



SOUTHERN  
WISCONSIN  
CHAPTER

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

# Monthly Footnotes

November 2012 [www.aga-wis.org](http://www.aga-wis.org)

Happy Thanksgiving



## Inside This Issue

1. Luncheon Meeting
2. President's Message
3. About This Month's Luncheon Speaker
3. Chapter News
4. December Ethics Workshop 
5. Member Spotlight
6. October Lunch Recap
7. 20-20-20 Chapter Recruitment and National Member Recruitment Program
8. National News
9. CGFM Corner
10. Articles
12. Calendar of Events
13. Chapter Contacts

## November Luncheon Meeting Welcome Members and Nonmembers

**TOPIC:** Financial Impact of Fort McCoy on the State of Wisconsin

**SPEAKER:** Linda M. Fournier, Public Affairs Officer, Fort McCoy, Wisconsin

**DATE:** Thursday, November 15, 2012

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

**COST:** \$6 for Members, \$12 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, breads, soups
- **Cheeseburger Flatbread** – ground beef, special sauce, lettuce, cheese, pickles, onions, sesame seeds, with fries
- **Club Sandwich** – honey glazed ham, smoked turkey breast, cherry wood smoked bacon, cheddar, swiss, lettuce, tomato on toasted sourdough, with kettle chips

**RESERVATIONS:** Contact Sherri Voigt by 11 a.m. on Monday, November 12, 2012 with your name, membership status, meal choice, and for carpooling information at (608) 266-2814/e-mail: [sherriv@live.com](mailto:sherriv@live.com)

## PRESIDENTS MESSAGE

Carrie Ferguson, CPA

November is here again, and with it comes Thanksgiving. Like last year, I would like to take the time to give a few thanks to those people who make AGA great.

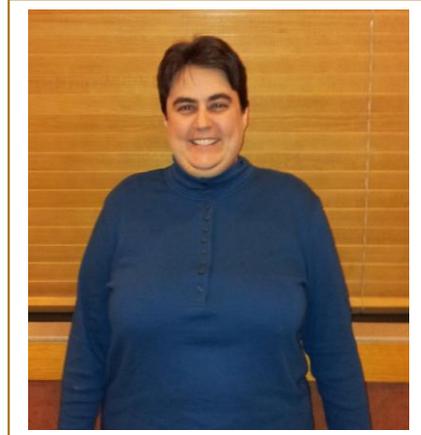
First, a thank you to all members and nonmembers who have attended our Chapter's training events. We are pleased that we are able to offer topics and courses that are of interest to you. Please continue to let us know how we are doing and suggest future topics and speakers by emailing a board member (see contact information on page 13 of this newsletter) or just chatting with one of us at an upcoming training event (see page 12 of this newsletter for our Calendar of Events). Also, if you missed an event, be sure to check out recaps of our events in our newsletters. For instance, a recap of our October luncheon meeting is included on page 6.

Also, a special thanks just to members, since we hope that the Southern Wisconsin Chapter of continues to provide value – from tangible benefits, such as the continuing education credits we offer at training events, to some less tangible benefits, such as serving as a resource for networking with other government accountability professionals.

Next, I would like to thank the speakers for our past events. You have shared information on a variety of topics, and we appreciate your insights.

Of course, what list of thanks would be complete without recognizing our Chapter Board members? Thank you all for your hard work this year and past years. A list of our current board members is included on page 13. If you are a member of AGA but aren't currently a board member, please consider volunteering. We'd love to have you. Just contact a current board member about attending a future board meeting; the dates are listed on our Calendar of Events.

Another group of thanks goes out to our regional and national AGA officers and staff. As a chapter, we value your leadership and insights as we work toward a common goal of making AGA great.



Finally, my thanks go out again to those of you in any of these groups who have contributed to our recent food drives—both with donations of food and other necessities and/or with donations paper bags that the food pantry will use to pack items for its customers. Unfortunately, in these continued tough economic times, there is still a very high demand at various food pantries throughout Southern Wisconsin. Every little bit helps. If you haven't donated yet (or even if you have), please consider donating at our upcoming luncheon meeting. Here's a thank you in advance to all who do.

