

AGA – Des Moines Chapter  
Chapter History Report  
June 1, 2008 – May 31, 2009 Program Year

**Committee:**

- President – Valerie Wedgeworth
- President Elect – Cindy Weber, CPA
- Past President – Suzanne Dahlstrom, CPA, CGFM
- Secretary/Treasurer – Angela D. James, CPA
- Professional Certification – Natalie Storm, CPA
- Chapter Recognition – Cindy Weber, CPA
- By-Laws and Procedures – Janice Evans, CPA, CGFM
- Member Recognition – Susan Battani, CPA, CGFM
- Membership - Cheryl D. Mather, CPA, CGFM
- Programs and Technical Meetings – Andrew E. Nielsen, CPA, CGFM and Susan Battani, CPA, CGFM
- Education – Stan Kuhn, CPA, CGFM
- Communications – Kim Knight, CPA
- Chapter Website – Marlene Dorenkamp, CPA, CGFM and Angela D. James, CPA
- Early Careers – Deb Schroeder
- Community Service – Michelle Wendel, CPA
- AICPA, GASB, FASB, NASB Liaison – Suzanne Dahlstrom, CPA, CGFM

**Monthly Meetings (9 hours CPE Offered):**

- September 10, 2008 at Iowa Department of Education, Grimes Building – Carl Salmons, former CIETC Board of Directors’ Attorney, spoke on “The Many Lessons Learned as an Attorney and His Dealings with 28E Agreements. ”. (1 hour CPE)
- October 7, 2008 at Mercy Capitol Hospital Cafeteria, Side Room – Honorable Michael Mauro, Secretary of State spoke on “Iowa Elections Update”. (1 hour CPE)
- November 4, 2008, at Mercy Capitol Hospital Cafeteria, Side Room – Tom Shepherd, Director, Department of Administrative Services, Technology Enterprise spoke on “IT & Personal Productivity”. (1 hour CPE)
- December 2, 2008, at Mercy Capitol Hospital Cafeteria, Side Room – Honorable David Vaudt, Auditor of State, spoke on “Iowa Financial Update”. (1 hour CPE)
- January 6, 2009, at Mercy Capitol Hospital Cafeteria, Side Room – Kristy Maitre, Internal Revenue Service, spoke on “IRS Update”. (1 hour CPE)
- February 11, 2009, at Iowa Vocational Rehabilitation Services, Jessie Parker Building – Anette Campbell, Director, Performance and Investigation Division, Office of the Auditor of State spoke on “Fraud Indicators”. (1 hour CPE)
- March 3, 2009 at Mercy Capitol Hospital Cafeteria, Side Room – Honorable Bill Northey, Iowa Secretary of Agriculture, spoke on “The Role of Agriculture in our State and the Impacts it Can Have on Our Economy”. (1 hour CPE) The Chapter also March of each year as CGFM Month with special treats.
- April 8, 2009 at Mercy Capitol Hospital Cafeteria, Side Room – Tina Pothoff & Emily Hajek, Rebuild Iowa Office spoke on “Disaster Recovery Efforts”. (1 hour CPE)

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- May 5, 2009 at Okoboji Bar & Grill – Gavin Jerome, Motivational Speaker, spoke on “Workplace Humor”. (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 (26 hours CPE Offered):**

