



SOUTHERN  
WISCONSIN  
CHAPTER



## Inside This Issue

1. October 17th Luncheon Meeting
2. Speaker Biography
3. October 23<sup>rd</sup> Audio Conference
4. President's Message
5. Chapter News and Community Service Opportunity
6. **Passionately Pink for the Cure**
7. September Luncheon Recap
8. Recruitment Program: **20-20-20**
9. National News
11. Calendar of Events
12. Chapter Contacts



# Monthly Footnotes

OCTOBER 2013

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

## Welcome Members and Nonmembers

### October Luncheon Meeting

**TOPIC:** University of Wisconsin (UW)  
Madison Grants Management

**SPEAKER:** Robert Andresen, Asst. Director, UW-Madison Research and Sponsored Programs

**DATE:** Thursday, October 17, 2013

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

**COST:** \$6 for Members, \$12 for Non-Members

**PLACE:** Monona Gardens Family Restaurant, 6501 Bridge Road (off the Beltline, between Monona Drive and South Towne Drive)

**MENU:** All sandwiches come with fries and a cup of soup. All meals include soda, tea, or coffee.

- **Cheeseburger**-1/2 pound ground beef patty with American cheese on a toasted bun
- **Grilled Chicken Breast**-served on a toasted bun
- **Grilled Reuben**-corned beef with sauerkraut topped with swiss cheese, served on grilled rye bread.
- **Spanokopita**-spinach pie with Mediterranean salad, hummus, and cup of soup

**RESERVATIONS:** Contact Sherri Voigt by 11 a.m. on Monday, October 14, 2013 with your name, membership status, meal choice, and for carpooling information at (608) 266-2814 or [sherri2.voigt@dot.wi.gov](mailto:sherri2.voigt@dot.wi.gov).  
**NEW!** Reservations may also be made from our website.

## ABOUT THIS MONTH'S LUNCHEON SPEAKER

**Robert Andresen** is the Director of Research Financial Services in the Office of Research and Sponsored Programs at the University of Wisconsin-Madison. He has been involved in sponsored projects administration for over 25 years. He and his staff are responsible for all areas of financial and non-financial post-award administration including financial reporting, invoicing, financial compliance, sub-award negotiation and monitoring, effort reporting, close-out, and audit. In addition, he is involved in the development and negotiation of the University's F&A and fringe benefit rates.

Robert has conducted training sessions on several sponsored research administration topics at the University of Wisconsin-Madison as well as universities across the country and overseas. He also is a participant in the Federal Demonstration Partnership and the Council on Governmental Relations in implementing and streamlining federal grants policies.

Robert received his MBA in Finance from the University of Wisconsin-Madison.

## 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.

### Back by Popular Demand!

**Who says there's no such thing as a free lunch?**

#### *Membership Special!*

Members who attend 3 lunch meetings from September to February receive a free lunch certificate for the March or April lunch meeting!

## Audio Conference

# Grants Management Reform Updates and Agency Insights- What to Expect in Fiscal Year 2014 Wednesday, October 23, 2013 1:00-2:50, 2 CPE

The Federal government issues over \$600 billion in grants each year to states, localities, tribes, universities, and non-profits. In February, the Office of Management and Budget (OMB) published its long-awaited proposed guidance on grant reforms “Reform of Federal Policies Relating to Grants and Cooperative Agreements; Cost Principles and Administrative Requirements.” The public comment period closed on June 2. What’s next? Join AGA and industry leaders for a conversational session on:

- Grant reform and modernization
- OMB’s preliminary reaction to public comments on reform updates
- Council on Financial Assistance Reform (COFAR) priorities for 2014-2015
- Agency experiences with improving the administration, compliance, monitoring, performance of grant programs, and overcoming human capital challenges
- Partnership collaboration, pilots, and cooperative audit resolution

This is a live event, so in addition to the speakers’ presentations, participants will have the opportunity to ask questions.

### Speakers

- **Norman Dong**, Interim Controller, Office of Management and Budget
- **Rich Rasa**, Director, State and Local Advisory and Assistance Services, Department of Education, Office of Inspector General
- **Merril Oliver**, CGMS, Deputy Director, State of Maryland Governor’s Grants Office
- **Dale Bell**, Deputy Division Director, National Science Foundation, Division of Institution and Award Support
- **Gloria Jarmon, CPA, CGFM**, Deputy Inspector General for Audit Services, Department of Health and Human Services
- **Leslie Leager**, Division Coordinator, State of Iowa Economic Development Authority

**Moderator: Wendy Morton-Huddleston, CGFM**, Principal, Grant Thornton LLP

---

### AGA Members \$0; Non-Members \$10

Register by: Phone or e-mail. Invoicing is available.

