



DES MOINES CHAPTER

Chapter History Report

June 1, 2013 – May 31, 2014 Program Year

Chapter Executive Committee:

- President – Gayle Isaac / Deb Krueger
- President Elect & Chapter Recognition – Deb Krueger
- Past President – Deb Schroeder, CPA
- Secretary – Kim Knight, CPA
- Treasurer – Gabe Stafford, CPA
- Professional Certification – Lilia Kryuchkova
- Chapter Recognition – Deb Krueger / Gabe Stafford, CPA
- By-Laws and Procedures & Historian – Patricia Townsend, CPA, CGFM
- Membership and Recognition – Cindy Weber, CPA, CGFM
- Programs and Education – Janice Jensen, CPA, CGFM
- Communications – Jyl Huskey
- Chapter Website – Denise Ragias, CGFM
- Early Careers – Valerie Wedgeworth
- Community Service – Natalie Storm, CPA, CGFM
- Accountability Outreach – Deb Schroeder, CPA

Monthly Meetings – 10 hours CPE Offered (1 hour each meeting):

- **June 5, 2013** – Andy Nielsen, Deputy Auditor of State, “Exercising Proper Fiduciary Controls”
- **September 18, 2013** – Jay Cleveland, State Accounting Enterprise, Department of Administrative Services, “State of Iowa Offset Program”
- **October 23, 2013** – Glenna Musselman, IPERS, and Andy Nielsen, Auditor of State’s Office, “Upcoming GASB Changes”
- **November 20, 2013** – Keith Luchtel, Executive Director and Bill Monroe, Board Chair, Iowa Public Information Board Office, “Iowa Public Information Board: Establishment, Purpose and Operations”
- **December 11, 2013** – Mary Mosiman, Auditor of State of Iowa, “Budgeting – Iowa’s Future”
- **January 15, 2014** – Kelly Green, Jacquie Holm-Smith and Michelle Boyd, Department of Administrative Services – Central Procurement Enterprise, “DAS Central Procurement Enterprise”
- **February 26, 2014** – Jennifer Moehlmann, Department of Administrative Services – GSE Buildings & Grounds, “Iowa State Capitol Complex Master Plan”
- **March 19, 2014** – Kristy Maitre, Tax Specialist, Center for Agricultural Law and Taxation, “Federal and State Tax Updates for Businesses and Tax Practitioners”
- **April 9, 2014** – Megan Tooker, Executive Director & Legal Counsel, Iowa Ethics and Campaign Disclosure Board, “Government Ethics”

- **April 29, 2014** – Annual Member Recognition Dinner. Jim Cunningham, office of the Auditor of State presented on "Fraud in Local Governments"

Educational Webinars and Seminars – 44 hours CPE Offered (2 hours each event, unless otherwise noted):

- **June 5, 2013 AGA Webinar** – “The Key Role of Performance Measurement in Leading your Community, Agency or Organization” presented by Michael Lawson, an affiliate faculty member at the State and Local Government Leadership Center at George Mason University
- **July 10, 2013 NASACT Webinar** – “GASB Review: 2013” presented by GASB Chairman-Elect David A. Vaudt, GASB, Director of Research, David R. Bean, and other GASB staff
- **August 7, 2013 NASACT Webinar** – “The Pension Challenge: Critical Issues to Implementing the New GASB Standards” presented by Jeff Markert, CPA, Partner, KPMG LLP, and Greg Driscoll, CPA, Partner, KPMG LLP
- **September 11, 2013 AGA Webinar** – “Fraud Deterrence, Prevention, and Detection” presented by David L. Cotton, CGFM, CPA, CFE, Chairman, Cotton & Company LLP, CPAs, Alexandria, Virginia
- **September 18, 2013 NASACT Webinar** – “Treasury Offset Program: How Federal and State Partnerships Can Cost Effectively Maximize Debt Recoveries” presented by U.S. Treasury including Wanda Rogers, Deputy Commissioner of Financial Services and Operations, Bureau of the Fiscal Service; Jeffrey Schramek, Assistant Commissioner, Debt Management Services; Ronda Kent, Deputy Assistant Commissioner, Debt Management Services; and Alyssa Riedl, Director of the Debt Collection Program Management Directorate, Debt Management Services. Also presenting will be James Keifer, Deputy Director, Compliance Administration, District of Columbia, and Carol Marshall, Revenue Tax Supervisor, Collection Division, State of Minnesota
- **October 9, 2013 AGA Webinar** – “Effective Internal Control: Understanding the New COSO Framework” presented by Mary E. Peck, CIA, CCSA, CGAP, CRMA, Director of the Office of Internal Control, New York State Office for People with Developmental Disabilities
- **November 13, 2013 AGA Webinar** – “Grants Management Reform Updates and Agency Insights – What to Expect in Fiscal Year 2014” presented by AGA and industry leaders
- **November 20, 2013 AGA Webinar** titled “How to Stay Cutting Edge in Tough Financial Times” presented by Gloria Jarmon, CGFM, CPA, Deputy Inspector General for Audit Services, U.S. Department of Health and Human Services and Melinda Miguel CFE, CIG, CFSA, PMP, CICA, Chief Inspector General, Executive Office of the Governor, State of Florida
- **December 11, 2013 AGA Webinar** – “Taking the High Road: How to Succeed Ethically When Others Bend the Rules” presented by Frank Bucaro, a professional writer and speaker on ethics who holds the Certified Speaking Professional designation through the National Speakers Association
- **January 15, 2014 AGA Webinar** – “Fraud Detection & Prevention: Using Technology for Auditing” presented by Laura M. Marlin, Esq., First Deputy Auditor, Office of the State Auditor, Massachusetts
- **February 5, 2014 AGA Webinar** – “What’s Trending in Financial Management, Oversight and IT?” presented by Relmond P. Van Daniker, DBA, CPA, Executive Director, AGA, Tom Greiner, CGFM, Accenture Federal Services, Denise Lippuner, Partner, Grant Thornton LLP and David M. Zavada, Partner, Kearney & Company
- **February 26, 2014 NASACT Webinar** – “OMB’s Final Rule: Uniform Administrative Requirements, Cost Principles and Audit Requirements for Federal Awards” presented

by Kathy Bialas, Assistant General Counsel, Community Development Division, US Dept of Housing and Urban Development, Nelson Clugston, Vice President, Maximus, Chris Zitzow, Senior Vice President, Maximus, and Tammie Brown, Audit manager, US Dept of Health and Human Services (3 hours CPE)

