

AGA – Des Moines Chapter
Chapter History Report
June 1, 2010 – May 31, 2011 Program Year

Committee:

- President – Patricia Townsend, CPA
- President Elect – Natalie Storm, CPA
- Past President – Cindy Weber, CPA, CGFM
- Secretary – Khristan Kaufman
- Treasurer – Natalie Storm, CPA
- Professional Certification – Denise Ragias, CGFM
- Chapter Recognition – Natalie Storm, CPA
- By-Laws and Procedures – Janice Evans, CPA, CGFM
- Membership and Member Recognition – Michelle Wendel, CPA
- Programs and Technical Meetings – Deb Schroeder
- Communications – Kim Knight, CPA
- Chapter Website – Patricia Townsend, CPA
- Early Careers – Valerie Wedgeworth
- Community Service – Denise Ragias, CGFM
- Accountability Outreach – Janice Jensen, CPA, CGFM
- AICPA, GASB, FASB, NASB Liaison – Patricia Townsend, CPA

Monthly Meetings (11 hours CPE Offered):

- August 11, 2010, at Jessie Parker Building, Grant Room – Joel Lunde, Department of Management, spoke on “The State of Iowa Budget Process”. (1 hour CPE)
- September 29, 2010 at Jessie Parker Building, Knudson Room – Stephen Wooderson, Vocational Rehabilitation, spoke on “Iowa Vocational Rehabilitation Services, and Leadership Skills”. (1 hour CPE)
- October 10, 2010 at Jessie Parker Building, Knudsen Room, Steve Graham, Cedar Rapids Community School District spoke on “Embezzlement at the Cedar Rapids School District”. (1 hour CPE)
- November 17, 2010, at Jessie Parker Building, Knudsen Room – Bert Dalmer, Citizen’s Aide – Ombudsman spoke on “The Whistleblower Act”. (1 hour CPE)
- December 8, 2010, at the Jessie Parker Building, Grant Room, - Jeff Robinson, Legislative Services Agency, spoke on “Iowa Revenue Estimating Conference”. (1 hour CPE)
- January 19, 2011, at Jessie Parker Building, Knudsen Room, - Kristy Maitre, Internal Revenue Service, spoke on “IRS Update”. (1 hour CPE)
- February 2, 2011, at Jessie Parker Building, Grant Room – Marlene Hyde, IPERS Senior Benefits Officer spoke on “IPERS Update”. (1 hour CPE)
- March 9, 2011 at Jessie Parker Building, Knudson Room – Mary Delagardelle, Iowa School Boards Foundation, spoke on “The Lighthouse Research Project”. (1 hour CPE)
- March 23, 2011 at Ola Babcock Miller Building, State Library of Iowa – Jodi Adams, Executive Officer, Iowa Accountancy Examining Board, spoke on “Accountancy Examining Board Recent Amendments to Iowa Administrative Code Ch. 193A”. The Chapter also recognized CGFM Month with special treats. (1 hour CPE)
- April 20, 2011 at the Jessie Parker Building, Grant Room – Catherine Demes Maydew, AGA Midwest Regional Vice President spoke on “Reconciliations & Analytics as Part of the Accountant’s Toolbox”. (1 hour CPE)

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- April 27, 2011 at Latin King – Karen Seidl, Prime America Financial, spoke on “Women, Money, & Chocolate”. (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 (57 hours CPE Offered):

