



SOUTHERN  
WISCONSIN  
CHAPTER



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# Monthly Footnotes

NOVEMBER, 2014

## Welcome Members and Nonmembers

### November Luncheon Meeting

**TOPIC:** The Audit Bureau at Work—We Are Here to Help!

**SPEAKER:** Joe Chrisman, State Auditor

**DATE:** Thursday, November 20, 2014

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

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

**PLACE:** The Rigby Pub, 119 E Main Street, upstairs

**MENU:** Meals include soda, coffee, or tea and are served with fresh cut pub fries.

- **Cheeseburger** – classic burger served with cheddar cheese, lettuce and tomato on side
- **Turkey Club Wrap** – served in a warm flour tortilla with lettuce, tomato, turkey, thick cut bacon, red onion, banana peppers, and chipotle mayonnaise.
- **Veggie Wrap** – in a warm tortilla, with roasted red pepper hummus, mixed greens, tomato. Topped with a sauté of red & green peppers, yellow onion, and broccoli, finished with a sundried tomato basil aioli.

**RESERVATIONS:** Contact Sherri Voigt by 11 a.m. on Monday, November 17, 2014 with your name, membership status, meal choice, and for carpooling information at (608) 266-2814/email: [sherriv@live.com](mailto:sherriv@live.com)

*NEW!* Reservations may also be made from our website. [www.aga-wis.org](http://www.aga-wis.org)

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

## ABOUT THIS MONTH'S LUNCHEON SPEAKER

### Joe Chrisman Wisconsin State Auditor

As State Auditor, Joe Chrisman directs the nonpartisan Legislative Audit Bureau, which conducts audits and evaluations of state agency operations to ensure financial transactions have been made in a legal and proper manner and to determine whether programs have been administered effectively, efficiently, and in accordance with the policies of the Legislature and the Governor. The Bureau also operates a hotline, which investigates allegations of fraud, waste, and mismanagement by state agencies and employees. Chrisman was appointed Wisconsin State Auditor by the Joint Committee on Legislative Organization in 2011. Prior to his appointment, Chrisman was Special Assistant to the State Auditor from 2002 through 2011, and was a legislative analyst and supervisor at the Bureau from 1997 through 2002.

## WEB CONFERENCE: WEDNESDAY, DECEMBER 10, 1:00-2:50 p.m.

### How Do You Spell Success? E-T-H-I-C-S!

No matter what the setting, what the company or what the industry, everyone admits that good ethics is good business. This web conference will share with you insights, tips and techniques to help your ethics program truly become the foundation of a successful enterprise.

The speaker is **Frank C. Bucaro, CSP, CPAE**, a professional writer and speaker on ethics and the author of the upcoming book, *If Good Ethics is Good Business, What's the Problem?* The program will explore these concepts:

**E = Experience:** Experience is not what happens to you, but what you make of what happens to you. Learn from the lessons of life and use that wisdom. Values are caught not taught. Think back, who modeled those life values to you, that wisdom that stands the test of time? Identify, embrace and integrate those values and in every decision you make in life.

**T = Training:** Train yourself to keep asking the question: "Am I doing the right thing, at the right time for the right reason?" This question is bound to keep you more ethically focused.

**H=Hindsight:** Hindsight gives us that opportunity to, hopefully, look more objectively into the past in order to analyze, discern, and when necessary, make appropriate changes.

**I= Intuition:** What does your "gut" tell you is the right thing to do? View intuition as your personal moral code, because deep down, you know what's right and wrong! Tap this "gift" of self-reflection for it will lead to better decisions, which lead to better results!

**C= Customer, Community:** Here's where people go "astray." Your best advertising is word of mouth. Your worst advertising is word of mouth. What's the difference? How you treat your people consistently and what is that treatment based on, should be your values, your ethics and the focus of building relationships.

**S= Stewardship:** Your mission statement, your values statement, every internal/external communication, all must reflect your commitment to stewardship.

**Learning Objectives:** To learn techniques for applying ethical guidelines to a variety of professional situations.

**CPE:** Two credit hours

**Cost:** Free!

Sponsored by the Office of Employee Development and Training (OEDT) and AGA Southern WI. Location: WI Department of Health Services

Registration form to be published shortly by DHS. Contact Sherri Voigt with any questions in the interim :([sherriv@live.com](mailto:sherriv@live.com)) or (608) 266-2814.

## PRESIDENT'S MESSAGE

### Mary Laufenberg, CGFM, CPA

We have a great lunch meeting scheduled for you this month. On November 20th, Joe Chrisman, State Auditor, will be speaking to us. The title of his presentation is "The Audit Bureau at Work- We Are Here to Help!"

Also a two-hour audio conference is scheduled on December 10 titled " How do you Spell Success? E-T-H-I-C-S!" to be held at the Department of Health Services.

Our chapter will participate and support community service donations for November; see our newsletter announcement below for a list of those items.

If you have any questions, feel free to contact Dave Mellem, membership chair, me, or any other board member.

## Community Service

The AGA Southern Chapter continues to support the Salvation Army Shelter and Community Center. Thank you AGA members and non-members for all of your wonderful support, it is greatly appreciated.