To close on a lighter note, I will give thanks for pumpkin pie and apple pie—well, frankly all pies. This doesn't exactly have anything to do with AGA, but here's hoping you will all be able to enjoy a pie that's right for you come Thanksgiving Day! Then again, maybe there's an obscure link. If you aren't a fan of eating pie, maybe, as government accountability professionals, you might appreciate a few good pie charts. Those pies are calorie-free, after all. We've included a few pie charts in our 2011-12 Chapter's Citizen Centric Report to Members available on the homepage of our Chapter website ([www.aga-wis.org](http://www.aga-wis.org)). Pie talk aside, there's a lot of other information in the report, which we hope you'll find useful.

Have a happy and safe Thanksgiving and here's hoping there's plenty you will find to give thanks for during the rest of our Chapter's program year!



## 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.



### ABOUT THIS MONTH'S LUNCHEON SPEAKER

**Linda M. Fournier** currently serves as the installation Public Affairs Officer, a position she has occupied since January 2000. She is the official spokesperson for the installation and is its liaison with government officials, community leaders as well as with regional business, civic, fraternal, professional, and Veterans organizations. The Public Affairs functional programs managed by Ms. Fournier include; Community Relations, Congressional Liaison, Media Relations, Public Information, and Command Information. She is also responsible for publishing the installation newspaper, "The Real McCoy", administrating the Fort McCoy public Web site, hosting the annual Fort McCoy Armed Forces Day Open House, managing the installation's Speaker's Bureau, and conducting the installation's official post tour program. Ms. Fournier was responsible for establishing the Fort McCoy Commemorative Area, a site dedicated to preserving Fort McCoy's history. She serves as the Fort McCoy Artifact Responsible Officer and manages the Commemorative Area as a museum activity for the Department of the Army Center of Military History. Ms. Fournier first joined the Public Affairs Office staff in 1989 as a Community Relations Specialist and was responsible for establishing Fort McCoy's first Community Relations Program.

Ms. Fournier has 34 years of Federal service, all of which have been served at Fort McCoy since she first began her government career in 1978. Ms. Fournier has a degree in Supervisory Management and is a graduate of the Defense Information School Public Affairs Officers Course. She is a lifelong resident of Monroe County.

## Chapter News

### Community Service

The Chapter will continue holding a food drives at the November and January lunch meetings. In addition, we will collect paper grocery bags for the MOM food pantry in Middleton to use for packing the food for people to take home.

As a new addition, we will also collect personal items for the Salvation Army; items include liquid soap, diapers, baby wipes, Kleenex, etc.



## Chapter Board Meeting Minutes

Next Meeting is Tuesday, November 13, 5:15 p.m., at Home Town Buffet

## Chapter Social Event

Friday, November 30, 2012, 5:30-6:30

Wine tasting at Fisher King Winery in Mount Horeb. Car pooling will be arranged to minimize travel issues. The first 5 people to sign up get their \$5 tasting session for free!

Please RSVP to Sherri Voigt at 608-266-2814 or [sherriv@live.com](mailto:sherriv@live.com) by 4:00 on 11/27 so any needed car pooling can be worked out.

Car pool meet-up at 4:45

## 2012-13 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



## The Apprehension of Being Ethical

The Southern WI AGA is partnering with the WI Department of Health Services to offer this event. This workshop is based on a recorded audio conference produced by the AGA featuring Leon R. Young (05/11/11) with added facilitated discussion.

Jessie Garza, DHS Office of Legal Counsel and Scott Thompson, Director, DHS Human Resources will serve as the facilitators. They will lead discussion questions to take the general content from the recording and apply it to Wisconsin rules.

This workshop is based on a recorded audio conference produced by the AGA featuring Leon R. Young.

**Learning Objective:** To obtain practical guidance in understanding ethical dilemmas and how to respond to the apprehension of certain ethical circumstances.

In the public sector, we face various pressures to do things which are unethical. How do we respond to these pressures?

This workshop includes:

- Reporting violations
- Refusing to do something that violates regulations
- Disagreeing
- Commenting

**YOU MUST REGISTER TO ATTEND.**

Please complete the DHS training registration form

<http://www.dhs.wisconsin.gov/forms/f8/f80475.doc>

3 CPE will be available upon request at the meeting.

**Date: Tuesday, December 18, 2012**

**Time: 8:30-11:30 a.m.**

**Location: 1 West Wilson, Room 751**

**Cost: Free**



## Member Spotlight

We asked Steve Gauger, AGA member since 1978, if he would write up a member spotlight for our newsletter. Steve graciously agreed. Please see the related social event on page 4.

### Steve Gauger

I moved to Wisconsin in 1972 after receiving a degree in Natural Resources Economics from the University of Massachusetts and started working for the WI Department of Administration in the state budget office under the Patrick Lucey administration. My assignment was the Department of Natural Resources budget.

