

# Association of Government Accountants Phoenix Chapter

Annual Report for 2020-2021 AGA Program Year

## I. Background

### Our Vision

The Phoenix Chapter of the Association of Government Accountants (AGA) 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.

### Our Mission

The 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.

### Our Goals

- Provide high quality, low-cost continuing professional education to the membership and the government accounting community through audio conferences and live speakers.
- Promote the value of AGA membership in order to retain and expand membership.
- Promote the value of the Certified Government Financial Management (CGFM) program as the preferred professional designation.
- Promote government financial management to schools and colleges and become spokespersons for the advancement of government accountability through quality course offerings to students.
- Provide a web site that the membership can use to research current information relating to the Phoenix Chapter.
- Promote networking among membership at Chapter events.
- Reach out to members consistently, provide social/recruiting events, and survey members annually.
- Promote Executive Board membership in order to diversify our ideas and strengthen our focus.
- Expand AGA membership throughout the state.

## II. Executive Board

Our Chapter Officers and Committee Members, as part of the Executive Board, work together to create a professional organization for the government financial management community. Our Officers and Committee Members for the 2020-2021 Program Year were as follows:

## Officers:

Jordan P. Dale, CGFM	President
Michael D. Baumert, CPA	President-Elect
Marvin Mendieta, CGFM, CPA	Treasurer
Joshua Jumper, CGFM, CPA	Secretary
Michelle Huckabay, CGFM, CPA	Past President

## Committee Chairs/ Members:

Kim Prendergast, CGFM	Accountability Chair
Marvin Mendieta, CGFM, CPA	CGFM Co-Chair
Gergana Kovatcheva, CGFM	CGFM /Professional Certification Co-Chair
Jordan Dale, CGFM	CGFM /Professional Certification Co-Chair
Kelly Alkhoury, CGFM	CGFM /Professional Certification Co-Chair
Michelle Huckabay, CGFM	Programs Committee Co-Chair
Daniela Kunova	Programs Committee Co-Chair
Paola A. Julio De Matson	Community Service Chair
Kelly Alkhoury, CGFM	Scholarship Committee Chair
Mary Adelman, CGFM	Membership Committee Chair
Michelle Huckabay, CGFM	Newsletter Editor
Michael D. Baumert, CPA	Education Committee Chair
Keith Orr, CGFM	Education Committee Member
Jerry Snyder, CGFM	Education Committee Member
Robert Harwood	Education Committee Member
Getzamany Aragon	Young Professionals/Early Career Co-Chair
Joshua Jumper	Young Professionals/Early Career Chair
Myrna Lopez, CGFM	Communications Committee
Vacant	Sponsorship Committee Chair
Kelly Alkhoury, CGFM	NCC Representative
Jordan Dale, CGFM	Webmaster

### III. Meetings

#### 1. Chapter Luncheon Meetings with Guest Speakers:

The Phoenix Chapter held monthly luncheon meetings, usually on the second Wednesday of the month. Meetings were held virtually throughout the program year. The cost for attending the regular monthly luncheon meetings was \$25.00 for members and \$40.00 for nonmembers. We offered 28 hours of CPE over 13 meetings throughout the Program Year.

Date	Topic	Attendees
September 9, 2020	Communications	19
October 7, 2020	GASB 87 Leases	28
November 4, 2020	COVID-19 and the CARES Act	30
December 9, 2020	Fraud – Report to the Nations Update	31
January 13, 2021	Uniform Guidance	25
February 3, 2021	GASB Update	30
February 26, 2021	Tax and Retirement Seminar	63
March 3, 2021	Improper Payments	20
March 24, 2021	Cybersecurity	23
April 7, 2021	Increased Fraud Risks	33
April 21, 2021	CARES Act	24
May 12, 2021	Fraud Data Analytics	24
June 9, 2021	Best Practices in SEFA and Grants Management	31
Grand Total		381

#### 2. Special Meetings:

Two special meetings were held during the Program Year: a four hour ethics class to allow Arizona CPA's to obtain required ethics CPE for CPA certification and the AGA Professional Development Training (PDT), which provided eight hours of CPE on a variety of governmental topics. Both sessions were held virtually: the Ethics class for the first time, and the PDT was held virtually for the second year in a row.

