

Monthly Footnotes

Monthly Publication

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

February, 2007

Vol. VI, No. 2

Two Events This Month: Luncheon & Audio Conference

Luncheon Meeting

Welcome all Members and Non-Members

TOPIC: Cost Effective Ergonomic Solutions

SPEAKER: Scott Smith, WI Department of Health and Family Services

DATE: Thursday, February 22, 2007

LUNCH: 11:45 A.M. **REGISTRATION:** 11:30 A.M.

PLACE: Babe's American Grill, 5614 Schroeder Road (just off intersection of Hwy 12 and Whitney Way, across from Vitense Mini Golf)

COST: \$8 for Members; \$10 for Non-Members

MENU CHOICES: Pesto Penne Pasta Meat Loaf Baked Chicken
Meals include roll, vegetable, & garlic mashed potatoes (except pasta)

RESERVATIONS: Please call **Sherri Voigt** by 11 a.m. on **Friday, February 16, 2007** with your name, menu selection and membership status, (608) 267-9818 or e-mail: sherri.voigt@wisconsin.gov. 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?

FEBRUARY 27 AUDIO CONFERENCE ON PROCUREMENT CARDS

See the article in this newsletter for registration information (deadline is February 22) and details about the audio conference from CD to be held at Rocky's East on Tuesday, February 27. The audio conference qualifies for 2 CPEs.

ABOUT THIS MONTH'S LUNCHEON SPEAKER

Scott Smith has worked for the State of Wisconsin for 28 years. His current position is Environmental Services Supervisor for Mendota Mental Health Institute and Central Wisconsin Center for the Developmentally Disabled. In this role Scott has been responsible for development and implementation of all health and safety programs for nearly 2000 staff and 600 patients. These programs include ergonomic assessments, OSHA standards, Life Safety Codes, injury investigation and reduction plans and all hospital accreditation standards.

Scott also assists the Wisconsin Council of Safety with program development and has been a judge for the annual Corporate Safety Award for the past 5 years. He has also served as President and Vice President of the State Agency Safety Council.

In his spare time, Scott is the President of Safety Services. This company provides training and consultation in manufacturing settings.

We need your ideas 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

Our luncheon speaker last month was the Annual Tax Update presented by Shannon Davis of Virchow Krause. He informed us on all the new IRS tax rules that we can use personally and professionally. Hopefully we will still be able to take advantage of those we have in the past. Maybe we should all be saying "good luck" when doing our taxes this year.

Please mark your calendar to attend the monthly luncheons. Not only can you receive CPE credit for attending, you can make new contacts, see old ones, and even take part in the discussions. Remember, if you are new member and you are attending your first luncheon, just let us know and that lunch is on us.

At our February and March luncheons, we will be sponsoring an office supply drive to help the faculty and staff at John McDonogh High School in New Orleans. We are working in a partnership with the New Orleans AGA chapter on this drive. I believe these words from Mother Teresa sums up the meaning of this drive; "Kind words can be short and easy to speak, but their echoes are truly endless". Let's put forth a good effort.

We will be having a CD audio training on February 27th at Rocky's East. There is more information within the newsletter as to sign up. Also, keep in mind that the Annual Symposium will be May 3, 2007 at the UW-Madison Memorial Union.

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.

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!

Procurement Cards - Successes and Challenges

Audio Conference from CD, 2 CPEs

Date: Tuesday, February 27

Location: Rocky's East (pizza/salad/soda included)

Registration: 11:30 a.m. Lunch: 11:45 a.m. Program: 12:15 - 2:10 p.m.

Cost: \$ 9 Members \$13 Non-Members

AGA, in conjunction with NASACT and ALGA, is sponsoring an audio conference, worth 2 CPE hours, addressing the "Successes and Challenges" and evolution of government procurement cards.

Speakers: Jeffrey Glen B. Gainer III, West Virginia State Auditor
 Tom Sadowski, CGFM, CPA, Director of Accounting, State of Missouri
 Bruce E. Sullivan, Vice President, Government Services, Visa USA

Taped live on December 6, 2006

Registration deadline is Thursday, February 22. To register:

Mail to:

Association of Government Accountants

P.O. Box 1454

Madison, WI 53701-1454

Call or E-mail:

608-267-9818 or Fax 608-264-6277

sherri.voigt@wisconsin.gov

Purchase orders accepted. Payment can be made ahead or at the door.

