



SOUTHERN  
WISCONSIN  
CHAPTER

# Monthly Footnotes

SEPTEMBER 2013

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



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## Welcome Members and Nonmembers

### September Luncheon Meeting

**TOPIC:** Investment Fraud

**SPEAKER:** Kimberly Hazen, Regional Director  
Southwest Region, Wisconsin  
Better Business Bureau

**DATE:** Thursday, September 26, 2013

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

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

**PLACE:** Vintage Brewing Company  
674 South Whitney Way

**MENU:** meals include pub chips, fountain soda/tea/coffee

- ❖ **Cheeseburger** - cheddar cheese, lettuce, tomato, onion on a Parker House roll
- ❖ **Veggie Burger**: house-made black bean patty, cheddar cheese, lettuce, tomato, onion on a Parker House roll
- ❖ **BBQ Pulled Pork Sloppy Joe**: tender pulled pork in [zesty](#) chipotle peach BBQ sauce & VBC coleslaw on a Parker House roll
- ❖ **Crispy Buffalo Chicken Wrap**: crispy chicken tossed in buffalo sauce with cheddar jack cheese, lettuce, tomato, and ranch dressing in a garlic herb wrap

**RESERVATIONS:** Contact Sherri Voigt by 11 a.m. on Monday, September 23, 2013 with your name, membership status, meal choice, and for carpooling information at (608) 266-2814 or [sherri2.voigt@dot.wi.gov](mailto:sherri2.voigt@dot.wi.gov).



**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**

**Kimberly Hazen** serves as the Regional Director for the Southwest Region of the Wisconsin Better Business Bureau. She holds a B.A. from University of Wisconsin-LaCrosse and an M.A. from Marquette University. She has spent much of her professional career creating advertising messages that target opinion leaders. Now, in her current position at the BBB, she's working to advance marketplace trust so those opinion leaders can believe the advertising messages they hear. Her community activities have included past service on the boards of Big Brothers/Big Sisters of Waukesha County, The Topeka Advertising Federation, and The Dane County Humane Society. She currently serves as Chair of Madison Country Day School's Board of Trustees. Kimberly has two daughters and calls Madison her home.

"Outsmarting Investment Fraud" is a topic near and dear to Kimberly's heart. As a founding member of the "Scaredy Cats Investment Club" here in Madison, she has been learning about stocks and investments actively for over 15 years and most recently was trained by FINRA to present this material to both beginning and advanced investors.

**Back by Popular Demand!**

**Who says there's no such thing as a free lunch?**

***Membership Special!***

Members who attend 3 lunch meetings from September to February receive a free lunch certificate for the March or April lunch meeting!

## PRESIDENTS MESSAGE

Sherri Voigt, CGFM, CPA

Welcome to the new AGA program year. We have the entire fall lunch meeting schedule updated for speaker/topic information already. Take a look at the Calendar of Events on page 11 or on our website.

For 2014, we had a goal of increasing CPE opportunities for the membership. We will be offering 4 live audio conferences this year. We tried to pick from different topic areas to hit on items that would appeal to the most people. These are all included on the Calendar of Events, and more details will be announced ahead. AGA National conducts the audio conferences and they are worth 2 CPE each.

If you were to attend all events listed on our calendar, you would earn 20 CPE!

As always, if you have any suggestions for speakers, topics, or locations, please feel free to contact Education Chair Mary Laufenberg ([mary.laufenberg@revenue.wi.gov](mailto:mary.laufenberg@revenue.wi.gov)) or myself ([sherri2.voigt@dot.wi.gov](mailto:sherri2.voigt@dot.wi.gov)) at any time. It is never too soon to start our process for developing the Symposium agenda!

I hope to see you at the September lunch!



From the Dallas PDC in July: Sherri Voigt and Michele Tessner met up with Shrek

# Chapter News

## Community Service

### Warm Socks -- and other ways we can help out the Salvation Army's Homeless Shelter and Community Center.

The Southern Wisconsin AGA Chapter has taken the collection of donated items to the next level for the 2013-14 program year. Throughout the year, the Salvation Army Volunteer Coordinator will communicate what items are most critically needed for the Salvation Army homeless shelter and community center. She will also provide information about volunteer opportunities at the shelter and community center. The Chapter will pass all of this information on to members.

When we asked her what items would be needed going into the winter, her response was "Warm Socks." Think about the comfort we could provide just by giving a man, woman or child a pair of warm socks. Warm feet, something most of us take for granted. Sounds simple. We will be collecting new warm socks of all sizes at the September luncheon on September 26. Please consider donating a pair, or two, or more.

