

# AGA CHICAGO CHAPTER

MAY 2017

## CHAPTER NEWS

**JOIN US ON FACEBOOK AND LINKEDIN**

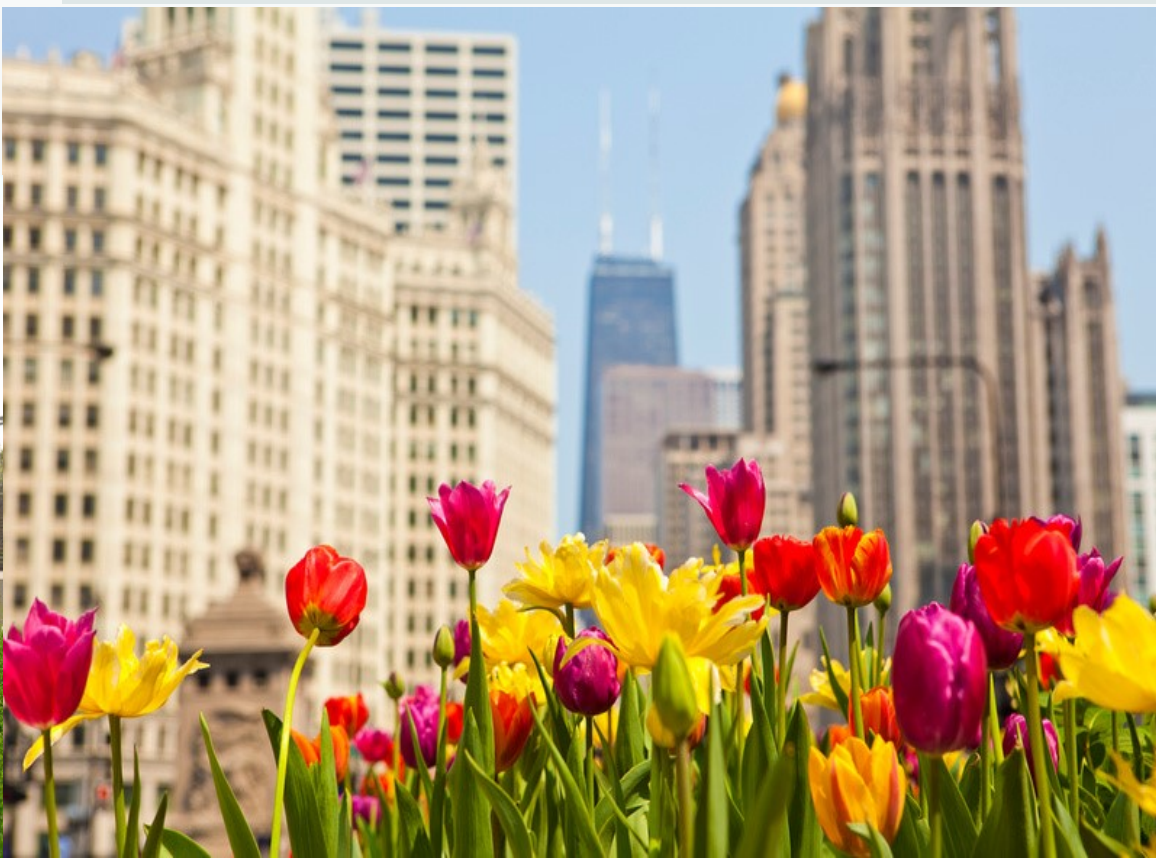
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### Chapter Recognition Credits Earned as of April 30, 2017

<u>Category</u>	<u>Earned</u>	<u>Year-To-Date</u>
Leadership	125	3900
Education	450	3525
CGFM	125	6000
Communications	525	5385
Membership	100	800
Community Service	900	1725







## AGA CHICAGO CHAPTER OBSERVATIONS

### 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*





## 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](mailto:mccoya@agachicago.org)



## **2016-2017 CEC Meeting Schedule**

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

*End of 2016-2017 Chapter Year*



:





## **2017 Sectional Leadership Meeting** ***Baltimore, Maryland***

Every year, chapters across the United States send representatives to attend this excellent leadership meeting to learn about the mission, vision and values that the AGA provides to educate and empower professionals to advance government accountability.



The Chicago Chapter sent Della Hernandez; Social Media/Newsletter/Community Service Director and Tiffany McCoy; Website Admin and Historian to bring back and share what new rules, regulations and enhances that Nationals has worked so hard to provide for their members. We will be sharing them with you through-out the new 2017-2018 Chapter year!



