



Monthly Footnotes

FEBRUARY, 2010

VOLUME X, ISSUE 5



February Luncheon Meeting Welcome Members and Non-Members

TOPIC: Health Care – What It Means For
Individuals, Families, Businesses,
Governments, and Health Care Providers

SPEAKER: Eugene S. Farley, MD, MPH

DATE: Thursday, February 25, 2010

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

COST: \$5 for Members, \$10 for Non-Members

PLACE: Dayton Street Café (Inside the
Concourse Hotel, 1 West Dayton Street)

MENU: Meals include soda, coffee, or tea

- **Salad Bar** - variety of salads, toppings, soups, bread
- **Grilled Chicken on Artisan Bread** - cherry wood smoked bacon, romaine lettuce, basil cheese spread, vine-ripened tomatoes on Artisan bread with Farrow salad with dried cherries & almonds
- **Traditional Burger** – dry-aged highland beef, served with fries

RESERVATIONS

Please contact Sherri Voigt **by 10 A.M. on Monday, February 22, 2010** with your name, membership status, meal choice at (608) 267-9818/e-mail: sherri.voigt@wisconsin.gov. If you need help getting a ride to lunch, please contact Sherri for car-pooling information.

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NEW MEMBERS FIRST LUNCHEON MEETING

If you are a new member and this is your first luncheon, 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 the Southern WI 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 to this months meeting?

ABOUT THIS MONTH'S LUNCHEON SPEAKER

HEALTH CARE SECURITY FOR ALL IS A MORAL, ETHICAL, SOCIAL AND RELIGIOUS GOOD; A FAMILY VALUE; AN ECONOMIC NECESSITY

Gene Farley is a retired family physicians who, with his recently deceased wife, has served:

- Rural and urban practice experience – Navajo, small town, rural farming, outer city and inner city.
- Rich, poor, middle class,
- Healthy and sick,
- Old and young,
- Employed and unemployed,
- Before & after Medicare and Medicaid came in,
- Insured and uninsured.

Gene is a native of Pennsylvania, a graduate of Swarthmore College 1950, and both he, and his wife Linda graduated from the University of Rochester Medical School. He is a member of the emeritus faculty of the UW-Madison School of Medicine and Public Health where he served as chair of the UW Department of Family Medicine. He is a member of Physicians for Social Responsibility, Physicians for a National Health Program, American Public Health Association, and Wisconsin and American Academies of Family Physicians. He is on the board of Citizen Action of Wisconsin, an associate member of The Madison Institute board and an active member of the Coalition for Wisconsin Health and Physicians for a National Health Program (PNHP).

PRESIDENTS MESSAGE

Sherri Voigt, CGFM, CPA, MBA

Our annual income tax update luncheon was held January 25 (photos below.) Our speaker, Mardee Blattner, had a 29 page handout for us. For those who couldn't attend, here are a few highlights:

- itemized deduction for sales tax on new vehicle purchases 2/17/09-12/31/09
- Making Work Pay-refundable credit up to \$400 for single or \$800 married taxpayer (phase out with AGI of 75,000 single or 150,000 married filing joint); W2 withholding was adjusted to reflect this credit
- Several versions of the first-time homebuyer credit exist and one was added later in the year for non-first-time homebuyers
- American Opportunity Tax Credit-an education credit that allows tuition, fees, & books; up to 40% refundable

There are many more changes made to the tax law and gaps to be corrected by future legislation. Feel free to contact me for a .pdf copy.

Thinking back to past AGA meetings, I realized it was time for me to check my credit report. Don't forget you are entitled

to request a free report from each of the 3 main credit reporting companies at www.freeannualcreditreport.com. Doing one report from a company every 4 months can help you monitor what is happening with your credit report.