To kick off the program year in high gear during August, our Chapter has already donated 42 backpacks and some school supplies to the community center. The community center fills each backpack with all the supplies the students need. We will collect backpacks and school supplies again next August, so if you see

any quality backpacks marked down significantly when the back-to-school season ends, please consider bringing them to any luncheon this year. We will add them to the donations for next August. The sturdy, larger backpacks for older children are especially hard to find.

Throughout the last year we have collected travel size toiletry items and toothbrushes, and we will continue to collect these items at every monthly luncheon. So if you travel or have items sitting around at home, please consider donating any unused items.

If you have any questions about this program or have warm socks to donate but can't make the September luncheon, please contact Michele Tessner at [michele.tessner@dpi.wi.gov](mailto:michele.tessner@dpi.wi.gov) or 608-267-9218.



August backpack drop-off at the Salvation Army Community Center



## Chapter Board Meeting Minutes August 27, 2013

**Present:** Michele Tessner, Shellee Bauknecht, Roger Birkett, Lily Radivojevich, Tom Scheidegger, Mary Laufenberg, Sherri Voigt, and guest: Max Brunner

**Treasurer's Report:** Balance as of 8/27/13 was \$25,863.88.

**Membership:**

- 87 members; 1 new member so far this year.
- We received a recruitment scholarship from National and will run the 20/20/20 program again this fall.

**CGFM:**

- Shellee and 3 others are studying for the exam currently; Shellee will donate her Part 2 review book to the Chapter library once she is done.
- Michele is working on a way to communicate free/cheap CPE to interested CGFMs in the Chapter .

**Community Service:**

- Our 2014 partnership with the Salvation Army is off to a strong start. 42 backpacks were delivered to the Community Center. For 1<sup>st</sup> lunch, we will collect new, warm socks to delivery.
- They will let Michele know what items are needed throughout the year, and also notify us of any volunteer opportunities.

**Accountability:** The 2013 Member Centric Report is in process and will be submitted by 9/30. It will be posted on the website.

**Chapter Recognition:** points due 9/30; get all info to Eric by 9/15 so draft numbers can be reviewed.

**Newsletter:** Get items to Lily by 9/25.

**Education:**

- All speakers and topics for the fall are set.
- Audio conference list discussed and four were selected to offer (discount on 4+). Plan to partner with agencies for locations.

**Other:**

- Reports made by board members who attended the PDC on the chapter meeting topics.
- Discussed board meeting dates on calendar.

2013 Chapter Financial Summary	
<b>Chapter Revenues</b>	
Monthly Lunch Meetings	1,440
Annual Symposium	11,940
Training Events	2,495
Member Recruitment	155
Interest on Bank Account	40
CGFM Book Deposits	65
Donations at Lunches	47
<b>Total Chapter Revenues</b>	<b>\$16,182</b>
<b>Chapter Expenditures</b>	
Monthly Lunch Meetings	2,792
Annual Symposium	5,741
Training Events	1,837
Community Service Donations	1,000
Chapter Administration	865
Member Recruitment	180
PDC Sponsorship	1,000
CGFM Program	531
<b>Total Chapter Expenditures</b>	<b>\$13,946</b>
<b>Net Increase in Cash Balance</b>	<b>\$2,236</b>

### 2013-14 Officers and Directors



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

## **Community Service Opportunity**

### **Treasurer, SToughton Area Resource Team (START)**

The Stoughton Area Resource Team (START) a local non-profit and United Way of Dane County agency that provides a safety net for families in crisis in the Stoughton area, is seeking a volunteer to serve as Treasurer of the START Executive Board beginning January, 2014. The time commitment is 3 to 4 hours a month and includes a monthly board meeting in Stoughton the 2nd Tuesday of each month from noon to 1:30 pm. Responsibilities include:

- Serve as financial consultant to Executive Board and Program Director
- Oversee financial records including monthly balance sheet and revenue/expense statement and present to the Executive Board  
(Note: The monthly balance sheet and revenue/expense statements, payroll processing, audit and IRS Form 990 are completed by local businesses.)
- Compile materials for annual audit and filing for Form 990
- Receive timesheets every other week for the Program Director and Program Assistant, send to local firm for payroll processing, and write 4 payroll checks.

