

AGA Phoenix Chapter (www.agaphoenix.org)

PY 2017-2018

October 2017



Message From the President



On September 13th the Chapter held a very successful class on Advanced Excel with instructor Gregory Cleveland, with over 50 people in attendance. Mr. Cleveland was very personable in his approach to sharing tips and tricks in Excel, like using pivot tables and macros, as well as other functions. Thank you, Mr. Cleveland, and to you who attended this class.

Our next meeting will be held on October 11th. This will be an audio conference on the topic of internal controls from 10:30 AM to 12:50 PM and will be worth two CPE credits. The meeting will be held at ASU SkySong Global Room 301. Please visit our website for more information and to register for this event.

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Besides the normal monthly meeting, this month we will also be holding a CGFM review course October 30th through November 3rd. The registration for this course has been extended to October 11th, so if you missed the original deadline, but are interested in registering for this class, please register by visiting the Phoenix AGA website. This course is worth 40 hours of CPE for all five days.

Here are some other updates/deadlines to share with you. I would like to welcome Jessica Leal as the new Phoenix AGA Young Professionals / Early Career chairperson! Jessica has already organized an event with the GCU Accounting Society, on October 25th, to talk with their members about the benefit in working in government financial management. Thank you, Jessica! Also, the Phoenix AGA scholarship application is due on December 31, 2017, so if you are interested in this opportunity, please visit the Phoenix AGA website for a downloadable application.

The Phoenix AGA website is www.agaphoenix.org. You can find updates on all Phoenix AGA activities and register for any of our events. Also, if you would like to reach out to the Board with your feedback, or interest in participating on the Board, please contact us at contact@agaphoenix.org.

Looking forward to seeing you at the October event!

Thank you for supporting the Phoenix Chapter!

Gergana Kovatcheva, CPA, CGFM

President

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CGFM Resources Available:

For AGA members interested in taking the CGFM please contact our CGFM chair at contact@agaphoenix.org for more information.

AGA Phoenix has study guides available for member check-out. Check here for availability:

<https://www.agacgfm.org/Chapters/Phoenix/CGFM-Certification/CGFM-Study-Materials.aspx>

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



Don't forget!

CGFM Review Course 10/30-11/3

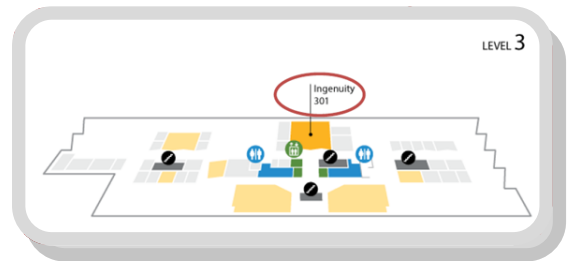
Deadline 10/11

agaphoenix.org

10/11/17 Meeting (2 CPE)
Topic: Internal Controls
 Lunch (10:30 AM)
 Audio Conference (11:00 AM—12:50 PM)

