



## Message from the President



Hello everyone! My name is Jordan Dale and I am taking on the role of President for the AGA Phoenix Chapter in the 2020-2021 program year. I have been fortunate to be able to learn so much from our past President, Michelle Huckabay. I am excited for all of the opportunities that the upcoming year brings.

We ended program year 2019-2020 with the virtual audio conference on the topic of Taking Care of People – Leadership that Matters, which was worth two CPEs. Also, don't forget that AGA National will offer its annual PDT this summer, on July 20th through 22nd. This event is worth 21 CPEs, and this year it will be held exclusively online. To find out more about this event, [click here](#).

The ongoing COVID-19 pandemic has required our chapter to look for ways to deliver high quality CPE trainings online. I truly appreciate all of our members bearing with us as we navigated this unfamiliar territory. As President, I am committed to our continued improvement and innovation in the way we deliver virtual content. One development from our previous program year was the creation of our Chapter's Amazon Smile account. At no cost to you, 0.5% of every purchase you make on Amazon can go towards supporting the Phoenix Chapter!

If you are not a member of the AGA, or let your renewal lapse, and are interested in joining, just go to the AGA website, and click join or renew. We offer many benefits such as free study materials for the CGFM exams as well as discounted CPE events. We are also always looking for interested individuals to consider joining our Chapter's Board. I can personally attest to it being an excellent professional opportunity!

In these uncertain times, we are fully committed to providing excellent educational content to you all this program year. I am truly privileged to be able to work with such a great Chapter Board. I hope you all have an excellent summer and I look forward to having the opportunity to serve you all.

Sincerely,

Jordan Dale, CGFM  
 President of the AGA Phoenix Chapter

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## AGA Phoenix Chapter Executive Board Program Year 2020-2021

**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	Jordan Dale, CGFM
Past President	Michelle Huckabay, CGFM, CPA
Vice President	Matthew Turgeon
Secretary	Joshua Jumper
Treasurer	Marvin Mendieta, CGFM, CPA

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

**EMAIL:** [contact@agaphoenix.org](mailto: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](mailto:contact@agaphoenix.org)



## Goals for 2020-2021 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 in spring.
  - Send out survey to members annually.
  - Provide student members the option to attend three meetings for free.
- **Accountability:**
  - Prepare chapter’s Citizen Centric Report (CCR) by September 30, 2020 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

2019 & 2020 Budget and Spend through 05/31			
Budget Category	'19 Spent	'20 Budget	'20 Spent
Education	\$19,328.16	\$19,050	\$12,396.12
Membership	\$680	\$750	\$680.00
Travel	\$2,873.47	\$1,000	\$700.60
Board Expenses	\$100	\$100	\$87.75
Scholarship	\$1,000	\$1,000	\$1,500
CGFM	\$125	\$1,550	\$1,332.25
Com. Service	\$695	\$500	\$250
Early Career	\$0	\$750	\$510.14
Audit	\$150	\$150	\$150
Misc.	\$180.56	\$200.15	\$184.25
<b>Total</b>	<b>\$25,132.19</b>	<b>\$25,050.15</b>	<b>\$17,791.11</b>

**PY 2020-2021 Committee Members:**

**Membership** – Mary Adelman, CGFM, CPA

**Education** – Keith Orr, CGFM, Jerry Snyder, CGFM, CPA, Michael Baumert and Robert Harwood, CPA

**Programs** – Michelle Huckabay, CGFM, CPA and Daniela Kunova

**Accountability** – Kim Prendergast, CGFM, CPA

**CGFM** – Gergana Kovatcheva, CGFM, CPA, Jordan Dale, CGFM

**Young Professionals / Early Career** – Getzamany Aragon and Joshua Jumper

**Scholarship** – Kelly Alkhoury, CGFM

**Community Service** – Cindy Ensign

**Communications Committee** – Myrna Lopez, CGFM, CPA (newsletter) and Jordan Dale, CGFM (webmaster)

**NCC Representative** – Kelly Alkhoury, CGFM

# Upcoming Events & Survey

## Upcoming Events:

AGA National will offer its annual **PDT** this summer!

