

Volume 16-09 May 2017

# President's Message

AGA President's Message -May 2017

What a year it has been for our AGÁ chapter in Seattle! We just wrapped up our annual professional development training, the 2017 Government Accounting and Auditing Conference last month, and this month we looked forward to gathering for our last luncheon meeting of the year on May 9, 2017, our annual Emerald Award ceremony, which honors local leaders in the field of government accountability at Seattle's famous Columbia Tower Club. Our new chapter board of directors will gather for strategic planning at a retreat in June and lay out the agenda for next year's slate of activities. I want to thank each and every one of our chapter members and officers for your



participation in chapter events and your contributions to our various community service efforts during the year. I wish all of you a peaceful and relaxing summer break and hope to see you all next fall for the start of our 2017-2018 program year.

Mary Ann Hardy, Chapter President

### Welcome New Members

welcome to the Seattle Chapter: Katherine N. King, King County Grants Senior Accountant

# We are pleased to

## Upcoming Events 2017 AGA Professional

Development Training July 9-12 in Boston or online

**North Seattle** College Accounting **Spring Fair** Saturday, June 3

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# 2016 Emerald Award Luncheon honoring Dwight Dively $\frac{1}{2}$

Dwight Dively was awarded the AGA's Emerald Award for developing and implementing a process of government accountability that impacts over two million King County residents.

Mr. Dively provided an in-depth discussion of the workings of the accountability

system his Office of Performance,
Strategy, and Budget is tasked with
developing and overseeing for King County.
The scope of the process covers all
functions of King County, which is the 13th
largest county by population in the United
States and the 9th largest in terms of
employment. In order to provide the most
effective use of resources by the many
different functions of King County, ranging
from regional responsibilities of waste



Dwight Dively speaking to AGA members and guests at the Columbia Club Restaurant atop Columbia Tower.



Seattle AGA President Mary Ann Hardy presents Director Dwight Dively with the Emerald Award for 2017.

water management and transportation to public health and the criminal justice system, Mr. Dively's organization developed a 10-year implementation plan which requires input from his staff of experts in such diverse fields as demographics and goal-orientated team building.

While the project is estimated to have three years to completion, Dwight pointed out areas where the work thus far has resulted in millions of dollars in savings for taxpayers and improvements in the efficiencies of operations. This was accomplished through better planning,

cross-training, and evaluating methods in use at the lowest levels of operation as well as critically evaluating overarching policies.

King County Office of Performance, Strategy, and Budget Director Dwight Dively leads the offices responsible for developing and monitoring the annual King County budget, implementing the King County Strategic Plan, and identifying and tracking performance measures. He oversees a wide range of activities, including project analysis, financial forecasting, demographic analysis, and policy development. Prior to King County, Dwight had a 22-year career with City of Seattle, most recently serving as Director of Finance and leading the city's financial and budget management initiatives since 1994.

Dwight also serves as an affiliate professor on the Evans School faculty teaching courses in budgeting and public finance and an instructor with the Cascade Executive Programs.

Mr. Dively holds a Ph.D. in Civil Engineering from the University of Washington, a Master of Public Administration from Princeton University, and a BS from Rose-Hulman Institute of Technology, Terre Haute, Indiana.

# Governmental Accounting and Auditing Conference 2017

By Mary Ann Hardy, Chapter President

In cooperation with its partner organization, the Washington Society of Certified Public Accountants, the Seattle AGA chapter co-hosted the Governmental Accounting and Auditing Conference on April 24-25, 2017 on the campus of Pacific Lutheran University in Tacoma, Washington. Over 140 participants attended the conference at all locations, which included the live site in Tacoma, two remote broadcasting locations in Everett, Washington and Spokane, Washington, and the virtual conference broadcast via webinar.



Ann Ebberts AGA President and Chapter President Mary Ann Hardy preparing for their presentations.

Speakers included Gil Tran from the Office of Management and Budget, David Bean of the Government Accounting Standards Board, Ann Ebberts of the Association of Government Accountants, and a panel of elected officials including Washington State Auditor Pat McCarthy and Washington State Treasurer Duane Davidson. Ms. Ebberts's presentation, titled "Transparency in Government" featured an overview recent developments and trends in the methods government entities use to share information about their mission and performance metrics with the public.

