

AGA – Des Moines Chapter
Chapter History Report
June 1, 2009 – May 31, 2010 Program Year

Committee:

- President – Cindy Weber, CPA, CGFM
- President Elect – Patricia Townsend, CPA
- Past President – Valerie Wedgeworth
- Secretary – Marilyn Hanson, CPA
- Treasurer – Natalie Storm, CPA
- Professional Certification – Natalie Storm, CPA
- Chapter Recognition – Patricia Townsend, CPA
- By-Laws and Procedures – Janice Evans, CPA, CGFM
- Member Recognition – Michelle Wendel, CPA
- Membership - Cheryl D. Mather, CPA, CGFM
- Programs and Technical Meetings – Brenda Loy, CPA, CGFM
- Communications – Kim Knight, CPA
- Chapter Website – Patricia Townsend, CPA
- Early Careers – Valerie Wedgeworth
- Community Service – Denise Ragias, CGFM
- AICPA, GASB, FASB, NASB Liaison – Cindy Weber, CPA, CGFM

Monthly Meetings (9 hours CPE Offered):

- September 2, 2009 at Hoover Building – Terry Rich, President/CEO, Iowa Lottery Authority, spoke on “Creating New Ideas in a Tough Economy”. (1 hour CPE)
- October 7, 2009 at Jessie Parker Building, Knudsen Room, Jamie McDermott, ING spoke on “Financial Planning”. (1 hour CPE)
- November 18, 2009, at Jessie Parker Building, Knudsen Room – Ray Walton, Director, Department of Administrative Services spoke on “The Department of Administrative Services”. (1 hour CPE)
- December 16, 2009, at the Hoover Building, - Michael Fitzgerald, Treasurer of State, spoke on “Great Iowa Treasure Hunt, College Savings Iowa & Financial Literacy Program”. (1 hour CPE)
- January 13, 2010, at Jessie Parker Building, Knudsen Room, - Kristy Maitre, Internal Revenue Service, spoke on “IRS Update”. (1 hour CPE)
- February 10, 2010, at Ola Babcock Miller Building, State Library Forrest Spaulding Room 310 – Barb Corson and Beth Henning spoke on “State Library Update and Census 2010”. (1 hour CPE)
- March 3, 2010 at Jessie Parker Building – Edward Parker, ICN, spoke on “The Leader in the Mirror”. (1 hour CPE) The Chapter also recognized CGFM Month with special treats.
- April 14, 2010 at the Jessie Parker Building, Knudsen Room –Patty Schroeder, Des Moines Schools CFO spoke on “Des Moines Public Schools Financial Challenges”. (1 hour CPE)
- May 4, 2010 at Okoboji Bar & Grill – Lekeisha Veasley, Operation Threshold, spoke on “Understanding Credit and Credit Scores”. (1-hour CPE) The Chapter also held its annual awards ceremony and passing of the gavel at this evening social event.

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

- July 15, 2009, at the Iowa Vocational Rehabilitation Services, Jessie Parker Building – This educational event titled **Using Performance Measures to Manage Government Services** 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, Controllers, and Treasurers (NASACT) and Association of Local Government Auditors (ALGA). Speakers were Rebekah Stephens, Planning and Performance Coordinator, Metropolitan Government of Nashville and Davidson County and Fred Klunk, Program Performance and Projection Manager, Research and Development Division, Pennsylvania Board of Probation and Parole.
- July 16, 2009, at the Iowa Vocational Rehabilitation Services, Jessie Parker Building – This educational event titled **ARRA Administrative Costs: Understand the Alternatives** 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, Controllers, and Treasurers (NASACT) and Association of Local Government Auditors (ALGA). Speakers were Gilbert Tran, CPA, Technical Manager, Office of Management and Budget; Darryl Mayes, Director, and Janet Turner, National Specialist for State and Local Governments, Division of Cost Allocation, U.S. Health and Human Services; Clark Partridge, CPA, CGFM, Arizona State Comptroller; and David McDermott, CPA, Colorado State Controller.
- August 12, 2009, at the Iowa Vocational Rehabilitation Services, Jessie Parker Building - This educational event titled **Next Steps in Accountability & Control over Recovery Act Funds** 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 Marcia Pauli, Chief Financial Officer, Office of Justice Program, US Department of Justice; John Radford, CGFM, CIA, CFE, Controller, State of Oregon; Daniel I. Werfel, Deputy Controller, Office of Federal Financial Management, U.S. Office of Management and Budget; and David M. Zavada, CPA, Partner, Kearney and Company, P.C
- September 2, 2009, at the Hoover Building, Room 6 - This educational event titled **Grants Management in Today's Environment** 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 were Thomas A. Cooley, MS, Chief Financial Officer and Director, Office of Budget, Finance and Awards, National Science Foundation; W. Scott Erwin, CGFM, CRA, Director, Office of Sponsored Programs, Texas State University – San Marcos; and Joseph L. Kull, CGFM, CPA, Director, PricewaterhouseCoopers, LLP.
- October 7, 2009, at the Jessie Parker Building, Knudsen Room, - This educational event titled **Internal Controls for Auditors, Management and Staff: Making Government Organizations More Effective** 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 were David R. Hancox, CGFM, CIA, Audit Director, Office of the State Comptroller, State of New York; and Mary Peck, CIA, CCSA, CGAP, Director of Internal Controls, New York State Office of Mental Retardation and Developmental Disabilities.
- November 18, 2009 at the Iowa Vocational Rehabilitation Services, Jessie Parker Building, Knudsen Room. This educational event titled **A New Service Model:**