## 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.

### \*Updates\*

1. New Study Guides and book store
2. Multi-User online guide  
\*with admin features
3. Track and progress your profile
4. Cheaper pricing when buying in bulk



**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](mailto:raul.nieto@ed.gov).**

# AGA NATIONAL NEWS

## CRP Credits!

Want to print your CRP Credits? Sign-in and then click the new “Print All” on the top right-hand corner of the page

<https://www.agacgfm.org/My-AGA/utilities/Sign-in.aspx?RET=/My-AGA/Chapter-Resources/Chapter-Recognition-Program.aspx>

## Webinar!

DATA Act: Moving Beyond Compliance

May 17, 2-3:50pm ET with 2 CPE Credits

[https://www.agacgfm.org/Training-and-Events/Learn-Online/Webinars/2015-2016-Offerings/051717-DATA-Act.aspx?utm\\_source=Informz&utm\\_medium=Email&utm\\_campaign=AGA+Communications](https://www.agacgfm.org/Training-and-Events/Learn-Online/Webinars/2015-2016-Offerings/051717-DATA-Act.aspx?utm_source=Informz&utm_medium=Email&utm_campaign=AGA+Communications)

## Webinar!

A Conversation with Women

June 1st, 4-5pm ET, FREE!!!!

[https://www.agacgfm.org/Training-and-Events/Learn-Online/Webinars/2015-2016-Offerings/A-Conversation-With-Women-060117.aspx?](https://www.agacgfm.org/Training-and-Events/Learn-Online/Webinars/2015-2016-Offerings/A-Conversation-With-Women-060117.aspx?utm_source=Informz&utm_medium=Email&utm_campaign=AGA+Communications)

[utm\\_source=Informz&utm\\_medium=Email&utm\\_campaign=AGA+Communications](https://www.agacgfm.org/Training-and-Events/Learn-Online/Webinars/2015-2016-Offerings/A-Conversation-With-Women-060117.aspx?utm_source=Informz&utm_medium=Email&utm_campaign=AGA+Communications)

## 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

## AGA CHICAGO CHAPTER EXECUTIVE COMMITTEE

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Vacant

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Vacant

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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](http://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](http://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.



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



**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.

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.



### **President Dunn's Call to Action**

**President Dunn's call to action for the PDT:**

*Leave as Ambassadors for work around organizational development (OD) and related emphasis within your organizations; why it's necessary and how it has to be an adjunct of the overall H.R. function and the role that it plays and how it is the premise of the whole deal and how Universities are now being challenged (public ones) that they will be relying on more and more on the O.D. operations within businesses and companies, public sector entities and corporations to really extend the educational work that needs to take place as you onboard new employees to your organizations.*

**President Dunn is truly emphasizing the Public-Private University partnership for career development as well as organizational development**



## ***Professional Development Training***

### **12 NASBA CPEs Including:**

- ★ Accounting (Gov't)
- ★ Finance
- ★ Fraud
- ★ Fiscal Policy
- ★ Leadership
- ★ Management Services

### **Silver Level PDT Sponsor:**



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](http://www.learningmarket.org).

***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](mailto:mmatczynski@hudoig.gov)**

# 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

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.

**Register by May 12, 2017**

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

**Delivery Method:** Group Live

**Registration Questions:** Please contact our Registrar,  
Matthew Matczynski via email at [MMatczynski@hudoig.gov](mailto:MMatczynski@hudoig.gov)

**Payment Questions:** Please contact our Treasurer,  
Tom DiLisio via email at [Dilisio.Thomas@dol.gov](mailto:Dilisio.Thomas@dol.gov)

## Registration Information

FIRST NAME	LAST NAME	ORGANIZATION	EMAIL	PRICE
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**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](mailto: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](mailto: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.



## **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 welcome you to our annual educational session, invite you to our after-hours networking event at Ceres Café, and announce that Southern Illinois University is our Silver Level PDT Sponsor.

It is also 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 17 <sup>th</sup>	
8:30am	Registration & Networking Breakfast
9:00am	Welcome Address & Introductions
9:15am	<b><i>"Who Are You BECOMING as a Leader?"</i></b> Mr. Fanning (Personal Development)—1.5 CPEs
BREAK	
10:45am	<b><i>"Solving our Fiscal Problems – A Case Study"</i></b> Chief Mike Spain (Finance)—1.5 CPEs
LUNCH	
12:45pm	<b><i>"Preparing the Next Generation Govt. Finance Leaders"</i></b> Mr. Nichols (Personnel/Human Resources)—1.5 CPEs
BREAK	
2:15pm	<b><i>"Leadership Through Fraud Prevention: IRS Case Study"</i></b> Ms. McGill (Specialized Knowledge)—1.5 CPEs
WRAP UP: Announcements	
4:00 – 7:00pm	PDT Mixer: Ceres Cafe, 141 W Jackson Blvd, Chicago
Thursday, May 18 <sup>th</sup>	
8:30am	Registration & Networking Breakfast
9:00am	Welcome Address & Introductions
9:15am	<b><i>"Education as Foundation for Our Shared Prosperity"</i></b> Dr. Dunn (Specialized Knowledge)—1.5 CPEs
BREAK	
10:45am	<b><i>"Pension Round Table"</i></b> (Specialized Knowledge)—1.5 CPEs
LUNCH	
12:45pm	<b><i>"Driving Fiscally Sustainable Progress through GRC"</i></b> Mr. Kimmel (Management Services)—1.5 CPEs
BREAK	
2:15pm	<b><i>"Fiscal State of the State"</i></b> Ms. Weinberg (Government Accounting)—1.5 CPEs
WRAP UP: Evaluations/CPEs	

# ***AGA Chicago Chapter PDT***

## ***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.

# ***AGA Chicago Chapter PDT***

***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.

# ***AGA Chicago Chapter PDT***

***Wednesday, May 17, 2017***

***10:45am***

## **“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**



**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 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 PDT***

***Presents...***

**Theresa McGill**  
**Senior Stakeholder Liaison**



**Theresa McGill** has worked for the Internal Revenue Service since 1980 (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.