# AGA Chief Executive Officer Speaks to University Students

Ann Ebberts, Chief Executive Officer of the AGA traveled from her Arlington, VA headquarters to the Seattle-Tacoma area in order to make a presentation to at our annual Government Accounting and Auditing Conference. Ms. Ebberts agreed to come out a few days early to makes a speak to accounting majors and other interested students at the University of Washington, Tacoma Campus on April 21st. Ms. Ebberts' topic was The Need for Transparency in Government (and current approaches). The presentation was held at Carwein Auditorium on the U of W Tacoma Campus.



Ann Ebberts CEO, AGA

Ann M. Ebberts has been AGA's Chief Executive Officer since October 2014. Ebberts has more than 30 years of management consulting experience with the federal government in financial management, financial process improvement, program evaluation and shared services. She also provided project management and advisory support services for the implementation of accounting, acquisition, travel and grant management systems.



- 3 Reasons Why You Should Attend:
  1. Earn up to 24 CPEs: Enhance your lifelong learning and gain the knowledge and understanding to better improve your job effectiveness. The presentations are facilitated by both industry experts and colleagues who have faced similar challenges. You can earn up to 24 CPEs.
  - 2. Stay on the cutting edge: Includes top-notch speakers from federal, state, local, academia and the private sector bringing you key findings and educational experiences to augment your job knowledge and skills.
  - 3. Network and connect: Connect with a variety of government financial experts and industry colleagues from around the nation facing the same or similar issues, and exchange ideas to bring back to your organization.

#### Registration now open!

Attend In Person

Attend Virtually

Save the Date: North Seattle College Accounting Spring Fair

Saturday, June 3, 2017, 9 am - noon!

The Accounting Club at North Seattle College would like to formally invite you to participate in our **Spring Accounting Fair**. We are a student-run organization that strives to bridge the transition from academia to the workplace by providing networking environments between accounting professionals and students, and by creating hands-on learning events. Our goal is to enhance technical, personal, and critical-thinking skills while increasing academic and professional opportunities.

We are inviting the following groups, and are hoping you will be a part of our event:

- Students
- · Current and past students from North Seattle College
  - o Accounting students from nearby colleges and universities
  - o Representatives from four-year schools
- · Faculty and other representatives from North Seattle College
- · Accounting firms
- · Recruiting firms
- · Corporations/companies
- · Government agencies
- · Not-for-profit agencies
- · CPA review course providers
- Professional associations

We know your time is valuable, and your presence is key to the success of our event.

If you and/or someone with whom you work are interested in representing your organization at this event, at no cost, please let us know who will be attending, (or with whom we should get in touch), as soon as possible! If you would like to RSVP, or if you have any concerns, comments, or general questions, please contact us at NorthSeattle. AcctClub@gmail.com or call us:

Oscar Covarrubias and Jannet Rivas, Co-Presidents

North Seattle College Accounting Club

NorthSeattle.AcctClub@gmail.com

Oscar Covarrubias - (206) 250-9729 Jannet Rivas - (206) 484-4898 Marla Lockhart, Accounting Department Co-Coordinator

Accounting Club Advisor,

marla.lockhart@seattlecolleges.edu

(206) 934-6026

#### 2016-2017 Webinars

AGA has scheduled the following webinars for the 2016-2017 Program Year.

See https://www.agacgfm.org/Training-and-Events/Learn-Online/ Webinars/2016-2017-Offerings.aspx for more information about participating in these events.

DATA Act

Fraud/Data Analytics

May 7, 2017

Jun. 14, 2017

# AGA Seattle Chapter Celebrates 60 Years

Our chapter was chartered on May 1, 1957, and members celebrated our 60th anniversary at the annual Emerald Award luncheon on May 9. After Chapter President Mary

Ann presented the award to Mr. Dwight Dively, Budget Director for King County, and introduced the incoming board of directors for the new program year, the members in attendance gathered for a group photo to mark the occasion while posing with an AGA pennant. Joining the board members and officers were fellow members Susan Cohen, Michael Jacobson, and Susan Manaloor. Member Cheryle Broom and new board member Tony Eayrs also ioined in the celebration

Submitted by Karyn Angulo, Chapter Historian



Left to Right: Susan Cohen, Sandra Starnes, Tim Dobler, Karyn Angulo, Karen Murphy, Michael Jacobson Dwight Divey, Susan Manaloor, Sam Lord, and Mary Ann Hardy Photo by Brian McMahan

# Congratulations to our New Members of the AGA Seattle Board

One sign of a vital organization is new people stepping into leadership roles. We are very pleased to announce the addition of Karen Murphy and Tom Eayrs to our board.