**For more information** about the SToughton Area Resource team, go to [www.startstoughton.org](http://www.startstoughton.org). To learn more about serving on the Board of Directors, contact Kay Davis, Board President, 873-4886, [dkaydavis@sbcglobal.net](mailto:dkaydavis@sbcglobal.net)

**20-20-20 Recruitment Program:  
\$20 Incentive Payments, \$20 Bonus and \$20 Rebates  
Under Southern Wisconsin AGA Chapter  
New Member Recruitment Program**

Our chapter is again holding our 20-20-20 Member Recruitment Campaign this year.

**Incentive Payments:** You can earn an incentive single payment of \$20 as a Southern Wisconsin Chapter member simply by recruiting one or more new chapter members.

**Bonus Award:** Members who recruit more than one member will be entered into a drawing for a prize of an additional \$20 award. Members who recruit more than one new member will have one entry for each additional member recruited.

**Rebates:** Each new chapter member will receive a \$20 rebate for their first year's dues.

This chapter member recruitment program begins September 2013 and runs **through Friday, January 31, 2014**. The membership application must be submitted by this date to the AGA national office. The member recruiter or new member must notify the chapter membership chairperson at [david.mellem@oig.hhs.gov](mailto:david.mellem@oig.hhs.gov) or 608-264-5415 ext. 25 by this submission deadline. Funds available for this recruitment effort are limited and will be paid on a first notice, first paid basis.

The AGA Membership Categories, annual dues and reduced dues after rebate for this recruitment campaign are as follows:

Full Government Member	\$ 90 less \$20 rebate = only \$ 70
Private Sector Member	\$150 less \$20 rebate = only \$130
Early Career Member	\$ 45 less \$20 rebate = only \$ 25
Student Member	\$ 30 less \$20 rebate = only \$ 10
Retired	\$ 30 less \$20 rebate = only \$ 10

Membership applications and instructions are available on the AGA national website at [www.agacgfm.org](http://www.agacgfm.org) under the Membership drop down menu near the top of the website homepage.

In addition to the rebate above, you receive all the standard “perks” of membership:

- First chapter lunch meeting is free
- Access to AGA National complimentary webinars (new this year) - free CPE!!
- Discounts on lunch meetings and other training events
- Subscription to the quarterly *Journal of Government Financial Management*

*If you have been thinking about it...this is the time to join!*



## National News

### NATIONAL NEWS



**2013-2014  
National President**  
Ms. Mary E. Peterman,  
CGFM, CPA

#### **Perspectives: AGA's Citizen-Centric Report Goes to College**



The Executive Director and staff of AGA had a vision to become a pillar in government thought leadership. They planted a seed and watched it grow. This would be the Citizen-Centric Report (CCR) -a 4-page plain-speak document to be prepared by governing bodies for the attendant constituencies

- William D. Miller, CGFM, CIA, AGA National President-Elect. [Read more](#)

#### **Perspectives: Mobile Gov Apps - Long Way To Go**

Mobility is all the buzz now a days! And of course, mobile apps (software applications) are where creativity and technology meet to create exciting new possibilities. It was with somewhat bated breath that I went to <http://appsusa.gov>, a mobile apps gallery set up by General Services Administration (GSA) to incubate the development and sharing of government apps - Sunil Datt, MBA, MS, MA, CGFM, PMP, *IBM Global Business Services*. [Read more](#)

#### **AGA's FMSB Issues Comment Letter to GASB**

The Financial Management Standards Board (FMSB) provided comments to the Governmental Accounting Standards Board (GASB) on the exposure draft entitled, 'Pension Transition for Contributions Made Subsequent to the Measurement Date', an amendment of GASB Statement No. 68. (ED). [Read more](#)

#### **2013 Federal Technology Survey**

The survey explores how leaders in the federal IT community are responding to competing requirements, technology trends and other challenges in the current budget-constrained environment. Topics of interest to CIOs include cyber-security, human capital, analytics and innovation. AGA would like to hear from the technology community that plays a role in your organization. [Take the survey](#)



# CGFM Corner

## Certified Government Financial Manager (CGFM®)



### Interested in the CGFM

#### CGFM Intensive Review Course

Oct. 28-29 | Washington | 18 CPEs Available



Finish 2013 with a great accomplishment! Sign up for AGA's Intensive Review Course on October 28-29 and take the CGFM Examinations by the end of the year at no additional cost. Don't miss this opportunity to earn your CGFM! [Read more](#)

