

# NEWSLETTER

November 2020

## PRESIDENT'S MESSAGE

Dear Members,

I recently applied to our National AGA chapter for an innovation award on behalf of Kentucky Retirement Systems (KRS). Many associate innovation as only related to technological advances. However, innovation also applies to organizational systems and operations. Innovation is not invention; it is improving what already exists. The following is an excerpt from that application.

In *Perspectives on Innovation*, Malerba and Brusoni write, "This topic [innovation] is an extremely important one, but it has been disregarded for quite some time. Nowadays, however, everybody agrees that innovation does not happen in the vacuum and that the institutional environment plays a key role," (p. 5). To that end, the KRS Executive Team has empowered and encouraged all KRS team members to think outside of the box about how we as an institution can leverage technology and teamwork to be more efficient and improve customer service for our 394,490 members.

In order to increase transparency, efficiency, and accountability, KRS has worked towards offering more online services, increasing email communications, and safeguarding organizational security by breaking down traditional institutional norms. This transformation began with one of KRS' mandates to insist on a culture of continuous enhancement in everything we do. That is the very definition of innovation.

Our executive team has supported myriad innovative projects across the agency that include, but are not limited to, the following: Self-service redesign (ESS, MSS, and RSS); E-balloting implementation; cyber security assurance; email harvesting; benefits webinars (retirement, reemployment, general overview); and our Continuity of Operations Plan (COOP).

To accomplish its mandates, KRS consulted with team members across the organization to create the COOP to ensure that the most important and time critical operations are performed efficiently and with minimal disruption, especially during an emergency. The document provides guidance for implementing programs to allow KRS to perform its critical operations during and following an emergency. The major goals of this plan are as follows:

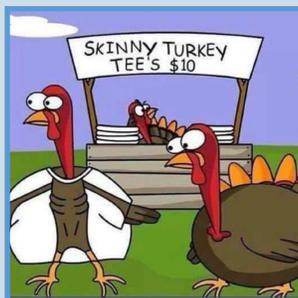
- To provide a quick reference for KRS management during a business continuity event.
- To minimize interruptions to normal KRS operations.
- To limit the extent of disruption and damage.
- To minimize the economic impact of the interruption.
- To establish alternative means of operation in advance.
- To train personnel with emergency procedures.
- To provide for rapid restoration of service.

On the technology front, KRS is unique compared to other state agencies because we do not report directly to the Commonwealth Office of Technology. This allows our IT team to address issues that are specific to our organization which includes security, adherence to HIPAA, and customer service—and they have done a bang-up job. However, organizationally, you have the ability to affect your work culture. I feel very fortunate to have an executive team that encourages input from all KRS team members. If you are a leader in your organization, reach out to your employees to get feedback on how you can improve. Do not underestimate the power of teamwork.

I hope all of you and yours are doing well.

All best,

Jared Crawford, CKY AGA President



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<http://ckyaga.com/>

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# In the Spotlight

## Kristen Coffey

### Division Director, Kentucky Retirement Systems

Bachelor of Science—Accounting with a minor in Psychology, Certified Internal Controls Auditor

**How did you choose government financial management as your career?** After taking an Accounting class in high school, I knew that was the field I wanted to pursue. My favorite class was Auditing, so that seemed like the right choice after graduation. At that time, I lived in Tennessee. I attended a job fair and spoke to a representative from the Tennessee Comptroller of the Treasury (similar to Kentucky APA). The job sounded interesting and I knew that was where I wanted to work. About a month after meeting with the Comptroller, I accepted a job offer and began my career in governmental accounting. After moving to Kentucky, I worked in the private sector with Toyota Tsusho America, Inc. The job was challenging (in a good way) and I enjoyed travelling to the various locations (all over the U.S. and Canada) and learning about their various roles in manufacturing. However, I did not feel the work was as fulfilling as work in the public sector. When an opportunity opened up, I returned to employment with the Commonwealth of Kentucky.

