

AGA – Des Moines Chapter
Chapter History Report
June 1, 2011 – May 31, 2012 Program Year

Committee:

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

Monthly Meetings (9 hours CPE Offered):

- September 28, 2011 at the State Library of Iowa, Ola Babcock Miller Building, Spalding Room 310 – Jean Slaybaugh and Lori Lipscomb, DHS, spoke on “Impact of Budget Reductions on DHS and the Resulting Redesign (1 hour CPE)
- October 19, 2011 at the Jessie Parker Building, Knudsen Room, Natalie Storm, DM AGA President, and Patricia Townsend, DM AGA Past President spoke on “Citizen Centric Reporting”. (1 hour CPE)
- November 2, 2011, at the Jessie Parker Building, Knudsen Room – David Vaudt, State Auditor, spoke on the “Status of the State Budget”. (1 hour CPE)
- December 14, 2011, at the Jessie Parker Building, Grant Room, - Kathy Mabie (DOM) and Tena Malone (Dulles Tech), spoke on “Grant Reporting Requirements and the Iowa Grants.gov System”. (1 hour CPE)
- January 11, 2012, at the Jessie Parker Building, Knudsen Room, - Karen Keninger, Director, Department of the Blind, spoke on “Department for the Blind’s Resources and Services”. (1 hour CPE)
- February 8, 2012, at the Jessie Parker Building, Grant Room – Kristy Maitre, Internal Revenue Service, spoke on “IRS Update”. (1 hour CPE)
- March 7, 2012 at the Jessie Parker Building, Knudson Room – Margaret Van Ginkel, Iowa State University, spoke on “Budgeting 101”. (1 hour CPE)
- April 18, 2012 at the Jessie Parker Building, Grant Room – Barb McClannahan, Vocational Rehabilitation, spoke on “Workforce Planning”. (1 hour CPE)
- April 25, 2012 at Okoboji Bar and Grill – John Seefeld, Jester Insurance, spoke on “Effects of Fraud in the Insurance Division”. (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):

- June 8, 2011, at the Jessie Parker Building, Knudsen Room – This educational event titled **Improving Controls Can Improve Program Performance** 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

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Auditors, Comptrollers, and Treasurer's (NASACT) and Association of Local Government Auditors (ALGA). Speakers were David Hill, PwC; Kathy Hill, Department of Homeland Security/FEMA; and Rory Souther, U.S. Coast Guard.

- June 22, 2011, at the Jessie Parker Building, Knudsen Room – This educational event titled **Moving Beyond the Numbers – Turning Performance Measures into Dollars** 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 Sheri Chaney Jones, President, Measurement Resources Co.; Bev Seffrin, Dep. Director, Performance Evaluation, Franklin County Domestic and Juvenile Court, Columbus, OH; Roland P. Hombostal, Dep. Director, Policy and Programs, Dept. of Aging, State of Ohio
- July 20, 2011, at the Jessie Parker Building, Knudsen Room – This educational event titled **GASB Review - 2011** 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 Robert H. Attmore, Chair, Governmental Accounting Standards Board (GASB) and David R. Bean, Director of Research, GASB.
- August 24, 2011, at the Hoover Building, Level A, Room 7 - This educational event titled **Building a Sustainable Performance Management Framework – Supporting Government Programs with Valuable Data** 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 Leslie Crowell, Deputy County Executive, County of Santa Clara, CA and Kaye Knedrick, Kaye Kendrick and Associates.
- September 28, 2011, at the State Library of Iowa, Ola Babcock Miller Building, - This educational event titled **Continuous Monitoring – Management's Window to Preventing Fraud, Waste and Abuse** 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 Jeff Steinhoff, Executive Director, KPMG Government Institute and Managing Director in KPMG's Federal Advisory Practice; AGA Past National President; Pam Franceschi, Deputy Director, Defense Finance and Accounting Service, U.S. Department of Defense; and Matt Jadacki, Assistant Inspector General, Office of Emergency Management Oversight, U. S. Department of Homeland Security.
- October 5, 2011, at the Grimes Building, 2nd Floor ICN room, - This educational event titled **SSAE 16: Reporting on Controls – Revised SAS 70 Report and Service Organization Control Reports** 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 Rick Hannmann, Partner, IT Advisory Services, KPMG, LLC; Dean Martin, Audit Liaison and Internal Control Coordinator, National Business Center, U.S. Department of the Interior.
- October 12, 2011, at the Hoover Building, First Floor ICN Conference Room. This educational event titled **Subrecipient or Vendor? – Sorting Out the Subaward of Federal Grants Now** provided 2 hours of CPE and was a purchased CD audio conference sponsored by Thompson Publishing. The speaker was Robert M.

