

AGA – Des Moines Chapter
Chapter History Report
June 1, 2007 – May 31, 2008 Program Year

Committee:

- President – Suzanne Dahlstrom, CPA, CGFM
- President Elect – Valerie Wedgeworth
- Past President – Barbara A. Gordon, CPA
- Secretary/Treasurer – Angela D. James, CPA
- Professional Certification – Cindy Weber, CPA
- Chapter Recognition – Valerie Wedgeworth
- By-Laws and Procedures – Janice Evans, CPA, CGFM
- Member Recognition – Susan Battani, CPA, CGFM
- Membership - Cheryl D. Mather, CPA, CGFM
- Programs and Technical Meetings – Andrew E. Nielsen, CPA, CGFM
- Education – Stan Kuhn, CPA, CGFM
- Communications – Dorothy Stover
- Chapter Website – Marlene Dorenkamp, CPA, CGFM and Angela D. James, CPA
- Early Careers – Deb Schroeder
- Community Service – Michelle Wendel, CPA
- AICPA, GASB, FASB, NASB Liaison – Suzanne Dahlstrom, CPA, CGFM

Monthly Meetings (9 hours CPE Offered):

- September 4, 2007 at Mercy Capitol Hospital Cafeteria, Side Room – Dean Lemer, Director, and Beverly Zylstra, Iowa Department of Inspections and Appeals, spoke on “The structure and purpose of DIA”. (1 hour CPE)
- October 2, 2007 at Mercy Capitol Hospital Cafeteria, Side Room – Jeff Robinson, Iowa Legislative Services Agency spoke on “Revenue Estimating in Iowa”. (1 hour CPE)
- November 6, 2007, at Mercy Capitol Hospital Cafeteria, Side Room – James R. Scharff, Ph.D., Executive Director, Iowa Association of School Business Officials, spoke on “Russia Trip and School Systems Visited”. (1 hour CPE)
- December 4, 2007, at Mercy Capitol Hospital Cafeteria, Side Room – Heidi Patterson, Executive Director, Iowa Accountancy Examining Board, spoke on “Iowa Accountancy Examining Board”. (1 hour CPE)
- January 8, 2008, at Mercy Capitol Hospital Cafeteria, Side Room – Mark Schuling, Iowa Department of Revenue, spoke on “Iowa Department of Revenue”. (1 hour CPE)
- February 5, 2008, at Mercy Capitol Hospital Cafeteria, Side Room – Christie Maitre, Senior Stakeholder, Liaison, U. S. Department of Treasury, spoke on “IRS Issues and Topics”. (1 hour CPE)
- March 4, 2008 at Mercy Capitol Hospital Cafeteria, Side Room – Jim Pierson, Iowa Department of Administrative Services, Human Resource Enterprise (HRE), spoke on “Employee Benefits and the Many Services Provided by HRE”. (1 hour CPE) The Chapter also celebrated the Governor’s proclamation of March 2008 and March of each year hereafter as CGFM Month with special treats.
- April 1, 2008 at Mercy Capitol Hospital Cafeteria, Side Room – Jeff Riese, Polk-Des Moines Taxpayers Association, spoke on “Operations of the Polk-Des Moines Taxpayers Association”. (1 hour CPE) A \$500 scholarship was also presented to a Grand View College Student.

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- May 6, 2008 at Johnny's Italian Steakhouse – Jack Ketterer, Director, Racing and Gaming, spoke on "Racing and Gaming in Iowa". (1-hour CPE) The Chapter also held its annual awards ceremony and passing of the gavel at this evening social event.

