

AGA – Des Moines Chapter  
Chapter History Report  
July 1, 2018 – June 30, 2019 Program Year

**Committee:**

- President – Kimberly Knight, CPA
- President Elect, Nominations – Kaylynn Short, CPA
- Past President – Brenda Nye, CPA, CGFM, CPM
- Secretary – Kimberly Ashmore, CGFM
- Treasurer – Mihneta Lisinovic and Bridgett Wood, MBA
- CGFM / Professional Certification – Pam Sullivan, CPM
- Chapter Recognition – Marilyn Hanson, CPA
- Historian, Bylaws and Procedures – Janice Evans, CPA, CGFM
- Membership and Member Recognition – Tracie Kirkpatrick
- Education – Lisa Dooly, CPA
- Communications – Angie James, CPA
- Webmaster – Denise Ragias, CGFM
- Community Service – Kimberly Ashmore, CGFM
- Accountability Outreach – Rich Schoeppner, CPA

**Monthly Meetings (7 hours CPE Offered):**

- September 12, 2018, at the Lucas Building, State Auditor’s Office Training Room, Jennifer Campbell, Manager, State Auditor’s Office, spoke on “Recent Frauds”. (1 hour CPE).
- October 10, 2018, at the Grimes Building, Room, B100, Brian, DAS-SAE, spoke on the “Income Offset Program”. (1 hour CPE).
- November 28, 2018, at the Grimes Building, Room, B50, Scott Lockwood, Iowa Department of Revenue, spoke on “Income Tax Fraud Prevention”. (1 hour CPE).
- February 6, 2019, at the Grimes Building, Room B100. Marketa Oliver, City Administrator, City of Bondurant, spoke on “City/Local Government Finance”. (1 hour CPE).
- March 6, 2019, at the Grimes Building, Room, B100. Karen Austin, Deputy State Treasurer, Treasurer of State, spoke on “An Overview of State Treasury Activities”. (1 hour CPE).
- May 15, 2019, at the Grimes Building, Room B100. Jesse Martinez, Executive Officer, Office of the Chief Information Officer (OCIO), spoke on the “Cybersecurity”. (1 hour CPE).
- June 12, 2019, at the Grimes Building, Room B100, Joel Lunde, Department of Management, spoke on the “Revenue Estimating Conference”.

**Educational Audio Conferences and Seminars (30 hours CPE Offered):**

- July 18, 2018, at the Grimes Building, Room B100 – This educational event titled **GASB Review - 2018** provided 2 hours of CPE and was a webinar hosted by the Des Moines AGA Chapter and sponsored by the National Association of State Auditors, Comptrollers, and Treasurers (NASACT). Speakers were David A. Vaudt, Chair, Governmental Accounting Standards Board (GASB); David R. Bean, Director of Research, GASB; and other GASB staff.
- September 12, 2018, at the Lucas Office Building, State Auditor’s Office Training Room, - This educational event titled **Communicating Effectively in an Evolving and Transitioning Workforce** provided 2 hours of CPE and was a webinar hosted by the Des Moines AGA Chapter and sponsored by National AGA.

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The speaker was Alfred Robinson, PHD, MSA, BSM, AAS, Chief, J1, Department of Defense.

