

The Southern Wisconsin Chapter of the Association of Government Accountants earned platinum status for the 2014 program year. We had a wide variety of educational events and community service opportunities. We were able to offer a total of 1,410 CPE hours during the program year. Anyone attending all sessions could earn 20.5 CPE for the year.

## **1. Training Events Held – Total CPE Offered: 15.5 Hours**

### **November 13, 2013: Grants Management Reform Updates and Agency Insights – AGA National Web Conference**

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.

CPE’s Offered – 2 hours

Attendance: 67

### **December 11, 2013: Taking the High Road: How to Succeed Ethically When Others Bend the Rules – AGA National Web Conference**

Live audio content from Leon Young conference.

CPE’s Offered – 2 hours

Attendance: 39

### **January 15, 2014: Fraud Detection & Prevention: Using Technology for Auditing – AGA National Web Conference**

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

CPE's Offered – 2 hours

Attendance: 32

**May 14, 2013: AGA Annual Spring Symposium** at the University of Wisconsin  
Topics – Various accounting/auditing/development topics (listed behind speaker below)  
Speakers:

- **Health Care Coverage Issues: The Evolving Landscape and Market.** Bobby Peterson, ABC for Health
- **Grant Reform and Super Circular,** Sean Walker, CliftonLarsonAllen
- **Public Performance in Milwaukee County, Rob Henkin, Public Policy Forum**
- **ERP and the STAR Project,** Dawn McCauley, DOA
- **An Overview of the Economic Development of WI and WEDC,** Stephanie Walker, WEDC and Jake Kuester, WEDC
- **Green Book Update,** Tom Hackney, GAO

Location – University of Wisconsin-Madison Union South, Madison, WI

CPE's Offered – 7.5 hours

Attendance: 132

**June 11, 2014: Understanding the DATA Act – AGA National Web Conference**

On May 9, President Obama signed into law the Digital Accountability and Transparency Act, which passed Congress with bipartisan support. The law requires federal agencies to publish spending information in a standardized format that will be accessible to the public. The DATA Act has the potential to make federal expenditures more transparent and easy to analyze by interested parties. It has implications for federal agencies and recipients of federal grant funds.

This web conference will provide an overview of the law's major provisions and the first steps toward implementation.

**Learning Objectives:** To understand how the DATA Act will impact reporting of federal expenditures.

CPE's Offered – 2 hours  
Attendance: 19

**2. Monthly Chapter Luncheon Meetings**– 1 CPE offered for each luncheon except January Tax Update – 5 CPE

- September 26, 2013 – Investment Fraud, Kimberly Hazen, Regional Director for the Southwest Region of the Wisconsin Better Business Bureau, (23 attended)
- October 17, 2013 – UW-Madison Grants Management, Robert Andresen, Asst. Director, UW-Madison Research and Sponsored Programs (33 attended)
- November 21, 2013 – 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 (9 attended)
- January 23, 2014 – Annual Tax Update, Andrew Justl, Manager, Baker Tilly Virchow Krause & Company (23 attended)
- March 20, 2014 – Overview and History of the WI Government Accountability Board, Reid Magney, Public Information Officer, Wisconsin Government Accountability Board (16 attended)
- April 17, 2014 – Budget and Estimated Impact on Operations, Alliant Energy Center Construction, Mark Clarke, Executive Director and Bill Franz, CEO of the Alliant Energy Center (25 attended)

**3. Membership:**

We offer a free lunch meeting to all new members to encourage participation. New members are announced and welcomed at the monthly lunch meetings. The chapter president or membership chair sends out a welcome letter.

Based on last year's success, we ran another 20-20-20 Membership Campaign to recruit new members. We recruited 3 new members under this program and hope to make it annual. The highlights are:

**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](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.

#### **4. Community Service:**

Our chapter held specialized drives at the September, October, November, and March lunch meetings to collect seasonal items needed by the Salvation Army Community Center and Homeless Shelter. We collected over 50 backpacks, 40 pairs of warm socks, and 100 diapers. We held food drives at the January and April meetings. We also collected cash donations and collected paper bags to help out the MOM Food Pantry in Middleton. Members were also invited to bring small sized toiletries for the Salvation Army homeless shelter to any meeting. Two members participated in the Volunteer Income Tax Assistance Program, totaling over 100 hours. The chapter had a team participate in the MS Walk on May 5, 2014. Our team included 1 member and 3 non-members. The team raised over \$700 in donations. The chapter donated \$110 for selected WI products to go the PDC for the National Community Service Fund (NCSF) raffle.

The chapter made the following cash donations during the program year: \$300 to the Second Harvest Food Bank.

#### **5. CGFM Activities:**

We published articles in each newsletter related to the certification and offered reimbursement to the first 4 people to pass the exam. This year, we had several members start the review process, but no one sat for any exams.

We were once again able to get a Governor's Declaration that March was CGFM month. We received a signed certificate from Scott Walker, Governor, State of Wisconsin. We were also able to get a certificate from the Mayor of Madison. The two proclamations were displayed and highlighted at the March 20 lunch meeting and May 14 Symposium. CGFM holders who came to the March lunch received a free lunch. At our March 21 luncheon meeting and the May 7 Symposium, all CGFM holders received a special CGFM sticker for their name badge to highlight their professional achievement. A photo was taken of the CGFMs and the proclamations for the newsletter.

#### **6. Early Career Activities**

We tried to target early career people with the membership rebate offer. We invited some early career members to join the board.

#### **7. Awards**

The Chapter earned the Platinum level under the Chapter Recognition Program.

#### **8. Accountability**

The chapter prepared its third annual Member Centric Report and submitted it to the awards program.