



SOUTHERN  
WISCONSIN  
CHAPTER

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# Monthly Footnotes

September 2012 [www.aga-wis.org](http://www.aga-wis.org)



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Welcome to the new 2012 - 2013 program year!

## September Luncheon Meeting Welcome Members and Non-Members

**TOPIC:** Fiscal and Economic Issues: The 2012 Context

**SPEAKER:** Todd Berry, Wisconsin Taxpayers Alliance

**DATE:** Thursday, September 20, 2012

**REGISTRATION:** 11:30 a.m. LUNCH: 11:45 a.m.

**COST:** \$6 for Members, \$12 for Non-Members

**PLACE:** Rocky Rococo's Pizzeria, 1753 Thierer Road (near East Towne)

**MENU:** In-room buffet with pizza, salad, breadsticks, fountain soda, and cookies

**RESERVATIONS:** Please contact Sherri Voigt by 1 p.m. on Monday, September 17, 2012 with your name, membership status, meal choice at (608) 576-6473/e-mail: [sherriv@live.com](mailto:sherriv@live.com). If you need help getting a ride to lunch, please contact Sherri for car-pooling information.

**Fall is Here!**

## PRESIDENTS MESSAGE

Carrie Ferguson, CPA

### Welcome to the new 2012-13 program year!

This month, in the spirit of the continuing election season, we welcome Todd Berry of the Wisconsin Taxpayers Alliance. We've had Todd speak to our organization in the past, and we had requests to bring him back for his continuing insights into fiscal and economic issues of the election process. We hope you will join us for this first luncheon meeting.

As you'll notice from the Calendar of Events on page 14 of this newsletter, we have already scheduled a number of other program items for the year. We hope you will save the dates and watch the Calendar of Events each month as we begin finalizing additional speakers and topics for future events.

While the AGA program year differs from the membership year, we do encourage any of you that are not yet members to consider joining. While there is a fee structure for membership at the national level, our chapter does not charge any additional dues. Further, we try to structure the pricing of our chapter's educational events, so that members will be charged reduced fees. Some other benefits of membership are listed at this link on the AGA national website: <http://www.agacgfm.org/AGA/Documents/Membership/MembershipBenefits.pdf>

If you are a member, we encourage you to become more involved by joining the board. This does not have to be a large time commitment. If you are interested, feel free to contact any of



the board members listed on page 15 and come and check out a board meeting. We meet about once each month (see the scheduled meetings on the Calendar of Events), with some email contact in between as events are planned or issues arise.

As always, we like to hear feedback whenever possible, so if you have ideas for future events, speakers or event locations, email them to Mary Laufenberg, our Education Chair ([mary.laufenberg@revenue.wi.gov](mailto:mary.laufenberg@revenue.wi.gov)).

Happy fall!

### 2012-13 Officers and Directors Full Contact information on Page 14



Pictured (left to right): front: Tom Scheidegger, Mary Laufenberg, Sherri Voigt, Dolly O'Laughlin; back: Roger Birkett, David Mellem, Lillian Radivojevich, Carrie Ferguson

**NEW MEMBERS  
FIRST LUNCHEON MEETING IS FREE**

If you are a new member and you are attending your first luncheon, it's **FREE!** Please note that when calling in your reservation.

**ABOUT THIS MONTH'S LUNCHEON SPEAKER**

**Todd A. Berry**  
Biographical Sketch

Todd A. Berry has been President of the Wisconsin Taxpayers Alliance (WISTAX) since 1994. Now in its 80th year, WISTAX is a privately funded and widely respected nonpartisan organization dedicated to improving government through public policy research and citizen education.

Prior to that, Todd combined private business experience with service in state and local government. For 10 years, he was a marketing executive for one of the state's oldest food manufacturers. In the late seventies and early eighties, he was Wisconsin's Assistant Secretary of Revenue.

Berry has served on a number of gubernatorial, legislative, and agency commissions or task forces. He also served on the Dane County Board, the Jefferson School Board, the CESA ("see-sah") #2 Board of Control, and the North Central College Board of Trustees, Naperville, Illinois.

