



SOUTHERN  
WISCONSIN  
CHAPTER



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# Monthly Footnotes

NOVEMBER 2013

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

## Welcome Members and Nonmembers

### November Luncheon Meeting

**TOPIC:** Upcoming Budget of the Madison School District and Influences by the Drop of Shared Revenues

**SPEAKER:** Mike Barry, Assistant Superintendent, Business Services, Madison School District

**DATE:** Thursday, November 21, 2013

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

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

**PLACE:** The Rigby Pub, 119 E Main Street, upstairs

**MENU:** Meals include soda, coffee, or tea and served with house made potato chips.

- **Cheeseburger** – classic burger served with cheddar cheese, lettuce and tomato on a Kaiser bun
- **Grilled Chicken** – marinated grilled chicken breast topped with lettuce, tomato, red onion, and chipotle mayo on a Kaiser roll
- **Grilled Mozzarella Cheese** – fresh mozzarella grilled with sliced roma tomatoes and homegrown basil served on a rustic Italian bread

**RESERVATIONS:** Contact Sherri Voigt by 1 p.m. on Monday, November 18, 2013 with your name, membership status, meal choice, and for carpooling information at [sherriv@live.com](mailto:sherriv@live.com).

**NEW!** Reservations may be made from our website. [www.aga-wis.org](http://www.aga-wis.org)

## ABOUT THIS MONTH'S LUNCHEON SPEAKER

**Mike Barry** was named the new assistant superintendent for business services, in July. Barry was the assistant superintendent for business services in the Oconomowoc Area School District. He will be discussing the latest school budget updates.

## 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.

## 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!

**Happy Thanksgiving**



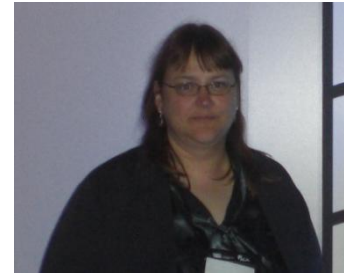
## PRESIDENTS MESSAGE

**Sherri Voigt, CGFM, CPA**

I would like to express a special thank you to everyone who attended the October lunch meeting. We had an overflow crowd to match a restaurant mix-up. I appreciate the great attendance.

I also thank those who wore pink in appreciation of the Passionately Pink for the Cure event (and those who made a donation). Also, thank you to those who brought warm socks. Your generosity is much appreciated.

I would like to draw your attention to a report out on our website. On September 30, we published our third annual Report to Our Members. It is available under the Chapter History area at <http://aga-wis.org/wp-content/uploads/2013/11/WI->



[CCR-20131.pdf](#). This is a four-page report that highlights the Chapter accomplishments for the past program year. I hope you will take a moment to look at it. Please let us know anything else you would like to see included.

And if you need some last CPE for 2013, check out the announcement for the December 11 audio conference (page 4). Please note that registration is through the DHS Training Office.



## Chapter News

### Community Service

#### Community Service Opportunities

The Salvation Army will be hosting a Thanksgiving Community Meal on Thursday, November 21. Approximately six more volunteers are needed to help serve the meal starting around 4:30 until around 6:30. The Chapter will also be donating a ham for this meal. If you are interested in representing the Southern Wisconsin AGA Chapter by helping the hungry enjoy their meal, please contact Michele Tessner at [michele.tessner@dpi.wi.gov](mailto:michele.tessner@dpi.wi.gov) or 267-9218 for further details.

At the November luncheon we will continue to support winter warmth by collecting warm socks, gloves or mittens. Please consider bringing new warm

socks, gloves or mittens of any size to the luncheon to be passed on to the Salvation Army Shelter and Community Center.

#### 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

## AGA Board Meeting Minutes Tuesday, October 8, 2013 – 5:15 p.m. – Home Town Buffet

- Treasurer's Report – Balance as of 10/8/13 was \$25,189.09.
- Membership – at 89 members (includes 3 new)
- CGFM – A survey is in the works to find out if CGFMs want to join a CPE e-mail list
- Community Service – We delivered 32 pairs of socks to the Salvation Army after the September lunch meeting. We will collect socks again at October lunch meeting in addition to the Komen Passionately Pink for the Cure event. Michele will contact Salvation Army for ideas for November/December.
- Accountability – The 2013 program year "Report to Our Members" was submitted

by 9/30 and is posted out on the web site.

- Chapter Recognition – Reports submitted at 9/30 without review; adjustments will be shown with Q2.
- Newsletter – Get items to Lily by 10/25
- Education
  - Lunches: Ideas discussed for winter/spring speakers
  - Symposium: many topics discussed; Mary will start contacting speakers to get schedule moving.
  - Live audio courses-4 scheduled this year; locations set up for 3
- Other Matters?
  - Social event to be scheduled for upcoming months

### October Luncheon Meeting Photos



**Robert Andresen**, Director of Research Financial Services in the Office of Research and Sponsored Programs at the University of Wisconsin-Madison, was the October speaker. He has been involved in sponsored projects administration for over 25 years. He covered many aspects of how the UW Madison monitors and track grants, including a number of the accounting system tool. He spoke to a capacity crowd at the Monona Garden Family Restaurant.