- October 10, 2018, at the Grimes Building, Room B100 - This educational event titled **Internal Control** provided 2 hours of CPE and was a webinar hosted by the Des Moines AGA Chapter and sponsored by National AGA. Speakers were Heather Pajak, Senior Policy Analyst, OMB; Ryan Schaedig, Acting Director, Do Not Pay Center, Department of Treasury; and Brad Wiggins, UI Integrity Coordinator, Department of Labor/ETA, Office of Employment Insurance.
- November 28, 2018, at the Grimes Building, Room, B50, - This educational event titled **Ethics, Escape the Blindspot Zone** provided 2 hours of CPE and was a webinar hosted by the Des Moines AGA Chapter and sponsored by National AGA. The speaker was Kevin McCarthy, Inspirational Speaker.
- January 24, 2019, at the Grimes Building, Room B100 - This educational event titled **GASB's Preliminary Views on Financial Reporting Model Improvements and Soon to-be-released Implementation Guides** provided 2 hours of CPE. Speakers were David Vaudt, Chairman, Governmental Accounting Standards Board (GASB); David Bean, Director of Research and Technical Activities, GASB; and other GASB staff.
- February 06, 2019, at the Grimes Building, Room B100 - This educational event titled **GASB Update** provided 2 hours of CPE and was a webinar hosted by the Des Moines AGA Chapter and sponsored by National AGA. The speakers were David Vaudt, Chairman, Governmental Accounting Standards Board (GASB); David Bean, Director of Research and Technical Activities; Lisa Parker, Senior Project Manager; Roberta Reese, Senior Project Manager; and Scott Reeser, Supervising Project Manager.
- March 06, 2019, at the Grimes Building, Room B100 - This educational event titled **Updates to the New Tax Reform** provided 2 hours of CPE and was a webinar hosted by the Des Moines AGA. The speakers were Jo Bachman, CGFM, Accountant; US EPA; Mariane Smith, Enrolled Agent, Block Advisor; and Nichelle Williams, Enrolled Agent, Block Advisor.
- March 27, 2019, at the Grimes Building, Room B100 - This educational event titled **Cybersecurity – Protecting and Utilizing Government Data** provided 2 hours of CPE and was a webinar hosted by the Des Moines AGA and sponsored by National AGA. The speakers were Steven Burke, Special Agent-in-Charge, Data Analytics and Computer Crimes, US DOT OIG; Doug Robinson, Executive Director, National Association of State Chief Information Officers (NASCIO); and Tony, Hubbard, Partner KPMG.
- April 10, 2019, at the Grimes Building, Room B100 - This educational event titled **Ethics** provided 2 hours of CPE and was a webinar hosted by the Des Moines AGA and sponsored by National AGA. The speaker was Nathan Mueller, Fraud and Ethics Awareness Speaker and co-author of “Lessons from an \$8 Million Fraud.
- April 11, 2019, at the Noah’s Event Venue, West Des Moines - This educational seminar hosted by the Des Moines AGA chapter included John Lynsky, CGFM, CPA, AGA National President, Controller and Division Director for Financial Management, National Science Foundation spoke on “Professional Resiliency”; Janet Phipps, Director Department of Administrative Service spoke on “The Art of Leadership – What is It?”; David Vaudt, GASB Chairman, spoke on “Recently Issued Standards & Current Technical Agenda”; and Kim Hanson, Department of Administrative Services, Human Resources Enterprise, spoke on “Ethics & Leadership”. This seminar provided 8 hours of CPE.
- May 15, 2019, at the Grimes Building, Room B100 - This educational event titled **Fighting Fraud with Analytics**, provided 2 hours of CPE and was a webinar

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- hosted by the Des Moines AGA and sponsored by National AGA. The speakers were Megan Gaillard, CGFM, Director of Audit, Palm Beach County, OIG; and Latesh Love, Assistant Director, Forensic Audits and Investigative Service, GAO.
- June 12, 2019, at the Grimes Building, Room B100 - This educational event titled **Journey to the Frontline**, provided 2 hours of CPE and was a webinar hosted by the Des Moines AGA and sponsored by National AGA. The speakers were Chidilim Okonkwo, CGFM, Director, NASA Headquarters and Alex Yow, CPA, Senior Associate Guidehouse.
  - 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 webinars.

**Community Service Events:**

- Provided a donation for the National PDT Community Service Raffle in July 2018 in Orlando, Florida.
- July – August, 2018 – Collected cash donations for the Alzheimer's Association. This organization's mission is to eliminate Alzheimer's disease through the advancement of research; to provide and enhance care and support for all affected; and to reduce the risk of dementia through the promotion of brain health. Total contributions, including Des Moines AGA and national AGA matches totaled \$1,771.50. Several members walked in the August 2018 Walk to End Alzheimer's event held at the State Capitol in Des Moines.
- September – October 2018 – Collected donations of cash and supplies for AHeinz57, which is a foster-based animal rescue organization, headquartered in De Soto, IA. They exist to bridge the gap between traditional animal shelters and no-kill rescues by providing free transportation and temporary housing for dogs from traditional shelters to no-kill rescues and by pulling dogs out of traditional shelters and placing them in foster homes and forever homes. Total contributions, including Des Moines AGA and national AGA matches totaled \$684. Chapter members and guests donated numerous other items including paper towels, newspapers, blankets, dog and cat food and treats, pet collars and leashes, peanut butter, bleach, garbage bags, and sterile gloves. All contributions were dropped off at the AHeinz57 location.
- November – December 2018 - Collected cash donations for the Youth Emergency Services and Shelter (YESS) Their mission is to change lives by protecting children and empowering families. YESS is Iowa's largest emergency shelter for children with emergency shelter, crisis nursery care, mental health counseling, and care coordination. Total contributions, including Des Moines AGA and national AGA matches totaled \$650.
- January – February 2019 - Collected donations of cash and food and household items for the Food Bank of Iowa. Their mission is to alleviate hunger through food distribution, partnership and education. Total contributions, including Des Moines AGA and national AGA matches totaled \$596 plus over thirty pounds of canned items, peanut butter, boxed cereal, and pasta were collected and dropped off at the Food Bank.
- March – April 2019 – Collected donations of cash for Everybody Wins! Iowa. Their mission is to increase children's success in school and life through one-to-one reading and mentoring experiences with caring volunteers. Donations go towards purchasing books and supplies at each location, books for gifts for children to build a home library, and background checks for volunteers. Total contributions, including Des Moines AGA and national AGA matches totaled \$736.