With bachelors and doctoral degrees from UW-Madison, Berry also holds master's degrees from Harvard University and the University of Chicago Graduate School of Business. Todd, and his wife, Margaret Lewis, have 3 children and reside in Middleton, Wisconsin, where their two Welsh Corgis run their lives.

## Chapter News

### Community Service

At the September 20 lunch meeting, the Chapter will be holding a food drive. In addition, we will collect paper grocery bags for the MOM food pantry in Middleton to use for packing the food for people to take home.

As a new addition, we will also collect any personal items, including those little shampoo and conditioner bottles brought home from hotels, for the Salvation Army. Full size bottles and bar soaps are great, also. Other ideas include: liquid soap, diapers, baby wipes, Kleenex, etc.

## Member Spotlight



### CGFM Promotion Corner

**Michele Tessner, CGFM, CPA**, has recently been promoted to School Finance Auditor at the Department of Public Instruction. Michele started as an Accountant at the Department of Public Instruction in November of 2008. The position of School Finance Auditor is her 3<sup>rd</sup> role with the DPI. In her new role as auditor, Michele will provide technical accounting guidance to the school districts, CESA's and CCDEB's across the State and to the CPA firms which audit them. She will also review the audited financial statements and the CPA firm's work papers. The review of the financial information collected by DPI is important to ensure over \$4.5 billion in state education aid is distributed accurately.

In each of Michele's roles at DPI, she has moved up at least one level of responsibility. She believes these moves are directly related, in part, to her education and credentials.

Michele completed all the requirements for the CGFM certification in December of 2011. She currently serves on the Southern Wisconsin AGA board as co-chair of the CGFM and Community Service Committees.



## Chapter Board Meeting Minutes August 28, 2012

Present: Lily Radivojevich, Dolly O'Laughlin, Carrie Ferguson, Bea Beasley, Mary Laufenberg, Tom Scheidegger, Sherri Voigt, Roger Birkett, Michele Tessner.

- Treasurer's Report – Account balance was \$24,805.40 as of 8/28/12.
- Membership – 78 members; 8 are on the suspend list and Dave is contacting them.
- CGFM – 1 book is checked out and we have the deposit. Looking at ways to add information to the CGFM Corner in the newsletter with chapter articles starting later this fall.
- Community Service – Will start the year with a food and bag drive. We'll also try to collect personal items (trial sizes and full size) for the Salvation Army.
- Accountability – We won a Certificate of Achievement for the 2011 member centric report. The 2012 report is due to National office by 9/30/12. Some local government contacts are being made to get more reports prepared in our area.
- Chapter Recognition – The new handbook is on the web. Don't forget to copy Dolly and Eric on items that need to be counted.
- Newsletter – September issue is almost ready for posting to the Chapter web site.
- Education
  - September/October speakers are set up.
  - The October 18 training brochure will be ready to send out by Tuesday. The follow-up session from the 3/1 training will be scheduled soon.
  - The December 18 Ethics training will be in partnership with WI DHS. We should have registration details for the October newsletter. 3 CPE expected.
  - Many other lunch and symposium topics were discussed. Mary will look into speakers that could present them or other similar topics.

## Chapter Earns Recognition/Awards

### Accountability

The AGA Southern Wisconsin Chapter earned a *Certificate of Achievement in Member-Centric Reporting* for its first ever report to members, based on the 2011 program year. A scanned copy of this Certificate is attached below:



Acrobat Document

If you would like to see the full published report, it is posted on the Chapter Web Site at <http://www.aga-wis.org/PDFFiles/WI-CCR-2011.pdf>

The Chapter also received some good feedback on things to include in future reports. The new report for the 2012 program year will be finalized by 9/30/12. We are interested in any feedback on an ongoing basis, so please let us know if there are other reporting items you would like included. Contact Sherri Voigt at [sherriv@live.com](mailto:sherriv@live.com)

### AGA Platinum Level Award Presented to Southern Wisconsin Chapter

AGA National presented a 2012 Platinum Level Chapter Award to the Southern Wisconsin Chapter at the Wednesday, August 1, Awards Breakfast at the Professional Development Conference in San Diego before 1,800 attendees. Chapter achievement awards are presented to the Chapter President whose name appears on the award. National President Richard Bunce, Jr. presented the award to David Mellem on behalf of Carrie Ferguson, Chapter President, who was unable to attend.

