

NEWSLETTER

August 2021



PRESIDENT'S MESSAGE

Hello Central Kentucky AGA!

My name is Alice Wilson and I'm your FY22 Central Kentucky AGA Chapter President. I've known or worked with many of you for several years, but for those that don't know me; I retired from the executive branch of state government in November 2018, where I spent my career at the Auditor of Public Accounts and the Kentucky Transportation Cabinet. After enjoying several months as a "young" retired person, I came back to work in August 2019 with the judicial branch of government and I'm now the Director of the Office of Audits at the Administrative Office of the Courts. I look forward to working with you and serving you this year along with our fantastic AGA Chapter Executive Committee, who are listed at the end of this newsletter.

I attended the virtual Professional Development Training (PDT) July 19-21 – I could have been in Nashville attending the PDT in person if they were having it in person, but AGA chose to have the PDT as a virtual conference again this year due to ongoing concerns about COVID-19. Virtual training can be challenging, but I enjoy training for the most part, as I feel I always walk away learning something new. I think everyone should embrace "lifelong learning." I've attended a few other national AGA virtual conferences, and thankfully, they do an excellent job presenting training in a virtual setting with a lot of interaction and networking availability. Of course, nothing beats in-person networking. Speaking of in-person meetings, our Chapter Executive Committee will be deciding how we will present our training events this year. We hope to provide quality training to meet our members' needs. We learned last year that virtual training can do just that and reach people that otherwise may not have been able to attend the in person events. However, it is also good to get together in person – so maybe we will have some hybrid sessions, stay tuned! Our next monthly training will be August 11 and will be a virtual two-hour event.

Now back to PDT. The AGA annual PDT brings together an audience of over 2,000 federal, state and local government financial professionals, including federal, state and local government CFOs, inspectors general, accountants, auditors as well as financial professionals from the private sector. PDT offers educational sessions involving a variety of topics over three days of training. This year, we heard from many great speakers on topics such as GAO Comptroller General updates, best practices for working remotely, Enterprise Risk Management, Internal Controls best practices, virtual auditing after the pandemic, digital body language, fraud risk management, the yellow book and the pandemic, new leasing standards, integrity and ethics, and so much more!!

If you are an AGA member, you know there are many benefits involved, including education and networking opportunities, awards and scholarship programs, discounts on training, and access to AGA resources. Annually, AGA members have the opportunity to receive at least 14 complimentary hours of training on a variety of topics for FREE! If you haven't checked out AGA's website, check it out! Finally, throughout this year, please reach out to me, or any other CEC member and let us know what is on your mind – if you have suggestions for training, send it our way! We are here to serve you and contribute to the success of state government. I'm looking forward to "seeing" you all in August at our next AGA meeting! Take care, be safe, and most importantly, be KIND!

Alice

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In the Spotlight

Natalie Young

Kentucky Public Pensions Authority, Investment Operations Branch Manager

Hello! My name is Natalie Young. I am the Investment Operations Branch Manager for Kentucky Public Pensions Authority (formerly known as KRS). I earned my undergraduate degree in accounting from Midway College and my graduate degree in business management from KY State University. I have worked at KPPA for 11 and a half years.

How did you choose government financial management as your career?

What advice would you give a recent graduate joining the field

Be patient. Keep your head up and work hard. No matter how hard you try, you absolutely cannot please everyone. Focus on your goals and your work and move forward. Listen to those with more experience than you. So much can be learned from those who have been in the field for a long time. Listen. And lastly – life is short, make sure you have FUN!

Do you have a mentor and how has this person helped you?

YES! My boss, Ann Case, is incredible. She teaches me all she can and is never afraid to share what she knows about KPPA. She welcomes questions and has never made me feel less about myself for not knowing the answer. I need her to not retire until I can also retire with her. Ha!

What is one goal that you plan to accomplish during your adult lifetime?

Outside of my professional career – personally, I am currently studying to become a Certified Personal Trainer. I love to help people. It fills my bucket when I see others reach their personal goals.

Share one thing that you love to do that you get to do nearly every day.

I sincerely love my job and the people I work with. They aren't just my teammates, they are my family and I have the BEST work family anyone could ask for.