To be held July 20-22, 2020 virtually.

*Top 3 Reasons to attend:*

1. **Earn up to 21 CPEs and/or 20 PDUs.**
2. **Stay cutting-edge.** Top-notch speakers from federal, state and local government, academia, and the private sector.
3. **Network and connect.** Through the online platform collaborate and engage with industry experts and government financial management colleagues.

To find out more about this event, click [here](#).

## Survey:

Our chapter has been asked to forward a link to a survey on sexual harassment within the government accounting profession. This is for a research study being conducted by accounting faculty at Loyola University Chicago. The purpose of this study is to revisit the socially unacceptable behavior of sexual harassment in government accounting. The survey should take no more than 15 minutes. The involvement of accounting professionals from government sectors and at different points in their careers will better help the research team determine how pervasive the problem of sexual harassment is and whether it is focused at employees at certain levels or in certain industries. Responses are confidential, survey data will be encrypted, results of the study will only be published in the aggregate, and no personally identifiable information would be solicited in the survey. The survey can be accessed at [https://luc.co1.qualtrics.com/jfe/form/SV\\_2iCPZUg8i3NGU7P](https://luc.co1.qualtrics.com/jfe/form/SV_2iCPZUg8i3NGU7P) and will be available until August 31, 2020.



### **CGFM Study Resources Available:**

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

Also, successful CGFM candidates, who are members, 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](mailto:contact@agaphoenix.org).

Education & Meeting Plan - 2020-2021 Program Year					
Date	Event Type/Times	Topic	CPE Credit	Registration Deadline	Location
9/9/2020	<i>Chapter Meeting (Audio) &amp; Lunch/</i> Lunch: 10:30am-11:00am Meeting: 11:00am-12:50pm	Audio Communications	2	9/4/2020	Virtual Meeting
10/7/2020	<i>Chapter Meeting (Live) &amp; Lunch/</i> Lunch: 10:30am-11:00am Meeting: 11:00am-12:50pm	Grant Thornton - GASB 87 Leases	2	10/2/2020	Virtual Meeting
11/4/2020	<i>Chapter Meeting (Live) &amp; Lunch/</i> Lunch: 11:30am-12:00pm Meeting: 12:00pm-1:50pm	Lealan Miller, Eide Bailly - Topic TBD	2	10/30/2020	Virtual Meeting
12/9/2020	<i>Chapter Meeting (Live) &amp; Lunch/</i> Lunch: 11:30am-12:00pm Meeting: 12:00pm-1:50pm	Brian Hemmerle, Henry + Horne - Fraud - Report to the Nations Update	2	12/4/2020	Virtual Meeting
1/13/2021	<i>Chapter Meeting (Audio) &amp; Lunch/</i> Lunch: 11:30am-12:00pm Meeting: 12:00pm-1:50pm	Audio Uniform Guidance	2	1/8/2021	ASU SkySong 1 301 Ingenuity Conference Room 1475 N. Scottsdale Rd. Scottsdale, AZ 85257
*1/22/2021	<i>Special Event*/</i> Continental Breakfast: 8:00am-8:30am Class: 8:30am-12:00 pm	Professional Ethics for AZ CPAs	4	1/15/2021	Maricopa Community College 2411 W. 14th Street Tempe, Arizona 85281
2/3/2021	<i>Chapter Meeting (Audio) &amp; Lunch/</i> Lunch: 11:30am-12:00pm Meeting: 12:00pm-1:50pm	Audio GASB Update	2	1/29/2021	ASU SkySong 1 301 Ingenuity Conference Room 1475 N. Scottsdale Rd. Scottsdale, AZ 85257
2/26/2021	<i>Chapter Meeting (Live) &amp; Lunch/</i> Lunch: 11:30am-12:00pm Meeting: 12:00pm-3:30pm	Tax & Retirement Updates: ASRS, Nationwide Deferred Comp, IRS, AZDOR	4	2/19/2021	ASU SkySong 3 130 Synergy I 1475 N. Scottsdale Rd. Scottsdale, AZ 85257
3/3/2021	<i>Chapter Meeting (Audio) &amp; Lunch/</i> Lunch: 11:30am-12:00pm Meeting: 12:00pm-1:50pm	Audio Improper Payments	2	2/26/2021	ASU SkySong 1 301 Ingenuity Conference Room 1475 N. Scottsdale Rd. Scottsdale, AZ 85257

