



SOUTHERN
WISCONSIN
CHAPTER



Monthly Footnotes

JANUARY 2014

www.aga-wis.org

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Welcome Members and Nonmembers

January Luncheon Meeting

TOPIC: Annual Tax Update

SPEAKER: Andrew Justl, Manager
Baker Tilly Virchow Krause, LLP

DATE: Thursday, January 23, 2014

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

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

PLACE: Imperial Gardens (East-4214 East Washington Avenue)

MENU: Traditional Banquet served family style, includes egg roll and hot tea: ♦ Shrimp with Pea Pods ♦ Beef with Broccoli ♦ Hunan Pork ♦ Vegetable Fried Rice ♦ Governor's Chicken

RESERVATIONS: Contact Sherri Voigt by 11 a.m. on Monday, January 20, 2014 with your name, membership status, meal choice, and for carpooling information at (608) 266-2814 or sherri2.voigt@dot.wi.gov.

NEW! Reservations may be made from our website www.aga-wis.org

ABOUT THIS MONTH'S LUNCHEON SPEAKER

Andrew Justl, Manager with Baker Tilly Virchow Krause, LLP, joined the firm in 2011. He specializes in serving clients in the Construction and Real Estate industries.

Specific Experience

- Experience in all areas of tax preparation including corporations, partnerships, and individuals.
- Provides consulting and research services relating to federal, state, and international tax issues.

Industry Involvement

- American Institute of Certified Public Accountants (AICPA)

Education

Marquette University – Milwaukee
Bachelor of Science in Accounting
Master of Science in Accounting

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!

January 15, 2014 – Fraud Detection & Prevention Audio Conference, 1-2:50 p.m., 2 CPEs

Fraud Detection & Prevention: Using Technology for Auditing

Identifying fraud within the billions of dollars spent on public programs on a case-by-case basis is like searching for needle in a haystack. But new technology allows auditors to sift through all of the spending and to identify patterns outside the norm. Bringing in information from other systems provides more penetrating insight and allows investigators to focus time and energy more productively and meaningfully.

The Massachusetts State Auditor's Office has employed data analytics tools to make risk-based audit selections, enhance risk analysis in audits, and conduct data-driven, proactive investigations. This web conference will examine the case of a doctor's fraudulent billing of the state health program to illustrate the value of these tools. You will hear the story of how they uncovered the fraud as the team takes you through the investigative process step-by-step.

Speaker: Laura M. Marlin, Esq., First Deputy Auditor, Office of the State Auditor, Massachusetts

Learning Objectives: To understand how data analysis tools can help identify unusual patterns and allow auditors and investigators to make better audit selection decisions.

Field of Study: Auditing

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

Location: Department of Revenue, Rimrock Road

Parking and other details will be sent after registered.

****SPACE IS LIMITED TO 49 ATTENDEES****

PRESIDENTS MESSAGE Sherri Voigt, CGFM, CPA

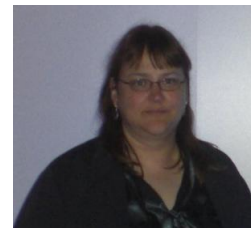
Please note that we have two separate training events in January! There is an audio conference on January 15 that features 2 CPE. The topic is Fraud Detection and Prevention

The lunch meeting is the Annual Tax Update at Imperial Garden east on January 23.

I am hopeful we can escape the ongoing snow and ice for these dates. I look forward to seeing you there.

The board is actively planning/scheduling the spring Symposium. If you have any topic or speaker recommendations, please send them in.

Chapter community service efforts continued in



November. Two board members volunteered at the Salvation Army Community Meal; check out the photos on page 4.

We have a great new way to sign up for news from the chapter. There is a simple "subscribe" option at the website. See page 4 for more information and a link. Never miss out on Chapter news again!

There is still time to save money and join AGA under the 20/20/20 program (page 7).

See you in January!



Chapter News

Community Service

Community Service Opportunities

The Salvation Army hosted a Thanksgiving Community Meal on Thursday, November 21. Volunteers helped serve the meal. The Chapter donated a ham for this meal. Thank you Southern Wisconsin AGA Chapter members for all you do and your service and donations.

At the January luncheon we will continue to support winter warmth by collecting warm socks, gloves or mittens. Please consider bringing more new warm socks, gloves or mittens of any size to the luncheon to be passed on to the Salvation Army Shelter and Community Center.



Board members Michele Gundrum Tessner and Rachel Zellmer volunteered at the November 21 community meal. Here they are before the hair nets, and after...joined by Dane County Executive Joe Parisi.



Capacity crowd at the November 13 AGA audio conference on federal grants management changes



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www.aga-wis.org

for updated employment opportunities and important news breaking announcements. Also, register online for luncheons, easy and convenient.

AGA Board Meeting – Tuesday, November 5, 2013

- Present: Roger Birkett, Lily Radivojevich, Tom Scheidegger, David Mellem, Michele Gundrum Tessner, Rachel Zellmer, Sherri Voigt, Carrie Ferguson.
- Treasurer’s Report – Balance as of 11/5/13 was 23,898.90.
- Membership – 89 as of today
- CGFM – looking at possibilities of offering one of the CGFM training courses in the future
- Community Service –
 - Salvation Army: Food items and 50 plus socks and some backpacks collected; the chapter will purchase a gift card to donate a ham to the Thanksgiving Community Meal
 - They need volunteers to work the Thanksgiving dinner on 11/21; will go in newsletter and Michele will organize
- Accountability – The Chapter 2013 program year Member Centric Report is on the web site.
- Newsletter – Get anything in tomorrow to be sent out
- Education -- Discussed possible lunch and Symposium speakers; list to be sent to Mary
- Other Matters?
 - Social event (get CRP points); we discussed a happy hour at Coliseum Bar or Brink Lounge in February; we will revisit it at January meeting and get it announced in the newsletter
 - Shellee Bauknecht had her baby at the end of October.

