

Monthly Footnotes

Monthly Publication

Southern Wisconsin Chapter of the Association of Government Accountants (AGA)

November 2007

Vol. VI, No. 1

Luncheon Meeting

Welcome all Members and Non-Members

TOPIC: Annual Income Tax Update

SPEAKER: Shannon Davis, Tax Manager, Virchow Krause & Co., LLP

DATE: January 25, 2007

LUNCH: 11:45 A.M.

REGISTRATION: 11:30 A.M.

COST: \$10 for Members; \$12 for Non-Members

PLACE: Imperial Garden East
4214 E. Washington Ave - across from East Towne

MENU: Traditional Banquet served family style, includes egg roll and hot tea

- ◆ Shrimp with Pea Pods
- ◆ Beef with Broccoli
- ◆ Hunan Pork
- ◆ Vegetable Fried Rice
- ◆ Governor's Chicken

RESERVATIONS: Please call **Sherri Voigt** by 11 a.m. on Monday, January 22, 2006 with your name, menu selection and membership status, (608) 267-9818 or e-mail: sherri.voigt@dnr.state.wi.us. If you need help getting a ride to the lunch, please contact Sherri for car-pooling information.

NEW MEMBERS FIRST LUNCHEON MEETING

If you are a new member and this will be the first luncheon you are attending, please note that when calling in your reservation. Your first chapter luncheon meeting is FREE!

BRING YOUR SUPERVISOR TO LUNCH ON AGA

One of the benefits of belonging to our Chapter is that you can bring you Supervisor to lunch once annually to show your appreciation for his/her support of your participation in AGA. Why not invite them for this months meeting?

ABOUT THIS MONTH'S LUNCHEON SPEAKER

Shannon Davis is a tax manager with Virchow Krause & Co., LLP and has been with the firm since 2001. He has been practicing since 1995 with firms in Arizona and Wisconsin. He specializes in business and individual taxation. He assists clients with tax planning, tax compliance, and business formations, reorganizations and liquidations.

Friendly Reminder and a Great Deal

Attend 3 Training Sessions from November to February

Earn a Free Lunch

Coupon Valid at the March, April, or May Lunch

We are into the planning process for the 2007 Annual Spring Symposium. If you have any suggestions for speakers and/or topics, please forward them to Carrie Ferguson, Education Chair at Carrie.ferguson@legis.state.wi.us, (608) 259-9839, or Eric Busse, President, at eric.busse@dpi.state.wi.us, (608) 267-9199.

Presidents Message Eric Busse

Happy New Year to everyone! I hope your holidays went as well as mine. As we enter 2007, we finished the year with our November speaker Steve Pearson from the Employee Assistance Program at UW-Madison. He gave a very energetic presentation and left us with some good points to follow and who knows, may make a difference in our everyday patterns. We ended 2006 also with the Packers beating the Bears (sorry, but I had to get that one in) and finished the season 8-8. We welcomed in the new year with the Badgers ranked #5 in football and beating Arkansas in the Capital One Citrus Bowl and the men's basketball team ranked #4. The women's hockey team is ranked in the top 5 and the women's basketball team is having a good season.

This month's luncheon will feature the annual tax program and I would encourage you to come to the luncheon. I believe there will be some things we all should be able to utilize.

Again, we have a few vacancies on our chapter board. Anyone interested in taking a more active role in the chapter should look at the vacancies on the last page of the newsletter. Feel free to contact me or any of the board members for more information or attend a board meeting to get an idea of what the committees do.

Have a great 2007!

Community Service Announcements

If you have any community service ideas you would like to see the chapter try out, let us know. We will conduct another food drive in the spring but would love to try something new!

**We Need Your Ideas
&
Suggestions!**

From The National Office

AGA's Performance Management Conference

AGA's Second National Performance Management Conference in Schaumburg, IL successfully provided education and networking opportunities for attendees. Thanks to the speakers and sponsors for supporting the conference and government performance reporting. [Read the conference summary and view pictures of this year's SEA Award Recipients.](#)

Public Sector Score Card — Now a Tool of Choice

Once used primarily in the private sector, score carding has made its way into the public sector and is showing staying power as a tool to drive excellence. Score carding systems as a management tool can help you measure, manage, and communicate strategic plans in your organization. Their increased popularity has led to more sophisticated systems, which in turn can reap larger benefits. Learn more about what top factors have increased the **use of score carding in government** and why an enterprise score carding system can fulfill their needs.

[Download this free whitepaper.](#)

Member-Get-A-Member Recruitment Challenge “Reach for the Stars” is in Full Swing



James J. Kennedy, CGFM, a member of AGA's Central Ohio Chapter, recruited his 21st new member recently, sending him into the Top Recruiter position! Next in line is **Janet M. Brooks, CGFM**, a member of AGA's Northern Virginia Chapter, with 13 recruits. The challenge is on to see who will land on top as Recruiter of the Year!