**What advice would you give a recent graduate joining the field?** When it comes to auditing, there are skills you need that you do not learn in school. Most important, be a good listener. This will get you farther in your job and life. When you ask people questions, listen to their answer; do not worry about your next question. If you just let the person talk, they will typically answer every question you have without you even having to ask it. Also, do not just listen to words; listen to tone and watch body language. You would be surprised how much you can learn from what is not said.

**What accomplishments are you most proud of in your career?** When I look at my career, I see several accomplishments. I have helped every place I have worked move towards electronic documentation, which has resulted in financial savings and increased employee efficiency. I have found several instances where controls were lacking that led to misuse of funds and/or theft. I also found evidence of bid rigging (that is an interesting story). The recommendations made in my audits helped establish controls to prevent these issues in the future. However, none of those are what make me the most proud. The thing that makes me the most proud is seeing the people that I have guided/supervised move on to bigger things. There is nothing better than seeing those people become successful, happy individuals. When someone calls you and thanks you for supporting them and giving them confidence, that is when you know you have truly made a difference.

**Do you have a mentor and how has this person helped you?** I do not have an official mentor, but I worked with one person a great deal during my time with the Comptroller of the Treasury. Over the years, this person also became a great friend. When I was faced with a decision to remain in Tennessee or move to Kentucky, I struggled with what to do. I knew moving was the best thing for me, but I was nervous about leaving my family and friends. I talked about my concerns with this person and he gave me some advice that I followed then and have followed many times since – when you have a decision to make, you cannot worry about everyone else, you must focus on what is best for you. If you do what is best for you, then you will be happy and those that love you will support you and be happy for you, too. If someone does not support you, then it may be that they do not have your best interest at heart and you do not need those type of people in your life.

**How did you get involved in AGA?** When I worked with the Kentucky Transportation Cabinet, many coworkers were members of AGA. I went to a few meetings and training events and realized the value of this type of professional organization. Last year I was able to take on a bigger role by joining the Chapter Executive Committee.

**Describe your dream vacation.** I love the beach! My dream vacation would be to an uninhabited tropical island with crystal clear water. I love to sit on the beach and watch the waves and just get away from everything.

**What is one goal that you plan to accomplish during your adult lifetime?** I want to travel to Scotland. I have always wanted to visit there and part of my family is from the area (I have the DNA results to prove it). I want to wait until my son is a little older because I think he will enjoy it more. I told him about going and he insists that we take time to hunt for the Loch Ness Monster while we are there. If we find her, I will let you know.

**Share one thing that you love to do that you get to do nearly every day.** This one is easy – playing with my son. He is six years old. He is smart, funny, and energetic. He reminds me of what is important in life.





