



SOUTHERN  
WISCONSIN  
CHAPTER

## THIRTY-SEVENTH ACCOUNTING AND FINANCIAL MANAGEMENT CONFERENCE

May 8, 2014

University of Wisconsin  
**Union South**  
1308 West Dayton Street  
Madison, WI 53715  
(608) 890-3000

The Association of  
Government Accountants

*Advancing Government Accountability*

Thursday, May 8, 2014

7:30 a.m. Registration  
8:00 a.m. – 4:00 p.m. Conference  
Varsity Hall 2, UW Union South

**Please note: All general sessions will be held at the Union South building.**

**Objective:** The intended audience is financial managers, controllers, treasurers, auditors and IT personnel whose responsibilities involve governmental accountability and financial management. This conference is designed to enhance understanding of some of the problems encountered today in the public sector, inform of public policies and emerging issues, and provide managerial techniques to affect positive changes. The 37th Annual Accounting and Financial Management Conference continues the Association of Government Accountant's commitment to a planned program of professional education and development for public sector financial managers.

**Format:** Lecture, question and answer

**Level:** Update/Overview

**CPE Credits:** 7.5 hours

**Fee:** AGA Member \$35  
Non-Member \$70  
Retired AGA Member \$25

**Registration deadline: April 24, 2014**

**Note:** Fees include breakfast rolls, beverage, luncheon with dessert, and refreshments. No refunds or cancellations will be accepted after April 24, 2014. Substitutions are permitted.

**\*\*SPACE IS LIMITED TO 185 PEOPLE\*\***

### GENERAL SESSIONS

**7:30-8:00 Registration – Varsity Hall 2, Union South**

**8:00-8:05 Opening Remarks/Welcomes**  
Sherri Voigt, Chapter President

**8:05–8:55 Health Care Coverage Issues: The Evolving Landscape and Market**  
Bobby Peterson, ABC for Health

**8:55-9:05 Break**

**9:05-10:20 Grant Reform and Super Circular**  
Sean Walker, CliftonLarsonAllen

**10:20-10:30 Break**

**10:30-11:30 Public Performance in Milwaukee County**  
Rob Henkin, Public Policy Forum

**11:30-12:30 Lunch – Varsity Hall 3**  
Buffet with meat or vegetable lasagna, tossed salad, bread sticks, assorted soft drinks and bottled water, and fudge bottom pie

**12:30-1:30 ERP and the STAR Project**  
Dawn McCauley, DOA

**1:30-1:40 Break**

**1:40-3:00 An Overview of the Economic Development of WI and WEDC**  
Stephanie Walker, WEDC  
Jake Kuester, WEDC

**3:00-3:10 Break**

**3:10-4:00 Green Book Update**  
Tom Hackney, GAO

**4:00 Closing Remarks**

*See session information under biographies*

### BIOGRAPHIES

**Sherri Voigt**, CPA, CGFM, CPA, is the Fiscal Services Section Chief at the WI Department of Transportation. Sherri has been a State of WI employee since 1992. An AGA member since 1995, she joined the board in 1998. She is currently the chapter president for the Southern WI AGA chapter.

**Bobby Peterson** is the founder and Executive Director of ABC for Health, Inc. A 1987 graduate of the University of Wisconsin Law School, Bobby first served as a legal intern and then attorney at the Center for Public Representation. In 1994, Bobby founded ABC for Health, a public interest law firm that helps children and families with health care benefits through advocacy and benefits counseling.

*Session information: Discuss the changing landscape of health care.*

**Sean Walker** is the managing principal for the state and local government practice for CliftonLarsonAllen. He is located in Wisconsin and services clients locally and nationally. He graduated from University of Wisconsin – Milwaukee with his bachelors and Concordia University Wisconsin with his masters.

*Session information: A review of the long awaited grant reforms and the Super Circular, OMB Guidance "Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards," is the guidance, combining requirements from past OMB Circulars.*

**Rob Henken**, is the president of the Public Policy Forum, a 100-year-old non-partisan think tank dedicated to fact-based public policy research on key issues facing Southeastern Wisconsin. Since joining the Forum in January 2008, Henken has authored two reports that won national awards from the Governmental Research Association.

*Session information: A review of public performance management research efforts in Milwaukee County.*

**Dawn McCauley**, STAR Project Director, has 25+ years of Enterprise Resource Planning (ERP) experience with

the last 5 years at the University of Wisconsin on a PeopleSoft implementation that involved 26 campuses comprised of 72,000 employees.

*Session information:* An overview of Enterprise Resource Planning (ERP) systems in general and an update on the current State of Wisconsin State Transforming Agency Resources (STAR) Project.

**Stephanie M. Walker**, CPA is the Chief Financial Officer for Wisconsin Economic Development Corporation. Prior to coming on board with WEDC in 2013, she served as the Finance Director for the Village of Shorewood, Wisconsin and previously served in a similar capacity at the Village of Brown Deer, Wisconsin and the City of Berwyn, Illinois.