Assessing Risk and Controls Audio Conference

The Chapter will purchase a CD of the live audio conference on "Practical Guidance for Auditors and Management in Effectively Assessing Risk and Controls" scheduled for February 28 and present it later. Watch future chapter newsletters.

Wisconsin State Controller William Raftery Retires

William J. Raftery, CPA, Wisconsin State Controller, retires Thursday, February 15, 2007. For 18 years, Mr. Raftery served as controller for the State of Wisconsin. He also served 4 years as controller for the State of Missouri during the 1970s and for about half his career in the private sector where he focused on governmental auditing and consulting. Until 1988, he was an audit partner with KPMG Peat Marwick in New York City.

During his tenure as Wisconsin's controller, he was instrumental in modernizing the state's financial information systems and implementing technology to improve the efficiency and effectiveness of government operations. Under Mr. Raftery's leadership, the state published its first comprehensive annual financial report, which has received the Government Finance Officers Association Certificate of Achievement every year since 1996.

In addition to extensive authorship on accounting and auditing matters, Mr. Raftery has been an active participant in the accounting standards setting process throughout his career. He served as a member of the National Council on Governmental Accounting (predecessor to GASB) task forces. He was a leading advocate for the early implementation of GASB Statement 34 and presented plans for its implementation across the country.

Mr. Raftery was a member of the Governmental Accounting Standards Advisory Council from 2002 to 2004 representing the National Association of State Auditors, Controllers and Treasurers (NASACT). He has an extensive history in teaching auditing and accounting, both for professional staff and as an adjunct professor in two institutions of higher education, including Edgewood College in Madison from 2002 to 2004. In 1994 and 1995 he taught governmental accounting and finance in Russia and Estonia.

In addition, he is a past president of the NASACT and the National Association of State Comptrollers. Other awards Mr. Raftery received include AGA Financial Manager of the Year Award for 1991-1992, the Wisconsin Institute of CPA's (WICPA) Government Service Award, and the NASACT President's Award, which he received twice. In 2001, the American Institute of CPAs named him Outstanding CPA in Government. On February 12, 2007, he receives the William R. Snodgrass Distinguished Leadership Award at AGA's National Leadership Conference in Washington, DC.

Mr. Raftery holds a bachelor's degree from Loyola College and a juris doctor from the University of Baltimore. He is also a graduate of the U.S. Army Finance School. During the Korean War, he served with the U.S. Army Second Infantry Division. He is a member of AGA's Southern Wisconsin Chapter, the AICPA, the MACPA, the WICPA, the American Legion and the Veteran's of Foreign Wars.

The Southern Wisconsin AGA Chapter thanks Mr. Raftery for his many years of service to governmental financial management and is proud to have had him as a member for many years. The Chapter wishes him a long and happy retirement!

In Memoriam

John 'Al' A. Gesell, 80, founder of the Southern Wisconsin Chapter of the Association of Government Accountants (AGA), died Thursday, January 18, 2007 at his home in Wausau, Wisconsin.

John received the AGA national Chapter Service Award, one of six major awards, at the AGA Professional Development Conference (PDC) on June 28, 1978 in San Francisco. The 1978 award publication stated in part:

. . . He has had a significant long-term impact on the activities of the Southern Wisconsin Chapter, and in doing so has enhanced the image of the chapter as well as the Association. As a direct result of his efforts, the chapter can look forward to continued growth, meaningful activities and professional fulfillment for its members. . . .

John also received the annual national AGA Author's Award for best financial management article published AGA's Journal of Government Financial Management. He also served as AGA Regional Vice President.

At the Chapter level, John served three terms as president and newsletter editor, two terms as membership chairman and chairmanships of numerous committees and study groups. Chapter membership increased one third during his second term as membership chair. He also chaired a successful chapter spring symposium and the chapter's first financial management project.

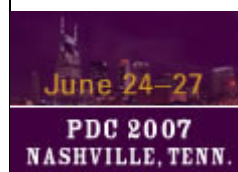
He was a long-time Auditor and Financial Manager in the U.S. Department of Transportation's Federal Highway Administration (FHWA). John received many awards recognizing his significant achievements during his career, including the FHWA Administrator's Award. John retired from the FHWA Wisconsin Division in December 1981 after having served over 30 years with FHWA and its predecessor, the Bureau of Public Roads, the U.S. Department of Agriculture, the U.S. Navy and the U. S. Army.