EVERY AGA member is challenged to recruit at least one new member into AGA before the close of the membership year, April 30, 2007. ***Are you up to the challenge?***

We have made it so easy to participate!

- [Click here to download a membership application.](#)
- Print your name on the “Sponsor’s Name” line on the application to receive sponsor

credit when your recruits join.

- Follow up with those individuals that you asked to join.

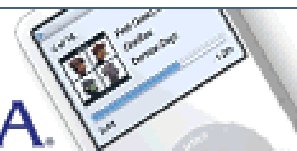
[View all of the details, including prize information.](#) The 2006-07 Recruitment Campaign runs through April 30, 2007. ***Now is the time to swing into action!*** And be sure to reach out to those early career members!

Membership Frequently Asked Question

Q: I've lost touch with an AGA member, how can I find their contact information?

A: One of the greatest benefits of AGA membership is networking with colleagues. With today's busy lifestyle it's easy to lose touch with someone you may have met at a conference, chapter event or other networking opportunity. You can easily locate an AGA member by logging in to the [Members Only](#) section of our website and selecting Member Directory at the top of the page. To do a simple name search, enter their last and first name separated by a comma and no spaces and then click the search button. This will bring up a list of everyone with that name. If you have any questions please contact [Rica Muhammad](#).

Accounting and Finance Professionals
Post Your Resume



CGFM Corner

Important Reminder for CGFMs Certified in 1996, 1998, 2000, 2002 or 2004: We are almost to the end of the year—have you earned your 80 CPE hours?



If your CGFM certification was awarded in 1996, 1998, 2000, 2002 or 2004, you need to have at least 80 Continuing Professional Education (CPE) hours earned within the two-year period of January 1, 2005 – December 31, 2006. If short, you can take advantage of the grace period of January 1 – March 31, 2007 to catch up on your CPEs (these hours then cannot be counted towards your next cycle of 2007-2008).

CGFMs can earn the required CPE hours in many ways. In addition to conventional training activities, such as courses, seminars and workshops, CGFMs can complete college and university courses, both credit and non-credit; serve as a speaker, instructor or discussion leader at programs that qualify for CPE hours; publish articles and books or develop CPE courses on topics and subjects that qualify for CPE hours and that contribute directly to the author's professional proficiency; and take individual study programs offered through correspondence courses, audiocassette tapes, videotapes and computers. For example, visit AGA's ["Education and Training"](#) page for information on online CPE opportunities offered through AGA.

Not all CPE hours can count towards the CGFM designation. The hours earned must be in

government financial management topics or related technical subjects applicable to government financial management areas. Applicable CPEs would need to maintain or enhance your professional proficiency in government financial management, and you have to keep back-up documentation of the completed CPE for at least three years. This documentation may be requested by AGA if you are selected to be audited; however, CGFMs should not automatically send information on their CPE hours to AGA at the time of renewal.

For more detailed information about earning CPE hours, what topics and subjects can qualify for CPEs and answers to commonly asked CPE questions, please visit "[CPE Requirements](#)" page. If you have any additional questions, contact AGA's Office of Professional Certification at 800.AGA.7211, ext. 305.

CGFM Profile: Second Career Prompts Dave Swindell to Find 'Right' Certification

Like many career military officers, Dave Swindell needed to make a big transition after his retirement. Unlike many of his peers, he did not shift to consulting work, contracting for the Department of Defense or maintaining close ties to his Army past. He made a big break, moving to an area with no military presence and taking on something completely new: a job in local government.

"When you change careers, everything's open. I considered the private sector, but in the end I was pleased with the ethics and purpose of government. I don't know if I could work that hard to make someone else money."

Swindell ended his 22-year military career, and moved from Oklahoma to Pocatello, Idaho, where he has served as the city's chief financial officer for the past five years. One of his first priorities was to become certified, and the CGFM turned out to be the broad-based governmental accounting certification that he was looking for. "I was influenced by others who were active in AGA," Swindell said. "Pocatello is home to Idaho State University and Kitty Pumphrey. Kitty is the Professor of Governmental Accounting and an active AGA pusher-and on my selection committee, I later found out. She got me thinking about the CGFM."

Swindell said that as a federal employee, he became well schooled in financial and policy analysis. He also earned a master's degree in public administration along the way. In the Army, his focus was on setting budget priorities, not the specifics of governmental accounting. By contrast, one of Swindell's first hires - CPA Joyce Stroschein - was stronger in accounting techniques and not as experienced in financial analysis. He purchased the self-study guides and got to work. After he passed the first exam, Stroschein also started studying, and ended up earning her certification before her boss did. "We really studied on our own, but we encouraged each other. I couldn't help but finish," he said. "There was a little honor involved." In addition to her CGFM, Stroschein received a promotion from senior accountant to controller. "She also found the program to be a good refresher of just how everything is connected between accounting, management, leadership and accountability to the public," Swindell said. Earning the CGFM from Pocatello was somewhat complicated. To take the exams, Swindell traveled to Ogden (130 miles), Salt Lake City (177 miles) and Boise (240 miles), with his wife in the

passenger seat quizzing him on the way to the testing centers. Being an AGA member is not simple either, as the Idaho Centennial Chapter meets in Boise, on the other end of the state. Swindell and Stroschein attend AGA's regional conferences and as many chapter functions as time and distance allow.