On a personal note – the things I get to do everyday and absolutely love are: enjoy that first cup of freshly brewed coffee every morning (it's ok to laugh, it's true), hang with my way cooler than me 9 year old daughter, love on my fur babies, and I also have finally come to a point in my life where I love to sweat and workout. I look forward to it.

I'd like to thank each one of you for volunteering for the AGA. Together we can show the world how awesome government finance and all it encompasses can be!





Mark Your Calendar

» UPCOMING EVENTS

UPCOMING MEETING

August 11, 2021

FREE For Members, \$5 for non-members

(Pay through GoToWebinar)

Upcoming AGA Programs

Date	Speaker	Topic	CPE Hours
August 11, 2021	Tom Stratton	Procurement	2
September 8, 2021	Beth Roark	Accountability and Leadership	1

Note: If there's a topic or speaker you'd like, please reach out to the 2020-2021 Education Co-Chairs. Their contact information can be found on the last page of the newsletter.

Telecommuting - Taboo or Game Changer?

I'm sure at this point many of you have returned to work, some have not and some are working in a hybrid work model. After success with telecommuting, the Education and Workforce Development Cabinet has chosen to offer a long-term hybrid work model. The immediate benefits of this model that I have seen as a Fiscal Manager are:

- Full office coverage for in-person questions
- Less mileage/gas for personal vehicles
- More quality time at home
- Flexibility of task completion throughout the day
- Lower budget for work clothes, make-up, etc...
- Natural cross-training scenarios as duties are shared for assigned at-work days (succession planning!)
- Ability to share office space, if feasible
- Increased familiarity with new technology

As the public sector struggles to offer attractive benefits to employees compared to the private sector, this could be a game changer for state government! Please consider and if you agree, encourage your agencies to entertain this model now that we know our employees can be trusted to work at home and still meet agency goals and innovate. It will be harder for the private sector to allow for this long-term benefit to employees due to the need for brick and mortar businesses for most services/goods. We need to strike while the iron is hot and snatch up all the talent we can, while incorporating strong succession plans for future transition. This is the future, take it all in... and also take quality private sector employees too... ☺

Krista Jackson, Fiscal Manager, Education Workforce Development Cabinet, Office of Administrative Services

August Presenter

Tom Stratton

Kentucky Cabinet for Health and Family Services

Director of Procurement and Grant Oversight



Tom is a US Navy Veteran-Operation Desert Storm. He graduated with an MBA from Morehead State University. Tom is a Certified Procurement Professional (NIGP-CPP), Certified Public Procurement Officer (CPPO), Certified Professional Public Buyer (CPPB), and a Certified Public Manager (CPM). He has worked in government procurement for almost 20 years.

Tom has a beautiful wife of 25 years, and eight children ages ranging from six to nineteen. Tom and his wife own and operate a 60 acre working farm with cattle, pigs, goats, and chickens. Their kids play baseball, basketball, volleyball, and piano. Their hobbies are working on their farm, church youth group activities, and mission work.

Congratulations!

The Central KY AGA has received the Platinum Level Ace (Achievements in Chapter Excellence) Award. The ACE program is designed to support, encourage, and promote AGA's mission and to provide flexible guidelines for a well-rounded chapter. Award levels are based on the number of points during the year. The Central KY AGA was one of 25 chapters that received 4,400 to 5,500 points, which earned the Platinum Level, the top level ACE award! Thank you, Jared Crawford, and the rest of the Chapter Executive Committee and members for striving for excellence!

Year-End Financial Reporting Deadlines

The Financial Reporting Branch of the Office of the Controller would like to remind all KY state agencies and component units of the annual financial reporting deadlines outlined below:

Topic:	Due Date:	Contact:
Annual Fixed Asset Inventory	Monday, May 31, 2021	Jessica Pinkston
GASB 42 - Asset Impairment	Friday, August 6, 2021	Joe McDaniel
Attorney Letters	Friday, August 6, 2021	Christina Shuffett
GASB 49 - Pollution Remediation	Friday, August 6, 2021	Joe McDaniel
AFR 34A,B,C (Accounts Receivable)	Friday, August 13, 2021	Phil Nally
Agency Closing Package	Friday, August 13, 2021	Joe McDaniel
Fixed Asset Shells Cleaned-up	Friday, August 20, 2021	Jessica Pinkston
SEFA	Monday, August 23, 2021	Pam Howarah
Real Property	Friday, September 17, 2021	Jessica Pinkston
AFR 55B - Leases	Monday, November 1, 2021	Jessica Pinkston
Component Unit Closing Package	Friday, October 1, 2021	Joe McDaniel
Subsequent Events	Thursday, December 9, 2021	Pam Howarah

For updated forms and instructions, please click [HERE](#). Don't forget to save this URL to your favorites!

