AGA CHICAGO CHAPTER

VOLUME 17, ISSUE 3

AGA CHICAGO CHAPTER,

MARCH 2017

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CHAPTER NEWS

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Chapter Recognition Credits Earned as of February 28, 2017

Category	Earned	Year-To-Date
Leadership	25	3650
Education	550	2625
CGFM	3250	4150
Communications	545	4315
Membership	200	600

CHICAGO CHAPTER

Association of Government Accountants

Chicago Chapter
P.O. Box 1744
Chicago, IL
60604-9998

www.agachicago.org

PRESIDENT'S MESSAGE

Greetings and Welcome to the Association of Governmental Accountants, Chicago Chapter! Congruent to our National Organizational Mission we lead and encourage change that benefits our field and all citizens.

It is my honor to serve as the 2016-2017 President at a time when earning the public trust and shaping our civil society through responsible fiscal accountability is paramount. I commit to lead through service and shape the change called upon by our times. This change can be accomplished only in collaboration with other service minded professionals to build public-private-educational institution partnership so the best of each has the chance to cross pollinate the others. We welcome change agents from all organizations who have an interest in taking this shared journey with us to join us in service, learning and development.

Please visit our Website to learn about us and join us. The lives we sustain will be our own!

Sincerely,

Dr. Kasthuri Henry, PhD, MBA, CTP, Six Sigma Black Belt
President AGA Chicago Chapter 2016-2017

AGA CHICAGO CHAPTER

MEMBER PROFILES

The AGA Chicago Chapter would like to ensure we keep you up-to-date on all of the Chapter events, educational opportunities and career resources. Please take a moment to verify your professional profile on the AGA website. We don't want you to miss any of the important communications that we share with our members!

RENEW YOUR MEMBERSHIP TODAY!

We have several members that are up for renewal on their memberships this month, are you one of them? Please do not waste anytime and renew! We have a jam packed year for our members and we do not want anyone to miss any of our events.

SPREAD THE WORD!

Have friends and/or coworkers who are not members yet? Tell them about the endless opportunities, networking events and training sessions that you have experienced and have them join.

If you have questions or concerns about these matters, please contact your Membership Director below:

Membership Director
Adriane D. McCoy, RTA
312/913-3289
mccoya@agachicago.org

2016-2017 CEC Meeting Schedule

Thursday, December 1, 2016 - Metcalfe Federal Building Room 237, 11:30am -12:00pm

Thursday, January 5, 2017 - Metcalfe Federal Building Room 330, 11:30am - 12:00pm

Thursday, February 2, 2017 - Metcalfe Federal Building Room 330, 11:30am - 12:00pm

Thursday, March 2, 2017 - Metcalfe Federal Building Room 330, 11:30am - 12:00pm

Thursday, April 6, 201 - Room TBD, 11:30am - 12:00pm

Thursday, April 27, 2017 - Metcalfe Federal Building Room 330, 11:30am - 12:00pm
(CEC PDT Planning)

Thursday, May 4, 2017 - Room TBD, 11:30am - 12:00pm (PDT Planning and Follow-Up)

Thursday, June 1, 2017 - Metcalfe Federal Building Room 330, 11:30am - 12:00pm
(Final CEC Meeting of the 2016-2017 Chapter Year)

Continuing Education Webinar

Title: AGA Webinar: "Getting Your Dollars to Work Harder: Blended and Braided Funding"

NASBA CPE: 2.0

When: Wednesday, April 26, 2017

Time: Webinar is from 2:00pm to 3:50pm

Where: GSA Conference Center, Room TBA at the Ralph Metcalfe Federal Building,

77 W. Jackson Blvd Chicago, IL 60604

Maximum Room Capacity: 30 Attendees

Speaker: TBA

Learning Objective: TBA

Cost: $10 members/$20 non-members (includes box lunch)

Additional Information:

https://www.agacgfm.org/Training-and-Events/Learn-Online/Webinars/2015-2016-Offerings/011817-blended-and-braided-funding.aspx

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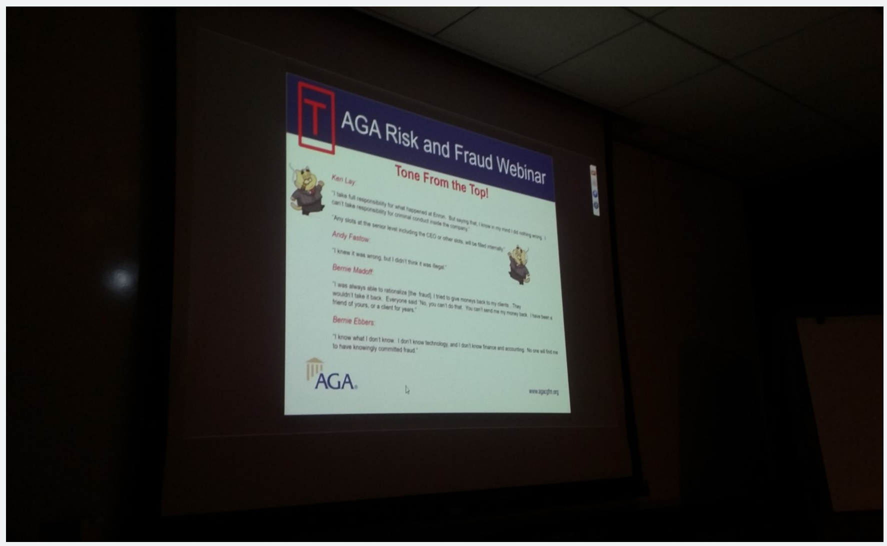
Continuing Education Seminar

"Fraud Indicators and Risk Assessments"

The Chicago Chapter held a webinar on February 22, 2017. The speakers were Kenneth Frederick, Senior Investigator, Special IG for Afghanistan Reconstruction, J. T. Littlejohn, Assistant Auditor General for Navy Internal Control and Fraud Audits, and Art Scott, Assistant Auditor General for Navy Research, Development & Acquisition Audits.



Those who attended, learned about fraud indicators and actual case examples, while also discussing the current guidelines and requirements for performing fraud risk assessments and reporting potential findings of fraud.

Community Service

Norvolution, the organization that Della Hernandez, our Social Media Director, volunteers for needs available hands!

Norvolution, is a residence for the elderly, some of which who are very active and others that are not. They need volunteers for daily jobs any day of the week and at all times of the day with activities such as:

1. Help with bingo
2. Serve breakfast, lunch and dinner
3. Clean-up after breakfast, lunch and dinner
4. Assist with arts and crafts
5. Assist with church service
6. Play games and cards

And many more fun activities that you can interact with the residents!

<u>There are a few things that we need to keep in mind when assisting the residents:</u>

- Make sure that before you assist them, you stand in front of them and introduce yourself.
- If you are assisting a resident who is in a wheelchair, please make sure that their feet are not on the floor but on the prop where they can rest their feet. Otherwise, you can injure their feet when you start to push them.
- If you need to get the resident's attention and cannot (do not call them from behind), gently touch their forearm so that they know you need to speak to them.

Organization: Norvolution – Norwood's Volunteer Revolution 6016 N. Nina Ave (in between Harlem Ave and Northwest Highway) Chicago, IL 60631

Anyone interested in putting smiles on faces and yours?
Then contact Della Hernandez, dhernandez@agachicago.org or cell: 773-510-9391.