In 1976 I became the Secretary of the Board of Commissioners of Public Lands where I wore several hats as a banker, land manager and archivist. I stayed there until my retirement in 2002. My career with the state was both challenging and rewarding, as was my participation in many AGA activities. I also served in the U.S. Army Reserve during my state career.

Since my retirement from the state and the Army I've been working part time for the



Mount Horeb Public Library where I have the opportunity to meet many interesting people and find good books to read. I'm also fortunate to have our three children and two grandchildren in the Mt. Horeb area. I have been a regular volunteer at Donald Park in Mt. Vernon and have taken several interesting trips with my wife Aimee, the most recent one being Poland.

Lately I've become an avid bike rider and have been on rides with a couple of other AGA members. I have also become involved with the Fisher King winery in Mt. Horeb and have come to appreciate how much work goes into producing a bottle of fine wine. Hopefully I will see some of you there soon.



Steve and his wife Aimee bottling wine at Fisher King Winery





## October Lunch Recap Elizabeth R. Dionne, CPA



### Evaluating IT Risks and Setting Audit Priorities in an Evolving Landscape

Ms. Dionne started out with a fun recap of computing capabilities over the years. From the Apple 2 with a full 4 kb Ram (over \$4,000) with the opportunity to upgrade to 16 kb for \$1,350 to our cell phones today with 16 MB.

She stressed the key takeaway: Don't underestimate the pervasive impact IT has on your organization.

There are a lot of rules/laws out there to consider. Ms. Dionne mentioned the need to consider all possibilities. For example, at the UW, they need to consider data safety under Health Insurance Portability and Accountability Act (HIPPA) since they conduct research studies and subjects are entitled to full health record safety.

She discussed the changing role of IT in the audit process and noted it needs to be more than a policing role. Examples were: value-added services, risk-focused advice and assurance, subject matter expertise on emerging issues.

Some of the key things to consider are:

- general information
- security of data
- program change control
- disaster recovery and business continuity planning
- integration with other systems/third parties
- completeness and accuracy of system-generated reports

Ms. Dionne highlighted some of the questions we should be asking as auditors and managers:

- What policies exist related to IT?
- What are the core systems?

- Where is the data?
- Are you responsible for protecting sensitive data (e.g., personally identifiable information)?
- What are the system's vulnerabilities?
- Are your systems up-to-date?
- Is critical equipment serviceable?

She discussed the physical security of data, changes controls, disaster recovery and business continuity planning.

She noted the following list of emerging and prevalent IT audit issues:

- Inadequate or lack of policies related to IT issues, including emerging issues
- Inadequate or lack of management oversight
- Poor segregation of duties
- Poor physical security of information
- Inadequate or lack of supporting documentation
- Data security

Ms. Dionne highlighted the possible costly outcomes of ignoring IT risks:

- Loss of productivity
- Unreliable data
- Embarrassment
- Loss of public trust
- Hard dollars

She noted that assessing the adequacy of internal controls should be the same, IT or not.

She closed by restating: don't underestimate the pervasive impact IT has on your organization

*All lists from the handout by Elizabeth Dionne, CPA, Director, UW-Madison, Director, Operations Review and Audit*

## Southern Wisconsin AGA Chapter 20-20-20 MEMBER RECRUITMENT CAMPAIGN



**\$20 Incentive Payments, \$20 Bonus, and \$20 Rebates**

### **New Member Recruitment Program**

Recruitment program runs **through Friday, December 28, 2012**. The membership application must be submitted by December 28, 2012 to the AGA national office. Notify the chapter membership chairperson at [david.mellem@oig.hhs.gov](mailto:david.mellem@oig.hhs.gov) or 608-264-5415 ext. 25 by submission deadline.

Membership applications and instructions are available on the AGA national website at <http://www.agacgfm.org/homepage.aspx> under the Membership drop down menu near the top of the website homepage.



## **2012 - 2013 AGA NATIONAL MEMBER RECRUITMENT PROGRAM**

Consider sharing your AGA membership experience and get rewarded for doing so.  
Recruit a member today!

### **Start Recruiting Today!**

[Download a membership application](#). You can also order applications by calling AGA at 800.AGA.7211 and/or emailing [agamembers@agacgfm.org](mailto:agamembers@agacgfm.org).

Tell your peers and co-workers about AGA. Simply encourage them to fill out AGA's membership application or apply online. Be sure to include your name in the sponsor's name category on the application to receive credit.



