

# AGA Phoenix Chapter ([www.agaphoenix.org](http://www.agaphoenix.org))

PY 2019-2020

September 2019



## Message From the President



This month we are back into the full swing of things. We have now laid out our education plan for the year, which you can review on our website. Please take a look and save the dates. Also, now is a great time to consider purchasing the package deal as a member, which includes 14 regular chapter meetings for the price of 9. This is a great way to save money!

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Our first meeting will be on September 11<sup>th</sup>, and the topic is - Achieve Results in Government Using Lean Six Sigma. We will hear from two live speakers, Teri O'Brien and Otto Sticca who are both Lean Six Sigma Black Belts working for the Dept. of Administration. The event will be held at the AZ Department of Education, and it is worth two (2) CPE. This meeting offers virtual attendance. To register for any of our events, you can head over to the events section of our website: <https://www.agacgfm.org/Chapters/Phoenix-Chapter/Home.aspx>.

Also, be on the lookout in our weekly e-mails for a link to our annual survey. We would love your feedback, and look forward to reviewing it and finding ways to implement your suggestions. When you complete our survey you enter for a chance to win a Starbucks gift card. As always, your feedback is much appreciated.

Additionally, as a special note, I would like to encourage you that if you are interested in sitting for the Certified Government Financial Manager (CGFM) exam, right now is a great time. AGA is in the midst of introducing its updated exams. You can save \$75 by taking any of the CGFM beta exams before the end of October. When you register for an exam, you will receive free access to the 2019 edition of the online study guide. This is a great way to save money and advance your career!

We want to thank you for your continued support of the Phoenix Chapter, and we hope to see you in September! In the meantime, let us know how we can help, by providing your questions and comments to us at [contact@agaphoenix.org](mailto:contact@agaphoenix.org). We would love to hear from you!

Michelle Huckabay, CPA, CGFM  
AGA Phoenix Chapter President

# AGA Phoenix Chapter Executive Board Program Year 2018-2019

**PURPOSE:** Consists of chapter officers, past president, committee chairs, and other members appointed by the chapter president. Responsible for all chapter business and planning.

**OFFICERS:**

President	Michelle Huckabay, CGFM, CPA
President Elect	Cindy Smith, CPA
Past President	Gergana Kovatcheva, CGFM, CPA
Secretary	Paola Matson
Treasurer	Gergana Kovatcheva, CGFM, CPA

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

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

## Our Purpose

### Mission Statement

AGA Phoenix Chapter serves Arizona professionals in the government financial management community by providing quality, low-cost continuing education, promoting professional development and interaction among members, and fostering a commitment to community involvement as well as a sense of responsibility for advancing government accountability.

### Vision

AGA Phoenix Chapter actively creates an avenue for membership to share ideas with each other, to share knowledge and time with the community, and to promote the advancement of government standards and accountability within the profession.

## We'd Love Your Input!

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

In addition, please send us any special announcements in relation to promotions, marriages, births, anniversaries, certifications achieved, or any other significant event for any of our chapter members. Any article submitted by the second week of the month will be included in the next month's newsletter.

Please email your news for forthcoming newsletters to:

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



# Goals for 2018-2019 and Beyond

- Membership & Education:
  - Provide 42 education credits throughout the program year. Audio conferences and live speakers.
  - Reach out to new members within first month of membership.
  - Reach out to all non-renewing members in May/June.
  - Provide social/recruiting event in spring.
  - Send out survey to members annually.
  - ✓ • Provide student members the option to attend three meetings for free.
- Accountability:
  - Prepare chapter’s Citizen Centric Report (CCR) by September 30, 2018 and post to website.
  - Submit chapter’s CCR to AGA’s Certificate of Excellence Review Program.
- CGFM Goals:
  - Continue reimbursements for chapter members who pass all three sessions of the CGFM tests. Reimbursement includes the cost of the three exams and application fee.
  - Communicate and promote CGFM designation to Chapter members .
  - Provide CGFM study guides to members on a first come first serve basis. Purchase two new sets this year.
  - Seek State proclamation for March as CGFM month and provide recognition to CGFM members.
- Young Professionals:
  - Reach out to college accounting clubs to present about jobs in governmental accounting and discuss what AGA is and how it can impact students’ careers.
  - Annually award up to two scholarships for students enrolled in an Accounting, Finance or Public Ad-