Accepting Nominations to Become an AGA Chicago Chapter Board Member!

TIME IS RUNNING OUT

Hello AGA Chicago!!! As we approach the new fiscal year we are seeking nominations for the new slate of officers to serve on the AGA Board. If you are interested in developing your leadership skills through service to this organization or want to step-up and be a contributing leader, we are looking for you. Nominate yourself, or another AGA member you feel would be a good candidate to help the AGA continue meeting its mission.

Having served on the AGA Chicago Board the last four years in various capacities (Community Service Director, Early Careers Director, now President-elect, and soon to be President) I have enjoyed many good experiences… and so can you! Not only have I learned more about the AGA, but I've gained a much broader understanding of overall board structure and the importance of good governance, and have improved my own leadership skills in the process.

Other benefits one can obtain from serving on the board include having a stronger platform to introduce needed initiatives; representing the AGA at national leadership events; networking with other AGA chapters; assisting with Speaker recruitment for training seminars and PDT's; collaborating with local universities on behalf of the AGA towards membership recruitment and scholarship opportunities; and aiding in building relationships with other organizations such as the Association of Certified Fraud Examiners (ACFE) and Institute of Internal Auditors (IIA). Let's not forget the opportunity to have an impact in our communities through community service efforts with local charities.

Bottom line….we are looking for energetic folks who will bring fresh ideas to aid the AGA Board towards continual improvement. If you want to see changes or new initiatives implemented – take the first step – ***nominate someone…or yourself***!

Eddie Jones, President-elect

The positions we are looking to fill are:

Officers

President Elect

Secretary

Treasurer

Directors

Community Service Director

Early Careers

Job Referral Director

Marketing Director

Program Director

Social Media Director

Sponsorship Director

Website Administrator

Please forward your nominations to Saundra Woods at SWoods@hudoig.gov. We look forward to your nominations to help us continue to transform the AGA Chicago Chapter.

CHICAGO CHAPTER

AGA CHICAGO CHAPTER SCHOLARSHIP WINNER

AGA Chicago Chapter Awards the Excellence in Accounting or Finance Scholarship

The AGA Chicago Chapter is proud to announce that it is has awarded one scholarship for Fall 2016 semester. Deyna Parvanova, a student at the College of DuPage, was awarded AGA's Excellence in Accounting or Finance Award. The scholarship recognizes outstanding college students in the field of accounting or finance who have achieved positive academic records and been rated highly by professional references. The scholarship recipient received $500 towards her tuition and a free AGA student membership.

The Excellence in Accounting or Finance Award and the Leadership/ Community Involvement Award are two scholarships offered by the AGA Chicago Chapter to current college students (undergraduate or graduate students) in the field of Accounting and Finance studies. The awards are restricted to students from Illinois or Greater Chicagoland Area institutions of higher education. The AGA Chicago Chapter will be announcing another scholarship opportunity in 2017. If you have any questions, please contact Chanel Castaneda (ccastaneda@agachicago.org).

Meet our AGA Scholarship Recipient

Deyna Parvanova - I am an academic honors student at College of DuPage and I am an active Phi Theta Kappa five-star member. Upon completion of an associate degree, I am plan to transfer to a four-year university. My educational aspiration consists of acquiring a Certified Public Accountant (CPA) license. My career vision is to one day be able work for the United States government. Working for the government is working for other people - serving both our nation and our society. Receiving AGA Chicago Chapter's Excellence in Accounting Finance Scholarship is not just receiving money for me; it tells me that I have potential for the future in our society. I will use the money to further my education so I can in turn help others through my career as an accountant and achieve my life goals of being an important contributor to the community.

Congratulations, Deyna!!!

CGFM CERTIFICATION

The Certified Government Financial Manager (CGFM®)

The Certified Government Financial Manager (CGFM) certification is awarded by the Association of Government Accountants (AGA). AGA is a national professional association of some 15,000 members who represent every level of government financial management. This professional designation is designed specifically to recognize the unique skills and special knowledge required of professionals who specialize in government financial management. In addition to meeting the program's education and experience requirements, those awarded the designation agree to abide by AGA's strict Code of Ethics and complete at least 80 hours of continuing professional education in government financial management topics or related technical subjects every two years.

NEWS

- The application fee is discounted **50%** from now until March 31, 2017.
- AGA now offers a multi-user subscription option for online study guides.
- Scholarship money is available for AGA members and their family members pursuing studies in financial mgmt such as accounting, economics, finance, etc. Apply by April 14.

For more information, please copy this link to your browser:
https://www.agacgfm.org/CGFM-Certification/About-CGFM.aspx

Click-on: Candidates –CGFM Process, Click-on: Membership –Awards and Recognitions

http://cgfmstore.omnibooksonline.com/

Did you know? The Chicago Chapter of the AGA maintains a copy of the study materials to prepare for the Certified Government Financial Manager (CGFM) exam. These materials are available for check out to members of the AGA Chicago Chapter upon request.

Study Guide 1: Governmental Environment
Study Guide 2: Governmental Accounting, Financial Reporting and Budgeting
Study Guide 3: Governmental Financial Management and Control

Want to request a copy? Want more information? Contact the Chapter's CGFM Director, Raul Nieto, at (312) 730-1634 or raul.nieto@ed.gov.

AGA NATIONAL NEWS

CGFM Intensive Review Course!

2 Day Review with material and Instructor. Exams included.
https://www.agacgfm.org/CGFM-Certification/Candidates/Preparing-for-Exams/CGFM-Intensive-Review-Course-Exams.aspx?utm_source=Informz&utm_medium=Email&utm_campaign=AGA+Communications&_zs=Dv5sc1&_zl=qNwb3

Journal Quizzes!

Did you know you can earn CPE credits by taking a quiz? Follow the link for details.
https://www.agacgfm.org/Training-and-Events/Learn-Online/Journal-CPE-Quizzes.aspx

AGA 2015-2016 Report for Our Members!

A look back at the 2015-2016 Fiscal Year. A year in review. Check it out!
https://www.flipsnack.com/FCAA7CF569B/aga-2015-2016-report-to-our-members.html

AGA has a Store!

Did you know that the AGA has an online store? Purchase a shirt and hat and show off that you are member! Check it out!!!
https://business.landsend.com/store/agamembership/

Headed out of Town?

If your headed out of town and want to stay connected with AGA, find an event near you!
https://www.agacgfm.org/Training-and-Events/Event-Calendar/Chapter-Regional-Events.aspx

CONTACT INFORMATION

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AGA CHICAGO CHAPTER

Interested in becoming a sponsor? Please contact us!

Post Office Box 1744

Chicago, IL 60604-9998

Check us out on the web!

agachicago.org

AGA supports the careers and professional development of government finance professionals working in federal, state and local governments as well as the private sector and academia. Founded in 1950, AGA enjoys a long history as the thought leader for the government accountability profession. Through education, research, publications, certification and conferences, AGA reaches thousands of professionals and offers more than 100,000 continuing professional education (CPE) hours annually.

For information on the AGA Chicago Chapter's financial condition, please see the Financial Statements posted to the website.

Pictures used throughout the newsletter are courtesy of: ***www.city-data.com/album/album-Chicago-Illinois.html***

CHICAGO CHAPTER MISSION STATEMENT

The mission of the Chicago Chapter is to carry out an educational responsibility of enhancing public financial management and accountability.