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- May - June 2019 – Collected cash donations for East Side Family, Inc. (ESF). This organization is a community organization focused on uplifting, educating, and feeding the youth in Des Moines. In April 2016, ESF became a non-profit organization with a mission to help someone in need. ESF believes that hunger is a root to many problems and if ESF can feed, educate, and uplift people to help change lives ESF is willing to do that. Total contributions, including Des Moines AGA and national AGA matches totaled \$672.
- Total impact to these six charities for 2018-2019 was \$2,126-chapter member and guest donations, \$600-chapter match, and \$2,383.50 requested National Community Service Fund match for a total financial contribution of \$5,109.50 plus the donations of items to the Food Bank of Iowa and AHeinz57 Pet Rescue and Transport.

**Early Careers Events:**

- Provided information on National Scholarship opportunities to Chapter members.
- John Lynsky, National President, Kim Knight, Chapter President, and Kaylynn Short, Chapter President Elect, met with a group of accounting students at Drake University to promote AGA.

**Membership:**

- Annual awards were presented at the April 11, 2019 spring conference. Membership awards were for 5 years (Tracie Kirkpatrick and Ronald Swanson), 10 years (Marilyn Hanson, Keven Heinzeroth, Patricia King, Patrice Sayre and Penney Sells), 20 years (Matthew Coulter, Suzanne Dahlstrom and Lisa Dooly), 25 years (Deborah Moser), 30 years (Cheryl Mather), 35 years (Janice Evans) and 40 years (James Anderson) of membership in the Des Moines Chapter.
- Member of the Year Award – Kim Ashmore.
- Added 5 new members from July 1, 2018 to June 30, 2019.
- Checked membership lists and contacted suspended members to encourage them to renew.
- Sent email invitations to non-members who attended monthly meetings, webinars, or conferences to invite them to upcoming events and encourage them to join.

**CGFM:**

- The Chapter CGFM Scholarship Program is established in order to assist chapter members in obtaining the CGFM certification.
  - A chapter member is reimbursed up to \$100 per exam upon successfully passing the respective exam.
  - A chapter member who applies to the CGFM program while actively serving on the Chapter Executive Committee (CEC) is reimbursed the application fee.
  - A chapter member successfully passing an exam while serving on the CEC is reimbursed the full cost of the exam.
- Obtained Governor's proclamation of March as CGFM month.
- Celebrated CGFM Month at the March meeting.
- Encouraged Chapter members to become a CGFM. Provided CGFM brochures at chapter events, articles in the newsletters, and answered questions or provided information on the National CGFM Review Sessions being held.
- Seven members are currently working on their CGFM certification.

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**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 eleven years.
- Bi-monthly (6) newsletters were issued during the year.
- Pam Sullivan was awarded the 2018-19 Volunteer of the Year for the Des Moines Chapter. This national honor recognizes distinguished contributions to the development and enhancement of an AGA chapter. The recipients of the award embody the spirit of volunteerism.
- The Chapter was the winner of the Chapter Website Contest for Group D and were recognized at the Chapter Awards Breakfast at the PDT in New Orleans.
- Kim Knight and Kaylynn Short attended the 2018 PDT in Orlando, Florida, and picked up the Chapter Recognition Award, Platinum Chapter award for the previous year's accomplishments.
- Kim Knight, Kaylynn Short, and Randy Lagerblade attended the first ever AGA Lead! 2019 training held April 25-27 in Kansas City, MO.