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- Auditor Roles in Government Performance Measures** provided 2 hours of CPE. The speakers were Paul D. Epstein, Project Manager, Auditor Roles in Government Performance Management; Leader, Results That Matter Team, Epstein & Fass Associates; Sam McCall, Ph.D., CGFM, CPA, CIA, CGAP, City Auditor, City of Tallahassee, FL and Past AGA National President; and Stephen L. Morgan, CIA, CGAP, CGFM, CFE, former City Auditor of Austin, TX
- December 16, 2009 at the Hoover Building, Room #6. This educational event titled **Latest Trends in Occupational Fraud** 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 William A. Morehead, Ph.D., CGFM, CPA, Chair of Accountancy, CIS and Finance, Delta State University, AGA National President, AGA Past National Treasurer, and Chair, AGA National Executive Committee.
 - January 13, 2010 at the Iowa Vocational Rehabilitation Services, Jessie Parker Building, Knudsen Room. This educational event titled **Sudden Impact or Long-Term Process? Impact of the Stimulus Plan** on Internal Controls provided 2 hours of CPE. The speakers were Arthur A. Hayes, JR., MBA, JD, CGFM, CPA, CFE, CIA, Director of the Division of State Audit in the Tennessee Comptroller's Office; and Thomas J. Sadowski, CGFM, CPA, former Missouri State Controller and AGA Past National President and Treasurer.
 - January 27, 2010, at the Jessie Parker Building, Knudsen Room. This educational event titled **President's Executive Order: Reduce Improper Payments and Eliminate Waste** 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. The speakers were Gene L. Dodaro, CGFM, Acting Comptroller General, U.S. Government Accountability Office; Jeffrey C. Steinhoff, CGFM, CPA, Executive Director, KPMG Government Institute and Past AGA National President; Daniel I. Werfel, Controller, Office of Federal Financial Management, U.S. Office of Management and Budget.
 - February 10, 2010 at the Ola Babcock Miller Building, State Library Forrest Spaulding Room 310. This educational event titled **Understanding IT Audits for Program Managers and Auditors** provided 2 hours of CPE and was a webinar hosted by the Des Moines AGA Chapter and jointly sponsored by National AGA, NASACT, and ALGA. The speakers were Jack Heyman, CGFM, CISA, CPA, who has nearly 15 years of technical and leadership experience providing internal controls, systems auditing, consulting, financial auditing and accounting services to Fortune 500 companies, accounting and consulting firms, and government agencies.
 - March 3, 2010, at the Jessie Parker Building, Knudsen Room - This educational event titled **The War Against Fraud and Abuse: Are We Winning?** 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. Speaker was. David L. Cotton, CFE, CGFM, CPA, Chairman, Cotton & Company LLP.
 - March 24, 2010, at the Jessie Parker Building, Knudsen Room - This educational event titled **Suggested Guidelines for Voluntary Reporting: Sharing the Government's Story** 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. Speakers were Lisa R. Parker, CPA, Project Manager Governmental Accounting Standards Board and Eveanna Barry, director of performance reporting, AGA,
 - April 14, 2010, at the Jessie Parker Building, Knudsen Room. This educational event titled **GASB Update: Keeping Pace in a Changing Environment** provided 2 hours of CPE and was a webinar hosted by the Des Moines AGA and jointly