AGA through its chapters, is a leading advocate for improving the quality and effectiveness of financial managers and auditors from local, state and federal governments from the Chicago area. The chapter provides an opportunity for accountants and auditors to meet on a regular basis for training and networking.

Chief Michael Spain
Bensenville Fire Protection District

Chief Spain started his career in Emergency Medical Services and Fire Service operation in Iowa City Iowa over 40 years ago. From the onset of his career, he has served in positions of Shift firefighter paramedic, Engineer, Chief Paramedic, shift supervisor/Lieutenant, Battalion Chief, Fire Chief in the Village of Richton Park, Bensenville and now a Fire District. Additionally, Chief Spain has experience as being a Village Manager, Director of a Hospital Based Paramedic operation and a Resource Hospital EMS Coordinator in Joliet, Illinois. This in addition to being hired as a consultant for EMS and Fire Agencies organizations, and being a publication reviver, and currently, Chief Spain Holds a Bachelor's Degree in General Science from the University of Iowa and a Master's Degree from Southern Illinois University in Fire Service and Homeland Security Management.

Chief Spain's accomplishments include establishing a hospital Based Paramedic organization, being the fire non-nurse system EMS coordinator in Illinois, member of the team that developed the Pre-Hospital Trauma Life Support (PHTLS), and finally, guiding the first transition from a Village operated fire department to a fire protection district in the country.

Q:Where were, you born?
A:Clinton, Iowa, 1955
Q:When did you know that you wanted to serve the public? Did someone or something influence you?
A:Frankly, my mother was a nurse and she had a great influence on my desire to be a productive individual to ensure the quality of life would be realized by those in need. Additionally, my grade school was across the street from the main fire station. I would see the firefighters daily doing their house duties. This set the stage for me since second grade.
Q:What was your first position in the fire department? How old were you? What training did you have to go through?
A:My first position was as an EMT-A /probationary firefighter at age 18. My training included fire dynamics, suppression, rescue, search and rescue, hose and ladder dynamics, and finally, the roles and responsibilities of a firefighter.
Q:With all the positions that you have had in the fire department, which one was the most challenging and why? How has it helped you get to where you are now with all the leadership roles that you hold?
A:The dynamic and challenging was the rank of Lieutenant. This position is the first level of being an officer. While you are an officer, you are still working alongside the firefighters. Many of who you started with and now you are their boss. Given that the orders from the Chief you may not agree with, you are expected to ensure their orders are carried out as designed. If you can work within the parameters of the position and gain the trust of your troops, then, if you continue that leadership concept you are ready to progress up the ladder of leadership.
Q:Where do you get your news from about your profession? Whether where the latest fire was to pension news?
A:Most of the information addressing my position comes from: continued attendance at leadership programs at the National Fire Academy, internet reviews and articles, Illinois state Fire Chiefs reviews and reports, and finally pension conferences twice a year.
Q:As you know, the Chicago pension system is in a crisis, which includes the firefighters. What do you say to those who say that firefighters are overpaid and take advantage of the system with overtime and these are the reasons that their pensions are in trouble?
A:Frankly, the position of firefighter/paramedic in my opinion are not overpaid. The firefighter's paramedics are in a "combat zone", daily. It has been proven that many suffer from PTSD and the latest review shows that our profession realizes cancer at a rate of 63%. Regarding overtime, this is directly related to minimum staffing needs, state and federal response regulations and the furlough's, sick, and injuries.
A potential answer to this situation would be to have the fire department limit their treatment and transport to advanced life support care.

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CHICAGO CHAPTER

Chief Michael Spain
Bensenville Fire Protection District

Contract with private ambulance services companies provide basic life support care and transport. This could be accomplished by have a "flying non-transport SUV respond to emergency requests and make the determination relative to the care needed and the level of ambulances needed.
This could be accomplished with a review of the operations of the department. This includes, type of requests, number of transports, vehicle wear and tear, workers comp, and lastly, a review of the work load dynamics.
Finally, a public relations program needs to be developed to explain the reasons for the changes. Expectations need to be realistic and idealistic.
Q:How important do you think it is for new firefighters to understand accounting and finance? Do you believe that all young recruits should take courses and why?
A:The new recruits need to be instructed on the dynamics of funding, state and federal mandates, and the specifics of how customer service is so very important to their success. Additionally, the recruit needs to understand that the need for a bachelor's if not a master's degree is imperative to their personal and professional success.
Q:Being in this profession, what do you think are some options that can help fund the Chicago Firefighters pension besides taxpayer money and investments?
A:Wow,this is a loaded question. The only way I think the only way this could be realized, is to have article 3 and 4 combined with IMRF. This reduces the amount paid to the investment brokers. Additionally, this falls into the responsibility of the IMRF brokers. They can invest more money and if the percentage is realized, the net amount could be higher, or lower too. This is risk management. For this to become real, there must be assurances that the pension money can't be swept or used for any other reasons. One option could be being to draft a federal IGA with Social Security. This would require a modification to the "Windfall payment", plan. This would eliminate the SS penalty, and create a plan that has shared liability.
Q:If you oversaw solving the pension crisis for the city of Chicago, who would you recruit to help you? For example, a financial advisor, an outside consultant, etc. and why?
A:See my answer to question 8. Consultants have been used to no real factual advantage. The ingrained machine of the city must be modified if there is to be a positive change to the north/positive.
Q:Thank you and congratulations on your 40+ of service. Do you plan on retiring soon? If so, what are you going to do? Or do you still have goals to accomplish in the fire department? If so, what are they?
A:Retirement for me will be in about nine years, god willing. My intensions in retirement will be to consult on advances for a better fire service leadership development, teach, and possibility work in some areas of Homeland Security.

Learning Objectives

- Identify root cause of fiscal problems
- Explore viable solutions from inside and outside the industry
- Synthesize the combination of solutions that will help resolve the fiscal problem at hand
- Develop a realistic execution plan
- Drive results through commitment leadership

Morgan Nichols

Managing Partner

Morgan Nichols has been recruiting and staffing accounting and finance professionals for 17 years in the Chicagoland area. His clients as a Managing Partner at Torrey & Gray number a wide array of both private and public sector organizations including municipal finance, banking and financial services as well as not for profit human services and educational institutions. Drawing upon his industry experience, he helps organizations attract and retain staff that drive long term goals and succession planning. Morgan is a graduate of North Park University in Chicago and is a board member of their School of Business and Nonprofit Management Advisory Board. He is also active with the Illinois CPA Society and the American Payroll Association.