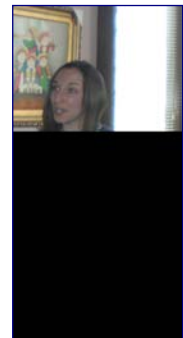
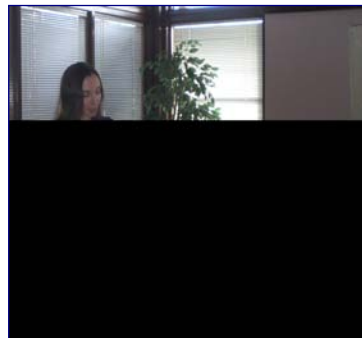
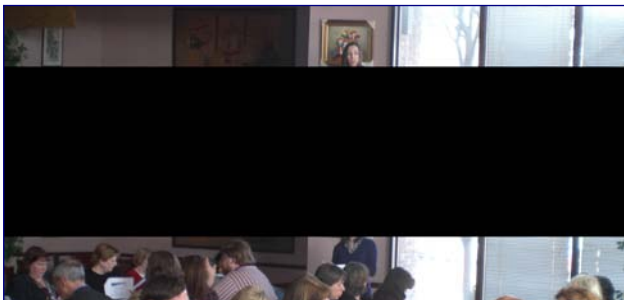
I recently read about credit score estimators. MyFico.com offers its free Fico Score Estimator (type "estimator" in the search box at MyFico.com). Upon answering a few questions about your current financial situation, the estimator will give you a score range. While not totally accurate, this range can give you an idea where your credit score is right now. It seems like another handy, and free, tool to help out consumers.

One last free tip: Get a free copy of the [*2010 Consumer Action Handbook*](#). It is full of helpful tips about preventing identity theft, understanding credit & filing consumer complaints. You can either receive a hard copy through the U.S. mail, or download the (2009) .pdf version at ConsumerAction.gov.

Sherri V. 🍷

January 25 Lunch Photos: Annual Tax Update at Imperial Garden-East

Mardee L. Blattner, CPA, MST, Manager, Baker Tilly Virchow Krause & Company, shared the latest federal and state tax information





CHAPTER MEMBER RECRUITMENT STIMULUS OFFER MARCH 17 - 31, 2010

Time Is Of The Essence – Don't Delay!

In case you missed the chapter member recruitment stimulus offer in November, you will have another opportunity to take advantage of this offer March 17 to 31, 2010. Last November was the first time we tried this incentive and our November offer yielded two new chapter members.

The offer works as follows. Earn \$10 for each new chapter member you recruit up to a total of three new members. Only current chapter members are eligible for this recruitment incentive. In addition, each new member recruited in this stimulus event will receive a \$10 rebate on their first year's membership. This membership recruitment stimulus offer will run for about 2 weeks from **Wednesday, March 17 through Wednesday, March 31, 2010.**

So, if you are a member, start planning to recruit and if you are not a member, the stimulus recruitment period in March 2010 will be a great time to join. AGA membership applications and information is on the national website www.agacgfm.org. AGA dues depend on the various membership categories. The chapter has no additional dues.

You Can Volunteer for AGA National Community Service Projects April 27-30, 2010 in New Orleans and July 15 in Orlando

Community service and helping those that are less fortunate than ourselves has been an important part of what AGA is about. It may be hard to believe that **New Orleans** still needs our help almost five years after Katrina, but they do, and we're going back. The dates for our Fourth Annual National Community Service project are **April 27-30, 2010**. This project is sandwiched between the two weekends of the New Orleans Jazz and Heritage Festival ([View details](#).) We will again seek lodging in the beautiful new University of New Orleans dormitory (actually two bedroom furnished apartments) with a rate of only about \$30/night/person.

Like last year, AGA will also create a second opportunity to experience what it's

like to work with Habitat for Humanity in conjunction with the PDC in **Orlando**, which also faces an affordable housing shortage. We will have a one-day community service event with Habitat in Orlando on Thursday, **July 15**, the day after the PDC ends. For this event, we will seek to extend AGA's special hotel rate to include this extra night.

We hope you will pencil in one or both of these dates on your calendar and join us for some of the fun! If you need additional information right now, please send **AGA Past National President Jeffrey S. Hart, CGFM** an e-mail at hart.jeff@epa.gov or call him at 303-312-6169. AGA will be sharing more details in a couple of weeks.

National News

From the National President



Welcome to 2010! Mississippi, as well as much of the country, has been facing record low temperatures during the month of January--some have actually been snowed, iced or frozen in. Despite the cold, AGA continues to move forward providing warmth and leadership in ***Advancing Government Accountability.***

Last fall, I began highlighting each of the departments within the AGA National Office and the staff in those departments. This month I am focusing on the Communications Department. *AGA Today* and *TOPICS* come to you courtesy of this department. Throughout the 24 years I have been a member of AGA, I can honestly state that we do an outstanding job with our publications, website, news flashes and the many documents (programs, signs, etc.) we receive at our conferences. As one who has contributed to our many communication outlets, our staff also does a GREAT job of reminding us of our publication deadlines. When you receive your communiqué, just remember that our staff, and many volunteers who are contributing or evaluating content, have already spent weeks and/or months of work to pull together the final product you are enjoying. [Read more about AGA's Communications department.](#)