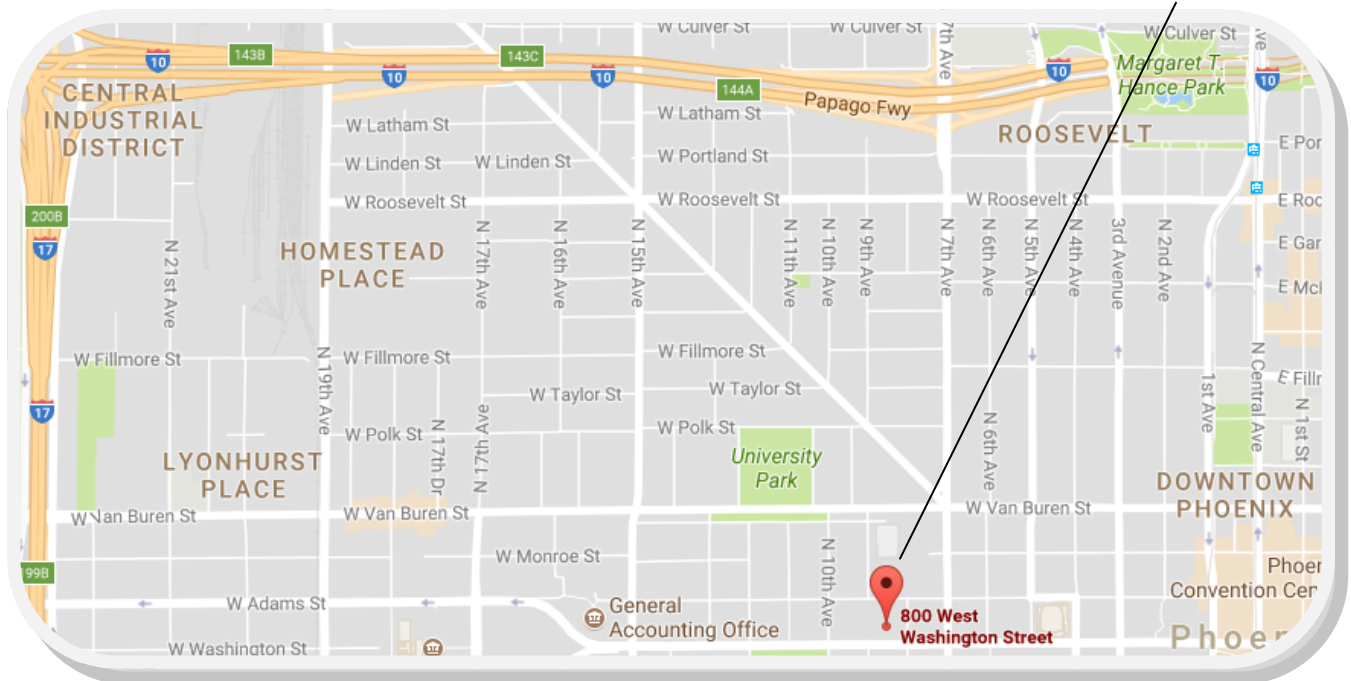


Sky Song 1475 N Scottsdale Rd., Bldg 1, Ingenuity Room 301, Scottsdale, AZ 85257



10/30/17—11/3/17 CGFM Review (40 CPE)
 Daily Schedule (8:00 AM—4:30 PM)

Arizona Industrial Commission 800 W Washington St. Phoenix, AZ 85007 Basement Conference Room



Goals for 2017-2018 and Beyond

- Membership & Education:
 - Provide 36 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.
- Accountability:
 - Prepare chapter’s Citizen Centric Report (CCR) by September 30, 2017 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.
 - Seek State proclamation for March as CGFM month and provide recognition to CGFM members.
 - Hold CGFM Review Course in October 2017
- 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.

PY 2017-2018 Budget	
Education	\$21,250
Membership	\$1,000
Travel	\$3,500
Board Expenses	\$1,000
Scholarship	\$1,500
CGFM	\$1,000
Community Service	\$750
Website	\$150
Early Career	\$100
Audit	\$100
Misc.	\$100
Total	\$30,450

PY 2017-2018 Committee Members:

Membership – Mary Adelman

Education – Keith Orr, Jerry Snyder, John Schutter, Anthony St. George

Programs – Michelle Huckabay

Accountability—Kim Prendergast

CGFM – Gergana Kovatcheva

Young Professionals / Early Career – Jessica Leal

Scholarship – Kelly Alkhoury

Community Service – John Schutter

Website – Josh Consier

**Association of Government Accountants
Phoenix Chapter
Education and Meeting Plan
2017-2018 Program Year**

Date	Event	Topic	CPE Credit	Registration Dead-line	Location
9/13/17	Chapter Meeting-Lunch 10:30am-11:00am, Seminar 11:00am-12:50pm	Advanced Excel presented by Gregory Cleveland	2	9/8/17	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
10/11/17	Chapter Meeting-Lunch 10:30am-11:00am, Audio Conference 11:00am-12:50pm	Internal Control	2	10/6/17	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
11/15/17	Chapter Meeting-Lunch 11:30am-12:00pm, Seminar 12:00pm-1:50pm	"Who's On Your Bench?" - Tips for Succession Planning presented by Pat Childress	2	11/10/17	AZ Department of Education Room 312 1535 W Jefferson St. Scottsdale, AZ 85007
12/6/17	Chapter Meeting-Lunch 11:30am-12:00pm, Seminar 12:00pm-1:50pm	Holiday Social—Cost Allocation presented by Donna Sandoval	2	12/1/17	ASU Skysong Bldg. 3, Synergy II #135 1475 N. Scottsdale Rd. Scottsdale, AZ 85257
1/10/18	Chapter Meeting-Lunch 11:30am-12:00pm, Audio Conference 12:00pm-1:50pm	Grants Management	2	1/5/18	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
1/19/18*	8:00am-8:30am Continental Breakfast 8:30am-12:00pm-Class	Ethics—ASCPA	4	1/12/18	ASU Skysong Bldg. 3, Synergy II #135 1475 N. Scottsdale Rd. Scottsdale, AZ 85257
2/7/18	Chapter Meeting-Lunch 11:30am-12:00pm, Seminar 12:00pm-1:50pm	TBD	2	2/2/18	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
2/16/18*	Chapter Meeting-Lunch 11:30am-12:00pm, Seminar 12:00p-12:50pm	ASRS	1	2/9/18	ASU Skysong Bldg. 3, Synergy II #135 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		
3/7/18	Chapter Meeting-Lunch 11:30am-12:00pm, Audio Conference 12:00pm-1:50pm	Infrastructure Financing	2	3/2/18	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257