2019 & 2020 Budget and Spend through 6/30			
Budget Category	'19 Spent	'20 Budget	'20 Spent
Education	\$19,328.16	\$19,050	\$0
Membership	\$680	\$750	\$0
Travel	\$2,873.47	\$1,000	\$0
Board Expenses	\$100	\$100	\$0
Scholarship	\$1,000	\$1,000	\$0
CGFM	\$125	\$1,550	\$0
Community Service	\$695	\$500	\$0
Website	\$0	\$0	\$0
Early Career	\$0	\$750	\$0
Audit	\$150	\$150	\$0
Misc.	\$180.56	\$200	\$0
<b>Total</b>	<b>\$25,132.19</b>	<b>\$25,050</b>	<b>\$0</b>

## PY 2019-2020 Committee Members:

- Membership – Mary Adelman, CGFM, CPA
- Education – Keith Orr, CGFM, Jerry Snyder, CGFM, Anthony St. George, CPA and Robert Harwood, CPA
- Programs – Michelle Huckabay, CGFM, CPA and Daniela Kunova
- Accountability—Kim Prendergast, CGFM, CPA
- CGFM – Gergana Kovatcheva, CGFM, CPA, Jordan Dale, CGFM
- Young Professionals / Early Career – Getzamany Aragon and Marvin Mendieta, CGFM
- Scholarship – Kelly Alkhoury, CGFM
- Community Service – Cindy Ensign
- Communications Committee – Michelle Huckabay, CGFM, CPA and Jordan Dale, CGFM
- Sponsorship—Anthony St. George, CPA

## **Tips for Preparing for CGFM Exams:**

Begin by **reviewing the CGFM examinations content outlines**, which list the main and subtopics covered in each examination. This should be the focal point of your preparation. It is the core document used as the basis for each examination and a guideline for writing examination questions.

Once you are ready to begin studying for the exam, there are a variety of ways to approach it. You can utilize all, or part of these resources. **The AGA offers instructor led courses**. You can attend an instructor led course in the Washington, D.C. area, or participate in an intensive review course at the annual AGA PDT.

Even if you take the instructor led courses, you will want to perform some self-study following this, in order to prepare yourself for the exams. **CGFM study guides** are available for purchase through AGA National, in hard copy, or as a soft copy. Spend time reviewing these materials and answering the questions from each section of the study guides. Also, the Phoenix Chapter, has CGFM study guides available for check out.

AGA also now offers three online **CGFM practice examinations**, which will help you prepare to take the real exam. These practice examinations, are a must.

**Study groups** can also be helpful. If you know others that are preparing to take the same exam, you can meet regularly to test each others knowledge, and support each other in the journey. Consider joining the AGA Phoenix Chapter study group. To find out more, e-mail [contact@agaphoenix.org](mailto:contact@agaphoenix.org).

Consider these tips, when starting your journey to obtaining your CGFM certification. Good luck and let the Phoenix Chapter of AGA know if we can answer any questions for you, or provide you with any of the Chapter resources.

Link to AGA National study information: <https://www.agacgfm.org/CGFM-Certification/Candidates/Preparing-for-Exams.aspx>



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

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

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

Contact our CGFM chair for step by step instructions on the CGFM process:

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

Association of Government Accountants					
Phoenix Chapter					
Education and Meeting Plan					
2019-2020 Program Year					
Date	Event	Topic	CPE Credit	Registration Deadline	Location
9/11/19	Chapter Meeting-Lunch 10:30am-11:00am, Education Seminar 11:00am-12:50pm	Lean Six Sigma in Government	2	9/6/19	AZ Department of Education Room 311 1535 W Jefferson St. Phoenix, AZ 85007
10/23/19	Chapter Meeting-Lunch 10:30am-11:00am, Education Seminar 11:00am-12:50pm	How Automation Can Take the Robot Out of the Human	2	10/18/19	AZ Department of Education Room 311 1535 W Jefferson St. Phoenix, AZ 85007
11/20/19	Chapter Meeting-Lunch 11:30am-12:00pm, Education Seminar 12:00pm-1:50pm	Trends in Budgeting and Forecasting	2	11/15/19	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
12/11/19	Chapter Meeting-Lunch 11:30am-12:00pm, Audio Conference 12:00pm-1:50pm	Internal Control	2	12/6/19	AZ Department of Education Room 311 1535 W Jefferson St. Phoenix, AZ 85007
1/8/20	Chapter Meeting-Lunch 11:30am-12:00pm, Audio Conference 12:00pm-1:50pm	Uniform Guidance	2	1/2/20	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
1/17/20*	8:00am-8:30am Continental Breakfast 8:30am-12:00pm-Class	Ethics—ASCPA	4	1/10/20	MCCCD Governing Bd Rm 2411 W. 14th Street, 2nd Floor Tempe, AZ 85281
1/22/20	Chapter Meeting—Education Seminar 2:00pm-4:00pm	TBD—Lealan Miller, CPA, CGFM	2	1/17/20	TBD
2/5/20	Chapter Meeting-Lunch 11:30am-12:00pm, Audio Conference 12:00pm-1:50pm	GASB Update	2	1/31/20	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
2/28/20*	Chapter Meeting-Lunch 11:30am-12:00pm, Education Seminar 12:00pm-12:50pm	ASRS	1	2/23/20	ASU Skysong Bldg. 3, Synergy I #130 1475 N. Scottsdale Rd. Scottsdale, AZ 85257
	1:00pm-1:50pm	Deferred Comp	1		
	1:50pm-2:40pm	Federal Tax Update	1		
	2:40pm-3:30pm	State Tax Update	1		
	Total		4		

<b>Association of Government Accountants</b>					
<b>Phoenix Chapter</b>					
<b>Education and Meeting Plan</b>					
<b>2018-2019 Program Year</b>					
<b>Date</b>	<b>Event</b>	<b>Topic</b>	<b>CPE Credit</b>	<b>Registration Deadline</b>	<b>Location</b>
3/4/20	Chapter Meeting-Lunch 11:30am-12:00pm, Audio Conference 12:00pm-1:50pm	Improper Payments	2	2/28/20	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
3/25/20	Chapter Meeting-Lunch 10:30am-11:00am, Audio Conference 11:00am-12:50pm	Cybersecurity	2	3/20/20	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
4/8/20	Chapter Meeting-Lunch 10:30am-11:00am, Audio Conference 11:00am-12:50pm	Ethics	2	4/3/20	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
4/24/20*	8:00am-4:00pm PDT	TBD	1	4/17/20	Rio Salado College 2323 W. 14th St. Tempe, AZ 85281
			1		
			1		
			1		
			1		
			2		
			1		
	Total	8			
5/12/20	Chapter Meeting-Lunch 10:30am-11:00am, Audio Conference 11:00am-12:50pm	Fraud Data Analytics	2	5/8/20	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
5/27/20	Chapter Meeting-Lunch 10:30am-11:00am, Education Seminar 11:00am-12:50pm	Advanced Excel Functionality	2	5/25/20	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
6/10/20	Chapter Meeting-Lunch 10:30am-11:00am, Education Seminar 11:00am-12:50pm	TBD—Brittney Williams, CPA, CGFM	2	6/5/20	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
			<b>42</b>		

## Announcements - Job Postings

**Senior Accountant—City of Tolleson. Salary \$66,862.28—\$83,577.84.** The Senior Accountant independently performs advanced accounting analysis and administrative work in the City's Finance Department. Duties include, but not limited to, preparing various monthly journal entries and schedules as needed. Responsible for the monthly bank reconciliation, grant accounting and capital asset accounting. Assisting in the preparation of the city's comprehensive annual financial report and all other duties as assigned.