# Mark Your Calendar

» UPCOMING EVENTS

## UPCOMING MEETING

November 9, 2020

\*\$50 for Members, \$100 for Non-Members\*

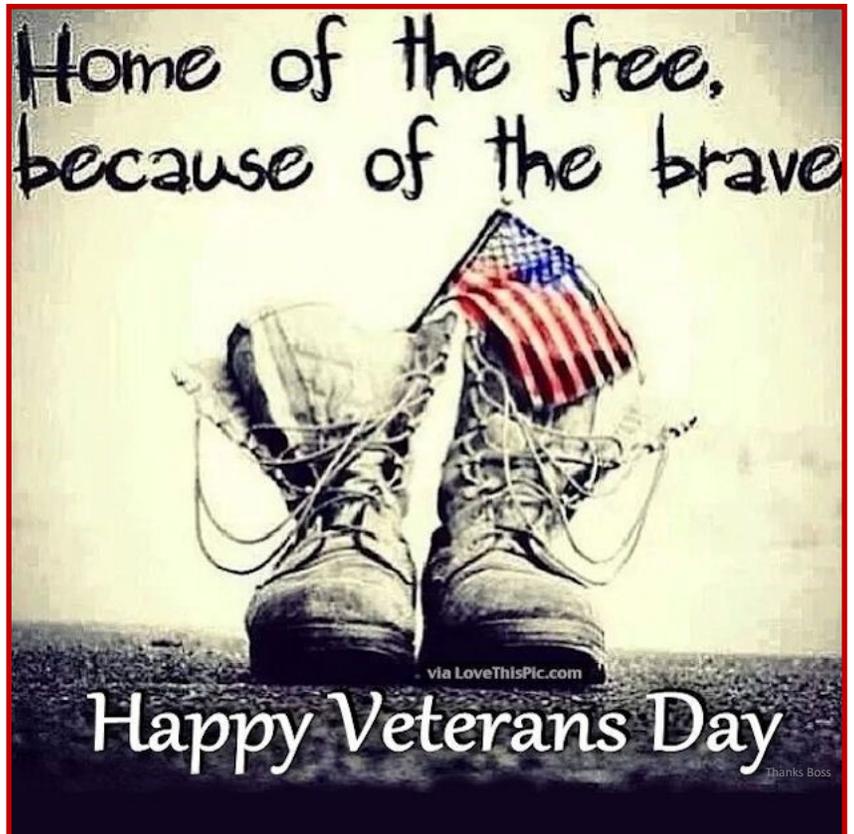
(Pay through GoToWebinar)

### Upcoming AGA Programs

Date	Speaker	Topic	CPE Hours
November 9, 2020	Central Kentucky AGA Fall PDT	Emerging Issues in State & Local Gov., GASB Standards Updates, Fraud	8

**Note:** If there's a topic or speaker you'd like, please reach out to the 2019—2020 Education Co-Chairs. Their contact information can be found on the last page of the newsletter.

THANK YOU  
VETERANS



# Fall PDT Presenters

## Lisa Parker

### Senior Project Manager, GASB



Lisa Parker is a senior project manager with the Governmental Accounting Standards Board (GASB). Prior to joining the GASB in 2008, Lisa worked for Runyon Kersteen Ouellette CPAs for 10 years, the town of Old Orchard Beach, Maine as finance director and interim town manager for 2 years, and the city of Saco, Maine as finance director for 8 years.

Lisa is a certified public accountant and a chartered global management accountant. She also is a member of the Association of Governmental Accountants, the American Institute of Certified Public Accountants, and the Maine Society of Certified Public Accountants, where she served as president. Previously, Lisa was president of the Maine Governmental Finance Officers Association, an executive board member of the New England Governmental Finance Officers Association, and a member of a national GFOA standing committee.

## R. Kinney Poynter, CPA

### Executive Director, NASACT

Kinney Poynter is the Executive Director for the National Association of State Auditors, Comptrollers, and Treasurers (NASACT). In this capacity, he is responsible for the overall operations of NASACT as well as the programs of the National Association of State Comptrollers and National State Auditors Association. NASACT is a professional organization whose mission is to assist state leaders to enhance and promote effective and efficient management of governmental resources. Kinney has been with NASACT since 1989, previously serving as the association's Deputy Director and various other positions.

In addition to his experience with NASACT, he has been a partner of a local public accounting firm in Lexington, Kentucky, and a principal auditor with the Kentucky Auditor of Public Accounts, where he conducted financial, performance, and investigative audits on state agencies and local governments. While in public practice, he performed single audits on various nonprofit organizations.

Kinney has BS and MS degrees in accounting from the University of Kentucky and is a Certified Public Accountant (CPA). He is a member of the American Institute of Certified Public Accountants (AICPA) and the Association of Government Accountants (AGA). He previously served on the AICPA Governing Council. He is also a member of the Kentucky Society of Certified Public Accountants, where he has served as chairman of the Governmental Accounting Committee. Kinney has served as an instructor domestically and internationally on a variety of governmental accounting and auditing issues.