# TAKING THE HIGH ROAD:

How to Succeed Ethically When Others Bend the Rules



Problems and consequences attributed to poor ethical decisions can arise when ethical behavior is not defined, understood, or demonstrated.

Emphasizing the value of ethics training will help to foster an environment where:

- Ethical behavior is valued;
- Ethical behavior is considered the norm; and,
- Ethical decisions help to contribute to long-term success.

This web conference features easy-to-understand definitions of ethics, guidelines for tackling difficult decisions, practical examples, and a generous amount of humor; the result is an upbeat look at a key factor in long-term success.

**Date:** Dec. 11, 2013

**Location:** 1 W. Wilson Street, Room 751

**Time:** 1:00 - 3:00 p.m. Room is open for sign-in at 12:30

**Sponsors:** Office of Employee Development and Training (OEDT) and the Association of Government Accountants (AGA)

**Note:** 2 CPE's will be available upon request. You will have the opportunity to enter your request on the day of the workshop.

## YOU MUST REGISTER TO ATTEND

Go to <http://www.dhs.wisconsin.gov/forms/f8/f80475.doc> for the Training Registration Form and information on accommodations.

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

**Don't Miss Out on this Great Opportunity**

**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.agacqfm.org](http://www.agacqfm.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



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

### **35 AGA Chapters Create and Submit Citizen-Centric Reports (CCRs)**

Congratulations to the 35 chapters that submitted CCRs. 13 regions were represented. Recommendations to chapters due by Oct. 30. [Read more](#)

### **From AGA National President Mary E. Peterman, CGFM, CPA**

In a meeting with Capitol Hill staffers, "Keeping the government open would be my number one financial management best practice." [Read ore](#)

### **2014 National Leadership Training Feb. 11-12 | Washington | 14 CPEs Available**

Learn new tactics to help you excel as

a government financial manager with the challenging theme of 'doing more with less'. [Read more](#)

### **Share *Your* AGA Story**

How has AGA impacted you? Share *your* 'AGA story' and inspire others to join AGA, connect and get involved! [Read more](#)

### **AGA's Financial Management Standards Board (FMSB) Seeks Input on New Reporting Framework**

FMSB seeks input on the development of a new reporting framework targeting executive and legislative decision-makers. **Comments due by Dec. 1.** [Read more](#)

### **Panel Discussion: 2013 CFO Survey Results**

**Nov. 6 | 8-10 a.m. | 1 CPE Available |  
Marriott Metro Center Hotel,  
Washington**

You are invited to attend a complimentary breakfast event to hear the views of federal CFOs as expressed in AGA's 18th annual CFO survey: The New CFO Management Agenda. [Read more](#)

### **Call for National Awards Nominations**

Help us acknowledge colleagues leading the way at the federal, state and local level, and private sector. **Nominations due Nov. 30.** [Read more](#)

**Members-Only Webinar: Prevent, Detect and Mitigate Fraud in Your Organization**

**Nov. 19 | 2-3 p.m. ET | 1 CPE Available | Members-Only**

This complimentary members-only webinar will focus on three "hands-on" toolkits issued by AGA's Intergovernmental Partnership. [Read more](#)

**Web Conference: Big Data + Big Analytics = Big Opportunity**

**Nov. 6 | 2-3:50 p.m. ET | 2 CPEs Available**

Learn how government agencies are cutting through complexity and using information as a powerful asset, both operationally - day-to-day - and strategically. [Read more](#)

**Request for Proposal (RFP) for a Grants Management Training Manual**

The National Grants Management Association (NGMA) invites you to submit a proposal for the development of a training manual on the full lifecycle of grants management. [Read more](#)

## CGFM Corner

**Certified Government Financial Manager (CGFM®)**



**New CGFM Online Study Guide 1**

AGA CGFM study guide 1 is now online. [Order your copy today](#)

### ARE YOU MOVING?

Please notify both your chapter and AGA National of your address change. Update your address online at the national website in the members' only area: [www.agacgfm.org](http://www.agacgfm.org)



### SHARE YOUR NEWS

Please 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.



## 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, Vintage Brewing

October 8, 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, Monona Garden Family Restaurant

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

November 13, 2013 – Grants Management Reform Updates and Agency Insights (audio conference), Department of Public Instruction (rescheduled from October 23)

**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, Rigby Restaurant**

**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.



## 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 extension 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 extension 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)

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



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