Taking a job in local government has been a great experience and a huge growth opportunity, Swindell said. Since entering West Point at age 18, his life had been wrapped up in the Army, a life he understood and knew well. He was comfortable walking the halls of Congress or the Pentagon, but nowhere is the role of government in people's lives more obvious than in City Hall. Approving a setback for a garage may sound mundane, but it is important to the resident involved. At the federal level, the direct impact of what you do can be somewhat lost, he said. "Everything a city does is generally important," he said. "I found the right niche for me." The values he learned through his military education-becoming a well-rounded person with awareness of many disciplines-applied to the CGFM. As a big believer in what he calls a "core education", the CGFM fit into his desire to understand the big picture. Studying for the CGFM Exams gave Swindell a stronger knowledge of the theoretical underpinnings of governmental accounting, describing the origin of certain rules and how they evolved to the point where they are today. "I think the CGFM distinguishes you amongst your peers," he said. "I can testify to the value of it."

-by Christina Camara

SHARE YOUR NEWS

Do you have some interesting news that your fellow chapter members may be interested in? If so, please submit an article to the Newsletter Editor at radivl@dhfs.state.wi.us. Deadline for submission of articles is the 25th of the month.

ARE YOU MOVING?

If you are moving, or have already moved, please notify AGA National of your address change. You can update your address online at: www.agacgfm.org/membership/form_address.htm. Don't forget to notify your local chapter.



Southern Wisconsin Chapter Calendar of Events for 2006-2007

September 12, 2006 – Board Meeting, Old Country Buffet, Madison
September 28, 2006 – City/County Public Health Agency Merger, Thomas Schlenker,
MD, MPH, (Rocky Rococo-East)

October 10, 2006 – Board Meeting, Old Country Buffet, Madison
October 26, 2006 – The Upcoming Election: Corruption, Finances, and Reforms, Jay
Heck, Common Cause In Wisconsin (Dayton Street Café)

November 14, 2006 – Board Meeting, Old Country Buffet, Madison
November 30, 2006 – “How to Avoid Taking Things Personally”, Stephen R Pearson,
MA, LPC, Director, UW-Madison Employee Assistance Office
(Dayton Street Café)

No December Luncheon Meeting

January 23, 2007 – Board Meeting, Old Country Buffet, Madison
January 25, 2007 – Luncheon Meeting, Annual Tax Update (Imperial Garden)

February 13, 2007 – Board Meeting, Old Country Buffet, Madison
February 22, 2007 – Luncheon Meeting

March 13, 2007 – Board Meeting, Old Country Buffet, Madison
March 22, 2007 – Luncheon Meeting

April 10, 2007 – Board Meeting, Old Country Buffet, Madison
April 19, 2007 – Luncheon Meeting

May 3, 2007 - *Annual Spring Symposium*, Tripp Commons, UW-Madison Memorial
Union

May 8, 2007 – Board Meeting, Old Country Buffet, Madison
May 24, 2007 – Luncheon Meeting

June 12, 2007 – Board Meeting, Old Country Buffet, Madison

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

2006 - 07 Chapter Officers & Board Members

President – Eric Busse, DPI eric.busse@dpi.state.wi.us, 608-267-9199

President Elect – Vacant

Past President – Sherri Voigt, CGFM, CPA, DNR, sherri.voigt@dnr.state.wi.us, 608-267-9818

Chapter Recognition – Dolly O’Laughlin, olaughlin@co.dane.wi.us, 608-242-6314

Secretary – Vacant

Treasurer – Roger Birkett, CPA, jabirk@charter.net

Historian – David Mellem, CGFM, CIA, CISA, US DHHS OIG, 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,
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Newsletter Editor – Lillian Radivojevich, DHFS, radivl@dhfs.state.wi.us, 608-267-7306

Education Chair – Carrie Ferguson, CPA, LAB, Carrie.ferguson@legis.state.wi.us, 608-259-9839

Webmaster – Scott Thornton, scott@goochpages.com

Community Service Chair – Sherri Voigt, CGFM, CPA, DNR, sherri.voigt@dnr.state.wi.us

Research Coordinator & Liaison w/Other Profession Organizations – Vacant

CGFM Chair – Eric Busse, DPI Eric.Busse@dpi.state.wi.us

Awards Chair – Vacant

Early Careers Chair – Vacant

Directors -

Thomas A. Scheidegger, CPA, Virchow Krause, Tscheidegger@virchowkrause.com, 608-240-2303

Cynda Solberg, DHFS, solbeck@dhfs.state.wi.us, 608-301-1360

RVP North Central Region – Sherri Voigt, sherri.voigt@dnr.state.wi.us



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