Association of Government Accountants Phoenix Chapter

Annual Report for 2018-2019 AGA Program Year

# I. Background

## Our Vision

The Phoenix Chapter of the Association of Government Accountants (AGA) actively creates an avenue for membership to share ideas with each other, to share knowledge and time with the community, and to promote the advancement of government standards and accountability within the profession.

## Our Mission

The Phoenix Chapter serves Arizona professionals in the government financial management community by providing quality, low-cost continuing education, promoting professional development and interaction among members, and fostering a commitment to community involvement as well as a sense of responsibility for advancing government accountability.

## Our Goals

* Provide high quality, low-cost continuing professional education to the membership and the government accounting community through audio conferences and live speakers.
* Promote the value of AGA membership in order to retain and expand membership.
* Promote the value of the Certified Government Financial Management (CGFM) program.
* Promote government financial management to colleges and universities and become spokespersons for the advancement of government accountability through quality course offerings to students.
* Provide a consistent local web site format and the technical support necessary to provide a web based venue that the membership can use to research current information relating to the Phoenix chapter.
* Promote networking among membership at chapter events.
* Promote Executive Board membership in order to diversify our ideas and strengthen our focus.
* Expand AGA membership throughout the state.

# II. Executive Board

Our Chapter Officers and Committee Members, as part of the Executive Board, work together to create a professional organization for the government financial management community. Our Officers and Committee Members for the 2018-2019 Program Year were as follows:

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| Officers: |  |
| Michelle Huckabay, CGFM | President  |
| Cindy Smith, CGFM | President-Elect |
| Gergana Kovatcheva, CCGFM | Treasurer |
| Paola Matson | Secretary |
| Gergana Kovatcheva, CGFM | Past President |
| Committee Chairs and Members: |  |
| Kim Prendergast, CGFM | Accountability Chair |
| Gergana Kovatcheva, CGFM | CGFM Committee Co-Chair |
| Jordan Dale | CGFM Committee Co-Chair |
| Michelle Huckabay, CGFM | Programs Committee Co-Chair |
| Getzamany Aragon | Programs Committee Co-Chair |
| Cindy Ensign | Community Service Chair |
| Kelly Alkhoury, CGFM  | Scholarship Committee Chair |
| Mary Adelman, CGFM  | Membership Committee Chair |
| Michelle Huckabay, CGFM | Newsletter Editor |
| Keith Orr, CGFM | Education Committee Chair |
| Jerry Snyder, CGFM | Education Committee Member |
| Anthony St. George | Education Committee Member |
| Robert Harwood | Education Committee Member |
| Getzamany Aragon | Young Professionals/Early Career Co-Chair |
| Marvin Mendieta | Young Professionals/Early Career Co-Chair |
| Anthony St. George | Communications Committee Chair |
| Anthony St. George | Sponsorship Committee Chair |
| Mary Adelman, CGFM | NCC Representative |
| Michelle Huckabay, CGFM  | Webmaster |

# III. Meetings

## 1. Chapter Luncheon Meetings with Guest Speakers:

The Phoenix Chapter held monthly luncheon meetings, usually on the second Wednesday of the month. Meetings were usually held at SkySong meeting facilities. The cost for attending the regular monthly luncheon meetings was $25.00 for members and $40.00 for nonmembers. We offered 28 hours of CPE over 13 meetings throughout the Program Year.

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| --- | --- | --- |
| **Date** | **Topic** | **Attendees** |
| September 12, 2018 | Communications  | 16 |
| October 10, 2018 | Internal Control: Leveraging IT to Detect Fraud, Waste, and Abuse | 21 |
| November 14, 2018 | Blockchain | 28 |
| December 19, 2018 | Managing Resources Through the Budget | 25 |
| January 23, 2019 | Grants Management  | 22 |
| February 6, 2019 | Top Issues Facing State and Local Governments | 26 |
| March 1, 2019 | ASRS, Deferred Compensation, and Tax Updates | 38 |
| March 6, 2019 | Finance: Updates to New Tax Reform | 28 |
| March 27, 2019 | Cybersecurity: Protecting and Utilizing Government Data | 19 |
| April 10, 2019 | The FBI on White Collar Crimes and Following the Money | 36 |
| May 15, 2019 | Fraud/Data Analytics: Fighting Fraud with Analytics | 22 |
| May 29, 2019 | Robotics Process Automation | 25 |
| June 12, 2019 | Stress Can Be a Good Thing | 22 |
| Grand Total |   | 328 |

## 2. Special Meetings:

Two special meetings were held during the Program Year: a four hour ethics class to allow Arizona CPA’s to obtain required ethics CPE for CPA certification and the AGA Professional Development Training (PDT), which provided eight hours of CPE on a variety of governmental topics. The Ethics class was held at the Maricopa Community Colleges District Office in conjunction with the Arizona Society of Certified Public Accountants (ASCPA), while the PDT was held at the Conference Center by Rio, at Rio Salado College, in Tempe, Arizona.