September 21–22 | Virtual or In Person | 14 CPEs

Fraud 2021 Training!

The Internal Control & Fraud Prevention Training has a rich history of providing the "latest and greatest" developments in the field. Together we can find solutions and make a difference in our workplace and in the government finance profession.

AGA member

Early Bird (by Sept. 3)	\$525
Standard (after Sept. 3)	\$625



AGA CENTRAL KENTUCKY CHAPTER

June Secretary's Report

AGA Central Kentucky Chapter

Chapter Executive Committee

Meeting Minutes for meeting held: June 5, 2021

Members present on GoToMeeting: Jared Crawford, Alice Wilson, Ann Case, Kristen Hundley, Terra Coffey, Catherine Hunt, Brittany Wise, Madeline Perry, Kristen Coffey, and Natalie Young.

Call to Order by Jared.

1. Regular Reports:
 - a. April Meeting minutes – Motion to approve – Alice, seconded by Kristen. Motion passed.
 - b. March Treasurer's report – Motion to approve – Ann, seconded by Kristen. Motion passed.
 - c. Membership information – 156 Members
2. Old Business
 - a. Programs update
 - i. June 9: Joshua Konowe, Leadership and Innovation
 - b. Please provide at least one suggestion of a speaker/topic to the Education Committee by 7/15.
 - c. Internal controls document. Bylaws and Policies and Procedures – Kristen and Jared
 - d. Reminder: Submit newsletter items by 15th of the month (Terra Coffey) – No April Newsletter
 - e. Website update – No Update
 - f. Speaker Community Service donation: fourth quarter Homeless & Housing Coalition of Kentucky, Eviction Prevention Fund \$250. \$25 to Eula Hall Patient Assistance Fund in Alicia Boyd's name.
 - g. Scholarship update – No application for Graduate and 2 applications for undergraduate
 - h. Other - None
3. New Business
 - a. Education for 2021-2022

Month	Speaker	Topic	Contact Information
June, 9, 2021	Joshua Konowe (1 CPE)	Leadership and Communication	jkonowe@gmail.com
August 11, 2021	Tom Stratton (2 CPE)	Procurement	thomas.stratton@ky.gov
September 8, 2021	Beth Roark (1CPE)	Accountability/Leadership	beth.roark@ky.gov
October 13, 2021			
November 10, 2021	Fall PDT (8 CPE)	Fraud GASB updates AI/Data Analytics COSO	
December 8, 2021			
January 12, 2022	Dylan Schneider Mark Schmitt (1 CPE)	Tax Updates	Dylan.Schneider@mcmcpa.com Mark.Schmitt@mcmcpa.com
February 9, 2022			
March 9, 2022			
April 13, 2022	Spring PDT (16 CPE)	Accounting Auditing	
May 11, 2022			
June 8, 2022			

- b. Charge fee for training moving forward – to be discussed further
- c. Hybrid meetings
- d. ACE Awards

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AGA CENTRAL KENTUCKY CHAPTER

June Secretary's Report, Continued

mo	Requirement	Completed?	Bonus?
		<i>If complete: Insert date; if in progress, state "in progress" with estimated date of completion.</i>	<i>If available, potential bonus points are noted below.</i>
1	CEC reviewed the chapter's bylaws. If necessary, updates were made and approved by members.	Completed	N/A
2	File IRS Form 990-N or e-postcard by the appropriate deadline. (https://www.irs.gov/charities-non-profits/annual-electronic-filing-requirement-for-small-exempt-organizations-form-990-n-e-postcard)	Completed	N/A
3	CEC reviewed required state filings; either completed necessary action or determined that no action was necessary and recorded this information in meeting minutes.	Completed	N/A
4	Elect Chapter Officers for the new program year and email Officers Directory to chapters@agacgm.org by August 1.	Completed	Submitting by June 15: 100
5	Submit Chapter Strategic Plans and ACE goals for the program year to chapters@agacgm.org by September 1. (While not required, submitting detailed plans by program area can help national-level officers with supporting your chapter)	Completed	Submitting by August 1: 100
6	Use the correct Chapter and AGA-associated logos in all communications.	Completed	N/A
7	Chapter prepares and disseminates an annual report to its membership	Completed	Issuing as a Citizen-Centric Report by Oct. 31: 100
8	Chapter maintains an updated website	Completed	N/A
9	Chapter engages in annual audit or independent financial review (at an appropriate level for the chapter's funds) and sends results to chapters@agacgm.org	Completed	N/A