We also wish to thank our continuing board members and the general membership who took the time to vote.

# Sectional Leadership Meeting II in Kansas City, Missouri, May 5-6 Karen Murphy and Karyn Angulo $\frac{1}{2}$ shared their experiences at the SLM:

### By Karyn Angulo and Karen Murphy

Board members Karyn Angulo and Karen Murphy traveled to Kansas City, Missouri, earlier this month to participate in the Sectional Leadership Meeting (SLM). This conference is designed to bring national, sectional, regional, and chapter leaders together with AGA national office staff to discuss AGA's national direction and initiatives; expectations of AGA's leaders at all levels of our association; ways to improve services to retain members and recruit new ones; and accessing information to be more effective leaders.



Karyn Angulo and Karen Murphy here flanked by Arkansas contingent Lanetra "Denise" Griffin-Jackson, and Phlecia Gillespie at end of the day social.#

This SLM brought together AGA board members from chapter in Sections 2 (the Gulf, Midwest, South Central, and Southwest Regions) and 3 (the Northwest, Pacific Rim, and West Coast Regions). We were fortunate to have a third person from our chapter at this event, as incoming Regional Vice President (RVP) Sandra Starnes (current Chapter Secretary) also participated and led discussions with chapter officers representing the Northwest Region.

Throughout the SLM, we were encouraged to write down our take-aways from the sessions so that we could bring back some great ideas to our chapters



Portland Chapter representatives (Lee Ball and Ethan Postrel), and Demetric Williams, from the St. Louis Chapter show off their banners with Karen Angulo

for immediate action or even just something to consider in the future.

We started the first day with ice breakers to get to know some of our fellow participants and then heard from National leaders such as Chief Executive Officer, Ann Ebberts, who discussed the value of an AGA membership and AGA's ongoing assessment of the regional structure and potential changes to the association's governance. President-Elect, Jim Arnette, then covered his presidential theme and goals to address opportunities and challenges, such as increasing state and local participation at national events, replacing membership as the Baby Boomer generation retires, and encouraging students to enter into careers in higher education

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 $\frac{1}{2}$  Karyn Angulo will be the Chapter Secretary for the 2017-2018 program year, and Karen Murphy will serve as President-Elect.

# Sectional Leadership Meeting II in Kansas City, Missouri, May 5-6 Continued

and public service. His goals are to develop a new AGA strategic plan, increasing membership by making AGA more inclusive; increasing current initiatives for public service (including governmental accounting), and improving the number of state and local members at our events. He is interested in forming working groups to work on these goals. AGA will also revisit the branding of the association, as the name AGA implies it is just for accountants.

After lunch, participants broke into groups to talk about successes and challenges in our chapter governance, led by facilitator Carolyn Lugbill. Attendees first learned about three components of good governance—structure,



Sandra Starnes leading group discussion at Sectional Leadership Meeting.

process, and culture—as well as a fourth component, capacity (people and funding). Carolyn then described the main trends impacting AGA, including political uncertainty with a new administration, economic uncertainty in times of shrinking government and resources, advances in technology, the changing workforce as we transition from the Baby Boomers to the Millennials, and collaboration challenges across the different levels of government, among



AGA delegates on the bus to dinner at Zona Rosa staurant. Karen Murphy has her hand raised.

others. Each group then discussed some board topics, including how the chapters communicate with AGA National's leadership and staff. We found, for example, that chapter officers at our table tended to directly approach staff at the National office rather than communicate through the RVP or Senior Vice-President (SVP). The next topics discussed in the small groups were (1) what a thriving chapter is and (2) what chapters need from the National office and the RVPs and the barriers to getting that. The attendees generally agreed that chapters need leadership and a critical mass of membership and that it is helpful to give members "microprojects" to take on and to have a financial cushion

to support activities. Regarding assistance from the National office, one barrier was the shortage of written procedures, which made it more challenging to brief the next person filling a chapter position. As the small groups shared their thoughts with the attendees as a whole, we discussed the importance of focusing on development of the President-Elect; reaching out to past volunteers for ideas and support; developing a succession plan to ensure multigenerational boards that can bring in new ideas.

