix, AZ 85082-4911

EMAIL: contact@agaphoenix.org

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 11/18			
Budget Category	‘18 Spent	‘19 Budget	‘19 Spent
Education	\$18,534.98	\$21,000	\$3,013.55
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	\$5,251.11

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
- 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

Tips for Preparing for CGFM Exams:

Begin by **reviewing the CGFM examinations content outlines**, which list the main and subtopics covered in each examination. This should be the focal point of your preparation. It is the core document used as the basis for each examination and a guideline for writing examination questions.

Once you are ready to begin studying for the exam, there are a variety of ways to approach it. You can utilize all, or part of these resources. **The AGA offers instructor led courses**. You can attend an instructor led course in the Washington, D.C. area, or participate in an intensive review course at the annual AGA PDT.

Even if you take the instructor led courses, you will want to perform some self-study following this, in order to prepare yourself for the exams. **CGFM study guides** are available for purchase through AGA National, in hard copy, or as a soft copy. Spend time reviewing these materials and answering the questions from each section of the study guides. Also, the Phoenix Chapter, has CGFM study guides available for check out.

AGA also now offers three online **CGFM practice examinations**, which will help you prepare to take the real exam. These practice examinations, are a must.

Study groups can also be helpful. If you know others that are preparing to take the same exam, you can meet regularly to test each others knowledge, and support each other in the journey.

Attaining your CGFM certification is a great goal for the New Year. Why not invest in yourself. Consider these tips, when starting your journey to obtaining your CGFM certification. Good luck and let the Phoenix Chapter of AGA know if we can answer any questions for you, or provide you with any of the Chapter resources.

Link to AGA National study information:

<https://www.agacgfm.org/CGFM-Certification/Candidates/Preparing-for-Exams.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

AGA Phoenix Chapter, Treasurer's Reports - July 2018

Treasurer's Report

Book Balance 6/30/2018	\$10,189.87	
Receipts	\$266.25	
Disbursements	\$714.60	
Book Balance 7/31/18	<u>\$9,741.52</u>	
Outstanding Checks	\$50.00	
Outstanding Deposits	\$0.00	
Adjusted Book Balance	<u>\$9,791.52</u>	
<u>Account Balance</u>		
Cash on Hand	\$50.00	
Savings Balance	\$5.00	
Your Savings Balance	\$35.00	
Checking Balance	\$221.52	
Checking Balance	<u>\$9,480.00</u>	
	\$9,791.52	
Difference Adjusted Book vs Bank	<table border="1" style="display: inline-table;"><tr><td style="text-align: center;">(\$0.00)</td></tr></table>	(\$0.00)
(\$0.00)		

Balance Sheet

7/31/2018

Cash and Bank Accounts	
Cash on Hand	\$50.00
Savings Balance	\$5.00
Your Savings Balance	\$55.00
Checking Balance	\$201.52
Checking Balance	<u>\$9,480.00</u>
TOTAL Cash and Bank Accounts	<u>\$9,791.52</u>
Inventory	<u>\$0.00</u>
Speaker Gifts	<u>\$0.00</u>
TOTAL ASSETS	<u>\$9,791.52</u>
Outstanding Check	<u>\$50.00</u>
TOTAL Liabilities	<u>\$50.00</u>
TOTAL Equity	<u>\$9,741.52</u>

AGA Phoenix Chapter, Treasurer's Reports - August 2018

Treasurer's Report

Book Balance 7/31/2018	\$9,741.52	
Receipts	\$0.00	
Disbursements	<u>\$3,145.82</u>	
Book Balance 8/31/18	<u>\$6,595.70</u>	
Outstanding Checks	\$50.00	
Outstanding Deposits	\$0.00	
Adjusted Book Balance	<u>\$6,645.70</u>	
<u>Account Balance</u>		
Cash on Hand	\$50.00	
Savings Balance	\$5.00	
Your Savings Balance	\$35.00	
Checking Balance	\$221.52	
Checking Balance	<u>\$6,334.18</u>	
	\$6,645.70	
Difference Adjusted Book vs Bank	<table border="1" style="display: inline-table;"><tr><td style="text-align: center;">(\$0.00)</td></tr></table>	(\$0.00)
(\$0.00)		

Balance Sheet

8/31/2018

Cash and Bank Accounts	
Cash on Hand	\$50.00
Savings Balance	\$5.00
Your Savings Balance	\$55.00
Checking Balance	\$201.52
Checking Balance	<u>\$6,334.18</u>
TOTAL Cash and Bank Accounts	<u>\$6,645.70</u>
Inventory	<u>\$0.00</u>
Speaker Gifts	<u>\$0.00</u>
TOTAL ASSETS	<u>\$6,645.70</u>
Outstanding Check	<u>\$50.00</u>
TOTAL Liabilities	<u>\$50.00</u>
TOTAL Equity	<u>\$6,595.70</u>