Efforts Under Way to Aid Haiti Quake Victims

From AGA's Montgomery, AL Chapter: In an effort to assist those devastated by the Haiti Earthquake we will be taking up donations. Please make checks payable to the AGA with a memo for Red Cross Haiti Effort. If you prefer to give cash we will have a receipt book available. We will write one check to the American Red Cross on behalf of the AGA members. Please remember to include the people of Haiti in your thoughts and prayers. Contact Montgomery Chapter President [Kathleen Baxter, CGFM](#). From Kathleen: "Just to let you know what a giving organization this is, I sent the e-mail at 10 a.m. today. By 2 p.m. we had collected close to \$1,000. I am so fortunate to belong to this group. This group is absolutely amazing. Their generosity with their time and their money will astound most people. They deserve the recognition. Please note especially that our director of Community Service is Pam Henderson and her commitment to serving is outstanding. If other AGA chapters would like us to mention relief efforts in future issues of *TOPICS* and *AGA Today*, please send your information to [Marie Force](#).

Dream. Learn. Achieve... And Get Ready for AGA PDC 2010

Mark your calendar and make plans now to join us in sunny Orlando, Florida for AGA's 59th Annual Professional Development Conference & Exposition--*the* premier education and networking event for government financial managers and accountability professionals.

Worth 24 CPE hours, the conference covers the latest research and information about the American Recovery Act, the constantly changing rules and standards, new management techniques, technological advances and practical tips for bringing greater efficiency to government operations. The PDC offers a comprehensive program, captivating speakers, lively discussions, top-quality education sessions, and equips you with knowledge and skills you need to be more effective leader.

While the PDC has long been respected for offering the best training in the profession, it also offers a number of networking events to help you make new contacts, exchange ideas and collaboratively work on solutions to common problems. Exhibitors are also available to demonstrate the newest products, tools and cutting-edge technology available to help your agency achieve its mission.

Registration fees are \$800 for AGA members and \$1,000 for nonmembers until June 11, 2010. Early registration saves you money and increases your chances of obtaining accommodations at the conference hotel.

- [Register Online Now](#)

Hotel Accommodations: We reserved a block of rooms at the Orlando World Center Marriott to accommodate PDC attendees. The rate is \$108 per night (plus tax) until **June 18, 2010**, or until the room block is sold out. Reservations *received after June 18, or after the room block has been filled, will only be made on a space-available basis, and may be subject to significantly higher rates.*

Information about the agenda, speakers, travel discounts and tours is coming soon. [Stay tuned to the website](#) for more information...See you in Orlando!

Call for 2010 National Academic Scholarships

Are you or a family member pursuing undergraduate or graduate studies in disciplines such as accounting, auditing, budgeting, economics, finance, information technology, public administration, etc.? If so, consider applying for an AGA National Academic Scholarship today! Each year, AGA National awards up to four \$3,000 full-time merit scholarships to AGA members and their family members; one \$1,000 part-time merit scholarships to AGA members and their family members; and one \$3,000 community service scholarship. The **deadline for receipt of applications is Wednesday, March 31, 2010.** [Download a copy of the application](#) or contact [Louise Kapelewski](#).

Ohio Fire Department Outlines its Successes, Challenges in Report to Citizens

The Beaver Creek Township Fire Department in Greene County, Ohio, has issued a four-page report that briefly outlines the department's finances, successes and challenges in the last fiscal year.

The department's "[2008 Annual Report to Residents](#)" is the latest Citizen-Centric Report that follows the guidelines recommended by AGA to bring greater transparency to government services. The Beaver Creek Township Fire Department, with issuance of its report, [joins a growing list of states, local governments and federal agencies](#) that are using [AGA's Citizen-Centric Reporting format](#) as a means to communicate financial and performance information to its constituents. AGA also offers a [Certificate of Excellence in Citizen-Centric Reporting](#) for

governmental entities that prepare and distribute exceptional reports.