At the end of the day, Sandra invited chapter representatives from the Northwest Chapter, encompassing Idaho, Montana, Northern Nevada, Utah, and Washington--to join her for dinner at a nearby Italian restaurant. We three Seattle Chapter members were joined by Judy Shock, former RVP-Northwest and incoming SVP for Regional Services for Section III, and Jim Glover and Tenielle Young-Humphries of the Northern Utah Chapter. Carol Olney

# Sectional Leadership Meeting II in Kansas City, Missouri, May 5-6

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from the Sacramento Chapter (West Coast Region) also joined us. It was a great opportunity to meet with officers from other chapters in an informal setting to get to know each other and exchange ideas.

### By Karen Murphy

The **Sectional Leadership Meeting** was not just about talks and workshops. We closed each day with social events, such as a Cinco de Mayo celebration after the first full day.

The first topic discussed was <u>Leadership</u>: Role & <u>Importance of Communication</u>. CEO Ann Ebberts, opened the discussion on Chapter Recognition, goal-setting, mapping out the geographical areas of our regional chapters, documentation for board position succession, strategic planning at the end of the year for the start of the following year, and how to identify the next opportunities (NOs).

Next, <u>Membership</u> was discussed. Ann Ebberts specified several pools of potential new members. There are approximately 600 unaffiliated members that are "at large," meaning they are not presently active in a chapter. She discussed building relationships with non-profits and as well as for-profit organizations, and CPA firms that have roles with governments. She suggested we look at our vendor directory and seek out members from those lists. Another suggestion Ann made was to start investigating why people are leaving the association. She asked us how we would define a thriving chapter. We pointed out that a thriving chapter is one that promotes the AGA at professional meetings by



Incoming Senior Vice President for Regional Services for Section III, Judy Shock (right) discusses issues during a panel presentation. Two representatives of the Idaho Centennial Chapter (left) and an Olympia Chapter representative were also on the panel.

having a chapter table with membership applications, chapter information, dues information, CGFM requirements and applications, a recent newsletter, recent Journal of Government Financial Management, and freebies like pens, AGA cups, pencils and erasers, AGA pins, and a calendar of upcoming events.

We suggested having a prepared package of member benefits that prove value to members

## Sectional Leadership Meeting II in Kansas City, Missouri, May 5-6

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of the chapter, the industries, agencies, and professions that support us. The package should include all activities and our philosophy on diversity. Other items suggested included having current mailing lists that are updated regularly, and keeping on hand Chapter Launch Kits from National. Perhaps Starbucks cards or other acknowledgements could be presented as recognition for exemplary contributions. Other suggestions included having a "member of the month," maintaining a website, staying in contact with past senior leaders, and maintaining a list of very good speakers.

Ann also suggested that during our monthly chapter meetings, we take 5 minutes to talk about membership and the opportunities and challenges we are facing to maintain current membership and attract new applicants. We should invite friends and families to events and distribute citizen-centric reports and marketing materials from AGA National. We should solicit sponsorships with outside organizations and seek out other chapter models to help improve our own chapters. To help committee chairs, develop co-chairs positions and even vice-treasurer and vice-secretary positions to help work out board issues in their respected areas.

Bobby Derrick, AGA Field Representative, discussed the **distinguishing value proposition** of long term commitment, AGA core, and striving for an enjoyable community so that we create trust and enhance our brand. As an example, to add more value to the CGFM program, the chapter should consider paying the application and exam fee or obtaining a stipend from National to assist new CGFM candidates or offer discounts to current members for classes. Finally, make use of the personalized new member welcome email from National.

We noted some of the barriers to added value. Particular to the Seattle Chapter is proximity to meeting locations, since the chapter covers a significant geographical area and a number of counties. Other issues included funding, parking, board member succession, and marketing.