## Daniel Porter, CFE

Daniel Porter, CFE, has conducted civil and criminal investigations for over 25 years as a licensed private investigator, a loss prevention manager, and as an investigator with the State of Tennessee. Currently, he is a Senior Investigator in the Division of Investigations where he investigates fraud for the Tennessee Comptroller of the Treasury.

He is a Cum Laude graduate from Middle Tennessee State University's Criminal Justice Program and a Certified Fraud Examiner. He has provided training at AGA, AASHTO, CFE, GFOA, IIA, and NASACT conferences as well as for governmental agencies and professional organizations internationally and in various states including the Tennessee Bureau of Investigation, the Kentucky League of Cities, the Indiana CPA Society, the Oregon CPA Society, and the Florida Institute of CPAs. He is a guest lecturer at Middle Tennessee State University and the Vanderbilt University School of Law.





## Central Kentucky Chapter AGA

### Professional Development Training

Monday, November 9, 2020

7:45 AM-4:45 PM

8 CPEs

*Emerging Issues in State and Local Government,  
GASB Standards Updates, and Fraud*

Registration: \$50 for AGA Members/\$100 for non-AGA Members

Please register for CKY AGA Fall PDT by November 8, 2020 at:

<https://attendee.gotowebinar.com/register/102490286719770640>

After registering, you will receive a confirmation email containing information about joining the webinar.

Space is limited to 250 attendees, so register early!

Interested in joining the CKY AGA Chapter? Please visit  
<http://ckyaga.com/> for more information.



## Will You Answer National President, Wendy Morton-Huddleston's Challenge to Commit to the Power of 7?

Want to help strengthen your association and have the chance to win fun prizes? Participate in AGA's Power of 7 recruitment campaign, running Oct. 1, 2020 to April 30, 2021!

This 7-month campaign is designed to strengthen AGA by challenging every member to recruit 7 new members. When you recruit a new member, you'll receive a recruiter lapel pin as well as a reusable AGA face mask and be entered into both our monthly prize drawings and the grand prize drawing for a complimentary trip to PDT in Nashville.

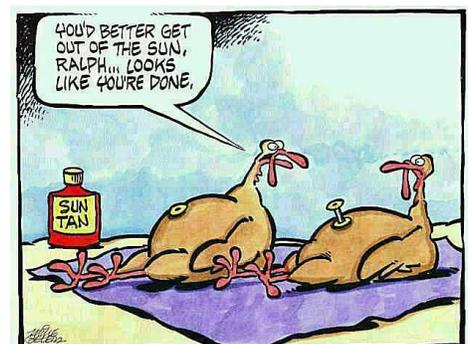
As members, you are the best recruiters for AGA since you know what membership means to you and your career. Ask your friends and colleagues to join AGA today — don't forget to give them your ID number!

## NLT is 100% Virtual!

National Leadership Training (NLT) is the essential event for developing and training government financial professionals to excel as leaders in today's competitive market. NLT will be held virtually, Feb. 24–25, 2021. This training offers up to 14 CPE hours.

## National Collegiate Leadership Program

Do you know a junior or senior college student who could benefit from listening and learning from government leaders? Currently enrolled junior and senior college students are invited to participate in [AGA's 2021 National Collegiate Leadership Program](#)! Recipients of this scholarship will attend AGA's virtual 2021 [National Leadership Training](#) on Feb. 24–25, 2021. These students will gain valuable one-on-one experience engaging with senior government leaders while learning more about government financial management careers. Register by 12:00 p.m. ET on Friday, Dec. 11.



# AGA CENTRAL KENTUCKY CHAPTER

## September Secretary's Report

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### AGA Central Kentucky Chapter

#### Chapter Executive Committee

Meeting Minutes for meeting held: September 2, 2020

Members present on Zoom: Phil Nally, Alice Wilson, Catherine Hunt, Jared Crawford, Kristen Coffey, Kristen Hundley, Elizabeth Smith, Ann Case, Michelle Sutton, Joe McDaniel, Rachael Prestenbach, Eveanna Barry, and Krista Jackson.