- July 17, 2008, at the Iowa Department of Education, Grimes Building – This educational event titled **GASB Review: new Standards and the Latest on SEA** 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 Attmore, Chairman, Governmental Accounting Standards Board; David Bean, Director of Research and Technical activities for the Governmental Accounting Standards Board. Katherine Cancro, Postgraduate Technical Assistant for the Governmental Accounting Standards Board and Lisa Parker, Project Manager with the Governmental Accounting Standards Board
- August 20, 2008, at the Iowa Department of Education, Grimes Building - This educational event titled **Everything You Wanted to Know About Performance Reporting, But Were Afraid to Ask** 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 Rebekah Stevens, Planning and Performance Coordinator, Metro Nashville, TN; Mike Taylor, CPA, CIA, City Auditor, Stockton, CA; and Drummond Kahn, CGFM, CIA, Director, Audit Services, Portland OR.
- September 11, 2008, at the Iowa Department of Education, Grimes Building - This educational event titled **Fraud Prevention and Detection – The Cost With No Return** 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 Bruce N. Crandlemire, CPA, Senior Consultant, EAM, Inc. /Mosley & Associates
- September 24, 2008, at the Iowa Department of Education, Grimes Building - This educational event titled **Implementing GASB Statement No. 49: A Cooperative Effort in New York** 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 Suzette Baker, CPA, CGFM, Assistant Director, Bureau of Financial Reporting, New York Office of the State Comptroller; Maria Moran, CPA Senior Accountant, Bureau of Financial Reporting, New York Office of the State Comptroller; Tim Reilly, CPA, Esq, Manager, Bureau of Financial Reporting, New York State Comptroller’s Office David Finlayson, Chief, Fiscal Management Section, Division of Environmental Remediation, New York State Department of Environmental Conservation; Shawn Warren, CPA, Partner, KPMG’s New England Public Sector Practice and Wesley Galloway, CPA, Project Manager, Governmental Accounting Standards Board,.
- October 15, 2008, at the Iowa Department of Education, Grimes Building - This educational event titled **Results of AGA’s Research on Performance Based Management Reporting** 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),

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- and (Association of Local Government Auditors (ALGA). The speakers were Clif Williams, CGFM, CPA, Partner, Grant Thornton; Jim Brimson, MS, Founder of Activity Based Management Institute; Marty Rajk, Deputy Assistant Commandant for Resources and Deputy CFO for the U.S. Coast Guard; Frank Wood, Deputy Office Chief, Office of Performance Management and Decision Support, U.S. Coast Guard; Kristen Lee Leipart, Ph.D., Deputy CFO for Budget and Policy, Federal Transit Administration; and Peter Chipman, Budget Analyst, Office of Budget and Policy, Federal Transit Administration.
- November 12, 2008 at the Iowa Vocational Rehabilitation Services, Jessie Parker Building. This educational event titled **Internal Control Overview – SAS Suite** provided 1 hour of CPE. The speaker was Susan Battani, CPA, CGFM, Director, Office of the Auditor of State.
  - November 12, 2008 at the Iowa Vocational Rehabilitation Services, Jessie Parker Building. This educational event titled **Understanding the Importance of Soft Controls in Improving Operations** 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 Mark Mitchell, MBA, CGFM, CIA, Audit Director, New York State Energy Research and Development Authority and Michael Piazza, MBA, Director of Program Development and Training for the Institute of Internal Controls.
  - December 10, 2008 at the Grimes State Office Building, Iowa Department of Education State Board Room - This educational event titled **21<sup>st</sup> Century Financial Managers: New Mix of Skills and Education Levels** 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 John D. Webster, CGFM, CPA, Former Chief Financial Officer, Library of Congress, Chair of the AGA Audit Committee; Kenneth Smith, Ph.D, Professor, Arkinson Graduate of Management, Willamette University; John J. Radford, CGFM, CIA, CFE, Controller, State of Oregon, Member of the AGA National Executive Committee.
  - January 21, 2009, at the Grimes State Office Building, Iowa Department of Education State Board Room - . This educational event titled **How XBRL Can Enable Improved Financial and Performance Reporting** 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 Clifton A. Williams, CGFM, CPA, Partner, Grant Thornton LLP; and James Brimson, MS, founder of Activity Based Management Institute
  - January 28, 2009 at the Iowa Vocational Rehabilitation Services, Jessie Parker Building - This educational event titled **Ethics in Work and Life** was a webinar hosted by the Des Moines AGA Chapter and jointly sponsored by National AGA, NASACT, and ALGA. The speaker was D. Scot Loyd, CGFM, CPA, partner with the firm Swindoll, Janzen, Hawk & Loyd, LLC of McPherson, Kansas.
  - February 11, 2009 at the Iowa Vocational Rehabilitation Services, Jessie Parker Building - This educational event titled **Building Fraud Risk Assessment Into Audit Planning** 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, John Hall Consulting.
  - March 11, 2009, at the Department of Education, Grimes Building - This educational event titled **Using Internal Controls to Better Manage and Monitor Programs** 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 Terry Carnahan, CGFM, CPA, Managing Director for KPMG LLP's Federal Internal Audit and Regulatory Compliance Services; and Robert Gray,