To improve *Succession planning*, Bobby Derrick recommended that board members document all their activities from the beginning to the end of their term to pass down to their succeeding board position holder. He also advised us to adopt a nominating committee consisting of, for example, President-Elect, Immediate Past President, Immediate Past Treasurer, and one member-at-large appointed by the President, and to implement accountability reporting.

The second major activity for the day was the **regional breakouts** that took place at 12:40 p.m. and lasted until the close of the event. Sandra Starnes, our Regional Vice President, led the discussion for the Northwest Region. Other regions held breakouts in other rooms that included the Gulf Region, the Midwest, Pacific Rim, South Central, Southwest, and West Coast regions. These were practical workshops focused on the composition and nature of chapters in particular regions. Several people mentioned that they would like to see workshops based on recruitment of new members. In particular, encouraging students to study government accounting, inviting students to meetings, and requesting professors as speakers. Our AGA chapter should also continue to attend college/university job fairs. One member urged creating an easily accessible career database similar to NEO-GOV data but having all open positions and their represented governmental units compressed into in one database. Another suggestion was made to outline public sector career progression for graduating students, early career job seekers, mid-career advancement, and late career progression, to illustrate career advancement in public service is something evident.



The Northwest Run/Walk for Epilepsy benefits the <u>Epilepsy Foundation</u> <u>Northwest</u> that leads the fight to overcome challenges of living with epilepsy and to accelerate therapies to stop seizures, find cures, and save lives.

The Northwest Run/Walk for Epilepsy takes place in Seattle, Tacoma, Olympia, Spokane, Bellingham, Silverdale and Monroe. Other locations are in Oregon and Alaska.

The Epilepsy Foundation Northwest is the largest agency in the Northwest serving the needs of the epilepsy community. Nearly 136,000 people in Washington, Oregon, Alaska and Montana have seizure related health issues. Please plan to join Board Member Sandra Starnes in this great cause. You can sign up to run, walk, or donate at http://www.nwrunwalk.org.

Here is the link that will take you to the event site for people interested in joining Sandra Starnes' AGA - Seattle Chapter team:

http://www.nwrunwalk.org/faf/home/default.asp?ievent=1171842 Once you go there you'll see our team on the right side of the screen, click on it & join our team. You can also look on the left side of the screen and click on event information and it will give you the location and times.

Location is at 8801 Washington Ave NE, Silverdale WA

Registration at 9am and run/walk starts at 10am with celebration ceremony at 11am

# NEVER MISS A KUDO

AGA Members Sandra Starnes and Tim Dobler participated in the tax assistance program sponsored by AARP. We received the following acknowledgements. The work is easy and the gratitude is great. Please consider joining Sandra and Tim next year. If someone else provided tax assistance, please let us know and your name will added in our next newsletter.



Date: April 28, 2017

To: All Tax-Aide Volunteers

CC: Tax-Aide Staff

From: Lisa Marsh Ryerson, President, AARP Foundation

Subject: Thank You for Volunteering

Greetings!

I offer my heartfelt gratitude for all you have done to help older adults in need. You are our lifeblood. You help bring our mission to life. You are America in action. That's a phrase Ethel Percy Andrus, the founder of AARP, used back in the 1960s to describe volunteers, and it still holds true today. Volunteers are the embodiment of the American spirit.

April is Volunteer Appreciation Month, and the many thank you messages you will receive are well deserved. By devoting your efforts to older adults who are struggling, you are sending an important message, and a reminder that older Americans are frequently overlooked.

Senior poverty is often invisible - too many assume that social services provide the basics for low-income older adults. The sad truth, as you know, is that more than 20 million older adults don't have the resources to meet their basic needs. For example, 1 in 10 older adults face hunger each and every day.

You are performing a double service: helping those in need, and showing by your action that there are needs to be addressed. Raising awareness about senior poverty is no small thing.

Please know how grateful we are that you have given your time and your effort to help make things better for others.

I would even shorten Ethel's phrase: You are America.