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| **Date** | **Topic** | **Attendees** |
| January 18, 2019 | Ethics with ASCPA | 34 |
| April 26, 2019 | AGA Phoenix Chapter Professional Development Training | 105 |
| Grand Total |   | 139 |

The PDT agenda is listed below:

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| **Time** | **Topic** | **Presenter** |
| 7:30-8:00 | Registration and Continental Breakfast | N/A |
| 8:00-8:10 | Welcome Address | Michelle Huckabay, President |
| 8:10 | Welcome and Introduction of Session | Chad Kirkpatrick, Grant Thornton LLP |
| 8:10-9:00 | Your Professional Opportunities and Journey  | John Lynskey, AGA National President |
| 9:00-9:10 | Break | N/A |
| 9:10-10:00 | Yellow Book Updates | Kathleen Wood, Arizona Auditor General’s Office |
| 10:00-10:10 | Break | N/A |
| 10:10-11:00 | 2019 GASB Updates | Michael Stelpstra, Arizona Auditor General’s Office |
| 11:00-11:10 | Break | N/A |
| 11:10-12:00 | Current Status of Municipal Bonds | Kurt Freund, RBC Capital Markets |
| 12:00-12:30 | Lunch | N/A |
| 12:30-1:20 | 2019 State Treasurer’s Updates  | Mark Swenson, Deputy Treasurer, Arizona State Treasurer’s Office |
| 1:20-1:30 | Break | N/A |
| 1:30-3:10 | Economic Development Panel Discussion;  | Cindy Smith, Facilitator Dan Henderson, Town of GilbertAric Bopp, City of MesaLori Collins, City of Phoenix |
| 3:10-3:30 | Break – Ice Cream Social | N/A |
| 3:30-4:20 | Audit Updates, Including Cybersecurity in Financial Statement Audits | Brian Hemmerle, Henry+Horne |

## 3. Chapter Board Meetings

Our Chapter also held Chapter Board Meetings throughout the Program Year. Chapter Board Meetings started the Program Year off strong with a Leadership Retreat in June, 2018, followed by Board meetings in August, September, November and December, 2018 and January, March, April, and May, 2019. Chapter officer elections were held in March, 2019.

# IV. Community Service Projects

The Community Service Events were coordinated by Cindy Ensign. The Community Service Committee chair is responsible for promoting and finding volunteers for community service projects, which allow members to contribute skills, labor, or funds to community based activities. Events this year included the following:

* Participated in Feed My Starving Children.
* Participated in Toys for Tots.
* Participated in Food bank collection for St. Vincent de Paul.

# V. Scholarships

The Phoenix Chapter attempts to sponsor scholarships each year to deserving students at Arizona colleges and universities. Scholarships are awarded to undergraduate (sophomore or higher) or graduate students in an accounting or financial management discipline who are interested in the pursuit of public financial management careers. This year our Chapter awarded one $1,000 scholarship to a student identified for academic excellence and community service achievements and one $500 scholarship to a second deserving student. The entire board served as members of the Scholarship Committee.

# VI. Young Professionals / Early Career

This committee promotes AGA membership and careers in government financial management to students, and to those early in their careers. The committee is co-chaired by Getzamany Aragon and Marvin Mendieta. During the year, the committee gave a presentation at Grand Canyon University to the student accounting club. Additionally, they sponsored a discussion by AGA National President, John Lynskey, at the Department of Administration, to State of Arizona accounting and finance interns, as well as early career employees.

# VII. CGFM

This committee promotes and assists individuals in obtaining AGA’s Certified Government Financial Manager certification. Gergana Kovatcheva was the Chair of the CGFM Committee. During the Program Year, the CGFM Committee made available CGFM exam study guides for members to borrow for exam preparation. The CGFM committee also offered scholarships to individuals who pass portions of the CGFM certification examination

# VIII. Membership

For the 2018-2019 Program Year, the Phoenix Chapter of AGA had 161 members, down slightly from 166 in 2017-2018. To increase our membership, we are reaching out to non-renewing members to see how we can meet their needs and reaching out to non-members to encourage them to join.

# IX. Sponsorship

The Chapter formalized a sponsorship program in 2018-2019, as way to bring in business partners that want to support what AGA is doing, and can help us achieve our goals. This committee was chaired by Anthony St. George. The committee approved a flyer for use that outlines the sponsorship opportunities with the Chapter. Potential sponsors were identified and the flyer was shared with these organizations. Three organizations sponsored our PDT in 2018-2019.

# X. Newsletters

The Phoenix Chapter published twelve newsletters in the 2018-2019 Program Year, between July 2018 and June 2019. The newsletters were produced by Michelle Huckabay, Newsletter Editor. Michelle informed members of upcoming events, training, and job opportunities.

# XI. Website

The Phoenix Chapter of AGA maintains a web site at <https://www.agacgfm.org/Chapters/Phoenix-Chapter/Home.aspx>. The Webmaster, Michelle Huckabay, kept information on our website current. The website includes the Chapter Vision, Mission and Goals; How to become a member; Newsletters, Minutes, and Treasurer Reports; Community Service information; Scholarship information; Job Postings; and Contact information for Board Members, as well as AGA Nationals news.

# XII. Chapter Recognition Program

The Phoenix Chapter of AGA earned sufficient Chapter Recognition Points during the 2018-2019 Program Year to be the recipient of the Platinum Chapter Designation Award from AGA National.

# XIII. Accountability

The Accountability Committee is chaired by Kim Prendergast. On behalf of the Phoenix Chapter, Kim prepared the FY18 Citizen Centric Report, marking the fourth year that the Chapter has prepared this meaningful report. The report is made available to members of the Chapter, and the general public, on the AGA Phoenix Chapter website.