1. Call to Order by Jared.
2. Regular Reports:
  - a. June Meeting minutes – Motion to approve – Phil, seconded by Evie. Motion passed.
  - b. June Treasurer's report – Motion to approve - Krista, seconded by Kristen. Motion passed.
  - c. Membership information – We currently have 2 new members, Kathryn Hook, League of Cities and Tony Meeks, Lake Cumberland Area Development District. Total chapter membership is 161.
3. Old Business
  - a. Programs update:
    - a. September—John Hicks, State Budget Director webinar 12:00 (1 CPE)
      - i. Non-members will be charged \$5 and can pay through pay pal
    - b. Please provide at least 1 suggestion of a speaker/topic to the education committee by September 10<sup>th</sup>.
  - b. Reminder: Submit newsletter items by 15<sup>th</sup> of the month (Terra)
  - c. Updated bylaws, Strategic Plan, Chapter Reporting and 990-N were all submitted to National on 9/1.
  - d. Jared, Alice and Phil shared the experience they each had with virtual LEAD.
  - e. The website will be updated throughout the year to the National platform.
  - f. GoToMeeting had to be upgraded to GoToWebinar in order to handle the upcoming virtual presentations. The software was purchased at a total cost \$1,188.
  - g. Other
4. New Business
  - a. AGA Internal Control and Fraud Training 2020 is coming up September 23-24. The cost is \$300 for AGA members and 14 CPE.
  - b. Scholarships for the fall have been reduced to one undergraduate and one graduate due to the lack/uncertainty of revenue for the chapter.
  - c. CCR is due on October 31, 2020.
  - d. In order to be more transparent, Kristen Coffey will be documenting the chapter's internal controls and the document will be posted to the website and in the CCR
  - e. Quarterly donation – discussion to consider Lee Initiative which accepts donations and then disburses them in the form of tips to the service industry.
5. Next meeting – October 6, 2020 (11:30 – 12:30) Further details to be shared
6. Adjourn

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# September TREASURER'S REPORT