Lia Marsh Ryen

With gratitude,

Lisa Marsh Ryerson

President

AARP Foundation 601 E Street NW Washington, DC 20049

202-434-6100

aarpfoundation.org

0.00

76.83

732.80

\$ 10,672.93

\$

\$ 10,672.93

\$10,672.93

1.83

Liabilities

Members' Equity

Interest Income

Ending Cash Balance

Net Cash Change

Subtotal Cash Deposits

Liabilities & Members' Equity

Financial Condition as of March 31	l, 2017
Checking	\$ 1,950.09
Savings	\$ 4,064.29
12 Month Certificate of Deposit	<u>\$ 4,658.55</u>
Total Assets	\$10,672.93

Cash Flow Report, Month Ending March 31,	2017		
Beginning Cash Balances Lunch meals, speaker costs (incl.		\$1	1,405.73
parking), & name tags		\$	160.63
Web Conference Trainings		\$	289.00
2016 GAAC-PDT Co-Chair		\$	360.00
Cash Expended		\$	809.63
Lunch Receipts	\$ 75.00		

# AGA Seattle Chapter Recognition Program Points

Chapter Goal: 19,000

Chapter Recognition Program categories Section I - Chapter Leadership, Planning, & Participation	Points to Date	Maximum Points
	2,775	5,000
Section II - Education & Professional Development	2,675	4,000
Section III - Certification	1,600	4,000
Section IV - Communications	3,000	3,000
Section V - Membership with a Focus on Early Career and Student Members	4,000	4,000
Section VI - Accountability	0	2,000
Section VII - Community Service	2,000	2,000
Section VIII - Awards	100	1,000
Total as of March 2017	16,150	25,000

#### Recognition Levels:

A Bronze Chapter Designation will be presented to any chapter that attains between 10,000 and 14,500 credits for the year. The chapter president's plaque will include recognition that the chapter has achieved Bronze status.

A Silver Chapter Designation will be presented to any chapter that attains between 14,501 and 17,000 credits for the year. The chapter president's plaque will include recognition that the chapter has achieved Silver status.

A Gold Chapter Designation will be presented to any chapter that attains between 17,001 and 19,500 credits for the year. The chapter president's plaque will include recognition that the chapter has achieved Gold status.

The **Platinum Chapter Designation** will be presented to any chapter that attains between 19,501 and 25,000 credits for the year. The chapter president's plaque will include recognition that the chapter has achieved Platinum status.



### The Sounder

WE'RE ON THE WEB: WWW.AGASEATTLE.ORG

AGA serves government accountability professionals by providing quality education, fostering professional development and certification, and supporting standards and research to advance government accountability.

The purpose of the Association and the Chapter is to be an international, professional organization dedicated to the advancement of government financial management. The Association shall serve its members by providing or sponsoring appropriate educational programs, encouraging professional development, influencing governmental financial management policies and practices, and serving as an advocate for the profession. The Association shall serve government officials and the public by sponsoring efforts to ensure full and fair accountability for all public monies, and by providing a variety of pro bono services throughout the United States and its territories that support that end.

# AGA Seattle Chapter 2016-2017 Board Members

#### President

Mary Ann Hardy, U.S. GAO 206-654-5594 hardym@gao.gov

#### President-Elect

Open

#### Immediate Past President

Diane MaKaeli 206–772-1430 dmakaeli@gmail.com

Treasurer, Webmaster and Early Careers Chair

Sam Lord, HHS OIG 206-615-2257 Samuel.Lord@oig.hhs.gov

#### Secretary

Sandra Starnes, Port Gamble S'Klallam Tribe 360-297-9667 sandra@pgst.nsn.us

#### Newsletter Editor

Tim Dobler, Retired 206-364-3499 Dobler5@msn.com

Membership Chair and Historian

Karyn Angulo, U.S. GAO 206-287-4868 angulo@agaseattle.org Education Chair and Professional Development Chair

Open

CGFM Chair and Community Service Chair

Gabrielle Sivage, Seattle DOT 202-277-8250 gsivage@gmail.com

#### Board Member

John Kurpierz, Institute for Better Governance JohnRKurpierz@gmail.com

This newsletter was produced by board member Tim Dobler, with the assistance of Karyn Angulo. Thanks to chapter members who contributed articles and photos for this issue. Masthead Photo compliments of Board Member Diane MaKaeli.