The award was achieved based on the reported chapter activities under the national Chapter Recognition Program that tracks chapter leadership, education programs, certification (CGFM), communications, membership, accountability, community service, and awards.

### AGA Regional Coordinator Award Presented to Chapter Member

AGA presented the 2012 national award for Regional Coordinator to David Mellem, a member of the Southern Wisconsin AGA Chapter, at the Professional Development Conference in San Diego on July 31. David served as Regional Coordinator for Chapter Development and Assistance for the North Central Region. The region includes Indiana, Illinois, Minnesota, and Wisconsin. National President Richard Bunce, Jr. presented the award to David at the Tuesday Awards Luncheon before 1,800 attendees (see photo below). The award selection was based, in part, on his preparation of a condensed informational notice for prospective AGA members.



## REGISTER TODAY!

### Cost Principles, Cost Allocation Rules and Regulations for Federally Funded Grants and Contracts

**Thursday, October 18, 2012 – 8:30 a.m. to 4:30 p.m.**

Concordia University  
12800 N Lake Shore Drive  
Mequon, WI 53097

8 CPE

**Presented by:  
Joseph Stertz**

See the full training brochure at [www.aga-wis.org](http://www.aga-wis.org)

*In partnership with:*



### Job Announcements

Don't forget to visit Wisc.Jobs at <http://wisc.jobs/public/index.asp> to check the latest state job listings (and some county openings, also). Currently, there is a long list of financial related positions listed, including accountant, auditor, budget & policy analyst, and financial program supervisor. If you set up an account, you can have notices sent to you based on criteria you set up.

For those interested in the federal arena, there is USAJobs at <http://www.usajobs.gov/>. This site can be searched by geographic location and/or position titles.

Even if you aren't looking to make a change, it doesn't hurt to check out the openings in the area. You never know when that perfect job will appear...

**The following is an advertisement received from Government Finance Officers Association (GFOA). We pass it along to members that may be interested in purchasing a GFOA Blue Book -- as mentioned in the ad, orders should be placed directly with GFOA.**

## **Have you picked up your copy of GFOA's Blue Book?**

The Government Finance Officers Association (GFOA) is pleased to announce the release of *Governmental Accounting, Auditing, and Financial Reporting (GAAFR* or "Blue Book"). Some 75 years have now passed since the first *GAAFR* was published. In the intervening years, *GAAFR* has become a public finance classic, and its signature focus on application has made it a perennial favorite among practitioners.

This **ninth edition** of *GAAFR* has been:

- **Completely rewritten and greatly expanded**
- Includes guidance through **GASB Statement No. 66**
- Hardcover: 1,121 pages
- Includes a link to the **online model comprehensive annual financial report**. Supporting materials – the **journal entries, trial balances, and chart of accounts** – are located in the text.
- **Quantity discounts** are available – go to the [GAAFR webpage](#) for details.

Go to GFOA's [e-store](#) to order this publication and to check out other GFOA publications. Questions? E-mail [GFOA Publications](#).

Take advantage of GFOA's group Internet-based course, "**Getting to Know the New GAAFR**" on **September 19 or December 12, 2012**. This session will combine lecture and exercises to explore the wealth of guidance available to practitioners in the latest *GAAFR*. For details on the training and to register, visit [GFOA's website](#).



## Former U.S. Comptroller General David Walker to Discuss U.S. Fiscal Condition at “\$10 Million a Minute Bus Tour” Stop in Wisconsin

The Honorable David M. Walker, former U.S. Comptroller General and a former Trustee of Social Security and Medicare, will discuss the nation’s fiscal condition at a “\$10 Million a Minute Bus Tour” stop in Wisconsin **on Monday, September 17<sup>th</sup> from 4:00 to 5:30 p.m.** This non-partisan, fact-based effort is the first-of-its-kind national bus tour to engage citizens about the nation’s financial condition and show them what they can do to help. The Wisconsin location will be the Richard T. Anderson Center, Waukesha County Technical College at 800 Main Street, Pewaukee, WI 53702. The event is free, but a limited number of tickets are available. Tickets should be reserved in advance via the tour website which shows the number of tickets remaining or through the College.