Educational Audio Conferences and Seminars (26 hours CPE Offered):

- August 8, 2007, at the Iowa Department of Education, Grimes Building - This educational event titled **Making Informed Decisions Using Performance Management and Reporting** provided 2 hours of CPE and was an audio conference hosted by the Des Moines AGA Chapter and jointly sponsored by National AGA, National Association of State Auditors, Comptrollers and Treasurers (NASACT), and (Association of Local Government Auditors (ALGA). Speakers were Mike Lawson, Director, ICMA Center for Performance Measurement; Mike Matthes, Assistant City Manager, Des Moines; Jay Fountain, CGFM, CPA, CMA, GASB Consultant.
- September 20, 2007, at the Iowa Department of Education, Grimes Building - This educational event titled **Making the Transition to Management: What it Takes to Succeed** provided 2 hours of CPE and was an audio conference hosted by the Des Moines AGA Chapter and jointly sponsored by National AGA, National Association of State Auditors, Comptrollers and Treasurers (NASACT), and (Association of Local Government Auditors (ALGA). The speakers was Robert A. Carnegie, MBA, Founder of R. Carnegie Associates, Inc.
- November 14, 2007 at the Iowa Department of Education, Grimes Building - This educational event titled **Tools for Performance Audit Efficiency** provided 2 hours of CPE and was an audio conference hosted by the Des Moines AGA Chapter and jointly sponsored by National AGA, NASACT, and ALGA. Speakers were Leslie Tanaka, CPA, City Auditor, Honolulu, Hawaii; Drummond Kahn, CGFM, CIA, CGAP, Director of Audit Services, City of Portland, Oregon.
- December 12, 2007, at the Iowa Vocational Rehabilitation Services, Jessie Parker Building - This educational event titled **Identity Theft and Fraud Seminar** provided 4 hours of CPE. Speaker was Michael McCoy, Author of the Best-Selling Book on Identity Theft, "Who Is You", Co Director of the Identity Theft Institute: National Lecturer, Consultant, and Instructor at ISU.
- December 12, 2007 at the Iowa Vocational Rehabilitation Services, Jessie Parker Building - This educational event titled **Anatomy of Fraud: Case Examples of Greed, Collusion & Override of Controls** provided 2 hours of CPE and was an audio conference hosted by the Des Moines AGA Chapter and jointly sponsored by National AGA, NASACT, and ALGA. Speakers were David L. Cotton, CGFM, CFE, CPA, Chairman, Cotton & Company; David R. Hancox, CGFM, CIA, Director, Division of State Government Accountability, Office of the New York State Comptroller.
- February 6, 2008 at the Iowa Department of Education, Grimes Building - This educational event titled **Using Internal Controls to Improve Operations** provided 2 hours of CPE and was an audio conference hosted by the Des Moines AGA Chapter and jointly sponsored by National AGA, NASACT, and ALGA. Speakers were Janet Hayes, MBA, CPM, CICA, Director, Management Services and Nongovernmental Compliance Division, Office of the State Auditor, State of North Carolina; Michael L. Piazza, MBA, CICA, Principal Associate and Lead Consultant, Professional Development Associates, Director, Program Development and Training, Institute for Internal Controls; Martha J. Smith,

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Central Site Director, Cleveland Center, U.S. Defense Finance and Accounting Service.

- March 5, 2008, at the Department of Education, Grimes Building - This educational event titled **How Fraud Can Undermine the Integrity of Environmental Programs and Create Environmental Risks** provided 2 hours of CPE and was an audio conference hosted by the Des Moines AGA and jointly sponsored by National AGA, NASACT and ALGA. Michael Daggett, Director, EPA OIG Program Integrity Directorate; Larry Valett, Director, EPA OIG Financial Fraud Directorate; and Frank Lane, Director, Suspension and Debarment Division, EPA.
- March 26, 2008, at the Department of Education, Grimes Building - This educational event titled **Emerging Issues at FASAB & GASB: The Landscape is Changing** provided 2 hours of CPE and was an audio conference hosted by the Des Moines AGA and jointly sponsored by National AGA, NASACT and ALGA. Wendy M. Payne, CPA, CGFM, Executive Director, Federal Accounting Standards Advisory Board (FASAB) and David R. Bean, CPA, Director of Research and Technical Activities, Governmental Accounting Standards Board (GASB).
- May 14, 2008, at the Iowa Vocational Rehabilitation Services, Jessie Parker Building - This educational event titled **Ethics Seminar** provided 4 hours of CPE. Speaker was Stan Kuhn, MBA, CPA, CGFM, Instructor of Business Ethics, UIU.
- May 14, 2008, at the Iowa Vocational Rehabilitation Services, Jessie Parker Building - This educational event titled **The Anatomy of Ethical Slips in Government** provided 2 hours of CPE and was an audio conference hosted by the Des Moines AGA and jointly sponsored by National AGA, NASACT and ALGA. The speaker was Marianne M. Jennings, JD, Professor in the Department of Management in the W.P. Carey School of Business at Arizona State University (ASU).
- Also provided information on other continuing education opportunities sponsored by National AGA, other regional AGA Chapters, and other organizations in the Chapter's newsletters, by email, and at Chapter meetings and audio conferences,.