## National News



Brown serves as AGA National President and chair of the National Executive Committee with more than 34 years of government financial management experience.

### From the National President, Evelyn A. Brown, CGFM-Retired

We are well into the month of October with many of our 2012 AGA activities already past, and more are on the horizon. I was honored to be invited by Heather Keister, President of the AGA Northern Virginia Chapter, to speak at their monthly meeting. My visit in September, afforded me the opportunity to talk about the benefits of membership in AGA and specifically about



mentoring as I delivered the presentation, "Our Professional Journey, A Path to Success". [Read more](#)

## Become An AGA Leader: Nominating Committee Seeks Candidates

Join our leadership team! AGA's National Nominating Committee is seeking candidates for a variety of national and regional leadership positions! [Read more](#)

## AGA Membership Survey Results

As you know, this past summer we asked members to evaluate a wide array of member benefits and services and to provide basic demographic information. A total of 2,446 responses were received, representing a 19% response rate. We are pleased to provide you the [Executive Summary of the AGA Membership Survey](#). A few observations to take note of:

- The 'typical' respondent was a female full government member between the ages of 41 and 60 who works in middle management at the state or federal level.
- Thought Leadership and Collaboration, specifically conducting best practice research, commenting on standards and working as a neutral third party in fostering cooperation and communication among different levels of government continues to rate very highly.
- Seven out of 10 respondents indicated they earn CPE via conferences and seminars, followed by chapter events and online or web-based programs.

- 16% of respondents indicated that they do not attend chapter events, even though there is one in their area. 48% said more professional development from the chapter would be most effective in servicing their needs. 23% want more networking opportunities from the chapter.
- 43% of the respondents reported that they held the CGFM. Reasons members gave for pursuing the CGFM are professional accomplishment and enhanced marketability were the top.
- With regard to communications, email was the overwhelmingly preferred method of choice for receiving information from AGA, and nine out of ten respondents rated the amount of email received from AGA as about right.
- Respondents who had contacted the office rated staff very highly on courtesy, professionalism, competence, accuracy of information provided, promptness and accessibility. The staff also rated higher than benchmark data of other associations in all areas as well.
- Half of the respondents indicated that their employer does not allow access to social media sites during business hours.
- 86% of respondents indicated that they would recommend AGA membership to a colleague versus 85% in 2010.



## CGFM Corner

### Certified Government Financial Manager (CGFM®)



**The Mark of Excellence  
in Federal, State  
and Local Government**

### CGFM Exam Fee Reimbursement

Did you know the Chapter will reimburse your exam and application fees once you pass all three parts of the exam? And it is easy! All you have to do is be a member and save your receipts/credit card statements. This applies to the first four people to pass all parts of the exam in any given program year. The formal policy is still being drafted, however this program has been around for over 8 years. This reimbursement program is to help reduce the financial burden of credentialing, which is typically borne by the individual. For more information, contact one of our CGFM co-chairs: Michelle “Bea” Beasley ([michelle.beasley@wisconsin.gov](mailto:michelle.beasley@wisconsin.gov)) or Michele Tessner ([michele.tessner@dpi.wi.gov](mailto:michele.tessner@dpi.wi.gov)).





## Articles

### STATE & LOCAL NEWS

#### States and the Federal Fiscal Cliff

When the Urban Institute convened a briefing on the "fiscal cliff" -- the impact of federal tax cuts set to expire and spending cuts due at the start of the new year -- an A-list of economists showed up. Among them, Bob Greenstein, founder and president of the Center on Budget and Policy Priorities; Douglas Holtz-Eakins, president of the American Action Forum and former economic adviser to John McCain's presidential campaign; and Donald Marron, director of the Urban-Brookings Tax Policy Center " Penelope Lemov, *Governing*. [Read more](#)



#### How 'Ideation' Can Power Innovation

The innovation delivery teams that five cities across the country have launched are part of an effort, supported by the Bloomberg Philanthropies, to produce smarter, more informed, big-picture solutions to significant policy and service-delivery challenges. At the core of their efforts is a concept known as "ideation." Neil Kleiman, *Governing*. [Read more](#)

### FEDERAL NEWS

#### CFOs Remain Tepid on Financial Shared Services

Federal chief financial officers say finding efficiencies in their agency is among their top priorities. But moving to a financial management shared service provider or even to individual shared applications doesn't rank high on their to-do lists. In an exclusive *Federal News Radio* survey of CFOs and deputy CFOs conducted in August, 55 percent of the respondents rated spending money more wisely as their top priority. But at the same time, 36 percent rated moving to the Internet Payment Portal or other financial management shared services as their fourth highest priority, while only 9 percents ranked it as high as third overall. Jason Miller, *Federal News Radio*. [Read more](#)



