



## 2007-2008 Chapter History Report

September, 2008

The Southern Wisconsin Chapter of the Association of Government Accountants earned platinum status for the 2007-2008 program year. We had a wide variety of educational events and community service opportunities. We were able to offer a total of 1,900 CPE hours during the program year. Anyone attending all sessions could earn 39.5 CPE for the year.

### 1. Training Events Held – Total CPE Offered: 31.5 Hours

October 16-17, 2007: Government Financial Management and Controls (CGFM training course)

Presenter – Harold Steinberg, CGFM, CPA

Location – Inn on the Park, Madison, WI

CPE's Offered – 16 hours

Attendance: 19

March 11, 2008: Cost Principles and Cost Allocation Rules and Regulations for Federally Funded Grants and Contracts

Presenter – Joseph Stertz, retired-US Federal Highways Agency

Location – UW Memorial Union, Madison, WI

CPE's Offered – 8 hours

Attendance: 43

May 13, 2008: AGA Annual Spring Symposium at University of Wisconsin

Topics – Various accounting/auditing/development topics (listed behind speaker below)

Speakers:

- Richard Fair, CGFM, CPA, NJ State Auditor and AGA National President, *Technology and Other Challenges Facing Audit Organizations*
- Sue Hunter, CEAP, UW Madison, *Health Boundaries at Work*
- Susan Fuszard, CEAP, UW Madison, *Health Boundaries at Work*
- Ann Marie Anderson, CPA, WI Dept of Health and Family Services, *Common Audit Findings and Changes in Audit Requirements*
- Menzie D. Chin, professor, UW Madison, *Macroeconomic Prospects: Rates? Recession? Recoupling?*
- Harry Webne-Behrman, Training Officer, UW Madison, *Listening Effectively in a Swamped Environment*

Location – UW Memorial Union, Madison, WI

CPE's Offered – 7.5 hours

Attendance: 139

**Monthly Chapter Luncheon Meetings**– 1 CPE offered for each luncheon – 8 CPE

- September 19, 2007 – E-Mail Etiquette, Cindy Cox, North Central RVP and Ron Cox, Section 1 SVPRS (27 attended)
- October 25, 2007 – Wisconsin's Homeland Security Grant Program, Greg Engle, WI

Office of Justice Assistance (29 attended)

- November 15, 2007 – Charter Schools in Wisconsin, Barry Golden, WI Department of Public Instruction (23 attended)
- January 24, 2008 – Annual Tax Update, Shannon Davis, Tax Manager, Virchow, Krause, and Co (34 attended)
- February 21, 2008 – How to Maintain Balance in a Hurried World, Kathleen Holt, UW-Madison (28 attended)
- March 27, 2008 – Wisconsin Senior Care, Pamela Appleby, WI Department of Health and Family Services (25 attended)
- April 24, 2008 – Wisconsin’s Controller’s Office: Through the Years, Steve Censky, Wisconsin State Controller (37 attended)
- May 22, 2008 – The Legislative Audit Bureau – Auditing and Accountability, Janice Mueller, State Auditor (46 attended)

2. **Membership:**

We offer a free lunch meeting to all new members to encourage participation. New members are announced and welcomed at the monthly lunch meetings. Members who attend 3 training sessions from September through February receive a free lunch coupon to use for a lunch in March, April, or May.

3. **Community Service:**

Our chapter conducted a food drive and cash donation collection at the September, October, and March monthly luncheons. Four members participated in the Volunteer Income Tax Assistance Program, totaling over 100 hours. The chapter made the following cash donations during the program year: \$300 to the American Red Cross for the Bagley Floods, \$300 to the American Red Cross for the midwest floods, and \$300 to the Second Harvest Food Bank (plus \$41 from chapter members.)

The chapter created a team to participate in the MS Walk on May 4, 2008. Our team of 5 included 2 members and 3 non-members. We raised \$395 in donations. This will become an annual event for the chapter.

4. **CGFM Activities:**

We published articles in each newsletter related to the certification and offered reimbursement to the first 4 people to pass the exam. This year, we had one member pass the final exam part, receive her certification, and take advantage of the scholarship. We were once again able to get a Governor’s Declaration that March was CGFM month. We received a signed certificate from James Doyle, Governor, State of Wisconsin. The certificate was displayed and highlighted at the March 27 lunch meeting and May 13 Symposium. CGFM holders who came to the March lunch received a free lunch. At our March 27 luncheon and the May 13 Symposium, all CGFM holders received a special CGFM sticker for their name badge to highlight their professional achievement.

5. **Early Career Activities**

Two officers attended the volunteer fair at the UW-Madison Memorial Union on January 30. We shared information about the organization and the governmental accounting

profession. We held a drawing for free student memberships. Three students were selected and one has become a member.

6. **Award**

At our April 24 luncheon we presented David Mellem with a award to honor his new status as a lifetime member and his many years of dedicated service to the chapter. It was named the David J. Mellem Lifetime Achievement Award and will be used as the award to honor any other members achieving this benchmark in the future.