### State Resistance to Federal Government Goes Back to US Beginnings

The Affordable Care Act is the law of the land, but that hasn't stopped a handful of states from doing what they can to gum up its implementation. Take Missouri: The state isn't expanding Medicaid, it isn't opening its own health insurance exchange, and it is barring local and state officials from cooperating in any way with the federal insurance exchange - Michael Ollove, *Stateline*. [Read more](#)

## Articles

### STATE & LOCAL NEWS

#### FAF Issues Revised Proposal on GASB Scope of Authority

The Financial Accounting Foundation (FAF) Board of Trustees issued for comment a revised proposal to clarify the characteristics of information that the Governmental Accounting Standards Board (GASB) may incorporate into the financial accounting and reporting concepts, standards, and guidance that it issues for state and local governments - *Financial Accounting Foundation*. [Read more](#)

### FEDERAL NEWS

#### Government Clouds: Interior Dept. Sets New Standard

The Department of the Interior's (DOI's) decision to invest as much as \$10 billion to migrate its IT operations to the cloud, through a set of 10 competing contracts, is perhaps the most significant example yet of how central cloud computing is becoming to federal agencies -- and to leading federal IT service providers. Experts also believe it will set the agency on a path toward becoming a major government cloud service provider - *InformationWeek*. [Read more](#)

## Coaching and Training in a Time of Lean Budgets

Crowdsourcing through social media can engage the public and identify innovative solutions to government problems, says an Aug. 19 report from the IBM Center for the Business of Government. The report outlines four approaches to crowdsourcing, including engaging the public to report problems and broadcasting problem-solving challenges on the internet - Ryan McDermott, *Fierceregovernment*. [Read more](#)



### 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.agacgfm.org](http://www.agacgfm.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 [radivojevich@danesherriff.com](mailto:radivojevich@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 2013 - 2014

August 27, 2013 – Board Meeting, Hometown Buffet, Madison

**September 26, 2013 – Lunch Meeting, Kimberly Hazen, Regional Director for the Southwest Region of the Wisconsin Better Business Bureau, Investment Fraud**

October 1, 2013 – Board Meeting, Hometown Buffet, Madison

October 17, 2013 – Lunch Meeting, UW-Madison Grants Management, Robert Andresen, Asst Director, UW-Madison Research and Sponsored Programs, location to be determined

October 23, 2013 – Grants Management Reform Updates and Agency Insights (audio conference)

November 5, 2013 – Board Meeting, Hometown Buffet, Madison

November 21, 2013 – Lunch Meeting, Upcoming Budget of the Madison School District and Influences by the Drop of Shared Revenues, Mike Barry, Asst Superintendent for Business Services, Madison School District, location to be determined

December 3, 2013 – Board Meeting, Hometown Buffet, Madison

December 11, 2013–Taking the High Road: How to Succeed Ethically When Others Bend the Rules (ethics audio conference)

January 7, 2014 – Board Meeting, Hometown Buffet, Madison

January 15, 2014–Fraud Detection (audio conference, exact title to be determined)

January 23, 2014 – Lunch Meeting, Annual Tax Update, Imperial Gardens

February 4, 2014 – Board Meeting, Hometown Buffet, Madison

February 20, 2014 – Lunch Meeting, topic and location to be determined

March 4, 2014 – Board Meeting, Hometown Buffet, Madison

March 5, 2014 – Accountability in Government (audio conference, exact title to be determined)

March 20, 2014 – Lunch Meeting, topic and location to be determined

April 1, 2014 – Board Meeting, Hometown Buffet, Madison

April 17, 2014 – Lunch Meeting, topic and location to be determined

May 6, 2014 – Board Meeting, Hometown Buffet, Madison

May 2014 – Community Service Event – MS Walk

May 8, 2014 – Annual Spring Symposium, UW-Madison Union South

June 3, 2014 – Board Meeting, Hometown Buffet, Madison

June 19, 2014 – 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 2013 - 2014

**President** – Sherri Voigt, CGFM, CPA, DOT, [sherriv@live.com](mailto:sherriv@live.com), 608-266-2814

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

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

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

**Accountability Outreach Chair** – Sherri Voigt, CGFM, CPA, DOT, [sherriv@live.com](mailto:sherriv@live.com), 608-266-2814

**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)

**Chapter Recognition Coordinator**

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

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

– Shellee Bauknecht, LAB, [shellee.bauknecht@legis.wisconsin.gov](mailto:shellee.bauknecht@legis.wisconsin.gov)

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

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