## It's Easy to Pretend Government Doesn't Matter

Gautam Mukunda, author of *Indispensable: When Leaders Really Matter*, recently told Excellence in Government that critics of government employees have forgotten what life was like before government regulations made life simpler. It's a shame that [government employees] are being vilified because the people who are doing that, at a basic level fail, to understand the extent to which the activities of the government, "especially the federal government" undergird every part of the day-to-day life of the United States, said Mukunda " Bryan Klopack and Mark Micheli, *Government Executive*. [Read more](#)

### 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 in the members' only area:

[www.agacqfm.org](http://www.agacqfm.org)

The sign in box is in the upper right corner



### SHARE YOUR NEWS

Do you have some interesting news that your fellow chapter members may be interested in? If so, you are welcome (and encouraged) to 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. Feel to send in topic suggestions or features to include.



## Calendar of Events 2012-2013

August 28, 2012 – Board Meeting, Hometown Buffet, Madison

September 20, 2012 – Lunch Meeting, Todd Berry, Fiscal and Economic Issues the 2012 Context, Restaurant--Rocky Rococo's Pizzeria, 1753 Thierer, Road (near East Towne)

October 2, 2012 – Board Meeting, Hometown Buffet, Madison

October 18, 2012 Cost Allocation A-87 Training, Joe Stertz, Mequon, WI

October 25, 2012 – Lunch Meeting, E. Dionne, The Planning of Audits – Setting Priorities and How It's used in Audits, Restaurant--Vintage Brewing, 674 S Whitney Way

**November 13, 2012 – Board Meeting, Hometown Buffet, Madison**

**November 15, 2012 – Lunch Meeting, Linda M. Fournier, Public Affairs Officer, Fort McCoy, Wisconsin, Financial Impact of Fort McCoy on the State of Wisconsin, Restaurant--Dayton Street Café (inside the Concourse, 1 West Dayton Street)**

December 18, 2012 – Ethics Training Audio/Live Discussion, WI Department of Health Services, 3 CPE

January 2013 – Board Meeting, Hometown Buffet, Madison

January 17, 2013 – Lunch Meeting, Tax Update, Imperial Gardens

February 2013 – Board Meeting, Hometown Buffet, Madison, WI

February 21, 2013 – Lunch Meeting, topic to be determined, Restaurant--Dayton Street Café (inside the Concourse, 1 West Dayton Street)

March 2013 – Board Meeting, Hometown Buffet, Madison

March 21, 2013 – Lunch Meeting, topic and location to be determined

April 2013 – Board Meeting, Hometown Buffet, Madison

April 18, 2013 – Lunch Meeting, topic and location to be determined

May 2013 – Community Service Event

May 2013 – *Annual Spring Symposium, UW-Madison Union South*

June 2013 – Board Meeting, Hometown Buffet, Madison

June, 2013 – Lunch Meeting, topic and location to be determined

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

# AGA Southern Wisconsin Chapter Officers and Directors 2012-2013

**President** – Carrie Ferguson, CPA, LAB, [carrie.ferguson@legis.wisconsin.gov](mailto:carrie.ferguson@legis.wisconsin.gov), 608-259-9839

**President Elect** – Vacant

**Immediate Past President** – Sherri Voigt, CGFM, CPA, DOT, [sherriv@live.com](mailto:sherriv@live.com), 608-266-2814

## **Chapter Recognition Co-Coordinators**

Dolly O’Laughlin, [olaughlin@co.dane.wi.us](mailto:olaughlin@co.dane.wi.us), 608 242-6314

Eric Busse, DPI [eric.busse@dpi.state.wi.us](mailto:eric.busse@dpi.state.wi.us), 608-267-9199

**Secretary** – Sherri Voigt, CGFM, CPA, DOT, [sherriv@live.com](mailto:sherriv@live.com), 608-576-6473

**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 ext 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 ext 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

**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)

**Director** - Thomas A. Scheidegger, CPA, [thomas.scheidegger@bakertilly.com](mailto:thomas.scheidegger@bakertilly.com)

**Chapter Website** – [www.aga-wis.org](http://www.aga-wis.org)

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



SOUTHERN WISCONSIN CHAPTER