- July 15, 2010, at the Jessie Parker Building, Knudsen Room – This educational event titled **Government Auditing Standards: 2010 Revision** 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 Marcia Buchanan, Assistant Director, Financial Management and Assurance Team Government Accountability Office (GAO) and Jim Dalkin, Director, Financial Management and Assurance Team, GAO.
- August 11, 2010, at the Iowa Jessie Parker Building, Grant Room - This educational event titled **Using Performance Measures to Improve Service Delivery** 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 Harold Steinberg, CGFM, CPA, AGA’s technical consultant and principal researchers, Anthony Longo, Deputy Direct, New York City Mayor’s Office of Operations, and John Whitley, Ph.D., Director of Program Analysis and Evaluation, U. S. Department of Homeland Security.
- September 29, 2010, at the Jessie Parker Building, Knudsen Room, - This educational event titled **Improving Program Performance & Accountability through Cooperative Audit Resolution** 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 Dale Bell, Deputy Director, Division of Institution and Award Support, National Sciences Foundation (NSF), Brett Baker, Ph.D., CISA, Assistant Inspector General for Audits, NSF, John Childs, MPA, Chief Financial Officer, Ohio Department of Education, Charles Laster, Deputy Director of School Support and Technology Programs, Officer of Elementary and Secondary Education, U. S. Department of Education (USDE), Rich Rasa, CGFM, Director of State and Local Advisory Assistance, Office of Inspector General, USDE, and Helena Sims, Director of Intergovernmental Relations for the AGA.
- October 20, 2010, at the Jessie Parker Building, Knudsen Room, - This educational event titled **Was it Fraud or Just Poor Audit Quality** 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 speaker was David L. Cotton, CFE, CGFM, CPA, Chairman, Cotton & Company LLP.
- November 17, 2010 at the Jessie Parker Building, Knudsen Room. This educational event titled **Achieving Transparency – The Next Step to Integrating Your Data** provided 2 hours of CPE. The speakers were Don Geiger, Acting Deputy Chief Financial Officer and Acting Director, Office of Financial Management at the U. S. Department of Interior, David Cofer, Information Technology Specialist in the Data Mining and Analysis Staff Office of Mission Systems, Office of Inspector General, U. S. Environmental Protection Agency, and Sheila Hammond, CGFM and Phyllis Eriksen, CISA from IDEA Audimation Services, Inc.

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- December 8, 2010 at the Jessie Parker Building, Grant Room. This educational event titled **Risk Assessments and SAS Update** 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. Speaker was 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 12, 2011 at the Jessie Parker Building, Knudsen Room. This educational event titled **Needles in a Haystack – Data Mining and Predictive Analytics to Prioritize Leads and Highlight Risk for Investigators and Auditors** provided 2 hours of CPE. The speakers were John Elder, Ph.D., CEO and founder of Elder Research, Inc; John V. Kelly, CGFM, CPA, CFE, Director of Forensic Audits, Office of Inspector General U. S. Department of Homeland Security; Edward Slevin, CISA, Director of Computer-Aided Assessment Techniques, Office of Inspector General, USDE; Isaiah Goodall, Director of Washington D.C. Office, Elder Research, Inc.
- January 19, 2011, at the Jessie Parker Building, Knudsen Room. This educational event titled **One Year Later, Are We Willing the Improper Payments Battle?** 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 Jeanette M. Franzel, CGFM, CPA, Managing Director, Financial Management and Assurance, GAO, Jeffrey C. Steinhoff, AGA Past National President, CGFM, CPA, Executive Director, KPMG Government Institute, Managing Director, KPMG, LLP;; George D. Strudgeon, CPA, Audit Director, Human Services Management Specialty Team, Auditor of Public Accounts, Commonwealth of Virginia; and Daniel Werfel, Controller, Office of Federal Financial Management, Office of Management and Budget.
- February 2, 2011 at the Jessie Parker Building, Grant Room. This educational event titled **Making Internal Controls Work in Your Organization** 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 speaker was John J. Hall, CPA, Professional Speaker, Seminar Instructor, and Business Consultant.
- February 21-23 at the Lucas Building, Department of Public Health and the State Library, and through ICN at the Iowa School For the Deaf, Council Bluffs. This Educational Event titled **Governmental Accounting, Financial Reporting and Budgeting** provided 24 hours of CPE. The speaker was Rich Arns, Retired from U. S. Department of Defense from St. Louis.
- March 9, 2011, at the Jessie Parker Building, Knudsen Room - This educational event titled **Planning, Conducting and Reporting Performance Audit Work Even More Efficiently: Additional Tools to Improve Your Office's Performance Audit Productivity** 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 Drummond Kahn, Director of Audit Services, Office of the City Auditor, Portland, Oregon.
- March 15, 2011, at the Jessie Parker Building, Knudsen Room - This educational event titled **Public Private Partnerships: From Accounting to Implementation** provided 2 hours of CPE and was a webinar hosted by the Des Moines AGA and jointly sponsored by National AGA, NASACT and ALGA. Speakers were Neil McMonagle, Senior Manager, .Grant Thornton LLP; Todd Webster, Practice Fellow, GASB, and James J. White, Executive Director, Maryland Port Administration