- **March 5, 2014 AGA Webinar** – “Assessing the Reliability of Performance Data” presented by Stuart S. Grifel, Instructor, Project Team Principal, Auditor Roles in Government Performance Measurement
- **March 19, 2014 AGA Webinar** – “Health Care Audits” presented by Dave Fleming, NY Office of the State Comptroller and Stephen Conway, US Department of Health and Human Services
- **April 1, 2014 NASACT Webinar** – “Pension Issues: Remaining Implementation Challenges and New Audit Guidance” presented by Jeff Markert, CPA, KPMG, and Greg Driscoll, CPA, KPMG
- **April 9, 2014 AGA Webinar** – “Fraud Prevention – You Found Outliers – Now What?” presented by Bill Kelly, CISA, CISM, Data Whispers
- **April 30, 2014 NASACT Webinar** – “ERP eProcurement and Vendor Self-Service” presented by Dale Kress, Project Manager, Advantage Procurement (CGi), Edgar C. Ross, State Controller (KY), and Thomas L. White, State Comptroller (AL)
- **May 21, 2014 AGA Webinar** – “Ethics: Figuring Out the Right Thing to Do and Then Having What It Takes to Do It!” presented by Alan Goodman, certified Master Trainer for Institute of Global Ethics
- **May 22, 2014 Chapter’s Annual Ethics Professional Development Conference** presented by Lance Noe, Director of Drake University’s Center for Professional Studies, and Professor in the Master’s Program at Drake University’s College of Business & Public Administration speaking on the topic “The Ethics of Good Decision Making”. This conference provided **7 hours of CPE** related to Business Ethics

Throughout the program year, information was provided on additional 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:

- **June-August, 2013** – Collected cash donations for Meals from the Heartland.
- **July 2013** – Donated Iowa product to National PDC Community Service Raffle
- **September-October, 2013** – Collected cash donations for the Susan G. Komen Race for the Cure. This event raises funds to be used towards breast cancer research with the hope of finding a cure. AGA Racers had a team that participated in the walk on Oct. 26 – Janice Evans, Rosemary Johnson, Kim Knight and Natalie Storm.
- **November-December 2013** – Collected cash donations for the Food Bank of Iowa.
- **January-February 2014** – Collected cash donations for Juvenile Diabetes.
- **March-April 2014** – Collected cash donations for Cystic Fibrosis.

Social Event:

- **April 29, 2014** – The annual evening meeting and awards was held in the evening at the Okoboji Bar and Grill, 6050 SE 14th St. in Des Moines. Spouses and other guests were invited. In addition to the interesting program on *Fraud in Local Governments*, the Chapter held its annual awards ceremony and passing of the gavel.

Membership:

- Added 5 new members from June 1, 2013 to May 31, 2014 – Steven Berkley, Billie Heth, Amy Pilcher, Tracie Kirkpatrick, and Ronald Swanson.
- 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.
- Membership Recruitment drive was held. A \$20 gift card went to the member bringing in the most guests in the months of November (Kim Knight), December (Kim Knight) and January (Deb Krueger). A new member, Billie Heth, joining in January received a \$20 gift card. She did not list a sponsor so no one received the \$50 gift card.
- A name was chosen at each general meeting (lunch 'n' learn) for a free meal at the annual awards meeting. Winners were Natalie Storm (Sept), Rosemary Johnson (Oct), Janice Jensen (Nov), Gabe Stafford (Dec), Janice Evans (Jan), Deb Schroeder (Feb), Tracie Kirkpatrick (Mar), and Marilyn Hanson (Apr). Five of these winners attended the awards meeting and received the free meal.
- Annual awards were presented at the April 29, 2014 meeting. Janice Evans was named Member of the Year. Instead of receiving a plaque, she opted to have the chapter make a donation in her name to either Food Bank or Meals from the Heartland.

CGFM:

- The Chapter offers a \$500 scholarship for any member who successfully completed the CGFM exam and met certain criteria for chapter membership and involvement.
- An additional \$500 was budgeted to be shared by those successfully completing the CGFM exams during any given year but do not qualify under the first incentive program.
- 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.
- Patricia Townsend & Gordon Thompson each received a \$500 CGFM Scholarship in June 2013 for attaining their CGFM certification in the 12-13 year. Gordon returned the check as his employer paid for his application and tests.

Other Activities & Accomplishments:

- 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 eleven years.
- The Chapter completed its third Citizen Centric Report (CCR) in September.
- Janice Jensen and Gayle Isaac attended the 2013 PDC in Grapevine, Texas.
- Deb Krueger attended the Midwest Region SLMR meeting in Bellevue, NE on January 14, 2014.
- The Chapter won honorable mention in the Group D website competition. The Chapter won first place in the Newsletter Award competition.
- Deb Krueger and Gabe Stafford attended the April 2014 Sectional Leadership meeting in Kansas City.
- Janice Jensen served as Regional Coordinator for Membership (Midwest AGA Region).