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- sponsored by National AGA, NASACT and ALGA. The speakers were Robert H. Attmore, CPA, GASB Chairman, Ken Schermann, CPA, GASB, Senior Technical Advisor; Den Michael, Mean, GASB, Research Manager; Karl D. Johnson, GASB Project Manager; Herbert A. Maquire, MBA, CPA, CGFM, Pennsylvania Office of the Budget, Comptroller Operations, Director of the Bureau of Financial Management; Eric S. Berman, CPA, Deputy Comptroller, Massachusetts Office of the Comptroller
- April 21, 2010 at the Jessie Parker Building, Knudsen Room – This educational event titled **The Latest Tools & Techniques for Auditors** 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 speakers were Steve Biskie, CPA, CITP, CISA, Director of Services Product Management, ACL Services, Ltd. and Cliff Cole, computer Audit Specialist, Office of Inspector General, U.S. Department of Housing and Urban Development
 - May 19, 2010, at the Downtown Holiday Inn. This educational seminar included presentations called **Prominence to Prison: Why Smart People do Dumb Things** by Patrick Kuhse, International Ethics Speaker and **Results of the Legislative Session** by David Vaudt, CPA, State Auditor. Also included was **Those Faint Signals: Learning to Catch Ethical Slippage Before It's Too Late**, which 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, Professor, Department of Management, W. P. Carey School of Business at Arizona State University. The educational event provided 6 hours of CPE.
 - 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:

- Donation of Iowa products to National PDC Community Service Raffle in June 2009 in New Orleans, LA.
- September 2009 – Collected donations of cash and school supplies, which were donated to Children & Families of Iowa (CFI), a private, nonprofit organization dedicated to helping at-risk children and families learn to help themselves.
- October 24 2009 - – 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. The chapter also collected the pink Yoplait yogurt lids that benefit Susan G. Komen for the Cure.
- November and December 2009 – Collected cash and toys to benefit the Toys for Tots drive.
- December 7, 2009 – 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, and took pictures of Santa.
- January and February, 2010 - Collected cash donations for the Food Bank of Iowa, which is a private, non-profit charitable organization whose vision is a hunger-free Iowa and mission is alleviating hunger through food events and federal government commodity programs.
- March 2010 – Collected cash donations for Kids Against Hunger, which is a humanitarian food-aid organization to significantly reduce the number of hungry children in the USA and to feed starving children throughout the world.

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- April 2010 – Collected cash donations for the Juvenile Diabetes Research Foundation, whose mission is to find a cure for diabetes and its complications through the support of research.
- May 2010 – Collected cash donations for Special Olympics Iowa, which is a nonprofit organization that provides year-round sports training and athletic competition in a variety of Olympic-type sports for individuals with intellectual disabilities.
- The Chapter and National AGA matched funds raised for the various community service activities.

Early Careers Events:

- Presented a \$500 scholarship to a University of Northern Iowa Accounting Student. Also offered a free one-year membership in AGA.
- Provided information on National Scholarship opportunities to Chapter members.

Social Event:

- May 4, 2010 – The last meeting for the program year was held in the evening at Okoboji Bar & Grill. Spouses and other guests were invited. In addition to the interesting program on Understanding Credit and Credit Scores, the Chapter held its annual awards ceremony and passing of the gavel.

Membership:

- Annual awards were presented at the May 4, 2010 meeting. Past President Award – Cindy Weber; Member of the Year Award – Kim Knight.
- Four members had perfect attendance at our AGA Monthly meetings and seven other members only missed one meeting.
- Added 7 new members from May 1, 2009 to April 30, 2010.
- 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 Natalie Storm, Treasurer and Professional Certification, for a National Chapter Service Award.

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.
- Chapter Recognition Scholarship from National – Provided two non-members with a one-year membership to AGA.
- Patricia Townsend attended the 2009 PDC in New Orleans, Louisiana and picked up awards for the previous year's accomplishments.
- Janice Jensen, Natalie Storm, Deb Schroeder, and Patricia Townsend attended the Sectional Leadership Meeting in Kansas City.
- Janice Jensen served as regional immediate past vice president and Patricia Townsend served as regional communications.
- Newsletter - Received the 2009–2010 chapter newsletter award for the second consecutive year.