Date	Topic	Attendees
January 22, 2021	Professional Ethics for AZ CPAs with ASCPA	49
April 30, 2021	AGA Phoenix Chapter Professional Development Training	87
Grand Total		136

The PDT agenda is listed below:

Time	Topic	Presenter
8:00-8:10	Welcome Address	Jordan Dale, President
8:10-9:00	Presentation from AGA National President	AGA President – Wendy Morton Huddleston
9:00-9:10	Break	N/A
9:10-10:00	SAS Updates	Arizona Auditor General's Office – Michael Stelpstra, CPA
10:00-10:10	Break	N/A
10:10-11:00	GASB Updates	Arizona Auditor General's Office – Michael Stelpstra, CPA
11:00-11:10	Break	N/A
11:10-12:00	Single Audit Updates	HeinfeldMeech – James Shankland
12:00-12:30	Lunch	N/A
12:30-1:20	2020 State Treasurer's Updates	State of Arizona Treasurer's Office – State Treasurer Kimberly Yee and Deputy Treasurer Mark Swenson
1:20-1:30	Break	N/A
1:30-2:45	BlockChain Tokenize Grant Payments	National Science Foundation – Justin Poll
2:45-2:55	Break	N/A
2:55-4:10	Subrecipient Monitoring Throughout the Grant Lifecycle and under the CARES Act	The Pun Group – Vanessa Burke and UHY Advisors and UHY LLP – Jack Regan

### 3. Chapter Board Meetings

Our Chapter also held Chapter Board Meetings throughout the Program Year. Chapter Board Meetings started the Program Year off strong with Board meetings from July through October 2020, and in January, April and May 2021. By a special vote, elections were cancelled, and all four elected Chapter Board positions were appointed. Several new members were recruited as committee chairs.

## IV. Community Service Projects

The Community Service Events were coordinated by Paola Matson. The Community Service Committee chair is responsible for promoting and finding volunteers for community service projects, which allow members to contribute skills, labor, or funds to community based activities. Events were limited this year due to virtual meetings

## V. Scholarships

The Phoenix Chapter attempts to sponsor scholarships each year to deserving students at Arizona colleges and universities. Scholarships are awarded to undergraduate (sophomore or higher) or graduate students in an accounting or financial management discipline who are interested in the pursuit of public financial management careers. This year our Chapter awarded \$1,500 scholarships to students identified for academic excellence and community service achievements. The entire board served as members of the Scholarship Committee.

## VI. Young Professionals / Early Career

This committee promotes AGA membership and careers in government financial management to students, and to those early in their careers. The committee is chaired by Joshua Jumper.

## VII. CGFM

This committee promotes and assists individuals in obtaining AGA's Certified Government Financial Manager certification. Gergana Kovatcheva, Jordan Dale, and Kelly Alkhoury were the Co-Chairs of the CGFM/Professional Certification Committee. During the Program Year, the Committee made available CGFM exam study guides for members to borrow for exam preparation. The CGFM committee also offered scholarships to individuals who pass portions of the CGFM certification examination.

## VIII. Membership

For the 2019-2020 Program Year, the Phoenix Chapter of AGA had 146 members, down slightly from 161 in 2018-2019. To increase our membership, we are reaching out to non-renewing members to see how we can meet their needs and reaching out to non-members to encourage them to join. We also held an open house/social event after our January 22<sup>nd</sup> meeting.

## IX. Sponsorship

This committee chair was vacant throughout the year. Three organizations sponsored our PDT in 2019-2020.

## X. Newsletters

The Phoenix Chapter published twelve newsletters in the 2019-2020 Program Year, between July 2019 and June 2020. The newsletters were produced by Michelle Huckabay, Newsletter Editor. Michelle informed members of upcoming events, training, and job opportunities.

## XI. Website

The Phoenix Chapter of AGA maintains a web site at <https://www.agacqfm.org/Chapters/Phoenix-Chapter/Home.aspx>. The Webmaster, Jordan Dale, kept information on our website current. The website includes the Chapter Vision, Mission and Goals; How to become a member; Newsletters, Minutes, and Treasurer Reports; Community Service information; Scholarship information; Job Postings; and Contact information for Board Members, as well as AGA Nationals news.

## XII. Chapter Recognition Program

The Phoenix Chapter of AGA earned sufficient Chapter Recognition Points during the 2019-2020 Program Year to be the recipient of the Platinum Chapter Designation Award from AGA National.

## XIII. Accountability

The Accountability Committee is chaired by Kim Prendergast. On behalf of the Phoenix Chapter, Joshua Jumper prepared the FY 2020 Citizen Centric Report, marking the sixth year that the Chapter has prepared this meaningful report. The report is made available to members of the Chapter, and the general public, on the AGA Phoenix Chapter website.