The [Comeback America Initiative](#) (CAI) organized the bus tour which kicks off in Manchester, New Hampshire, then moves to New York and at least 16 more states. Mr. Walker is CEO of the Comeback America Initiative and will be joined by other fiscal experts at various stops on the tour. A “who’s who” of national leaders support the tour. Visit [www.10MillionAMinute.com](http://www.10MillionAMinute.com) to reserve tickets and for the tour itinerary, graphics of a “U. S. Financial Burden Barometer”, the Seven Serious Questions, and a full list of high-profile bus tour supporters. Visit [www.keepingamericagreat.org](http://www.keepingamericagreat.org) for more



information about the Comeback America Initiative. The tour was also announced in the August 20<sup>th</sup> AGA Topics newsletter. To assist interested chapter members and others attend the event, the chapter will coordinate car pooling. If you are driving and have room for passengers or if you would need a ride to attend the event, contact David Mellem at [david.mellem@oig.hhs.gov](mailto:david.mellem@oig.hhs.gov) or (608) 264-5415 ext. 25. If you are offering a ride, please include the number of passengers that you can take. We cannot guarantee that everyone who would like to obtain a ride to attend will be able to do so, but are offering this assistance as a chapter service. If you plan to attend the event but are not offering car pooling, please let us know so that the chapter can report the number of attendees from our chapter efforts to AGA for statistical reporting credit under the AGA Chapter Recognition Program.





## National News



**Evelyn A. Brown, CGFM-Retired**

Brown serves as AGA National President and chair of the National Executive Committee with more than 34 years of government financial management experience.

## Randy Cohen Featured Speaker at Internal Control and Fraud Prevention Training

Sept. 24-25 | [Discount Registration Fees Extended to Aug. 31](#)



Acclaimed writer, radio host and four-time Emmy Award winner, Randy Cohen, offers a wealth of experience to audiences as he explores the idea that the answer often lies not in our character but in our communities. [Read more](#)

## Charting a Course Through Stormy Seas: State Financial Executives in 2012



State governments have been surrounded by a storm of financial turmoil for some years now. The AGA/Grant Thornton survey finds these financial professionals engaged, hard at work, and helping to guide their agencies through these perilous times. [Read the report.](#)

## Become An AGA Leader: Nominating Committee Seeks Candidates

AGA's National Nominating Committee is seeking candidates for a variety of AGA leadership positions. The nomination deadline is Oct. 31. Help shape your professional community and become an AGA leader. [Read more](#)

## Promoting Good Stewardship in Public Service

As a CGFM since 2001, I have been fortunate to work in financial management related positions at both the state and federal levels of government. I have also had the rewarding experience of teaching accounting as an adjunct professor for several universities – Nick Lebrede, CGFM, CPA, CFE, CMA. [Read more](#)

## Volunteer to Become a Citizen-Centric Reviewer

We will need 50 reviewers to review chapter, government and non-profit Citizen-Centric Reports (CCRs). You will learn more about the program, and also obtain some ideas as you are preparing your agency CCR. The review takes about 30 minutes, and your observations will make the report a more useful and understandable document. [Complete the application](#), and submit to [Louise Kapelewski](#).



## Call for National Awards Nominations

Who do you know that deserves special recognition for contributions to our field? Please help us acknowledge financial professionals at the federal, state and local level and private sector who are leading the way. Due date is Nov. 9, 2012. [Read more](#)



## CGFM Corner

Please see the member spotlight on page 4 for a recent CGFM promotion.

## Interested in the CGFM Certification?

### Give Yourself an Edge Over Your Competitors

Recent research has shown that employers attribute their recruiting difficulties to a shortage of qualified professionals. Give yourself a competitive advantage by showing your commitment to lifelong learning. You need a credential that shows you are qualified and have the skills to lead.