John was a U.S. Navy veteran serving in the South Pacific during World War II and a U.S. Army veteran serving in Germany during the Korean conflict. After retiring from FHWA John was a real estate broker in hometown of Tomahawk, Wisconsin.

In addition to his many professional accomplishments, John is remembered by those who knew him for his goodwill, friendliness, sense of humor and infectious laughter.

John is survived by his wife, Ursula; a stepdaughter, Patty (Gary) Duffrin, Wausau; two stepsons, Werner Gorshe, Wausau, and Steven Gorshe, Sparta; four grandchildren; a brother, William Gesell, Franklin; and two nieces and two nephews.

From The National Office



Saddle Up, Dust Off Your Best Pair of Boots and Get Ready for AGA's PDC in Nashville

Join us June 24–27, 2007 at the Nashville Convention Center in Music City, USA for AGA's 56th Annual Professional Development Conference & Exposition (PDC).

With dozens of educational sessions, social events and exhibitors available, the PDC is an authoritative source for the knowledge and contacts you need to succeed in today's constantly changing environment.

The PDC offers exceptional training opportunities. Learn about the newest research in the field. Discover tools and techniques that have advanced the profession. Meet the top leaders from federal, state, and local governments. Sessions will be organized around the following tracks:

- Accountability & Ethics
- Auditing Tips, Tools & Techniques
- Financial Management Strategies
- Innovative Funding Mechanisms
- Management Challenges & Solutions

In addition to an outstanding technical program, the PDC provides unparalleled opportunities to network, exchange ideas and meet new friends.

Register today and secure your place at *the* government financial management education event of the year!

- [Register Online and Save!](#)
- [Download Registration Form](#)
- [Visit the Website](#)
- [Become an Exhibitor](#)

.More Chances to Win in AGA's 2006–2007 Member-Get-A-Member Campaign—Reach for the Stars



Reach for the Rising Stars and You Could Be a Star in Nashville!

That's right, recruit new members into AGA this program year and you could win a FREE roundtrip airfare and registration to AGA's 2007 Professional Development Conference & Exposition in Nashville, TN, June 24–27.

This year we are focusing on recruiting the rising stars—we call them early career and tomorrow's professionals— individuals just starting out in their careers, with fewer than three years of experience. Finding and developing AGA leaders of tomorrow is so very important to AGA's future as well as to the future of our profession. Now is the time to reach out to these 'up and comers'—maybe even think about becoming a mentor.

Why you? We have found that the majority of new members join AGA because a

colleague recommended AGA membership to them. You probably do this frequently, maybe without even realizing you are officially "recruiting." Just be sure to have an [AGA membership application](#) ready or know the AGA website address (www.agacgfm.org). In addition, don't forget to include your name in the 'sponsor' line on the membership application to receive credit.

Now back to that FREE trip to Nashville...Recruit 10 or more members by March 31, 2007 and be placed into a fishbowl drawing for a FREE trip (roundtrip airfare and registration) to AGA's 2007 Professional Development Conference in Nashville. Recruit 10 members, get one chance at the drawing, recruit 16 members, and get seven chances and so on. The more members recruited the more chances to win.

Also, a \$500 American Express gift card will be awarded to the AGA member who recruits the most Early Career members during the Member-Get-A-Member campaign, which runs May 1, 2006 through April 30, 2007.

Show off your enthusiasm with firsthand accounts of how your AGA membership has been a great investment in your professional development and career! Start recruiting today!

[Read about the details and prize information.](#)

Membership Frequently Asked Question

Q. I need to verify that my contact information is correct. How do I update this with AGA?

If you have recently changed employers, received a promotion, moved, or have a new e-mail address, we ask that you update this information with AGA. This can be done quickly and easily by going to the [Members Only](#) section of our website and updating your profile. To access members only, use your member ID number as your login ID and your first initial followed by your last name as your password. If you have any questions or problems logging in please contact [Rica Muhammad](#).