Fire Chief David VandenBos spoke with AGA about his experience. [Read more.](#)

CGFM Corner

CGFM Intensive Review Course

The next CGFM Intensive Review Course will be held after the National Leadership Conference on Feb. 22–23 with CGFM Examinations on Feb. 24–25. [Learn more.](#)

Articles

Federal News

At One-Year Mark, Obama Shows Progress on Management Pledges

During his inauguration, President Obama set a clear standard for how he would manage the federal bureaucracy he was inheriting. "The question we ask today is not whether our government is too big or too small, but whether it works whether it helps families find jobs at a decent wage, care they can afford, a retirement that is dignified," the newly sworn-in president told a massive crowd on the National Mall on Jan. 20, 2009. "Where the answer is yes, we intend to move forward. Where the answer is no, programs will end." One year later, the president has taken steps toward that goal. Among other measures, he ordered administration officials to scour the budget for initiatives that weren't achieving desired outcomes, and in May 2009, he proposed cuts to 121 programs many of them in the Department of Defense as part of his formal fiscal 2010 funding request. He appointed Jeffrey Zients, the federal government's first chief performance officer, to ensure taxpayers' money is spent wisely. And he enlisted the help of rank-and-file civil servants to develop cost-cutting strategies.

—*Government Executive* [Read more.](#)

At SEC, the System Can be Deaf to Whistle blowing

Eric Kolchinsky was an executive at Moody's, the credit rating company, when he called a top official at the Securities and Exchange Commission in September to warn that his firm might be violating securities law. He reported that Moody's was blessing mortgage-backed investments that it knew were dangerous, according to a person familiar with the conversation. The SEC official assured Kolchinsky that someone from the agency would call him back shortly. But the call never came, Kolchinsky later told congressional investigators who were examining how the credit rating industry's failures contributed to the financial crisis. He had gone to Congress after losing patience with the SEC. —Zachary A. Goldfarb, *The Washington Post*. [Read more.](#)

State and Local News

Health Care Reform's Costs Rankle States

As Democrats in Congress work feverishly to meld separate House and Senate health care bills into a single blueprint for a historic overhaul of America's health care system, state leaders are bracing against the potential costs to states that they say could devastate already battered budgets. Some states also are protesting that the legislation's efforts to set minimum standards for health insurance coverage across the country will "reward" low-performing states, while penalizing others that have already expanded their eligibility for Medicaid, the state-federal program for the poor that is the nation's largest health insurance program, covering 60 million low-income or disabled Americans. —Pamela M. Prah, *Stateline.org*. [Read more.](#)

California Leaders in D.C. to Seek Funds Get Mixed And Distracted Reception

In a long-shot bid to ease California's fiscal troubles, Gov. Arnold Schwarzenegger came to Washington on Wednesday hoping to shake loose \$7 billion from Congress to help plug more than a third of the state's deficit. Schwarzenegger, accompanied by Assembly Speaker Karen Bass and Senate President Pro Tem Darrell Steinberg, met privately with Democratic Sens. Barbara Boxer and Dianne Feinstein, pressing the case that the federal government is shortchanging Californians. It was anything but a show of unity. At a news conference on Capitol Hill, Bass said the Republican governor had erred earlier this month by taking a combative tone in his dealings with members of Congress. —Rob Hotakainenm, *The Sacramento Bee*. [Read more.](#)

Private Sector News

Obama Blocks Government Contracts for Tax Cheats

President Barack Obama ordered the Treasury Department, the Office and Management and Budget, and other federal agencies to block contractors who are seriously delinquent in their taxes from receiving new government contracts. Obama also directed the IRS to conduct a review of the overall accuracy of companies' claims about tax delinquency. In addition, the president called on Congress to approve legislation to allow the IRS to crack down on corporate tax cheats, and to allow data sharing between the IRS and contracting officials at agencies to ensure that corporate scofflaws do not exploit loopholes to continue to win federal contracts. Obama pointed out that studies by the Government Accountability Office have identified tens of thousands of such "dead-beat companies"

that are being awarded government contracts. —*WebCPA*. [Read more.](#)

Stimulus Projects are Bright Spot for Construction Industry

The billions of dollars in stimulus funds being spent on facilities and highway construction projects is the lone bright spot in an otherwise gloomy outlook for the nation's construction industry this year, contractors say. After a year of near-record layoffs, the construction industry is bracing for another tough year, according to a business forecast issued Wednesday by the Associated General Contractors of America. The forecast, which is based on survey responses from nearly 700 construction firms submitted in late December and early January, finds nearly nine in 10 contractors predicting continued hardships this year. —Tim Kauffman, *Federal Times*. [Read more.](#)