The Certified Government Financial Manager does this like no other credential. The CGFM is the first certification broad enough to cover the whole field of government financial management—federal, state and local. It measures a wide range of knowledge and skills that professional needs to succeed in the federal government financial environment, or to meet the unique challenges faced by state and local government financial managers.

*"In today's complex and changing world, a professional certification provides prospective employers with a degree of confidence that candidates are prepared for the real world." —John Radford, CGFM, State Controller, State of Oregon*

## Articles

### What is Citizen-Centric Reporting?

AGA is encouraging governments of all sizes to produce Citizen-Centric Reports, or CCRs, which detail government finances in a visually appealing, clear and understandable four-page document. More governments every year are adopting

CCRs as a way to communicate government finances to the people they serve. See what state, local and federal government organizations have produced. [Read More](#)

### Chapter Member-Centric Reports

Since July 2011, 41 AGA chapters have produced Member-Centric Reports. The reports communicate to the chapter's members about the activities of the chapter, and also serves as a recruiting tool. [View completed reports](#). The AGA National Office distributed its 2012 Member-Centric Report at the PDC in San Diego.

## STATE & LOCAL NEWS

### The Qualities an Auditor Really Needs

Utah's current state auditor, Austin Johnson, is a certified public accountant. He was defeated in the Republican primary, and neither the man who beat him nor any of the other remaining candidates for the job is a CPA. So after the general election, Utah will become one of two dozen or so states that have as their audit-agency head an individual who is not a CPA – Mark Funkhouser, *Governing*. [Read more](#)

### Counties: An Outdated Concept or the Future?

Fulton County is coming apart. Over the past decade, four new cities have been carved out of the Georgia County, which is dominated by the county seat, Atlanta. As a result, Fulton County now provides a full



to federal grants and cooperative agreements. OMB received comments from over 350 individuals and organizations on the reform ideas. OMB has considered the comments and will be publishing revised guidance for 60-day comment very soon. We will alert you to the OMB proposals when published.

set of services to fewer than 10 percent of its 920,000 residents. All but one of the new cities are in the northern part of the county, which is both more affluent and more white than Atlanta and the rest of the county – Alan Greenblatt, *Governing*. [Read more.](#)

## FEDERAL NEWS

### Government is Getting 'Smarter,' Management Officials Say

The Obama administration's efforts to reduce government waste and create a "smarter" government are demonstrating results, and are motivated in part by current fiscal pressures that function like the profit motive in private enterprise, according to a team from the Office of Management and Budget – Charles S. Clark, *Government Executive*. [Read more](#)

### Federal Policies Reform Initiative in Final Phase

Earlier this year, OMB published an [Advanced Notice of Proposed Guidance](#) (ANPG) on some reform proposals related



## ARE YOU MOVING?

If you are moving, or have already moved, please notify both your chapter and AGA National of your address change. You can update your address online at the national website in the members' only area:

[www.agacqfm.org](http://www.agacqfm.org)

The sign in box is in the upper right corner



## SHARE YOUR NEWS

Do you have some interesting news that your fellow chapter members may be interested in? If so, you are welcome (and encouraged) to submit an article to the Newsletter Editor at [radiojevich@danesherriff.com](mailto:radiojevich@danesherriff.com)

Deadline for submission of articles is the 25th of the month. Feel to send in topic suggestions or features to include.

## Calendar of Events 2012-2013

August 28, 2012 – Board Meeting, Hometown Buffet, Madison

**September 20, 2012 – Lunch Meeting, Todd Berry, Fiscal and Economic Issues the 2012 Context, Restaurant--Rocky Rococo's Pizzeria, 1753 Thierer, Road (near East Towne)**

October 2012 – Board Meeting, Hometown Buffet, Madison

October 18, 2012 Cost Allocation A-87 Training, Joe Stertz, Mequon, WI

October 25, 2012 – Lunch Meeting, E. Dionne, The Planning of Audits – Setting Priorities and How IT is used in Audits, location to be determined