Q:What type of degree did you earn at North Park University?
A:Marketing and Finance
Q: What did you do for work before getting into recruiting and staffing? Or, have you always been working in this field?
A:Prior to recruiting and staffing, I was in employee benefit sales – Group Health Insurance, Qualified Retirement Plans, etc.
Q:Why have you stayed in the recruiting and staffing profession for 17 years?
A:I get a great deal of satisfaction finding jobs for people. Most people spend their time working in their jobs, not ON their careers… I try to help people advance their careers.
Q:How do you prepare for a very day busy at work? How do you organize your job tasks, meetings, interviews, request, etc.
A:Well, it is easy to say that I usually make a shortlist of my top priorities for the day, but by mid-day, something has usually changed. Priorities have changed, on search ended and another begins, etc. The challenge is getting back and following up on everything I set out to do that day.
Q: In all of the 17 years that you have been in staffing and recruiting, have you seen a shift in job placement, whether good or bad? For example, the demand is now high/low in government staffing and recruitment vs. when it was back 10 years ago? What other shifts have you seen in the private and public sector, good or bad?
A: Aside, from the period between November 2008 and around January 2010, the biggest shift is simply among different industries. With the adoption of Dodd-Frank Legislation and the subsequent interpretations, there has been a lot of activity in Financial Services. Not for profit sectors will always have the need for staffing, because they are typically running so lean that they cannot afford to be down even one person. There is usually pretty low turnover in the (municipal) government finance.
Q: Besides education, what are your clients looking for in a candidate? Public vs. Private? Have you seen any kind of shift in this from 10 years ago?
A: There is still, and probably always be a desire for candidates to have a prominent public accounting background. Aside from that, hiring companies are looking for business partners- professionals with strong communication skills and ability to harness the efficiencies for finance technology.
Q: What are the most challenging aspects of recruiting and staffing for your clients? Are they resumes, bad interviews, not enough experience or too much experience, etc?
A: I would say the most challenging aspects of recruiting includes situations where a client wants to hire entry level candidates to replace tenured employees. Hiring companies can say they will train and mentor employees, but one of the main reasons people are looking to leave their current positions is because they are not getting much in the way of training or mentoring.
Q: When you believe you have found a pool of candidates for a position, why did you pick them? What is your approach when interviewing them? What questions do you ask them and why? Are they the same questions for each candidate?
A: I usually do have an actual list of questions to ask everyone. But honestly, sometimes it doesn't really matter how well they answer the questions -because I know the candidate's personality is not a good fit, or the other way around – I know the person is so good for the client, it might not matter how they answered. From there, I tell the client why I like the candidates.
Q: Once you have picked the "perfect" candidate and/or candidates, how do you prepare them for the next step of the hiring process?
A: If I have done a good job selecting the best candidates, my additional preparation is not that hard. The best candidates run with their prep, and I try to shine a light on what it is really like to work at the company – the people, the industry, etc. Good candidates understand they need to do their homework and study all the information that is publicly available.

Morgan Nichols

Managing Partner

Q: Once the candidate and/or candidates have interviewed for the position with your client, what kind of conversation do you have with your client about the candidate and/or candidates?
A: We always talk with both parties as soon after the interviews as possible to get a sense of how they felt the meetings went. Did they have a good feeling about it? Did something come up in conversation that was different than what I had described to the candidate about the job and the company? Did the client pick up on anything about the candidate that I did not know or tell them? I pride myself on accurately portraying the opportunity and the candidates in an accurate and candid manner.
Q: What kind of advice can you give to someone almost coming out of college and who is trying to start their career in the fields that you recruit for? Do you see that the younger professionals prefer Private over Public, or vice versa?
A: All really depends on the program. Certain college programs are known for producing Big 4 caliber graduates, and some aren't. Also, most firms have a good campus recruiting program, so we never get those entry level searches. Most of the candidates we are talking to are looking for a job in industry, not public. Most candidates do not want to stay in public accounting forever though, and after a few years they have lots of options open to them.
Q: What advice can you give to someone who wants to switch working from Public to the Private sector, or vice versa? Have you seen a trend in this the past 10 years?
A: It usually comes down to lifestyle, they usually want out when the travel and hours start to become an issue in their personal lives. During the recession, may large firms laid off a lot of people, so they were forced to make the change. My advice would be to have the person really think about how they want the combination of their work and personal life to look like.
Q: What is the most challenging aspect of your career? Have you mastered it? Or do you have some learning to still do?
A: The challenge is when people tell you they want one thing then do something else. I can't control people, they are going to do whatever they ultimately want to do, even if it defies what they have said. Sometimes it heard to build a relationship with someone and sometimes it clicks right away. I can't say I have mastered it, but that's what keeps it interesting. I still have a lot to learn, and as you get older that becomes more apparent.
Q: Do you plan on retiring in this field? If so, why? If not, what will be your next move in your professional or educational career?
A: I do see myself staying in this field for the foreseeable future. I love it. The trick is to not have too many clients in one industry or even at too few clients. I try to keep it diversified as much as possible.

Learning Objectives

- Learn about the soft and technical skills needed for the future Govt Accounting and Finance Careers
- Develop strategies to attract, develop and retain the talent embodying these emerging skills
- Learn how to continually develop your own skills to remain relevant in the changing governmental environment
- Develop a robust strategy linking your own career path and your organization's succession plan

Theresa McGill

Senior Stakeholder Liaison

Theresa McGill has worked for the Internal Revenue Service since1980 (over 36 years) in various positions such as taxpayer service representative, tax auditor, on-the-job instructor, coach, EEO counselor, revenue agent, employment tax specialist and Senior Bank Secrecy Act Outreach Specialist. She is presently the Senior Stakeholder Liaison for Communications & Stakeholder Outreach (CSO). CSO is a business unit of the Small Business/Self- Employed (SB/SE) Operating Division of the Internal Revenue Service (IRS).

Working as a Senior Stakeholder Liaison, she communicates with targeted stakeholders to provide education and outreach events. These outreach activities are generally open forums with stakeholders to provide the exchange of ideas and information affecting the small business and self-employed communities. She identifies stakeholder issues, communicates strategic priorities, reduces taxpayer burden and helps to increase taxpayer compliance. She also collaborates to establish and maintain relationships and partnerships with practitioners and industry organizations. Theresa graduated from Oakwood University (formerly Oakwood College) located in Huntsville, Alabama in 1980, where she studied Business Administration and Communications. She is married with one child.

Q: Where were you born and raised in Alabama?
A :I was born in Detroit, Michigan. I attended Oakwood College (now Oakwood University) in Huntsville, Alabama
Q: How did you start your career in the IRS? Why did you choose to work there? Were you influenced by someone or something?
A: I was in still in Alabama after school sending out resumes to find a job. My Mom went to the local IRS office in Benton Harbor, Michigan to ask a question about taxes. She found out that the TSR (Taxpayer Service Representative) was leaving and that there would be an opening. I quickly came home and took the Civil Service Exam for the position. I was the only female and the only African American to pass the test and was offered the job. My career with IRS started on September 2, 1980.
Q: How do you stay informed when it comes to Fraud? News, journals, blogs, etc?
A: All IRS employees are constantly informed and educated about Fraud. We have a great Public Affairs Business Unit, Communications Business Unit and Criminal Investigation Business Unit that keep us abreast of all issues that affect taxpayers. From Scams, ID theft and Criminal Investigations, we are made aware of the badges of Fraud to look for and the pitfalls to stay away from. As a Senior Stakeholder Liaison, I share these “hot topics” with organizations, tax return preparers and industry groups. We ask organizations and groups to partner with us and share the information with their membership through tweets, email, Facebook, newsletters, posts to their websites, etc. to keep everyone informed.
Q: What was your first position with the IRS? What about this position that has helped you stay so successful there?
A: My first job at IRS was a Taxpayer Service Representative (TSR). It was a one-man operation where I assisted taxpayers with tax questions, notices regarding their tax return, self-help preparation of tax returns and conducted Small Business Tax Workshops at the local Community College. The great thing about this job was that it allowed me to become familiar with the tax forms and publications. I referred to them constantly and after 36 years; I can still quote many of the publications names from memory when needed to assist my stakeholders and their clients.