Community Service Events:

- October 6, 2007 – Participated in the Race for the Cure, either as a walker or a contributor. This event raises funds to be used towards breast cancer research with the hope of finding a cure.
- October, November, and December – Collected items and cash donations for the Beacon of Life. The Beacon of Life has provided a haven from Des Moines street for homeless women. It is the only shelter in central Iowa that provides transitional housing with supportive services in a structured environment, exclusively for single women who are homeless. Items needed included cleaning products, paper and plastic products, linens, and gift cards.
- December 18, 2007 – Volunteered at Jolly Holiday Lights, a fundraiser for the Make-a-Wish Foundation, held in Des Moines' Water Works Park. This event features over 75 light displays of leaping deer, skating penguins, and much more. Chapter members volunteered at Santa's Village and sold hot chocolate, coffee, frosted Christmas cookies, kettle corn, and various merchandise items, took pictures of Santa, and directed traffic to the parking lot or exit of the park.
- March and April - Collected \$201 donations for the Food Bank of Iowa. The Chapter contributed an additional \$100. National AGA subsequently matched the Chapter's contribution of \$301, bringing the grand total to \$602.

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- Donation of Iowa products to National PDC Community Service Raffle Nashville in June 2007 (Value \$52).

Early Careers Events:

- April 1, 2008 – Presented a \$500 scholarship to Michael Stevens, a Grand View College Accounting Student. Also offered him a free one-year membership in AGA.
- Provided information on National Scholarship opportunities to Chapter members.
- The scholarship committee reviewed the scholarship process and created an application form. The chapter will continue giving one \$500 scholarship to a Grandview student and work with Drake to establish a \$500 graduate student scholarship as the budget allows.

Social Event:

- May 6, 2008 – The last meeting for the program year was held in the evening at Johnny's Italian Steakhouse. Spouses and other guests were invited. In addition to the interesting program on Racing and Gaming in Iowa, the Chapter held its annual awards ceremony and passing of the gavel.

Membership:

- Annual awards were presented at the May 6, 2008 meeting. Past President Award – Suzanne Dahlstrom; Member of the Year Award – Janice Evans.
- Added 10 new members from May 1, 2007 to April 30, 2008.
- Checked membership lists and contacted suspended members to encourage them to renew.
- Sent email invitations to those non-members who attended our monthly meetings, audio conferences, to invite them to our upcoming events, or to encourage them to join.
- Nominated Janice Jensen, Regional Vice-President Elect, and long-time active member for the National 2008 Chapter Service Award, which she won for our size category. Janice has been an AGA member since 1995, and held many CEC positions over the years including President.
- Nominated Andrew Nielsen, Program and Technical Meeting Co-Director for the National 2008 Chapter Education Award, which he won for our size category. Andy has been an AGA member since 1992 and has done an excellent job identifying topics of interest for our monthly meetings and making appropriate contacts with key personnel in all areas of government.

CGFM:

- The Chapter offers a \$500 scholarship for any member who successfully completes the CGFM exam and meets certain criteria for chapter membership and involvement.
- An additional \$500 is budgeted to be shared by those successfully completing the CGFM exams during any given year but do not qualify under the first incentive program.
- Obtained Governor's proclamation of March as CGFM month.
- Encouraged Chapter members to become a CGFM. Provided CGFM brochures at our various events, articles in the newsletters, and answered questions or provided information on the National CGFM Review Sessions being held.

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Other Facts:

- Chapter Recognition – The chapter earned chapter recognition points to achieve the Platinum level this year. The chapter has received the Gold, Platinum, or Silver award in each of the last ten years.
- The Chapter received first place in both the National 2007-2008 Newsletter Contest and the 2007-2008 Website Contest in our size category.