# ***AGA Chicago Chapter PDT***

***Wednesday, May 17, 2017***

***2:15pm***

## **"Leadership Through Fraud Prevention: IRS Case Study"**

**By Theresa McGill**

### **Summary**

Changes are taking place across the nation and throughout the economy that affect taxpayers — and, in turn, the IRS — in many ways. The agency is working toward a Future State that focuses on the taxpayer experience and more online and self-service options to build on our in-person options – all while working with our partners in the tax community.

Maintaining and working with our local and national partners remain an important priority for the IRS. Our Future State work is aimed at continuing and expanding these relationships in innovative ways to help meet the needs of the tax community and taxpayers.

### **Learning Objectives**

- To learn how to spot tax fraud
- To learn the indicators of fraud—what are they?
- To learn how to report suspected tax fraud
- To share IRS Priority Messages
- To encourage taxpayers to make IRS.gov the First Stop for Tax Help
- To foster accountability with the tax laws

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

# AGA Chicago Chapter PDT

## Presents...

**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 PDT

## Presents...

### 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-faceted, 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



# AGA Chicago Chapter PDT

## Presents...

### 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.

# ***AGA Chicago Chapter PDT***

## ***Presents...***

### **Mark Kimmet, CPA, CIA, CFE**



**Mark Kimmet** was Chief Internal Auditor of the Illinois Workers Compensation Commission for five years and continues to assist the agency in developing and writing control procedures. His career includes eleven years in internal audit, eight years in consulting and project management, and six years as a controller with experience in government, communications, manufacturing, and start-up companies. Mark is a CPA, Certified Internal Auditor, and Certified Fraud Examiner. He was a founding member of the Government Advisory Committee of the Chicago Chapter of the Institute of Internal Auditors and serves as its Vice Chair. He has an MBA from the Kellogg Graduate School of Management and an undergraduate degree from Northern Illinois University. He resides in the Hyde Park neighborhood of Chicago.

# ***AGA Chicago Chapter PDT***

***Thursday, May 18, 2017***

***12:45pm***

## **“Driving Fiscally Sustainable Progress through GRC”**

**By Mark Kimmet, CPA, CIA, CFE**

### **Summary**

Given the state of the State, Illinois agencies must find ways to meet mission goals better with the same or lower expenditures. This presentation will show how one government agency improved a complex benefits payment process that had been plagued with problems for nearly a decade by implementing new governance, risk mitigation, and control procedures. It will cover specific issues involved, and how they were addressed through changes in IT systems and new procedures in the legal, IT, and accounting departments. The result was more accurate and timely benefit payments as well as more timely termination of payments due to disqualifying events.

### **Learning Objectives**

Attendees will learn:

- How GRC can reduce expenditures and improve fulfillment of mission goals
- Common reasons for GRC problems in government entities
- How to create the critical mass needed to address complex, entity-wide issues
- The unique role of internal audit in State agencies and how to leverage it
- Why and how accounting should champion GRC
- The importance of everyone in making effective change
- Developing procedures that will be embraced and passed on

Field of Study:	Management Services--Technical
CPE Credits:	1.5 hours (75 minutes)
Program Level:	Overview
Prerequisites:	None
Advance Preparation:	None



# AGA Chicago Chapter PDT

## Presents...

**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.

# ***AGA Chicago Chapter PDT***

***Thursday, May 18, 2017      2:15pm***

## **“Fiscal State of the State”**

**By Sheila Weinberg, CPA**

### **Summary**

The budget deadlock has intensified Illinois’ financial problems. This presentation will highlight the budget tricks that have plunged the state into its current financial mess. The session will also probe the interplay between budgeting practices and accounting standards.

### **Learning Objectives**

Attendees will:

- Learn the accounting gimmicks used to “balance” the state budget while simultaneously racking up billions of dollars of debt
- Understand the size of the state’s financial hole
- Explore how the Truth in Budget Act was passed in an effort to address the budgeting gimmicks
- Understand the ways accounting standards have played a role in the development of Illinois’ financial problems
- Review GASB’s Financial Modeling Project
- Take action with specific steps you can take to help address the issues

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

*Join Us!*

Professional Development Training Mixer  
Wednesday, May 17, 2017  
4:00 – 7:00pm

Ceres Café  
Board of Trade Lobby  
141 West Jackson Blvd.