Theresa McGill

Senior Stakeholder Liaison

Q: In all the years that you have worked there, what has changed the most about fraud? The least?
A: Well, the one thing that has not changed is that Criminals are Smart. And, we as accountants must remain vigilant and be mindful of the various methods used to defraud the American Public. As many of you know, there are many scams that have affected the public in recent years:

- Phishing Scams
- Impersonation of IRS employees
- Identity Theft
- W-2 Human Resource Email Scams (Data Breaches)
- Fraudulent Tax Return Preparers

These are just a few of the scams that affect taxpayers. Unfortunately, many of these scammers prey on the low-income and elderly taxpayers and more recently, the tax return preparers. Some tips can help you avoid becoming a victim to a phishing scam, whether through email, phone or fax.
When you receive an email:

- If it looks suspicious, don't open it.
- Stop and think about who or where it came from and what the sender wants from you before you open it.
- Criminals also phish for information over the phone by pretending to officials from certain organizations, including the IRS.

Here are some helpful links:
https://www.irs.gov/uac/newsroom/irs-warns-taxpayers-to-guard-against-new-tricks-by-scam-artists
https://www.irs.gov/uac/tax-scams-consumer-alerts

Be suspicious if you receive an unsolicited call or voicemail message that requests personal or sensitive information immediately directs you to make a payment or sends you to a website. If you receive an email fax, treat it just like any other email, taking the same precautions listed above. Even paper faxes can be dangerous; criminals now use quick response (QR) codes that once scanned, install malware on your phone. The bottom line is that you should *stop and think* before you open an email, click a link, download software or scan a QR code.
Q: What measures do/did you take when you come/came upon an audit that looks to have some type of fraud involved?
A: At the first indications of fraud, compliance employee should discuss the case with his/her manager. If you are not a compliance employee, you can submit a referral to the Examination Business Unit. Discuss case with the IRS Fraud Coordinator, develop the issues, consider the badges of Fraud (Inconsistent statements, false records, etc.) Contact our Criminal Investigation (CI) Business Unit – In Illinois, Stakeholder Liaison works closely with the Chicago CI Field Office.
Q: How high can the fines be and how long can jail time be?
A: Each case is different and is based on the facts and circumstances. At IRS we take into consideration if an item is an "honest mistake" or if there was "Willful Intent" to defraud the Federal Government. Taxpayers can visit the IRS Payment Options Page on irs.gov if they need help with paying a tax obligation: https://www.irs.gov/payments.
Q: As a Senior Stakeholder Liaison, what do you try and instill to your audience when teaching them about fraud?
A: Defrauding the Federal Government hurts everyone. Ever since Al Capone was sent to federal prison for tax evasion, it has been well known that illegally obtained income is still income for tax purposes, and failure to report that income is a tax crime. Tax crimes take away valuable resources that can be used for other activities such as outreach and education.
Q: Why have you stood with the IRS for 30+ years?
A: I like the work and the interaction with my stakeholders.
Q: What is your next role or goal with the IRS and/or career? Or are you planning to retire soon?
A: I plan to retire on June 30, 2017.

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Professional Development Training

12 CPE's

JOIN US!!

Wed., May 17, 2017
and
Thu., May 18, 2017

9:00am - 4:00pm

Metcalfe Federal Building
GSA Conference Room 331
77 West Jackson Boulevard
Chicago, Illinois 60604

Members: $295
Group (5+): $295/person
Non-members: $395
Retired Members: $95
Full-Time Students: $25
Life-Time Members: $0

Submit registration to:
mmatczynski@hudoig.gov

NATIONAL REGISTRY OF CPE SPONSORS

The AGA Chicago Chapter is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.learningmarket.org.

AGA Chicago Chapter PDT

May 17 — 18, 2017 9:00am — 4:00pm

General Information

Metcalfe Federal Building
GSA Conference Room 331
77 West Jackson Boulevard
Chicago, Illinois 60604

Register by May 8, 2017

Members: $295
Nonmembers: $395
Retired Member: $95
Group (5+): $295/person
Full-Time Students: $25
Life-Time Members: $0

Registration includes:

- A certificate of completion;
- Breakfast, lunch and snacks both days; and,
- Training materials furnished via a link for printing on your own or viewing on electronic devices at your leisure.

Delivery Method: Group Live

Registration Questions: Please contact our Registrar, Matthew Matczynski via email at MMatczynski@hudoig.gov

Payment Questions: Please contact our Treasurer, Tom DiLisio via email at Dilisio.Thomas@dol.gov

Registration Information

FIRST NAME	LAST NAME	ORGANIZATION	EMAIL	PRICE

Order Total:

Method of Payment

☐ **Check**
We will provide an invoice to the identified contact person. Checks should be made payable to AGA Chicago Chapter and mailed to:
Post Office Box 1744, Chicago, IL 60604-9998

☐ **Electronic Fund Transfer (EFT)**
We will provide an invoice and our bank routing information to the contact person.

☐ **Credit Card**
Contact AGA-Chicago Chapter Treasurer via email at Dilisio.Thomas@dol.gov to process credit card payment.

Contact Information

Please include the contact information for the person who will coordinate the registration fee payment.

Name/Title

Organization

Phone

Email

Cancellation Date: Friday, May 12, 2017

Requests for cancellation must be made in writing to MMatczynski@hudoig.gov prior to cancellation deadline. Registered participants who give a cancellation notice after the deadline, or who do not attend the event, will be charged the full price of the event. This policy is based on the fact that the Chapter contracts for costs (speakers, catering, etc.) and is required to pay for these costs whether or not the registered participant attends the event.

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Welcome Message

Congruent to our National Organization's Mission, the AGA Chicago Chapter leads and encourages change that benefits our field and all citizens.

It is my honor to both welcome you to our annual educational session and invite you to our after-hours networking event. It is encouraging that at a time when earning the public trust and shaping our civil society through responsible fiscal accountability is paramount, we are embarking on this Professional Developmental Training by bringing together the public-private-university partnership to help shape our world. Governmental Accounting, Audit and Fraud Prevention all exist only in the context of the Local, State and Federal Organizations serving areas like public safety, education, and housing. We welcome change agents from all organizations, who have an interest in taking this shared journey with us, to join us in learning and development. The lives we sustain will be our own.

Come join us and become part of a movement!