AGA Phoenix Chapter, Treasurer's Reports - September 2018

Treasurer's Report

Book Balance 8/31/2018	\$6,595.70
Receipts	\$1,459.90
Disbursements	<u>\$463.51</u>
Book Balance 9/30/18	<u>\$7,592.09</u>
Outstanding Checks	\$50.00
Outstanding Deposits	\$0.00
Adjusted Book Balance	<u>\$7,642.09</u>
<u>Account Balance</u>	
Cash on Hand	\$50.00
Savings Balance	\$5.00
Your Savings Balance	\$35.00
Checking Balance	\$221.52
Checking Balance	<u>\$7,330.57</u>
	\$7,642.09
Difference Adjusted Book vs Bank	(\$0.00)

Balance Sheet

9/30/2018

Cash and Bank Accounts	
Cash on Hand	\$50.00
Savings Balance	\$5.00
Your Savings Balance	\$55.00
Checking Balance	\$201.52
Checking Balance	<u>\$7,330.57</u>
TOTAL Cash and Bank Accounts	<u>\$7,642.09</u>
Inventory	<u>\$0.00</u>
Speaker Gifts	<u>\$0.00</u>
TOTAL ASSETS	<u>\$7,642.09</u>
Outstanding Check	<u>\$50.00</u>
TOTAL Liabilities	<u>\$50.00</u>
TOTAL Equity	<u>\$7,592.09</u>

AGA Phoenix Chapter, Treasurer's Reports - October 2018

Treasurer's Report

Book Balance 9/30/2018	\$7,592.09
Receipts	\$1,060.28
Disbursements	<u>\$545.91</u>
Book Balance 10/31/18	<u>\$8,106.46</u>
Outstanding Checks	\$50.00
Outstanding Deposits	\$0.00
Adjusted Book Balance	<u>\$8,156.46</u>
<u>Account Balance</u>	
Cash on Hand	\$50.00
Savings Balance	\$5.00
Your Savings Balance	\$0.00
Checking Balance	\$0.00
Checking Balance	<u>\$8,101.46</u>
	\$8,156.46
Difference Adjusted Book vs Bank	(\$0.00)

Balance Sheet

10/31/2018

Cash and Bank Accounts	
Cash on Hand	\$50.00
Savings Balance	\$5.00
Your Savings Balance	\$0.00
Checking Balance	\$0.00
Checking Balance	<u>\$8,101.46</u>
TOTAL Cash and Bank Accounts	<u>\$8,156.46</u>
Inventory	<u>\$0.00</u>
Speaker Gifts	<u>\$0.00</u>
TOTAL ASSETS	<u>\$8,156.46</u>
Outstanding Check	<u>\$50.00</u>
TOTAL Liabilities	<u>\$50.00</u>
TOTAL Equity	<u>\$8,206.46</u>

AGA Phoenix Chapter, Treasurer's Reports - November 2018

Treasurer's Report

Book Balance 10/31/2018	\$8,106.46
Receipts	\$1,052.52
Disbursements	<u>\$482.56</u>
Book Balance 11/30/18	<u>\$8,676.42</u>
Outstanding Checks	\$50.00
Outstanding Deposits	\$0.00
Adjusted Book Balance	<u>\$8,726.42</u>
 <u>Account Balance</u>	
Cash on Hand	\$50.00
Savings Balance	\$5.00
Your Savings Balance	\$0.00
Checking Balance	\$0.00
Checking Balance	<u>\$8,671.42</u>
	\$8,726.42
Difference Adjusted Book vs Bank	(\$0.00)

Balance Sheet

11/30/2018

Cash and Bank Accounts	
Cash on Hand	\$50.00
Savings Balance	\$5.00
Your Savings Balance	\$0.00
Checking Balance	\$0.00
Checking Balance	<u>\$8,671.42</u>
TOTAL Cash and Bank Accounts	<u>\$8,726.42</u>
Inventory	<u>\$0.00</u>
Speaker Gifts	<u>\$0.00</u>
TOTAL ASSETS	<u>\$8,726.42</u>
Outstanding Check	<u>\$50.00</u>
TOTAL Liabilities	<u>\$50.00</u>
TOTAL Equity	<u>\$8,676.42</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 Con- ference 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	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 Presi- dent 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 Develop- ment	2		
		TBD	1		
		Total	8		
5/15/19	Chapter Meeting- Lunch 10:30am- 11:00am, Audio Con- ference 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 Au- tomation	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

No Postings Currently—Check Back Soon

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.****