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- CGFM, CIA, CFE, Consultant, Robert Gray Training, Former Regional Inspector General, U.S. Department of Agriculture. .
- April 8, 2009, at the Iowa Vocational Rehabilitation Services, Jessie Parker Building. This educational event titled **The Future of Government Auditing – Which Direction(s) Are We Heading** 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 speakers were Jeanette M. Franzel, CGFM, CPA, Director of Financial Management and Assurance, U.S. Government Accountability Office; David R. Hancox, CGFM, CIA, Audit Director, New York State Office of the State Comptroller; and Drummond Kahn, CGFM, CIA, Director of Audit Services, City of Portland, Oregon
  - April 22, 2009 at the Iowa Vocational Rehabilitation Services, Jessie Parker Building – This educational event titled “GAO’s Role in the American Reinvestment and Recovery Act of 2009 was an audio conference 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 speakers were Marcia Buchanan, CGFM, CPA, Assistant Director, Financial Management and Assurance, Stan Czerwinski, MPA, Director, Strategic Issues Team, and Susan Ragland, MPA, Director, Financial Management and Assurance.
  - April 29, 2009, at the Iowa Vocational Rehabilitation Services, Jessie Parker Building. This educational event titled **GASB 54: Fund Balance Reporting and Governmental Fund Type Definitions** 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 Dean Mead, Research Manager, Governmental Accounting Standards Board.
  - May 13, 2009, at the Iowa Vocational Rehabilitation Services, Jessie Parker Building - This educational included presentations called **Think Big! Act Courageously! Make a Difference! – Presidential Theme; Improving Communications between Government and Taxpayers (Citizen Centric Reporting; Trends in Occupational Fraud; and Getting More Time in Your Day** provided 4 hours of CPE. Speaker was Billy Morehead, AGA National President Elect, Ph.D., CGFM, CPA, CPM.
  - May 13, 2009, at the Iowa Vocational Rehabilitation Services, Jessie Parker Building - This educational event titled **Ethics in the Workplace** 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 Leon Young, Adjunct Associate Professor and Trainer. .
  - 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:**

- Summer 2008 – Encouraged members to donate not only clothing, but also furniture, pots and pans and everything in between to the Salvation Army to replace merchandise at the Salvation Army warehouse destroyed by the early summer flooding in Iowa.
- September 2008 – Raise money for the Juvenile Diabetes Research Foundation International. One of the members is participation in a Diabetes Benefit Ride and will contribute a check from the funds raised.
- October 25 2008 - - 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

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- 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 and December 2008 – Collected money and toy collections to benefit the Toys for Tots drive.
  - December 16, 2008 – 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, took pictures of Santa, and directed traffic to the parking lot or exit of the park.
  - January, February, March and April - Collected donations for the Food Bank of Iowa.
  - May 2009 – Collected donations for Kids Against Hunger, an organization that purchase ingredients and supplies to package and ship meals to counties in need.
  - Donation of Iowa products to National PDC Community Service Raffle in June 2008 in Atlanta, Georgia.
  - The Chapter and National AGA matched funds raised for the various community service activities.

**Early Careers Events:**

- Presented a \$500 scholarship to a Grand View College Accounting Student. Also offered a free one-year membership in AGA.
- Provided information on National Scholarship opportunities to Chapter members.

**Social Event:**

- May 5, 2009 – The last meeting for the program year was held in the evening at Okoboji Bar & Grill. Spouses and other guests were invited. In addition to the interesting program on Workplace Humor, the Chapter held its annual awards ceremony and passing of the gavel.

**Membership:**

- Annual awards were presented at the May 6, 2008 meeting. Past President Award – Valerie Wedgeworth; Member of the Year Award – Cindy Weber.
- Three members had perfect attendance at our AGA Monthly meetings.
- Added 5 new members from May 1, 2008 to April 30, 2009.
- 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 Michelle Wendel, Community Service Coordinator for the National 2009 Community Service Award
- Nominated Angie James, Secretary and Treasurer, for a National 2008 Chapter Service Award.

**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.

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- 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.
- One member successfully completed the CGFM exams.

**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. ‘
- Two members attended the 2008 PDC in Atlanta, Georgia and picked up four awards for the previous year's accomplishments.