Accounting Standards News

AGA's FMSB Seeks Help on Reviewing FASB Pronouncements

The Governmental Accounting Standards Board (GASB) is planning to issue an exposure draft of a proposed Codification of Pre-Nov. 30, 1989 FASB Pronouncements very soon. The objective of the project is to specifically identify provisions in Financial Accounting Standards Board (FASB) Statements and Interpretations, Accounting Principles Board Opinions, Accounting Research Bulletins of the AICPA Committee on Accounting Procedure, and AICPA Accounting Interpretations, issued on or before Nov. 30, 1989 (collectively termed the FASB Pronouncements) that do not conflict with or contradict GASB pronouncements and to incorporate those provisions into the GASB's literature. These were referenced in paragraph 17 of

GASB Statement No, 34, *Basic Financial Statements and Management's Discussion and Analysis for State and Local Governments*. The comment period is probably going to be six months but it is still going to be a monumental task to review the entire exposure draft. AGA's Financial Management Standards Board (FMSB) reviews and comments on all GASB proposed statements of standards but may need additional volunteer help with this project. If you work in state and local government, have an interest in accounting standards and have some experience in responding to GASB on its proposed standards or to other accounting standard setters, please contact [Anna Miller](#), FMSB staff liaison. You could learn how the FMSB works and help make a difference!



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 radivojevich@co.dane.wi.us. Deadline for submission of articles is the 25th of the month. Feel to send in topic suggestions or features to include.

COMMENTS

We would love to hear feedback on the newsletter changes. Let us know what you like, what you hate, what we can do better! Contact the Newsletter Editor at radivojevich@co.dane.wi.us or the Chapter President at sherri.voigt@wisconsin.gov

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:
www.agacgfm.org/membership/form_address.htm



Southern Wisconsin Chapter Calendar of Events for 2009-2010

August 4, 2009 – Board Meeting, Old Country Buffet, Madison

September 1, 2009 – Board Meeting, Old Country Buffet, Madison

September 24, 2009 - Retirement System Update, Sari King, Constituent Relations,
Department of Employee Trust Funds (ETF), Great Dane - Fitchburg

October 6, 2009 – Board Meeting, Old Country Buffet, Madison

October 22, 2009 – State of Wisconsin Strategies for the American Recovery and
Reinvestment Act (ARRA), Susan Crawford, Chief Legal Council to Governor
Doyle, Babe's Restaurant

November 3, 2009 – Board Meeting, Old Country Buffet, Madison

November 19, 2009 – Wisconsin Economic Update, John Koskinen, Chief Economist,
Wisconsin Department of Revenue

December 1, 2009 – Board Meeting, Old Country Buffet, Madison (meeting cancelled)

January 5, 2010 – Board Meeting, Old Country Buffet, Madison

January 28, 2010 – Annual Tax Update, Mardee L. Blattner, CPA, MST, Manager,
Baker Tilly Virchow Krause & Company – Imperial Garden's Restaurant,
Madison

February 2, 2010 – Board Meeting, Old Country Buffet, Madison, WI (meeting cancelled)

**February 25, 2010 – Eugene S. Farley, MD, MPH, Health Care – What It Means For
Individuals, Families, Businesses, Governments, and Health Care Providers
– Dayton Street Café, Madison, WI**

March 2, 2010 – Board Meeting, Old Country Buffet, Madison

March 25, 2010 – Bradley Livingston, Director, Dane County Regional Airport, location
to be determined

April 6, 2010 – Board Meeting, Old Country Buffet, Madison

April 22, 2010 – luncheon topic and location to be determined

May 2, 2010 – MS Walk 2010 (community service event)

May 4, 2010 – Board Meeting, Old Country Buffet, Madison

May 11, 2010 – *Annual Spring Symposium*

May 20, 2010 – luncheon topic and location to be determined

June 1, 2010 – Board Meeting, Old Country Buffet, Madison

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

AGA Southern Wisconsin Chapter 2009-2010 Officers and Directors

President – Sherri Voigt, CGFM, CPA, DNR, sherri.voigt@wisconsin.gov, 608-267-9818

President Elect – Vacant

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

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,
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Mary Laufenberg, CGFM, CPA, DOR, mary.laufenberg@revenue.wi.gov, 608-266-1670

Webmaster – Scott Thornton, scott@goochpages.com

Community Service Chair – Sherri Voigt, CGFM, CPA, DNR, sherri.voigt@wisconsin.gov

Research Coordinator & Liaison w/Other Profession Organizations – Vacant

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

Awards Chair – Vacant

Early Careers Chair – Vacant

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SOUTHERN WISCONSIN CHAPTER