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- March 23, 2011, at the Ola Babcock Miller Building, State Library of Iowa - This educational event titled **Tools to Assist in Establishing a Performance Management System for Your Government – What You Need to Know** 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 Mark D. Abrahams, President of the Abrahams Group; Michael Jacobson, Manager, Performance Management Section, King County Office of Performance Strategy and Budget.
- April 20, 2011, at the Jessie Parker Building, Grant Room. This educational event titled **Mortgage Fraud and Beyond – Looking Toward the Future** provided 2 hours of CPE and was a webinar hosted by the Des Moines AGA and jointly sponsored by National AGA, NASACT and ALGA. The speakers were Kenneth M. Donohue, former Inspector General of the U. S. Department of Housing and Urban Development (HUD) and currently Principal, Reznick Group, P.C.; Steve Linick, JD, Inspector General, Federal Housing Finance Agency; Christy Romero, Deputy Special Inspector General for the Troubled Asset Relief Program, U. S. Department of Treasury; Michael P. Stephens, Acting Inspector General, HUD.
- May 11, 2011, at the Jessie Parker Building, Grant and Knudsen Rooms. This educational seminar included a presentation called **Character Counts in Iowa – Ethics in the Workplace** by Eric Martin and Mark Wills, assisted by Andrew Gross, and JD Stites, all with Character Counts. Also included was **The Apprehension of Being Ethical**, which was an audio conference hosted by the Des Moines AGA and jointly sponsored by National AGA, NASACT and ALGA. The speaker was Leon Young, MA, Adjunct Associate Professor, University of Maryland, University College. The educational event provided 7 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 (throw) to National PDC Community Service Raffle in July 2010 in Orlando, FL.
- August, 2010 – Collected donations of cash for Meals from the Heartland and collected school supplies for Children & Families of Iowa, CFI), a private, nonprofit organization dedicated to helping at-risk children and families learn to help themselves.
- September 2010 – Collected donations of cash for Habitat for Humanity and continued to collect school supplies, which were donated to CFI.
- October 23 2010 - – 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 2010 – Collected donations of cash and gifts for Adopt-a-Family through CFI. Continued to collect the pink Yoplait yogurt lids.
- November 29, 2010 – 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.
- December 2010 – Collected cash and toys to benefit the Toys for Tots drive.

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- January 2011 - 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.
- February 2011 – Collected cash donations for the American Heart Association through the Go Red for Women program, which support medical research, awareness, education, and community programs that will help women live longer heart-healthy lives.
- March 2011 – 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.
- April 2011 – Collected cash donations for the Beacon of Life, which is the only shelter in central Iowa that provides transitional housing with supportive services for women who are homeless.
- May 2011 – 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, for total contribution over \$3,400 as of April 21, 2011, plus non-monetary contributions.

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:

- April 27, 2011 – The last meeting for the program year was held in the evening at the Latin King. Spouses and other guests were invited. In addition to the interesting program on *Women, Money, & Chocolate*, the Chapter held its annual awards ceremony and passing of the gavel.

Membership:

- Annual awards were presented at the April 27, 2011 meeting. Past President Award – Patricia Townsend; Member of the Year Award – Janice Evans.
- Three members had perfect attendance at our AGA Monthly meetings.
- Added 9 new members from May 1, 2010 to April 30, 2011.
- Chapter members with 5 years (Natalie Storm and Valerie Wedgeworth), 10 years (Sue Ryboldt and Michelle Wendel), 15 years (Brenda Loy), and 20 years (Benjamin Merial) of membership were recognized at a chapter meeting.
- 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 the Des Moines Chapter for the Chapter Education Award and the Chapter CGFM Award.

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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.
- Sponsored the CGFM Exam 2 Review Course.
- One member successfully completed the CGFM exams and several others have passed at least one part.

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 2010 PDC in Orlando, Florida and picked up awards for the previous year's accomplishments.
- Deb Schroeder and Patricia Townsend attended the Sectional Leadership Meeting in Dallas, Texas.
- Janice Jensen served as regional membership and Patricia Townsend served as regional communications.
- Chapter Education Award - Received the 2010–2011 Chapter Education Award for Group D that recognizes chapters that have done an outstanding job in providing educational programs to its members and other accountability professionals. In recognition of the Des Moines Chapter, which is experiencing higher attendance on a regular basis due to its high-quality, low-cost education offerings on current issues affecting state and local government financial accountability, The chapter has taken advantage of national audio conferences, which are offered in conjunction with chapter "lunch and learn" meetings at least once a month. The schedule and convenience of these "mini seminars," worth 3 CPE hours, is much appreciated by attendees. The chapter offers an annual ethics seminar as well.