November 2012 – Board Meeting, Hometown Buffet, Madison

November 15, 2012 – Lunch Meeting, topic to be determined, Restaurant--Dayton Street Café (inside the Concourse, 1 West Dayton Street)

December 18, 2012 – Ethics Training Audio/Live Discussion, WI Department of Human Services, 3 CPE **\*NEW\***

January 2013 – Board Meeting, Hometown Buffet, Madison

January 17, 2013 – Lunch Meeting, Tax Update, Imperial Gardens

February 2013 – Board Meeting, Hometown Buffet, Madison, WI

February 21, 2013 – Lunch Meeting, topic to be determined, Restaurant--Dayton Street Café (inside the Concourse, 1 West Dayton Street)

March 2013 – Board Meeting, Hometown Buffet, Madison

March 21, 2013 – Lunch Meeting, topic and location to be determined

April 2013 – Board Meeting, Hometown Buffet, Madison

April 18, 2013 – Lunch Meeting, topic and location to be determined

May 2013 – Community Service Event

May 2013 – *Annual Spring Symposium, UW-Madison Union South*

June 2013 – Board Meeting, Hometown Buffet, Madison

June, 2013 – Lunch Meeting, topic and location to be determined

Note: Community service, VITA, and social events will be announced during the year.

# AGA Southern Wisconsin Chapter Officers and Directors 2012-2013

**President** – Carrie Ferguson, CPA, LAB, [carrie.ferguson@legis.wisconsin.gov](mailto:carrie.ferguson@legis.wisconsin.gov), 608-259-9839

**President Elect** – Vacant

**Immediate Past President** – Sherri Voigt, CGFM, CPA, DOT, [sherriv@live.com](mailto:sherriv@live.com), 608-576-6473

**Chapter Recognition Co-Chairs**

Dolly O’Laughlin, [olaughlin@co.dane.wi.us](mailto:olaughlin@co.dane.wi.us), (608) 242-6314

Eric Busse, DPI [eric.busse@dpi.state.wi.us](mailto:eric.busse@dpi.state.wi.us), 608-267-9199

**Secretary** – Sherri Voigt, CGFM, CPA, DOT, [sherriv@live.com](mailto:sherriv@live.com), 608-576-6473

**Treasurer** – Roger Birkett, CPA, [jbirk@charter.net](mailto:jbirk@charter.net)

**Historian** – David Mellem, CGFM, CIA, CISA, US DHHS OIG, [david.mellem@oig.hhs.gov](mailto:david.mellem@oig.hhs.gov), 608-264-5415 ext 25

**Membership Chair** – David Mellem, CGFM, CIA, CISA, US DHHS OIG, [david.mellem@oig.hhs.gov](mailto:david.mellem@oig.hhs.gov), 608-264-5415 ext 25

**Newsletter Editor** – Lillian Radivojevich, [radivojevich@danesherriff.com](mailto:radivojevich@danesherriff.com), 608-284-4801

**Education Chair** – Mary Laufenberg, CGFM, CPA, DOR, [mary.laufenberg@revenue.wi.gov](mailto:mary.laufenberg@revenue.wi.gov), 608-266-1670

**Webmaster** – Scott Thornton, [sbthornton@gmail.com](mailto:sbthornton@gmail.com)

**Community Service Chair** – Michele Tessner, CPA, DPI, [michele.tessner@dpi.wi.gov](mailto:michele.tessner@dpi.wi.gov)

**CGFM Co-Chairs** –

Michelle “Bea” Beasley, DSPS, [michelle.beasley@wisconsin.gov](mailto:michelle.beasley@wisconsin.gov)

Michele Tessner, CGFM, CPA, DPI, [michele.tessner@dpi.wi.gov](mailto:michele.tessner@dpi.wi.gov)

**Director** - Thomas A. Scheidegger, CPA, [thomas.scheidegger@bakertilly.com](mailto:thomas.scheidegger@bakertilly.com)

**Chapter Website** – [www.aga-wis.org](http://www.aga-wis.org)

**Chapter Address** – PO Box 1454; Madison, WI 53701-1454

