



DES MOINES CHAPTER

Chapter History Report

June 1, 2012 – May 31, 2013 Program Year

Chapter Executive Committee:

- President – Deb Schroeder
- President Elect & Chapter Recognition – Gayle Isaac
- Past President – Natalie Storm, CPA, CGFM
- Secretary – Valerie Wedgeworth
- Treasurer – Denise Ragias, CGFM
- Professional Certification – Lilia Kryuchkova
- Chapter Recognition – Natalie Storm, CPA, CGFM
- By-Laws and Procedures & Historian – Khristan Kaufman, CPA, CPE
- Membership and Recognition – Jenny Wall, CPA
- Programs and Education – Deborah Krueger
- Communications – Jyl Huskey
- Chapter Website – Patricia Townsend, CPA, CGFM & Denise Ragias, CGFM
- Early Careers – Patricia Townsend, CPA, CGFM
- Community Service – Daniel Durbin, CPA
- Accountability Outreach – Janice Jensen, CPA, CGFM

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

- **September 19, 2012** Chelsie Town talked about “What Human Trafficking Means to Iowans.”
- **October 17, 2012** Shawn Snyder from LSA Fiscal Services Division spoke on “School Aid: Iowa School Finance Formula Overview.”
- **November 7, 2012** Jeremy Davis, College Student Aid Commission, gave an overview on the “Iowa State Legislature Practice of Passing Bills.”
- **December 5, 2012** Karen Austin, Deputy Treasurer, State Treasurer's Office, spoke on “College Savings Iowa.”
- **January 9, 2013** Ryan Johnson, Government Entity Specialist at IRS, gave a presentation on “FSLG Tax Update.”
- **February 6, 2013** Jeff Berger, Deputy Director, Department of Education, spoke on “Risk Management and Internal Control.”

- **March 13, 2013** Dave Reynolds, Legislative Fiscal Bureau, spoke on the "State of Iowa General Fund Budget"; the legislative budget process, statutory budget requirements, General Fund budget trends, revenue estimates, reserve funds, and expenditure limitations.
- **April 17, 2013** Holly Lyons, Legislative Services Agency, spoke on "Revenue Estimating Conference Update."
- **April 30, 2013** the Annual Member Recognition Dinner was held. Margaret Buckton, Partner at Iowa School Finance Information Services and an experienced lobbyist presented on "The Role of the Lobbyist and the Citizens in the Legislative Process"; how the legislative process works, the role of the lobbyist, and how citizens can have an impact on this process.

Educational Audio Conferences and Seminars (41 hours CPE Offered – Audio Conf. 2 hrs each):

- **July 18, 2012** Audio Conference titled "GASB Review 2012."
- **August 22, 2012** Audio Conference titled "E-Reporting Research – the Results May Surprise You."
- **September 12, 2012** Audio Conference titled "Pension Accounting and Other Changes from GASB."
- **September 19, 2012** Audio Conference titled "Yellow Book: What You Need to Know."
- **October 3, 2012** Audio Conference titled "Strengthening Performance Management Systems: Management & Audit Perspectives."
- **October 17, 2012** Audio Conference titled "Improving Internal Controls."
- **November 7, 2012** Audio Conference titled "Data Analytics."
- **December 5, 2012** Audio Conference titled "Performance Management."
- **January 9, 2012** Audio Conference titled "Government Financial Management."
- **February 6, 2012** Audio Conference titled "Fraud Prevention."
- **February 27, 2012** "Audio Conference titled "Internal Controls."
- **March 6, 2013** the Chapter sponsored the NASACT Webinar on "GASB's Pension Accounting and Financial Reporting Standards: A Focus on Statement No. 68" for **2 hours of CPE**.
- **March 13, 2013** Audio Conference titled "Government Financial Management."
- **March 27, 2013** the Chapter sponsored the NASACT Webinar on "OMB Grant Reform" for **2 hours of CPE**.

- **April 17, 2013** Audio Conference titled “Internal Controls.”
- **May 8, 2013** Audio Conference titled “Fraud Prevention.”
- **May 22, 2013** Audio Conference titled “Ethics.”
- **May 23, 2013** Chapter’s Annual Ethics Professional Development Conference was led by Dr. John Dumonceaux, President, LMI Leadership Development LLC, Lincoln, Nebraska. Dr. Dumonceaux spoke about personal and organizational leadership and the importance of a personal mission statement, personal values, and ethics in today’s environment. 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:

- **July - August, 2012** Collected donations of cash for Meals from the Heartland.
- **September – October, 2012** Collected donations of cash 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.
- **November – December 2012** Collected donations the Food Bank.
- **January – February 2013** Collected cash donations for the National Federation of the Blind. This organization helps provide assistance to sight-impaired citizens.
- **March 2013** 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.
- **April – May 2013** Collected cash donations for the Multiple Sclerosis Society, which is a nonprofit organization whose vision is to create a world free of multiple sclerosis.

Social Event:

- **April 30, 2013** – 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 *The Legislative Process and Lobbying*, the Chapter held its annual awards ceremony and passing of the gavel.

Membership:

- Added 2 new members from June 1, 2012 to May 31, 2013.
- 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.
- November 13, 2012 - Janice Jensen conducted a presentation at Central College.
- Annual awards were presented at the April 30, 2013 meeting. Cheryl Mather was presented with Member of the Year award.

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.
- Two members successfully completed the CGFM exams during this year and both received scholarships. .

Other Activities & Accomplishments:

- Chapter Recognition – The Chapter earned chapter recognition points to achieve the Silver level this year. The chapter has received the Gold, Platinum, or Silver award in each of the last ten years.
- The Chapter completed its second Citizen Centric Report (CCR) in September.
- Deb Schroeder and Janice Jensen attended the 2012 PDC.
- Deb Krueger attended the Midwest Region SLMR meeting in Kansas City, Missouri on January 26, 2013.
- The Chapter won first place in the Group D website competition in March 2013.
- Janice Jensen, Deb Schroeder, Deb Krueger, and Gayle Isaac attended the Sectional Leadership meeting in LA during April 2013.
- Janice Jensen served as Regional Coordinator for Membership (Midwest AGA Region).