Contact: Sherri Voigt at 608-266-2814 or [sherri2.voigt@dot.wi.gov](mailto:sherri2.voigt@dot.wi.gov)

Location: Department of Transportation, 4802 Sheboygan Avenue, Room 364

Parking and other details will be sent after registered.

**\*\*SPACE IS LIMITED TO 60 PEOPLE\*\***

## PRESIDENTS MESSAGE

Sherri Voigt, CGFM, CPA

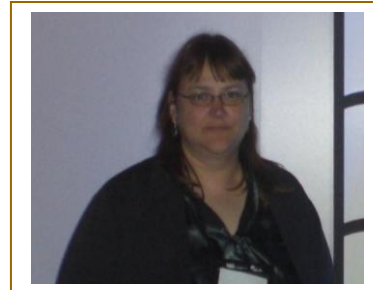
We have two training opportunities for you this month: our regular lunch meeting on October 17 and a two-hour audio conference on October 23. Both topics are grant-related and I hope you will take the opportunity to check them both out.

Our Chapter will host a Komen “*Passionately Pink for the Cure*” event as part of the *October is Breast Cancer Awareness Month* campaign. We will do this on conjunction with the October 17 lunch meeting. See page 6 for some FAQ. Anyone who would like to donate can use this link [http://www.info-komen.org/site/TR/PassionatelyPink/HeadquartersSite?team\\_id=278591&pg=team&fr\\_id=3715](http://www.info-komen.org/site/TR/PassionatelyPink/HeadquartersSite?team_id=278591&pg=team&fr_id=3715) or bring a donation to the lunch meeting. Anyone who donates \$5 or more will receive a pin. All lunch attendees will be entered in a drawing for a scarf (prize donated to the chapter.) So, break out your pink and wear it on the 17<sup>th</sup>!

If you would just like more information on risk factors and prevention, please visit <http://www5.komen.org/breastcancer/loweryourrisk.html>

We are still collecting socks for the Salvation Army Homeless and Community Shelters. We had a lot of success at the September lunch and wanted to give people a chance to bring any they may have forgotten to bring in. We will deliver them after the lunch meeting.

I would like to draw your attention to just one more thing in the newsletter. Our “20/20/20” Recruitment Campaign was



extremely popular last year. If you have ever considered joining AGA, please take a look at the article on page 8. It features all the benefits of joining, from the current \$20 rebate offer to the discounted training fees to the free lunch after joining. Feel free to contact David Mellem, membership chair, me, or any board member with questions.

Sherri Voigt, CGFM, CPA



# Chapter News

## Community Service

### Still Collecting Warm Socks for Salvation Army's Homeless Shelter and Community Center

The Southern Wisconsin AGA Chapter has taken the collection of donated items to the next level for the 2013-14 program year.

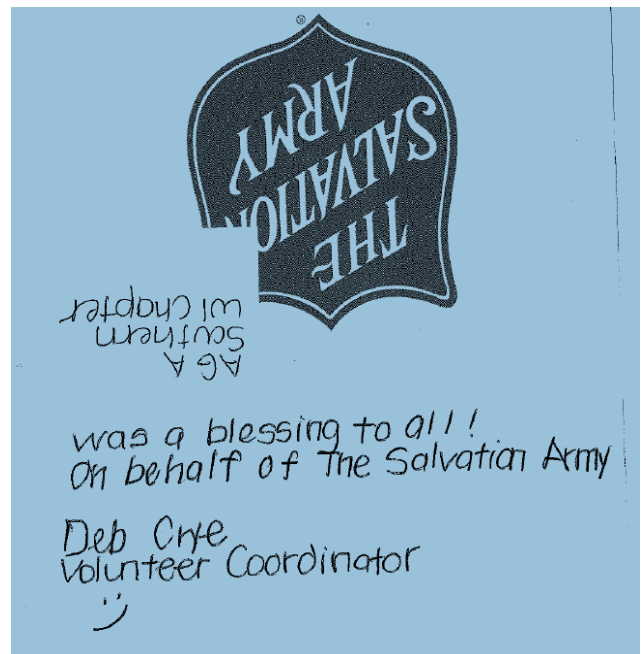
Think about the comfort you could provide by giving a man, woman or child a pair of warm socks. Please consider donating warm socks to provide someone with warm feet, something most of us take for granted. AGA Southern Wisconsin Chapter is collecting new warm socks of all sizes at the October luncheon on October 17th.