Dr. Kasthuri Henry, PhD, CTP, Six Sigma Black Belt
President, AGA Chicago Chapter

AGA Chicago Chapter PDT

Agenda-at-a-Glance

PLEASE NOTE: Schedule changes may occur that affect speakers, topics, etc

Wednesday, May 17th		
8:30am	**Registration & Networking Breakfast**	
9:00am	**Welcome Address & Introductions**	
9:15am	***"Who Are You BECOMING as a Leader?"*** **Mr. Fanning**	(Personal Development)—1.5 CPEs
BREAK		
10:45am	***"Solving our Fiscal Problems – A Case Study"*** **Chief Mike Spain**	(Finance)—1.5 CPEs
LUNCH		
12:45pm	***"Preparing the Next Generation Govt. Finance Leaders"*** **Mr. Nichols**	(Personnel/Human Resources)—1.5 CPEs
BREAK		
2:15pm	***"Leadership Through Fraud Prevention: IRS Case Study"*** **Ms. McGill**	(Specialized Knowledge)—1.5 CPEs
WRAP UP: Announcements		
4:00 – 6:00pm	**PDT Mixer**	**(Offsite Location TBD)**
Thursday, May 18th		
8:30am	**Registration & Networking Breakfast**	
9:00am	**Welcome Address & Introductions**	
9:15am	***"Education as Foundation for Our Shared Prosperity"*** **Dr. Dunn**	(Specialized Knowledge)—1.5 CPEs
BREAK		
10:45am	***"Pension Round Table"***	(Specialized Knowledge)—1.5 CPEs
LUNCH		
12:45pm	***"Accountability and State Fiscal Stewardship"*** **Mr. Martire**	(Specialized Knowledge)—1.5 CPEs
BREAK		
2:15pm	***"Fiscal State of the State"*** **Ms. Weinberg**	(Finance)—1.5 CPEs
WRAP UP: Evaluations/CPEs		

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Presents…

Jonathan Fanning

Leadership Development Expert

Jonathan Fanning helps organizations and individuals reach their full potential and is the author of Who are you BECOMING? Through keynote speaking, training workshops, coaching, and consulting, Jonathan works to create excellence within companies, teams and organizations that are not willing to settle for “good enough.”

Jonathan was voted best speaker at a recent TED Talk conference.

A traumatic car accident and several other “Frying Pan” moments in the middle of Fanning’s career as a management consultant to Fortune 500 companies triggered a quest for a deeper sense of purpose, meaning, and significance. “Who are you BECOMING?” and “Who are you helping others to BECOME?” became central to Jonathan’s life, businesses, and speaking. With over fifteen years of experience coaching leaders, from Fortune 500 executives to sole proprietors, Jonathan has developed expertise in the principles, practices, and challenges of creating a worthwhile vision and becoming the leader capable of the worthy pursuit.

Fanning has built several successful businesses, including a national children's fitness franchise and Entrepreneur Adventure, which helps young people experience business start-up and ownership. Jonathan shares his message with organizations around the world, inspiring with relevant stories, strategies, and practical application steps to help audience members challenge the status quo.

Jonathan lives in NY with his amazing wife, Dominika, and two angelic little girls, Ella and Maya.

Wednesday, May 17, 2017 9:15am

"Who Are You BECOMING as a Leader?"
By Jonathan Fanning

Summary
A year from today, will you be a better leader… or not? The answer affects every aspect of our lives. Who are you BECOMING? introduces four pillars the greatest leaders all have in common and a simple formula for enhancing these pillars in your own life and organization. A favorite of audiences across the country, Jonathan shares "The Simplest and Most Effective Leadership Development Plan", borrowing powerful and practical lessons from the greatest people developers in all walks of life.

- What is the greatest leadership advice ever given to a U.S. president?
- What success formula do world-class 7th grade teachers and Viktor Frankl have in common?

This program applies to you, whether you lead a company, non-profit, team, family, or just yourself.

Learning Objectives
Participants will:

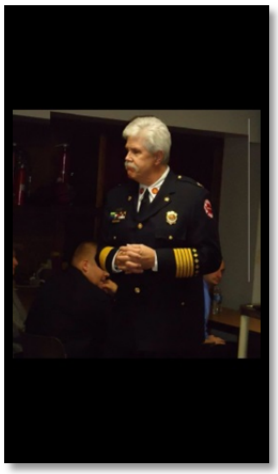
- Begin to apply the "Simplest and Most Effective Leadership Development Plan" for yourself, your family, your clients, and your team.
- Learn the greatest leadership advice ever given to a U.S. president.
- Find out how cooking chili will help to develop their leadership style.
- Gain insights on the success formula that world-class 7th grade teachers and Viktor Frankl have in common.

Field of Study:	Personal Development
CPE Credits:	1.5 hours (75 minutes)
Program Level:	Overview
Prerequisites:	None
Advance Preparation:	None

AGA Chicago Chapter PDT

Presents…

Chief Michael Spain
Bensenville Fire Protection District



Chief Spain started his career in Emergency Medical Services and Fire Service operation in Iowa City Iowa over 40 years ago, From the onset of his career he has served in positions of Shift firefighter paramedic, Engineer, Chief Paramedic, shift supervisor/Lieutenant, Battalion Chief, Fire Chief in the Village of Richton Park, Bensenville and now a Fire District. Additionally, Chief Spain has experience as being a Village Manager, Director of a Hospital Based Paramedic operation and a Resource Hospital EMS Coordinator in Joliet, Illinois. This in addition to being hired as a consultant for EMS and Fire Agencies organizations, and being a publication reviver, and Currently, Chief Spain Holds a Bachelor's Degree in General Science from the University of Iowa and a Master's Degree from Southern Illinois University in Fire Service and Homeland Security Management.

Chief Spain's accomplishments include establishing a hospital Based Paramedic organization, being the fire non-nurse system EMS coordinator in Illinois, member of the team that developed the Pre-Hospital Trauma Life Support (PHTLS), and finally, guiding the first transition from a Village operated fire department to a fire protection district in the country.

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"Solving our Fiscal Problems – A Case Study"
By Chief Mike Spain

Summary

Fiscal limitations are the reality of all public sector organizations today. This presentation will educate and probe the fiscal problem solving towards non-traditional means. The session will highlight how to develop alternatives to tax funded approaches and pursue various non-tax supported organizational revenue streams for your community through the development of a business type strategy and action plan.

Learning Objectives

Attendees will:

- Identify root cause of fiscal problems
- Explore viable solutions from inside and outside the industry
- Synthesize the combination of solutions that will help resolve the fiscal problem at hand
- Develop a realistic execution plan
- Drive results through commitment leadership

Field of Study:	Finance
CPE Credits:	1.5 hours (75 minutes)
Program Level:	Overview
Prerequisites:	None
Advance Preparation:	None

AGA Chicago Chapter PDT

Presents…

Morgan Nichols
Managing Partner

TORREY & GRAY

Morgan has been recruiting and staffing accounting and finance professionals for 17 years in the Chicagoland area. His clients as a Managing Partner at Torrey & Gray number a wide array of both private and public sector organizations including municipal finance, banking and financial services as well as not for profit human services and educational institutions. Drawing upon his industry experience, he helps organizations attract and retain staff that drive long term goals and succession planning. Morgan is a graduate of North Park University in Chicago and is a board member of their School of Business and Nonprofit Management Advisory Board. He is also active with the Illinois CPA Society and the American Payroll Association.

AGA Chicago Chapter PDT

Wednesday, May 17, 2017 12:45pm

"Preparing the Next Generation of Government Finance Leaders"
By Morgan Nichols

Summary

We will discuss talent pipeline strategies and the effect of mandates as well as the perception of unrealistic future obligations such as pension guarantees on the ability to attract and retain top accounting and talent. Also, we will explore guidance for career path development to be successful in future CFO team roles in our dynamic governmental accounting and finance world.