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- Lloyd, Consultant on Management and Government Relations. State Agencies were also able to rent the CD for their own educational events.
- October 19, 2011 at the Jessie Parker Building, Knudsen Room. This educational event titled **Avoiding Surprises: Insights for Implementing the New GPRA Modernization Act** 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 John Kamensky, MPA, a Senior Fellow with the IBM Center for The Business of Government; Richard Beck, Ph.D., Director of Planning and Performance Management (I.E., the Deputy PIO).
 - November 2, 2011 at the Jessie Parker Building, Knudsen Room. This educational event titled **Major Challenges to the Public Sector Auditing Profession** provided 2 hours of CPE. The speakers were David R. Hancox, CGFM, CIA, consultant, trainer and author, former director of state audits, New York State Comptroller's Office; and AGA past National President Jeffrey S. Hart, CGFM, CFE, trainer and consultant, former comptroller and director of fiscal management and planning, U.S. Environmental Protection Agency's Mountain and Plains Region.
 - November 16, 2011 at the Jessie Parker Building, Grant Room. This educational event titled **Using XBRL to Improve Accountability, Transparency & Efficiency in Government** provided 2 hours of CPE. The speaker was Kim R. Wallin, CPA, CMA, CFM, State Controller, State of Nevada.
 - December 14, 2011 at the Jessie Parker Building, Knudsen Room. This educational event titled **Boost Efficiency, Accuracy, Transparency, Fraud Detection and Cost Savings by Preventing Inappropriate Payments** 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 Gale Stallworth Stone, CPA, Deputy Assistant Inspector General for Audit – Financial Systems and Operations Audits, Social Security Administration, Office of the Inspector General; Greg Wallig, Principal, and Rob Irish, Director, Grant Thornton LLP; and Eric Werab, Senior Business Solution Strategist, Fiserv.
 - January 11, 2012 at the Jessie Parker Building, Knudsen Room. This educational event titled **Getting a Handle on Internal Controls** provided 2 hours of CPE. The speaker was William D. Miller, CGFM, CIA, County Auditor, Johnson County, KS.
 - February 8, 2012 at the Jessie Parker Building, Grant Room. This educational event titled **The New Stewardship Imperative – Federal Financial Management at the Crossroads** 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 Kilesh Chudasama, Senior Manager, Tom Coccozza, Director, and James G. Huse, Jr., Senior Adviser with Grant Thornton.
 - March 7, 2012, at the Jessie Parker Building, Knudsen Room - This educational event titled **Data Mining to Prioritize Investigations of Contract Fraud** 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 Bryan Jones, Director, Data Mining Group, Office of Investigations, Office of the Inspector General, U.S. Postal Service; and Antonia de Medinaceli, Director of Business Analytics and Fraud Detection, Elder Research, Inc.
 - March 27-28, 2012 on the capitol complex in Des Moines with remote sites through the ICN in Council Bluffs and Jefferson City, MO. This educational event titled **CGFM Study Course 3** provided 16 hours of CPE. The speaker was Tom O'Connor.

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- April 18, 2012 at the Jessie Parker Building, Knudsen Room. This educational event titled **Find Strength in Numbers: Sampling Techniques to Improve Financial Audit, Control and Program Performance**, provided 2 hours of CPE and was an audio conference hosted by the Des Moines AGA. The speakers were Albert Lee, Ph.D., senior economist, Summit Consulting LLC; and Denise S. Wu, CGFM, CPA, partner, Clifton Gunderson LLP.
- May 9, 2012 – at the Jessie Parker Building, Knudsen Room – This educational event titled **Carlo Ponzi or Bernard Madoff – Who Was the Bigger Villain?**, 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 David L. Cotton, CGFM, CFE, CPA, Chairman, Cotton & Company LLP.
- May 23, 2012 – at the Jessie Parker Building, Knudsen Room, - This educational event titled **Ethical Dilemmas – Recognizing, Analyzing and Resolving Situations Where There are Two Right Choices**, 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 Alan Z. Goodman, President, Goodman Professional Development, Inc.
- May 24, 2012, at the Stoney Creek Inn, Johnston. This educational seminar hosted by the Des Moines AGA chapter included a presentation called **Business Ethics**, by Richard Stanley, President, Legacy Performance Training. This seminar provided 7 hours of CPE related to Business Ethics and the challenges individuals face taking the high road.
- 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 2011 in Atlanta, Georgia.
- June - August, 2011 – Collected donations of cash 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.
- September – October, 2011 – 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 – December 2011 – Collected donations of cash for the Shoes that Fit Organization. This organization helps provide food and clothing for school children in the Des Moines area.
- December 18, 2011 – 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 the admissions gate, handing out CDs and admitting cars into Jolly Holiday Lights.
- January – February 2012 - Collected cash donations for the National Federation of the Blind. This organization helps provide assistance to sight-impaired citizens.
- March 2012 – Collected cash donations for Special Olympics of 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.

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- April – May 2012 – Collected cash donations for the MS Society, which is a nonprofit organization whose vision is to create a world free of multiple sclerosis. Several members also walked in the MS walk on May 19, 2012.

Early Careers Events:

- Presented a \$500 scholarship to a University of Northern Iowa Accounting Student.
- Provided information on National Scholarship opportunities to Chapter members.

Social Event:

- April 25, 2012 – The last meeting for the program year was held in the evening at the Okoboji Bar and Grill. Spouses and other guests were invited. In addition to the interesting program on *Effects of Fraud in the Insurance Division*, the Chapter held its annual awards ceremony and passing of the gavel.

Membership:

- Annual awards were presented at the April 25, 2012 meeting. Past President Award – Natalie Storm; Member of the Year Award – Cheryl Mather.
- One member had perfect attendance at our AGA Monthly meetings.
- Added 7 new members from May 1, 2011 to April 30, 2012, including one who reinstated her membership.
- 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, President 2011-12, for AGA's 2012 Chapter Service Award, which she received for Group D.

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 3 Review Course.
- Three members successfully completed the CGFM exams during this year.

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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 – Used to provide pizza and pop to attendees at the March 7 lunch n' learn.
- The Chapter completed its first Citizen Centric Report (CCR) in September.
- Natalie Storm attended the 2011 PDC in Atlanta, Georgia and picked up awards for the previous year's accomplishments.
- Deb Schroeder and Patricia Townsend, attended the Midwest Region SLMR meeting in Kansas City, Missouri.
- Deb Schroeder, Lily Kryuchkova, Janice Jensen, Valerie Wedgeworth, and Khristan Kaufman attended the Sectional Leadership Meeting in Las Vegas, Nevada.
- Janice Jensen served as regional membership and Patricia Townsend served as regional communications.