If you have any questions about this program or have warm socks to donate but can't make the October 17<sup>th</sup> luncheon, please contact Michele Tessner at [michele.tessner@dpi.wi.gov](mailto:michele.tessner@dpi.wi.gov) or 608-267-9218.



### Sharing a Thank You Note from the Salvation Army for the Backpacks collected in August:

Dear Michele and AGA Members,  
Thank you for the generous donation  
of backpacks and school supplies.  
Your timing was perfect... The day  
you came in with your donations I  
received a request for 31 more packs.  
We had most of the supplies but  
had ran out of backpacks. I have  
learned through the years not to  
panic... In you come with your  
arms full of backpacks.  
I wish you could see the joy on the  
students faces as they received  
their new backpacks. Priceless!  
Please share our appreciation  
to the members. Your donation



## Passionately Pink for the Cure at October 17 Meeting!

**Q: What is Passionately Pink for the Cure?**

A: Passionately Pink for the Cure is an awareness and fundraising program benefiting Susan G. Komen for the Cure.

**Q: How will the funds raised be used?**

A: Eighty-seven cents of every dollar Komen receives goes toward our mission. Twenty-five percent is used to fund life-saving research and 75% is shared with our Affiliates across the country to be used in local education, screening and treatment efforts.

**Q: Will I receive a tax receipt?**

A: Susan G. Komen for the Cure issues receipts for any funds of \$10 or more received directly by Susan G. Komen for the Cure. Anyone who provides a check written directly to Komen will receive an acknowledgement within approximately four to six weeks from the date it was deposited.

**Q: Is my donation tax-deductible?**

A: Yes, contributions to Susan G. Komen for the Cure may be tax-deductible to the fullest extent of the law. Please consult your tax

advisor for more information

**Q: When are the donations due?**

A: Team captains are encouraged to send in donations as soon as their Passionately Pink for the Cure day is over. (October 27)

**Q: Can donations be made online?**

A: We encourage it! Donors can either go to [passionatelypink.org](http://passionatelypink.org), click register/donate and find the team's page, or go directly to the team's donation page using the team URL. Online donors receive immediate acknowledgements, and you don't have to worry about sending checks by mail. Best of all, the money Komen saves in postage and handling goes toward the cause.

**Team:** [agasowi](http://www.info-komen.org/site/TR/PassionatelyPink/HeadquartersSite?team_id=278591&pg=team&fr_id=3715)      **Link:** [http://www.info-komen.org/site/TR/PassionatelyPink/HeadquartersSite?team\\_id=278591&pg=team&fr\\_id=3715](http://www.info-komen.org/site/TR/PassionatelyPink/HeadquartersSite?team_id=278591&pg=team&fr_id=3715)

**Q: How should checks be made out?**

A: Please make checks payable to Susan G. Komen for the Cure.

2013 Chapter Financial Summary	
<b>Chapter Revenues</b>	
Monthly Lunch Meetings	1,440
Annual Symposium	11,940
Training Events	2,495
Member Recruitment	155
Interest on Bank Account	40
CGFM Book Deposits	65
Donations at Lunches	47
<b>Total Chapter Revenues</b>	<b>\$16,182</b>
<b>Chapter Expenditures</b>	
Monthly Lunch Meetings	2,792
Annual Symposium	5,741
Training Events	1,837
Community Service Donations	1,000
Chapter Administration	865
Member Recruitment	180
PDC Sponsorship	1,000
CGFM Program	531
<b>Total Chapter Expenditures</b>	<b>\$13,946</b>
<b>Net Increase in Cash Balance</b>	<b>\$2,236</b>

### 2013-14 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

## September Luncheon Meeting Notes

Our September luncheon meeting featured Kimberly Hazen from the Better Business Bureau (BBB).

The BBB has the roles to provide ratings information on their website and to train “fraud fighters” nation-wide to carry the prevention message.

Her presentation covered who is falling victim, and it isn’t who we think. The typical victim of fraud is male, married, 55-65, college-educated, a risk taker, self-reliant, and more financially literate.

Ms. Hazen showed a video that helps one to learn to spot persuasion. Some of the key points were:

Phantom Riches: Dangling the prospect of wealth; something you want but cannot have.

Source Credibility: Credibility can be faked; can the claims or certifications be independently verified?

Social Consensus: If everybody wants it, it must be good!

Reciprocity: Doing a small favor in return for a big favor; watch out for the “free lunch” offers with a pitch since it can compel a guilt complex.

Scarcity: If it is rare or limited, it must be valuable. Be wary of limited time/quantity pitches.

Visit their website and check the “scam meter” if you have doubts.