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<p>Central Kentucky AGA Treasurer's Report Month Ended September 30, 2020</p> <p>Reconciled Cash Balance as of 08/31/2020 \$ 26,736.12</p> <table border="1"> <tr><td colspan="2">General Receipts:</td></tr> <tr><td>Monthly Program Fees - Cash</td><td></td></tr> <tr><td>Monthly Program Fees - PayPal</td><td>71.31</td></tr> <tr><td>Monthly Program Fees - Check</td><td></td></tr> <tr><td>Monthly Program Fees - Direct Dep</td><td></td></tr> <tr><td>Central KY Membership Dues</td><td></td></tr> <tr><td>Interest Earned</td><td>2.17</td></tr> <tr><td></td><td>73.48</td></tr> <tr><td colspan="2">Education Receipts:</td></tr> <tr><td>PDT Training Fees</td><td>-</td></tr> <tr><td>PDT Training Fees - PayPal</td><td>-</td></tr> <tr><td></td><td>-</td></tr> <tr><td><b>Total Receipts</b></td><td><b>73.48</b></td></tr> <tr><td><b>Total Funds Available</b></td><td><b>26,809.60</b></td></tr> </table>	General Receipts:		Monthly Program Fees - Cash		Monthly Program Fees - PayPal	71.31	Monthly Program Fees - Check		Monthly Program Fees - Direct Dep		Central KY Membership Dues		Interest Earned	2.17		73.48	Education Receipts:		PDT Training Fees	-	PDT Training Fees - PayPal	-		-	<b>Total Receipts</b>	<b>73.48</b>	<b>Total Funds Available</b>	<b>26,809.60</b>	<p>Less: Expenses (310.00)</p> <p>Checkbook Balance 09/30/2020 <b>\$ 26,499.60</b></p> <p>Less: Education Fund Balance -</p> <p><b>General Fund Balance 09/30/2020 \$ 26,499.60</b></p> <table border="1"> <tr><td colspan="2">General Expenses:</td></tr> <tr><td>David Taylor - Monthly Website</td><td>85.00</td></tr> <tr><td>AGA NCSF - Quarterly Donation</td><td>200.00</td></tr> <tr><td>WUKY Donation - J. Cheves</td><td>25.00</td></tr> <tr><td></td><td>310.00</td></tr> <tr><td colspan="2">Education Expenses:</td></tr> <tr><td></td><td>-</td></tr> <tr><td></td><td>-</td></tr> <tr><td><b>Total Expenses</b></td><td><b>\$ 310.00</b></td></tr> </table>	General Expenses:		David Taylor - Monthly Website	85.00	AGA NCSF - Quarterly Donation	200.00	WUKY Donation - J. Cheves	25.00		310.00	Education Expenses:			-		-	<b>Total Expenses</b>	<b>\$ 310.00</b>	<p>Central Kentucky AGA Change in General Fund Balance Month Ended September 30, 2020</p> <p>General Fund Balance 08/31/2020 \$ 26,736.12</p> <p>Transfer of Education Fund Balance</p> <p>Monthly Receipts 73.48</p> <p>General Expenses 310.00</p> <p><b>Net Increase (Decrease) in General Fund Balance (236.52)</b></p> <p><b>General Fund Balance 09/30/2020 \$ 26,499.60</b></p> <p>Central Kentucky AGA Change in Education Fund Balance Month Ended September 30, 2020</p> <p>Education Fund Balance 08/31/2020 \$ -</p> <p>Monthly Receipts \$ -</p> <p>Monthly Expenses \$ -</p> <p>Transfer to General Fund</p> <p><b>Net Increase (Decrease) in Education Fund Balance -</b></p> <p><b>Education Fund Balance 09/30/2020 \$ -</b></p>
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CCU-Checking	26,494.60
CCU-Savings	5.00
	<b>26,499.60</b>

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AGA news



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volunteer



Submit future  
Newsletter material



Visit our website at  
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# 2019–2020 Chapter Executive Committee Members

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President:	<a href="#"><u>Jared Crawford</u></a>
President-elect:	<a href="#"><u>Alice Wilson</u></a>
Immediate Past President:	<a href="#"><u>Krista Jackson</u></a>
Treasurer:	Elizabeth Smith
Secretary:	<a href="#"><u>Ann Case</u></a>
Education Co-Chair:	<a href="#"><u>Eveanna Barry</u></a>
Education Co-Chair:	<a href="#"><u>Kristen Coffey</u></a>
Education Co-Chair:	<a href="#"><u>Michelle Sutton</u></a>
Membership/Attendance:	<a href="#"><u>Catherine Hunt, CGFM</u></a>
Historian:	<a href="#"><u>Rachel Prestenbach</u></a>
Newsletter Editor:	<a href="#"><u>Terra Coffey</u></a>
Co-Webmaster:	<a href="#"><u>Amy Small, CGFM</u></a>
Co-Webmaster:	<a href="#"><u>Joe McDaniel</u></a>
Accountability (CCR):	<a href="#"><u>Kristen Hundley</u></a>
CGFM:	<a href="#"><u>Melissa Klink</u></a>
Young Professionals:	<a href="#"><u>Jetta Collett</u></a>
Community Service Co-Chair:	<a href="#"><u>Jodi Correll</u></a>
Community Service Co-Chair:	<a href="#"><u>Phil Nally, CGFM</u></a>
Chapter Travel Coordinator:	<a href="#"><u>Terra Coffey</u></a>
National Council of Chapters Representative:	<a href="#"><u>Phil Nally</u></a>

**Are you looking to build your professional networking skills? Do you have a passion for AGA and want to share it with others? If so, contact a current Committee Member!**