State of Oregon, City of Saco, Maine, and City of Portland, Oregon— Pioneers in Citizen Reporting



We are pleased to announce that the State of Oregon, the City of Saco, Maine and the City of Portland, Oregon have all signed on to produce four-page 'annual state of the government' reports to their citizens, as part of AGA's Citizen Centric Reporting initiative. These reports will be easy to understand and will tell the citizens what they need to know about their government and how their tax dollars are being spent. "This little bit of information will go a long way toward jump-starting citizen involvement in government," stated AGA Executive Director **Relmond Van Daniker, DBA, CPA**.

Each report is scheduled to be complete by early spring and AGA will work with local media, civic leaders, and elected officials to promote the reports as a good government tool that allows citizens to better understand their local government and to facilitate meaningful debates around fiscal priorities. And this is just the beginning. With 88,000 governmental entities in the U.S., we will be reaching out to them one by one.

Please let us know what you think about this initiative. Contact [Susan Fritzlen](#) at 800.AGA.7211 with your comments. Why not be on the cutting edge and add your government to the list? With a template now available and a tool kit in the works, we have made it so easy for you to develop a four-page report! [Read about the entire initiative including and view an actual report.](#)

AGA Accepting Independent Nominations for National Officers

As outlined in the Association's bylaws, AGA will accept independent nominations from AGA members via petition until Feb. 1, 2007. At that time, if other candidates are nominated, the Bylaws and Procedures Committee will conduct an election to determine the officers. However, if no other nominations are received, the committee's slate will take office effective July 1, 2007. [Click here to view the complete slate of nominees.](#) Contact [Rosanna Ortiz](#) with questions.

Member Happenings

Steve Allison, CGFM, a member of AGA's Idaho Centennial Chapter, resigned as deputy controller of statewide accounting, state of Idaho, to serve as controller of Boise State University.

William (Bill) Cole Jr., a past president of AGA's Richmond Chapter, has resigned his post as deputy state auditor of public accounts, Commonwealth of Virginia, to become senior associate vice president of administration for administration and finance at Christopher Newport University.

AGA Past National President **Bobby A. Derrick, CGFM**, a member of AGA's Indianapolis Chapter, is retiring from the Defense Finance and Accounting Service (DFAS) after 33 years of public service. He is now the Director of Administrative Services and Corporate Resources Support Services Customer Advocate. He has held several directorships for DFAS and has served on many positions with the Indianapolis Chapter and at the national level of AGA. Derrick, who is also a professional photographer, plans to spend more time babysitting his three grandchildren.

Jill Flinton, CGFM, board member and chair of the audit committee of AGA's New York Capital Chapter, gave birth to her son, Daniel Jonathon, on Dec. 7. Best wishes, Jill.

Shirley A. Henry, a member of AGA's Nashville Chapter, is being honored for her 30 years of state service at a reception on Thursday, Feb. 1 at the Tennessee Performing Arts Center. Congratulations Shirley.

Diana Jones Ritter, CGFM, member of AGA's New York Capital Chapter, has been appointed commissioner of the New York State Office of Mental Retardation and Developmental Disabilities by Gov. Eliot Spitzer. Congratulations, Diana!

James M. Williams, CGFM, CPA, a member of AGA's East Tennessee Chapter, has been reappointed to a second five-year term on the Governmental Accounting Standards Board (GASB). A former chair of AGA's Financial Management Standards Board, Williams is a retired partner and former national director of public sector accounting services with Ernst & Young.

CGFM Corner

Annual CGFM Renewal Time!

AGA is getting ready to send you an annual renewal invoice for your CGFM certification and/or AGA membership. If your address has recently changed, please be sure to update your contact information with AGA and pay your dues in the "Members only" section of the [AGA website](#). Below you'll find answers to frequently asked questions about CGFM renewal:

Q: How often do I have to renew my CGFM designation?

A: CGFM certification is renewed on an annual basis. A renewal invoice is sent out in February and the payment is due by March 31st. If you do not receive an invoice by mid-March, please call AGA at 800.AGA.7211. [Read more about maintaining your CGFM certification.](#)

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 ravidl@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
February 27, 2007 – Audio Conference on CD: Procurement Cards

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,
608-264-5415 ext 25

Newsletter Editor – Lillian Radivojevich, DHFS, radivi@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



SOUTHERN
WISCONSIN
CHAPTER

P.O. Box 1454
Madison, WI 53701-1454