### Preventing Investment Fraud

- Reduce your exposure
  - Use care with “free lunch” offers
  - Avoid high-risk investments
  - Develop a “refusal script” and stick to it
  - Sign up for the “Do Not Call” registry [www.donotcall.gov](http://www.donotcall.gov)
- Look for red flags



- Ask for and check the registration status of the professional and investment

### Become a “Fraud Fighter”

- Inform others of these concepts
- Share the “Tricks of the Trade” documentary with others
- Check out a business at [www.bbb.org](http://www.bbb.org)
- File a tip at [www.finra.org/fileatip](http://www.finra.org/fileatip)
- Sign up for the investor newsletter at <http://www.saveandinvest.org/>

### Q&A session

Q: What is the relationship with the state?

A: The BBB is not government. They do share information back and forth with Consumer Protection and Department of Justice

Q: Can a business status/rating be lost?

A: It can be lost due to non-payment of fees, reports of fraud or license lost (example given of a roofer), or if the 16 rated factors come up with a score of “B” or lower (then not accredited)

You can read all the information on-line for complaints, business response, etc. Names/numbers are redacted. Only confirmed reviewers are able to be posted.

Other web addresses noted:

[www.saveandinvest.org/meters/risk](http://www.saveandinvest.org/meters/risk)

[www.saveandinvest.org/meters/scam](http://www.saveandinvest.org/meters/scam)

**20-20-20 Recruitment Program:  
\$20 Incentive Payments, \$20 Bonus and \$20 Rebates  
Under Southern Wisconsin AGA Chapter  
New Member Recruitment Program**

Our chapter is again holding our 20-20-20 Member Recruitment Campaign this year.

**Incentive Payments:** You can earn an incentive single payment of \$20 as a Southern Wisconsin Chapter member simply by recruiting one or more new chapter members.

**Bonus Award:** Members who recruit more than one member will be entered into a drawing for a prize of an additional \$20 award. Members who recruit more than one new member will have one entry for each additional member recruited.

**Rebates:** Each new chapter member will receive a \$20 rebate for their first year's dues.

This chapter member recruitment program begins September 2013 and runs **through Friday, January 31, 2014**. The membership application must be submitted by this date to the AGA national office. The member recruiter or new member must notify the chapter membership chairperson at [david.mellem@oig.hhs.gov](mailto:david.mellem@oig.hhs.gov) or 608-264-5415 ext. 25 by this submission deadline. Funds available for this recruitment effort are limited and will be paid on a first notice, first paid basis.

The AGA Membership Categories, annual dues and reduced dues after rebate for this recruitment campaign are as follows:

Full Government Member	\$ 90 less \$20 rebate = only \$ 70
Private Sector Member	\$150 less \$20 rebate = only \$130
Early Career Member	\$ 45 less \$20 rebate = only \$ 25
Student Member	\$ 30 less \$20 rebate = only \$ 10
Retired	\$ 30 less \$20 rebate = only \$ 10

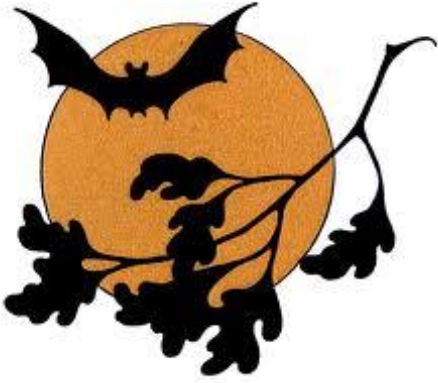
Membership applications and instructions are available on the AGA national website at [www.agacgfm.org](http://www.agacgfm.org) under the Membership drop down menu near the top of the website homepage.

In addition to the rebate above, you receive all the standard “perks” of membership:

- First chapter lunch meeting is free
- Access to AGA National complimentary webinars (new this year) - free CPE!!
- Discounts on lunch meetings and other training events
- Subscription to the quarterly *Journal of Government Financial Management*

*If you have been thinking about it...this is the time to join!*





## National News

### NATIONAL NEWS



**2013-2014  
National President**  
Ms. Mary E. Peterman,  
CGFM, CPA

**AGA celebrates its 63rd birthday.** AGA was founded as the Federal Government Accountants Association (FGAA) by Robert W. King and a group of federal government accountants on September 14, 1950. [Read more](#)

#### **From the National President - Mary E. Peterman, CGFM, CPA**

I challenge you to be active and connect in new ways this year within AGA. What is next for you? [Read more](#)

#### **Perspectives: Continue to Build Your Professional Network during Challenging Times**

Seek out relationships that provide new opportunities, insight, and support. Networking remains key. [Read more](#)