2013 Chapter Financial Summary	
Chapter Revenues	
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
Total Chapter Revenues	\$16,182
Chapter Expenditures	
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
Total Chapter Expenditures	\$13,946
Net Increase in Cash Balance	\$2,236

2013 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

Employment Opportunities

Accounting Manager

An exciting and rewarding Accounting Manager opportunity has become available with Milwaukee County! This individual will be responsible for managing the Central Accounting team, overseeing all governmental general ledger operations, and ensuring Local Ordinances, State and Federal regulations and Generally Accepted Accounting Principles (GAAP) are followed. The ideal candidate will be a CPA possessing a Bachelor's Degree in Accounting and have a minimum of five (5) years of accounting management experience. The ability to work collaboratively with others is required. For additional information please visit www.jobs.milwaukeecounty.org or email your resume and cover letter to becky.hampton@milwcnty.com prior to December 31, 2013.
Position Description: Accounting Manager

20-20-20 New Member Recruitment Program

Don't Miss Out on this Great Opportunity – still available through January 31, 2014

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 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.

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

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at

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for updated employment
opportunities and important news
breaking announcements. Also,
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and convenient.

National News



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

NEW! AGA Mentoring Program

As part of its commitment to the professional development needs of its members, AGA now offers an online mentoring program that features a user-driven matching resource. Only available to AGA members, this unique online networking and career development tool is designed to help members find and connect with one another to establish mutually beneficial mentoring relationships.

Once you have enrolled, you can search to find a mentor or mentees with whom you can connect online, by phone or face-to-face.

Take advantage of other features such as tracking your mentoring relationships, participating in discussion forums on mentoring topics, and find helpful information resources.

Get started by [enrolling here](#).

Already Registered? [Start your search for a mentor now!](#)

Perspective: How to Foster a Positive Work Environment

A positive work environment yields stronger mission results and happier employees. [Read more](#)

professional development training event. If you are interested, please contact our [Meetings Department](#).

Feature a Member of Your Chapter

Help us feature AGA members each month! If you have the name of a member that you would like for us to feature in a future article in *Topics*, please send the information to communicate@agacgfm.org.

Complimentary Online Workplace Tools

Whether detecting fraud, assessing risk, identifying internal control weaknesses or resolving audit findings, AGA has products to help financial professionals and grants managers do their job better. [Read more](#)

Call for 2014 National Academic Scholarships

Are you - or a family member - pursuing a degree in a discipline such as accounting, auditing, budgeting, economics, finance, information technology or public administration? Apply for an AGA National Academic Scholarship today! Submit applications by April 18. [Read more](#)

2014 Professional Development Training (PDT) Host Committee

The 2014 PDT Host Committee is looking for volunteers to assist with various activities that include: the registration desk, session-scanning, and other onsite duties. By volunteering for the [PDT 2014](#), July 13-16, in Orlando, your registration fee will be waived; however, you are responsible for all other expenses. Volunteering during this event allows you to earn CPEs and to network at the best government



ARE YOU MOVING?

Please notify both your chapter and AGA National of your address change. Update your address online at the national website in the members' only area: www.agacgm.org



SHARE YOUR NEWS

Please submit an article to the Newsletter Editor at radiojevich@danesherriff.com
Deadline for submission of articles is the 25th of the month.

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 Public Instruction

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

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

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

January 15, 2014–Fraud Detection & Prevention (audio conference), Department of Revenue

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.



SOUTHERN WISCONSIN CHAPTER

Officers and Directors 2013 - 2014

President – Sherri Voigt, CGFM, CPA, DOT, sherriv@live.com, 608-266-2814

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

Immediate Past President – Carrie Ferguson, CPA, LAB,
carrie.ferguson@legis.wisconsin.gov, 608-259-9839

Treasurer – Roger Birkett, CPA, jabirk@charter.net

Historian – David Mellem, CGFM, CIA, CISA, US DHHS OIG, 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, 608-264-5415 extension 25

Newsletter Editor – Lillian Radivojevich, radivojevich@danesherriff.com, 608-284-4801

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

Accountability Outreach Chair – Sherri Voigt, CGFM, CPA, DOT, sherriv@live.com,
608-266-2814

Webmaster – Scott Thornton, sbthornton@gmail.com

Community Service Chair – Michele Gundrum Tessner, CPA, DPI,
michele.tessner@dpi.state.wi.us

CGFM Co-Chairs –

Michele Gundrum Tessner, CGFM, CPA, DPI, michele.tessner@dpi.state.wi.us

Rachel Zellmer, DPI, rachel.zellmer@dpi.state.wi.us

Chapter Recognition Coordinator

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

Directors – Thomas A. Scheidegger, CPA, thomas.scheidegger@bakertilly.com

– Shellee Bauknecht, LAB, shellee.bauknecht@legis.wisconsin.gov

Chapter Website – www.aga-wis.org

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



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