- e. Strategic Plan – get this finalized to get to National
- f. Annual Audit – Clean Audit
- g. CEC Recognition – Katherine Hunt
- h. Other
- i. Next meeting August 4, 2021 (11:30-12:30) GoToMeeting

Adjourn- Motion to approve – Alice, seconded by Katherine. Motion passed.



"I'm on vacation, put it under accounts wait-able until I get back."

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June TREASURER'S REPORT

Find us on



Central Kentucky AGA
Treasurer's Report
Month Ended June 30, 2021
Reconciled Cash Balance as of 05/31/2021 \$31,861.69

General Receipts:		
Monthly Program Fees - Cash		
Monthly Program Fees - PayPal		
Monthly Program Fees - Check		
Monthly Program Fees - STRIPE	3.65	
Central KY Membership Dues		
Interest Earned - Checking	0.96	
Interest Earned - CD	11.51	16.12
Education Receipts:		
PDT Training Fees	-	
PDT Training Fees - Paypal	-	

Total Receipts 16.12
Total Funds Available 31,877.81

Less: Expenses (500.00)
Checkbook Balance 06/30/2021 \$31,377.81

Less: Education Fund Balance -
General Fund Balance 06/30/2021 \$31,377.81

General Expenses:		
Homeless Housing 4th Qtr Donation	250.00	
Eula Hall Patients' Asst. Fund (Alicia Boyd)	25.00	
Human Rights Commission (Joshua Konowe)	25.00	
JDF - In Memory of Mark Hunt	200.00	
	-	500.00
Education Expenses:		
	-	-
Total Expenses	\$500.00	

Change in General Fund Balance Month Ended June 30, 2021

General Fund Balance 05/31/2021	\$31,861.69
Transfer of Education Fund Balance	
Monthly Receipts	16.12
General Expenses	500.00
Net Increase (Decrease) in General Fund Balance	(483.88)
General Fund Balance 06/30/2021	\$31,377.81

CCU-Checking	11,296.58
CCU-Savings	5.00
CCU-CD	20,076.23
	31,377.81

Central Kentucky AGA Change in Education Fund Balance Month Ended June 30, 2021

Education Fund Balance 05/31/2021	\$ -
Monthly Receipts	\$ -
Monthly Expenses	\$ -
Transfer to General Fund	
Net Increase (Decrease) in Education Fund Balance	-
Education Fund Balance 06/30/2021	\$ -

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AGA news



To get involved and
volunteer



Submit future
Newsletter material



Visit our website at
[Central Kentucky AGA](http://CentralKentuckyAGA.org)

2021-2022 Chapter Executive Committee Members

President:	Alice Wilson
President-elect:	Natalie Young
Immediate Past President:	Jared Crawford
Treasurer:	Elizabeth Smith
Secretary:	Ann Case
Education Co-Chair:	Eveanna Barry
Education Co-Chair:	Kristen Coffey
Education Co-Chair:	Michelle Sutton
Membership/Attendance:	Catherine Hunt, CGFM
Historian:	Rachel Prestenbach
Newsletter Editor:	Terra Coffey
Co-Webmaster:	Amy Small, CGFM
Co-Webmaster:	Joe McDaniel
Accountability (CCR):	Kristen Hundley
Professional Certification:	Jared Crawford
Young Professionals:	Rachel Prestenbach
Young Professionals:	Brittany Wise
Community Service Co-Chair:	Madeline Perry
Community Service Co-Chair:	Phil Nally, CGFM
Chapter Travel Coordinator:	Terra Coffey
National Council of Chapters	
Representative:	Krista Jackson

Are you looking to build your professional networking skills? Do you have a passion for AGA and want to share it with others? If so, contact a current Committee Member!