#### **Call for Nominations: Join AGA's National and Regional Leadership Team!**

Here's your opportunity to shape AGA programs, advance your career & represent members' interests. **Submit nominations by Oct. 31.** [Read more](#)

#### **FMSB Provides Comment Letter to Financial Accounting Foundation (FAF)**

AGA's Financial Management Standards Board (FMSB) issued a comment letter to the FAF about the 'GASB Scope of Authority: Consultation Process Revised Proposal'. [Read more](#)

#### **Webinar: Why Your Leadership Should Produce a Citizen-Centric Report (CCR)**

**Oct. 17| 2-3 p.m. ET| Complimentary**

This webinar will focus on how managers encouraged their leadership to support the production of a CCR for their constituents. [Read more](#)

#### **CCR Templates Available in Updated Word Format**

Is your organization ready to build a Citizen-Centric Report (CCR)? Use our easy, updated Microsoft Word template. [Read more](#)

## On-site Governmental Environment Course

Learn about the governmental environment at the federal, state and local level. [Read more](#)

## Back-to-School Journal CPE Quiz Sale

Purchase before Oct. 15, to get four *Journal* CPE quizzes -- and earn you up to 12 CPEs -- for just \$89. [Read more](#)



## Citizen-Centric Report (CCR) Reviewers Needed

Serve on a team of three and provide advice and constructive recommendations to help government entities improve their CCR. [Read more](#)

## CGFM Corner

### Certified Government Financial Manager (CGFM®)

#### CGFM Intensive Review Course

Oct. 28-29 | Washington | 18 CPEs Available

Sign up for AGA's Intensive Review Course and take the CGFM Examinations by the end of the year at no additional cost. [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.agacgfm.org](http://www.agacgfm.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.



## SOUTHERN WISCONSIN CHAPTER

### Calendar of Events 2013 - 2014

August 27, 2013 – Board Meeting, Hometown Buffet, Madison

September 26, 2013 – Lunch Meeting, Kimberly Hazen, Regional Director for the Southwest Region of the Wisconsin Better Business Bureau, Investment Fraud, Vintage Brewing

**October 8, 2013 – Board Meeting, Hometown Buffet, Madison**

**October 17, 2013 – Lunch Meeting, UW-Madison Grants Management, Robert Andresen, Asst. Director, UW-Madison Research and Sponsored Programs, Monona Garden**

**October 23, 2013 – Grants Management Reform Updates and Agency Insights (audio conference), Department of Transportation**

November 5, 2013 – Board Meeting, Hometown Buffet, Madison

November 21, 2013 – Lunch Meeting, Upcoming Budget of the Madison School District and Influences by the Drop of Shared Revenues, Mike Barry, Asst Superintendent for Business Services, Madison School District, location to be determined

December 3, 2013 – Board Meeting, Hometown Buffet, Madison

December 11, 2013–Taking the High Road: How to Succeed Ethically When Others Bend the Rules (ethics audio conference)

January 7, 2014 – Board Meeting, Hometown Buffet, Madison

January 15, 2014–Fraud Detection (audio conference, exact title to be determined)

January 23, 2014 – Lunch Meeting, Annual Tax Update, Imperial Gardens

February 4, 2014 – Board Meeting, Hometown Buffet, Madison

February 20, 2014 – Lunch Meeting, topic and location to be determined

March 4, 2014 – Board Meeting, Hometown Buffet, Madison

March 5, 2014 – Accountability in Government (audio conference, exact title to be determined)

March 20, 2014 – Lunch Meeting, topic and location to be determined

April 1, 2014 – Board Meeting, Hometown Buffet, Madison

April 17, 2014 – Lunch Meeting, topic and location to be determined

May 6, 2014 – Board Meeting, Hometown Buffet, Madison

May 2014 – Community Service Event – MS Walk

May 8, 2014 – Annual Spring Symposium, UW-Madison Union South

June 3, 2014 – Board Meeting, Hometown Buffet, Madison

June 19, 2014 – 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 2013 - 2014

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

**President Elect** – Mary Laufenberg, CGFM, CPA, DOR, [mary.laufenberg@revenue.wi.gov](mailto:mary.laufenberg@revenue.wi.gov), 608-266-1670

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

**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 extension 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 extension 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

**Accountability Outreach Chair** – Sherri Voigt, CGFM, CPA, DOT, [sherriv@live.com](mailto:sherriv@live.com), 608-266-2814

**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)

**Chapter Recognition Coordinator**

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

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

– Shellee Bauknecht, LAB, [shellee.bauknecht@legis.wisconsin.gov](mailto:shellee.bauknecht@legis.wisconsin.gov)

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

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



SOUTHERN WISCONSIN CHAPTER