**Jake Kuester** is the vice president of credit and risk of the Wisconsin Economic Development Corporation (WEDC), Wisconsin's lead economic development organization. Jake has a bachelor's degree in economics from the University of Wisconsin-Madison and a M.B.A in finance from the University of St. Thomas.

*Session information:* An Overview of the economic development of WI, WEDC as an agency, underwriting and budget process, and the recent changes to internal processes.

**Tom Hackney** is a senior auditor in GAO's Financial Management and Assurance team. As member of GAO's auditing standards staff, he works with other GAO staff in assisting the Comptroller General and his Advisory Council on Government Auditing Standards with revising and maintaining government auditing standards He is also instrumental in preparing GAO's letters commenting on standards proposed by other standard setting bodies.

*Session information:* Internal control is the plans, methods, policies, and procedures an organization employs to ensure effective resource use in fulfilling its mission, goals, objectives, and strategic plan. GAO's Standards for Internal Control in the Federal Government are known as the Green Book.

**REGISTRATION FORM**  
**AGA Southern Wisconsin Chapter Symposium**  
**Thursday, May 8, 2014**

Name \_\_\_\_\_

Employer \_\_\_\_\_

Street \_\_\_\_\_

City \_\_\_\_\_

State \_\_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_

E-mail Address \_\_\_\_\_

**CPE Credits: 7.5 hours**

Fee - Mark Appropriate Line:

AGA Member - \$35 \_\_\_\_\_

Non-Member - \$70 \_\_\_\_\_

Retired AGA Member - \$25 \_\_\_\_\_

\_\_\_\_\_ Fee Enclosed (make check payable to the Association of Government Accountants or AGA)

\_\_\_\_\_ Purchase order forthcoming.

*Please contact us for the AGA Vendor ID number if it is needed to process payment or purchase order*

Sorry, we are unable to accept credit card payments due to the high processing fees.

**Registration should be received by April 24, 2014.**

Mail to:

Association of Government Accountants

PO Box 1454

Madison, WI 53701-1454

Registration Contact:

Sherri Voigt at 608-266-2814 or

[sherri2.voigt@wisconsin.gov](mailto:sherri2.voigt@wisconsin.gov).

For Symposium content questions and specific dietary requests, contact:

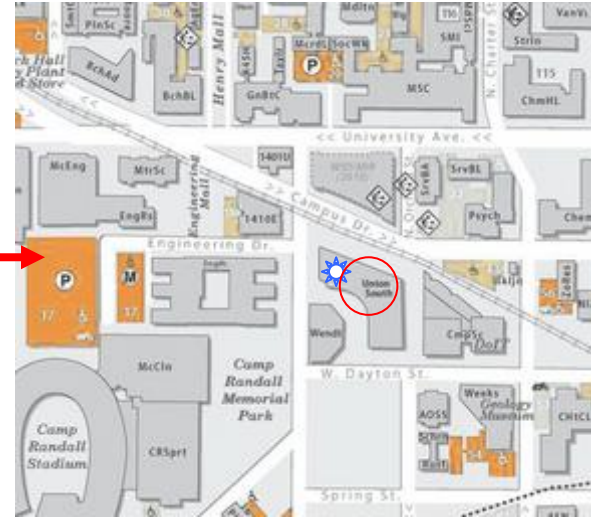
Mary Laufenberg at 608-266-1670

[mary.laufenberg@revenue.wi.us](mailto:mary.laufenberg@revenue.wi.us)

**Space is limited to 185 people.**  
**Once we reach 185 registrations, a waiting list will be created**

**Location Information**

The training event is being held at Union South again this year



The University of Wisconsin Union South is located at 1308 West Dayton Street, marked by the sun ☀ and red circle on the above map. Limited parking under the building is available for \$2 for each of the first two hours and \$1 for each additional hour (3 hours=\$5.) The next closest parking ramp is located in Lot 17 on Engineering Drive, across Randall Avenue. Rates are based on a daily fee of \$12.

**NEARBY LODGING CHOICES**

A list of nearby lodging is available upon request from Sherri Voigt, [sherri2.voigt@wisconsin.gov](mailto:sherri2.voigt@wisconsin.gov).

We recommend that you dress in layers and bring a sweater or jacket to the conference in case the room temperature is not comfortable for you.

**Membership**

If you are not currently a member and you would like to join AGA to take advantage of the member rate for this training, visit the National AGA web site and include a copy of your membership application with your registration to help speed our processing.

<http://www.agacgfm.org/Membership/overview.aspx>

Remember, membership benefits include not only a reduced price for this training, but also national publications, discounts on other chapter and national training events, and a free luncheon meeting from the chapter at the time of joining.

Membership dues are as follows:

- **Full Government**—\$90/year—available to individuals with three or more years of government experience.
- **Private Sector**—\$150/year —available to individuals working for private companies, corporations, partnerships and sole proprietors.
- **Early Career**—\$45/year—available to individuals with less than three years of government experience.
- **Student**—\$30/year—available to full-time college/university students that are not gainfully employed.

*Please note that these are the dues charged by AGA national, and that the Southern Wisconsin Chapter does not charge any additional chapter dues.*