Learning Objectives

Attendees will:

- Learn about the soft and technical skills needed for the future Govt Accounting and Finance Careers
- Develop strategies to attract, develop and retain the talent embodying these emerging skills
- Learn how to continually develop your own skills to remain relevant in the changing governmental environment
- Develop a robust strategy linking your own career path and your organization's succession plan

Field of Study:	Personnel/Human Resources
CPE Credits:	1.5 hours (75 minutes)
Program Level:	Overview
Prerequisites:	None
Advance Preparation:	None

AGA CHICAGO CHAPTER

Theresa McGill

Senior Stakeholder Liaison

Theresa McGill has worked for the Internal Revenue Service since1980 (over 36 years) in various positions such as taxpayer service representative, tax auditor, on-the-job instructor, coach, EEO counselor, revenue agent, employment tax specialist and Senior Bank Secrecy Act Outreach Specialist. She is presently the Senior Stakeholder Liaison for Communications & Stakeholder Outreach (CSO). CSO is a business unit of the Small Business/Self-Employed (SB/SE) Operating Division of the Internal Revenue Service (IRS).

Working as a Senior Stakeholder Liaison, she communicates with targeted stakeholders to provide education and outreach events. These outreach activities are generally open forums with stakeholders to provide the exchange of ideas and information affecting the small business and self-employed communities. She identifies stakeholder issues, communicates strategic priorities, reduces taxpayer burden and helps to increase taxpayer compliance. She also collaborates to establish and maintain relationships and partnerships with practitioners and industry organizations

Theresa graduated from Oakwood University (formerly Oakwood College) located in Huntsville, Alabama in 1980, where she studied Business Administration and Communications. She is married with one child.

"Leadership Through Fraud Prevention: IRS Case Study"

By Theresa McGill

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Randy Dunn, Ed.D., M.S., B.S.
President, Southern Illinois University System

Dr. Randy J. Dunn became the eighth president of the Southern Illinois University System on February 17, 2014, and he began his official duties at the University on May 1, 2014.

Prior to coming to Southern Illinois, Dunn served as president at two other state institutions—Murray State University in Kentucky (2006-2013) and Youngstown State University in Ohio (2013-2014). Before that, Dunn was the state superintendent of education, appointed to that role by the Illinois State Board of Education. He is not a stranger to the SIU System, having held the rank of professor in the Department of Educational Administration and Higher Education at SIUC. Dunn started at the Carbondale campus as an associate professor in 1995 and was named department chair in 2000, before leaving to assume the state superintendency. During his term as chair, he also taught in the joint doctoral program in educational leadership at SIU Edwardsville. Dunn began his academic career as an assistant professor in the Department of Leadership at The University of Memphis for two years before taking his faculty post at Southern Illinois University. His early career in Illinois public education included classroom teaching, service as a principal at two school districts in north central Illinois, and the post of district superintendent for two Illinois school systems.

Dunn received his doctorate in educational administration from the University of Illinois at Urbana-Champaign in 1991. He graduated from Illinois State University with a master's in administration and foundations in 1983, and the B.S. in education in 1980.

During his time in higher education, Dunn has served on a number of committees, councils, boards, and task forces, including those for the American Council on Education, American and Illinois Associations of School Administrators, North Central Association, Southern Association of Colleges and Schools, Nonprofit Leadership Alliance, Learning Point Associates, Illinois Board of Higher Education, Illinois Association of School Boards, and other groups. He has done extensive consulting on K-12 education issues nationally and has served as the principal investigator or co-PI on numerous grants totaling nearly $650,000. His scholarly writing included published articles on a range of education management issues in professional journals, as well as book chapters, book reviews and monographs. Additionally, he has evaluated a number of manuscripts for publication in journals and books and grant proposals for funding agencies.

Dunn is married to Dr. Ronda Baker Dunn, originally from Benton, IL, and they reside in rural Carbondale. They enjoy travel, riding in their Jeep, the arts—and of course, Saluki and Cougar athletics. Randy and Ronda are the parents of four adult children.

AGA Chicago Chapter PDT

Thursday, May 18, 2017 9:15am

"Education as Foundation for Our Shared Prosperity"

By Dr. Randy J. Dunn

Summary

Education prepares us for life and career. Continuing education helps us remain relevant in an ever-changing world. Economic development and financial prosperity of a nation is largely influenced by timely and relevant knowledge capable of driving innovation and growth. Therefore, it is no secret that education is the foundation for our shared prosperity. Governmental Sector is changing and Education continues to be the catalyst for successfully riding that wave of change. President Dunn of Southern Illinois University will engage you in a transformational journey to help you visualize your professional growth and shape your organizational development. At a time where we need the best of us seeking public service this insight and guidance is definitely a must have.

Learning Objectives

- Understand how education lays the foundation for a robust career trajectory in govt.
- Connect education to economic prosperity and shared growth
- Take away the importance of continuing education to be a trail blazer in government
- Go beyond your own prosperity and see how education can help drive our shared prosperity

Field of Study:	Specialized Knowledge
CPE Credits:	1.5 hours (75 minutes)
Program Level:	Overview
Prerequisites:	None
Advance Preparation:	None

AGA CHICAGO CHAPTER

Dr. Kasthuri Henry PhD, MBA, CTP, Six Sigma Black Belt
President

KasHenry Inc.
Steering Your Business for Success

Dr. Kasthuri Henry is an award-winning writer, engaging speaker and proven financial performance management leader with over 25-years of private and public sector experience alongside international exposure. Kas earned her B.Sc. majoring in Computer Science, Math and Physics; earned her MBA with an emphasis in Finance and Decision Sciences; and her PhD in Finance. A Six Sigma Black Belt, Kas' experiences include CFO at Chicago Teacher's Pension Fund, Regional CFO at Aon Risk Services, Vice President of Continuous Improvement for the University Division at Career Education Corporation and Sr. Vice President of Planning and Analysis at HSBC Consumer/Mortgage Lending.

Kas is also a Visiting Professor at Southern Illinois University Public Sector Management, DeVry/Keller Graduate School of Management and North Park University School of Business and Non-Profit Management. She has been on various advisory boards including the North Park University MBA Advisory Board, DeVry University Advisory Board, professional organizational and non-profit boards.

Kas' contribution at Aon Risk Services and dedication to education through various institutions was recognized by the Institute of Management Accountants, naming her the recipient of 'Financial Executive of the Year Award 2006' for the Mid-America region. Kas' professional affiliations include Governmental Finance Officers Association (GFOA), AGA, Association of Financial Professionals (AFP), and Treasury Management Association of Chicago (TMAC); Civic affiliations include the Lion's Club and Habitat for Humanity. A Phi Theta Kappa Leadership Honor Society and International Public Safety Leadership Ethics Institute (IPSLEI) Certified Ethical Leadership instructor, she currently serves as faculty member for AFP continuing professional education, where she writes curriculum and delivers webinars as well as workshops. Kas is the recipient of the National Lybrand Award for her contribution to the financial strategy literature in recognition of her cutting edge consulting value proposition manuscript "Financial Agents for Change". Kas recently received the "Award of Financial Reporting Achievement" from the Governmental Finance Officers Association (GFOA) of the United States and Canada for her achievements in FY 2015.

AGA Chicago Chapter PDT

Thursday, May 18, 2017 10:45am

"Pension Round Table"

Moderated By Dr. Kasthuri Henry, PhD, MBA, CTP, Six Sigma Black Belt

Summary

Pension has emerged as a hot button issue in Illinois and has continued to dominate center stage of the state budget and fiscal dilemma. While the root cause of the pension problem is multi-facetted, the change in accounting rules GASB 67 and 68 shined the light on the unfunded liability causing bond rating changes leading to higher cost debt financing. The resulting fiscal and budget issues have far-reaching impacts on education, public services, etc. across the state. As government professionals with state pensions, government accounting and audit professionals who need to understand the GASB rules as well as related exposure, and as general tax paying citizens of the state, we all have a stake in the equitable resolution of this dilemma. Role of audit and fraud risk mitigation, role of accountability and pension funding, role of budgeting for public services and service personnel are all aspects that will be explored during this holistic discussion.