**Association of Government Accountants
Phoenix Chapter
Education and Meeting Plan
2017-2018 Program Year**

Date	Event	Topic	CPE Credit	Registration Deadline	Location
3/28/18	Chapter Meeting-Lunch 11:30am-12:00pm, Audio Conference 12:00pm-1:50pm	Cybersecurity	2	3/23/18	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
4/11/18	Chapter Meeting-Lunch 10:30am-11:00am, Seminar 11:00am-12:50pm	Lisa Grace (ASU)	2	4/6/18	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
4/27/18*	8:00am-4:00pm PDT	AGA President	1	4/20/18	Rio Salado College 2323 W. 14th St. Tempe, AZ 85281
			1		
		State Treasurer—DeWit	1		
		GASB Updates	2		
		SAS Updates	1		
			2		
		Total	8		
5/16/18	Chapter Meeting-Lunch 10:30am-11:00am, Audio Conference 11:00am-12:50pm	Fraud Data Analytics	2	5/11/18	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
6/13/18	Chapter Meeting-Lunch 10:30am-11:00am, Seminar 11:00am-12:50pm	Leadership	2	6/8/18	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
			36		

*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.

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, Tax Update and Professional Development Training—PDT)

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

AGA Phoenix Chapter, Treasurer's Reports - August 2017

Treasurer's Report

Book Balance 7/31/2017	\$3,445.54
Receipts	\$0.55
Disbursements	\$0.00
Book Balance 8/31/17	\$3,446.09
Outstanding Checks	\$0.00
Outstanding Deposits	\$0.00
Adjusted Book Balance	\$3,446.09
<u>Account Balance</u>	
Cash on Hand	\$50.00
Savings Balance	\$5.00
Your Savings Balance	\$483.22
Money Market Account	\$1,165.03
Checking Balance	\$1,742.84
	\$3,446.09
Difference Adjusted Book vs Bank	(\$0.00)

Balance Sheet

8/31/2017

Cash and Bank Accounts	
Cash on Hand	\$50.00
Savings Balance	\$5.00
Your Savings Balance	\$483.22
Money Market Fund	\$1,165.03
Checking Balance	\$1,742.84
TOTAL Cash and Bank Accounts	\$3,446.09
Inventory	0.00
Speaker Gifts	\$70.00
TOTAL ASSETS	\$3,516.09
LIABILITIES & EQUITY	
TOTAL Liabilities	\$0
Equity	\$3,516.09

Announcements - Job Postings

Accounting Intern—Arizona Department of Administration. \$18/hour. Gain valuable, marketable skills in the workforce, before graduation, by participating in this internship. Objectives of internship include:

- Gain and understanding of government fund accounting and the application of Government Accounting Standards Board (GASB) principles while engaged in the preparation of accrual basis financial statements for internal service funds.
- Understand the State of Arizona banking process, while assisting with reconciliation efforts for Health Insurance Trust Fund (HITF) Non-sufficient funds (NSF) activity and electronic funds transfers (EFT) coming through our Treasury Department.

Ideal Candidate: A Junior or Senior at an accredited 4-year College or University with a focus in accounting, and have completed their intermediate accounting 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 through website: www.azstatejobs.gov

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

Please email AGA Phoenix Webmaster, Josh Consier, at joshc@agaphoenix.org

AGA Phoenix Chapter Executive Board Program Year 2017-2018

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	Gergana Kovatcheva, CGFM, CPA
President Elect	Michelle Huckabay, CGFM, CPA
Past President	Josh Consier
Secretary	Kim Prendergast, CGFM, CIA, CPA, CFE
Treasurer	Anthony St. George (appointed to complete Josh Neidigh's term)

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

PHONE: (480) 731-8582 **FAX:** (480) 731-8560

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!

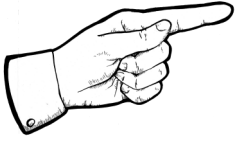
Please remember to send in any articles of interest, including any that you may have written on the subjects of management, accounting, or auditing. We welcome your comments and suggestions.

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





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/Resources/Tools-To.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.****