Education & Meeting Plan - 2020-2021 Program Year					
Date	Event Type/Times	Topic	CPE Credit	Registration Deadline	Location
3/24/2021	Chapter Meeting (Audio) & Lunch/ Lunch: 10:30am-11:00am Meeting: 11:00am-12:50pm	Audio Cybersecurity	2	3/19/2021	ASU SkySong 1 301 Ingenuity Conference Room 1475 N. Scottsdale Rd. Scottsdale, AZ 85257
4/7/2021	Chapter Meeting (Live) & Lunch/ Lunch: 10:30am-11:00am Meeting: 11:00am-12:50pm	Live Speaker TBD	2	4/2/2021	ASU SkySong 1 301 Ingenuity Conference Room 1475 N. Scottsdale Rd. Scottsdale, AZ 85257
4/21/2021	Chapter Meeting (Audio) & Lunch/ Lunch: 10:30am-11:00am Meeting: 11:00am-12:50pm	Audio Data Act	2	4/16/2021	ASU SkySong 1 301 Ingenuity Conference Room 1475 N. Scottsdale Rd. Scottsdale, AZ 85257
*4/30/2021	Special Event*/ Professional Development Training 8:00am - 4:30pm	PDT Topics TBD Auditor General - SAS and GASB Updates	8	4/23/2021	Rio Salado Conference Room 2323 W. 14th St. Tempe, AZ 85281
5/12/2021	Chapter Meeting (Audio) & Lunch/ Lunch: 10:30am-11:00am Meeting: 11:00am-12:50pm	Audio Fraud Data Analytics	2	5/7/2021	ASU SkySong 1 301 Ingenuity Conference Room 1475 N. Scottsdale Rd. Scottsdale, AZ 85257
6/9/2021	Chapter Meeting (Live) & Lunch/ Lunch: 10:30am-11:00am Meeting: 11:00am-12:50pm	Heinfeld Meech - Topic TBD	2	6/4/21	ASU SkySong 1 301 Ingenuity Conference Room 1475 N. Scottsdale Rd. Scottsdale, AZ 85257
		<b>Total Program Year CPEs</b>	<b>40</b>		

\* These events are not monthly chapter meetings and will be at an additional cost. Details will be provided in future newsletters and/or on the Calendar of Events page on our website (<http://www.agaphoenix.org/events/>).

# Announcements - Job Postings

## **Payroll Supervisor—Valley Metro, Salary Range (\$61,014- \$91,521)**

The Payroll Supervisor is responsible for performing a variety of supervisor duties and to perform advanced accounting duties involved in the processing of the Agency's payroll, and testing and implementing the payroll systems. This position is expected to display considerable initiative in identifying ways to improve and/or streamline processes and internal controls within their areas of responsibility, as well as meeting deadlines. The Payroll Supervisor shall contribute to team efforts and represents Agency core values in the performance of duties.

**Minimum Qualifications:** Bachelor's degree in Accounting, Finance, Business Administration, or a closely related field; AND five (5) years of responsible experience performing the payroll functions including two years of supervisory experience; OR, an equivalent combination of education and experience sufficient to successfully perform the essential duties.

An ideal candidate will have three or more years of supervisory experience, experience in a governmental entity, processing payroll using an enterprise resource planning (ERP) systems, and with computer (PC) software applications. Refer to the Valley Metro website for additional details.

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

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

Please email AGA Phoenix Webmaster, [contact@agaphoenix.org](mailto:contact@agaphoenix.org)



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## 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](mailto: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](http://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.\*\***