Learning Objectives

- IL State Budget and Accountability
- Root Causes of our Pension Problem
- GASB 67/68 exposing the unfunded pension liability
- Resulting Fiscal Dilemma for the State
- Explore possible fixes suggested for the pension system
- The implications of those on IL public universities
- How all this is playing out in the national conversation about higher education

Come join us at the Pension Round Table with Dr. Dunn, Mr. Martire and Ms. Weinburg to understand how you can directly make a positive difference in shaping our state's fiscal future.

Field of Study:	Specialized Knowledge
CPE Credits:	1.5 hours (75 minutes)
Program Level:	Overview
Prerequisites:	None
Advance Preparation:	None



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Ralph Martire, J.D., B.A.
Executive Director

Ralph Martire is executive director of the Center for Tax and Budget Accountability ("CTBA"), a bipartisan 501(c)(3) think tank committed to ensuring that state, federal and local workforce, education, fiscal, economic and budget policies are fair and just, and promote opportunity for all, regardless of race, ethnicity or income class. During his time at CTBA, Ralph has helped obtain numerous legislative successes (including passage of a state Earned Income Tax Credit, creation of a bipartisan legislative task force to integrate workforce and economic development policies, passage of the 2011 Temporary Tax Increases, corporate accountability legislation that, among other things, requires public reporting of economic development benefits created through receipt of tax breaks and other subsidies, decoupling Illinois tax policy from the federal bonus depreciation rules and federal repeal of the estate tax).

In 2011, Ralph was appointed as a full voting commissioner to the Congressionally-established "Equity and Excellence in Education Commission," under the Federal Department of Education's Civil Rights Division. The Commission was charged by Congress to review public education systems and systems of education finance at the national and state level in the U.S., to identify whether those systems contributed to either inequities in access to educational opportunities or creation of achievement gaps. The Commission completed its work with the issuance of the "For Each and Every Child" report in February of 2013. Ralph co-authored the first section of the report, which made recommendations regarding the fiscal and education funding policies required at the state and federal levels to provide an excellent education to every child.

Ralph has received numerous awards for his work on education and public policy reform, including the Champion of Freedom Award, presented by the Rainbow PUSH Coalition to individuals whose professional work embodies Dr. Martin Luther King, Jr.'s, commitment to equal educational opportunities, and the Ben C. Hubbard Leadership Award given by Illinois State University to individuals who have greatly benefited education in Illinois. He also received the Adlai Stevenson Award for Public Service presented by the American Society for Public Administration to honor one individual with a connection to the Chicago area that has made outstanding contributions to government and public administration over an extended period of time.

Ralph was elected to serve on the School Board of River Forest District 90, where he still serves as board president. He also serves on the West Cook Division Governing Board of the Illinois Association of School Boards.

A frequent lecturer on fiscal policy, Ralph teaches a Master's level class on fiscal policy at Roosevelt University, and has taught tax policy seminars for the International Fulbright Scholar Program, the National Labor College and the national Women in Government lecture series. Ralph has also designed and taught Master's programs on education finance for the University of Illinois, and a Doctoral program on the politics of public education for Illinois State University. Ralph has been featured as a tax policy expert for numerous television and radio news programs such as WTTW, the Chicago PBS affiliate, and WPWR, the Chicago NPR affiliate. He serves as a regular columnist for the State Journal-Register and the Daily Herald on issues involving government accountability, tax, fiscal and budget policies. Prior to joining CTBA, Ralph was a partner in a law firm, with a sophisticated transactional practice focused on intellectual property, structured finance and mergers and acquisitions. Ralph served as the deputy issues director for Dawn Clark Netsch in her gubernatorial campaign, and issues director for David Wilhelm in his run for the United States Senate. He is also a former candidate for the Cook County Board. His prior appointments include serving as a member of both the Cook County State's Attorney's Council on Hate Crimes Prosecution and Cook County Special Task Force on Domestic Violence, and chair of the state revenue committee on the budget advisory board of Governor Blagojevich's transition team.

Mr. Martire graduated from Indiana University Phi Beta Kappa, with a B.A. in history and received his JD from the University of Michigan. He is married to Mary Kay Martire, and has two children, a son Nicholas, and a daughter Valerie.

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Thursday, May 18, 2017 12:45pm

"Accountability and State Fiscal Stewardship"
By Ralph Martire, J.D., B.A.

Summary

The Center for Tax and Budget Accountability focusses on large, systemic challenges by taking a data-driven, evidence-based, and best practice approach to:

- Promoting sustainable, long-term policy reforms in the core areas of education, social services, healthcare, and workforce/economic development;
- Tying the fiscal side of the ledger to service delivery—after all, to have quality services that meet demographically driven needs and generate desired outcomes, sufficient capacity on the front end is essential; and
- Framing all reforms in ways that bridge rather than reinforce ideological divides.

This session will share insights gathered using this approach and provide useful tips on how each Governmental Entity and Stewards of those entities can drive sustainable fiscal progress.

Learning Objectives

- Understand the role of accountability beyond the mere functional or audit control perspective
- Develop stewardship strategies
- Promote sustainable policy reforms using lessons learned from process analysis, audits and risk evaluations
- Framing reform without the burden of political ideology to enable true fiscal viability

Field of Study:	Specialized Knowledge
CPE Credits:	1.5 hours (75 minutes)
Program Level:	Overview
Prerequisites:	None
Advance Preparation:	None

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Sheila Weinberg, CPA
Founder and CEO

Ms. Weinberg, is the founder and CEO of the Truth in Accounting, whose mission is to compel governments to produce financial reports that are understandable, reliable, transparent and correct. Since 2002 Ms. Weinberg has led Truth in Accounting's research initiatives, which include the "The Truth about Balanced Budget: a Fifty State Study", the "Financial State of the States" and the "Financial State of the Union." Because of her expertise in governmental budgeting and accounting, Ms. Weinberg has testified before the Federal Accounting Standards Advisory Board (FASAB), the Government Accounting Standards Board and numerous state legislative hearings on matters of proper government accounting.

Ms. Weinberg earned her Bachelor of Accounting degree from the University of Denver, which she attended on an academic scholarship. She received her certified public accountant (CPA) credential in 1981. Ms. Weinberg was active in the Concord Coalition from its inception in 1992, and was honored in 1998 with their Outstanding Volunteer Award.

Ms. Weinberg is a member of the Association of Government Accountants' Financial Management Standards Board, the University of Denver's School of Accountancy Advisory Board, and is a member of the Union League Club of Chicago's Public Affairs Committee. She has served as an independent legislative adviser to members of Congress on federal budgeting and accounting issues. She was also a member of the Comeback America Initiative Advisory Council, the Academy of Government Accountability Advisory Council and two FASAB Task Forces. Her commentary on the federal budget, Social Security, Medicare and other national issues has appeared repeatedly in numerous publications, including USA Today, Chicago Tribune and Chicago Sun-Times. She has been a guest on local and national television and radio shows, and is often engaged to speak on federal and state budget and accounting issues.

"Fiscal State of the State"

By Sheila Weinberg, CPA

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