**Minimum Qualifications:** Bachelor's Degree in Accounting or related field and minimum of five years of full time professional experience in accounting, auditing, budgeting, or closely related financial activity; OR, an equivalent combination of education and experience sufficient to successfully perform the essential duties of the job such as those listed above.

**Apply online at:** <https://tollesonaz.applicantpro.com/jobs/1137079.html>

**Senior Management Analyst—Valley Metro. Salary \$61,014—\$91,521.** The Senior Management Analyst is the second level in a two level Management Analyst series. Positions perform the most complex professional work in support of management services. Typical duties might include: managing financial models and projects; coordinating, preparing, and administering capital programs; preparing and forecasting budgets; conducting complex cost analyses; monitoring grants; preparing recommendations; and, representing regional interests. This position will be assigned primarily to the Transit Life Cycle Program.

The Senior Management Analyst shall contribute to team efforts and represents Agency core values in the performance of duties.

**Minimum Qualifications:** Bachelor's Degree in Business Administration, Management, Finance or a related field, and five (5) years of professional level experience in budgeting, accounting and project management or an equivalent combination of education and experience sufficient to successfully perform the essential duties such as those listed above. Experience with Federal Transit Administration grant programs is desirable. A valid driver's license.

**Apply online at:** <https://www.governmentjobs.com/careers/valleymetro/jobs/2516978/senior-management-analyst?pagetype=jobOpportunitiesJobs>

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

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



## Check out AGA's Free Toolkits & Guides:

- Sub-recipient vs. Contractor Checklist
- Blended and Braided Funding
- Leveraging Government Resources in Challenging Financial Times
- Risk Assessment Monitoring Toolkit
- Cooperative Audit Resolution and Oversight Initiative
- Fraud Prevention Toolkit
- Candidate Assessment Toolkit for Grant Managers
- How Federal, State and Non-Profit Collaboration Improved Efficiencies in Delinquent Debt Collection
- Citizen Centric Report: How To

<https://www.agacgfm.org/Tools-Resources/Intergov/Home.aspx>

## Membership Referral Program

Did you know that you can gain \$50 if you get two individuals who are not currently members to join our chapter? All you have to do is have them put your name down on the sponsor section of the membership form.

It is always nice to have new faces become members to our growing organization!

## Board Members Wanted

If you are interested in volunteering for a committee and to be on the Board, please contact AGA at the following e-mail: [contact@agaphoenix.org](mailto:contact@agaphoenix.org)

# We Are Always Looking For People Interested In Joining Our Organization

*NOTE: Excerpts and links below are from AGA's national website at [www.agacgfm.org](http://www.agacgfm.org).*

### What is AGA?

Briefly, AGA has been serving the government financial management profession for over 50 years As a not-for-profit educational organization, AGA serves the professional interests of financial managers from the local, state and the federal governments, as well as public accounting firms, responsible for effectively using billions of dollars and other monetary resources everyday. Members are accountants, auditors, contract, financial and performance, budget analysts, chief financial officers, information systems managers, finance directors, inspectors

general, professors, students. Membership in AGA is like tapping into a reservoir of actual real-world knowledge and experience of government financial management experts.

### Benefits of Joining

If you asked a member which of the benefits they value the most, they probably would say education and networking, which often occur at the same time and place. Here are some of our members' favorites:  
Continuing Professional Education and Networking Opportunities  
Keep Up-to-Date on Current Issues  
Keep Abreast of the Latest Technologies and Financial Systems  
Professional Guidance and Certification

### How Can You Join?

Click the links below to access the Membership Application and to find out membership types and dues.



Click <https://www.agacgfm.org/Membership/Learn-About-AGA/Join-or-Renew.aspx>

**to complete the online AGA Membership Application.**

**\*\*Did an AGA member inspire you to join? Don't forget to enter your AGA Sponsor's Name and Member ID on the application.\*\***