**The Salvation Army of Dane County,** Debra D. Crye, Volunteer Outreach Coordinator, provided some ideas for what is needed for the up-coming months:

**November:** mittens or gloves for all ages (children, women and men)

**December:** information will be provided for Christmas ideas in late October or early November

## Chapter News

Chapter Revenues	2014
Monthly Lunch Meetings	\$732
Annual Symposium	6,955
Training Events	60
Member Recruitment	163
Interest on Bank Account	36
CGFM Book Deposits	40
Donations at Lunches	20
<b>Total Chapter Revenues</b>	<b>\$8,006</b>

Chapter Expenditures	2014
Monthly Lunch Meetings	\$1,789
Annual Symposium	4,413
Training Events	1,267
Community Service Donations	538
Chapter Administration	935
Member Recruitment	120
PDC Sponsorship	267
CGFM Program	40
<b>Total Chapter Expenditures</b>	<b>\$9,369</b>

## 2014-15 Officers and Directors



Pictured (left to right): front: Sherri Voigt, Michele Tessner, Mary Laufenberg; middle: Lily Radivojevich, Rachel Zellmer, Sean Walker; back: Tom Scheidegger, David Mellem

If you travel... the Salvation Army is in need of travel size shampoo, conditioner, toothbrush, toothpaste. etc.

The Salvation Army of Dane County appreciates your donations and your generosity.

**AGA Southern Wisconsin:  
2013-2014 Report to Our Members**

The newly published “Report to Our Members” is now available on our web site. This 4 page report follows the Citizen Centric Reporting model and guidelines, but updates you on the local membership value and chapter progress.

Visit our website directly or go the following link: <http://aga-wis.org/wp-content/uploads/2014/10/WI-CCR-2014.pdf>. We welcome any feedback you have on the current report or suggestions for future performance criteria to measure.



Visit [https://www.agacgfm.org/Tools---Resources/Citizen-Centric-Reporting-\(CCR\).aspx](https://www.agacgfm.org/Tools---Resources/Citizen-Centric-Reporting-(CCR).aspx) for more information on CCR reporting. Feel free to contact [Sherri Voigt](#), Accountability Outreach Chair, if you know of a local government that would be interested in help to create a 4 page report for its citizens.

**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.



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

**Subscribe to AGA Southern Wisconsin Chapter News  
at**

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

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

**Don't Forget!**  
**20-30 Recruitment Program**  
**\$20 Incentive Payments and \$30 Bonus Award**  
**Southern Wisconsin AGA Chapter New Member Recruitment Program**

**Our chapter is holding a 20-30 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 new member will be entered into a drawing for a prize of an additional \$30 award. Members who recruit more than one new member will have one entry for each additional member recruited. The more members you recruit, the better your chances of winning.

This chapter member recruitment program begins October 2014 and runs through January 2015. The membership application must be submitted by the end of January to the AGA national office. The member recruiter 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 and annual dues are as follows:

Full Government Member	\$ 90
Private Sector Member	\$150
Early Career Member	\$ 45
Student Member	\$ 30
Retired	\$ 30

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

**As always, new members receive a free lunch meeting!**





# National News

## Excuses, Excuses, Excuses

Let's dispel the top three excuses heard when asking a member why they won't consider an AGA leadership opportunity. [Submit now!](#) | [Read more](#)

## Meet Fellow Member—Martin J. Benison, CGFM

I am extremely proud of my team of highly-motivated individuals focused on working together in a friendly environment of mutual respect. [Read more](#)

## Focus on Fraud: Commuter Bus + Fuel Oil Delivery + 'Open' Telephone Jacks =?

An alert U.S. Department of State employee points out unusual activity near a federal building. [Read more](#)

## Call for National Awards Nominations

[These awards](#), presented annually at the National Leadership Training, are open for nominations. **Due: Nov. 30.**

Questions? Contact [awards@agacqfm.org](mailto:awards@agacqfm.org)

## Web Conference: Fraud Risk Management

**Nov. 19 | 2-3:50 p.m. ET | 2 CPEs**

Learn to manage the risk of fraudulent activities by implementing detection and mitigation techniques in government programs. [Read more](#)

## News You Can Use

AGA provides a daily digest of articles related to the government financial management community. [Read more](#)

## Federal Financial Systems Summit

**Jan. 8 | Washington | 6 CPEs Available | Complimentary for Gov. Employees**

Public and private sector executives discuss future prospects of federal financial management systems in a budget-constrained environment. [Read more](#)

## 2014 CFO Survey Results Released

Federal CFOs list declining budgets, recruitment and retention of talent, and a range of financial management crises as risks to success. [Read more](#)

## Highlights: A Conversation with OMB Controller, David Mader

"We are stewards of the taxpayers' money, and need to show accountability. The challenge is syncing all of the data so it makes sense." [Read more](#)

## Focus on Fraud: The 1970's OPEC Gas Crisis

As an individual, manager or auditor, learn from notable cases of fraud to prevent a similar scam. This, one of a

series, features a [gas station scam](#) - Bert T. Edwards, CGFM, CPA, CGMA.

### **Advance Your Career & Earn Your CPE Online**

Through Becker Professional Education, you have access to educational resources to advance your career. Content is accessible online 24/7. [Read more](#)

### **Public Input Request on the Establishment of Financial Data Standards (Data Exchange)**

The U.S. Department of the Treasury requests comments about the DATA Act, specifically on data exchange, to ensure data standards are informed and useful. [Read more](#)



## **CGFM Corner**

Now is the best time to apply for the [Certified Government Financial Manager \(CGFM®\)](#) certification!

Whether you're new to the field of government financial management or an experienced professional seeking to advance or make a change, the CGFM certification expands your career options by offering you increased knowledge, more recognition, additional qualifications and enhanced marketability.

In order to be enrolled in the CGFM Program, we will need a copy of your official college or university transcript showing a bachelor's degree or higher, submitted within six months of the online CGFM application. [Learn more](#) about the process of earning the CGFM.

### **Register for the CGFM® Intensive Review Course (IRC)**

**February 23-24 | Washington | 18 CPEs**

AGA's IRC with CGFM Examinations included-a great opportunity to review course material with a knowledgeable instructor and earn your CGFM! [Read more](#)

If you ever come up with a topic or speaker you think the local AGA chapter should offer, let us know!!! We are always looking for ideas. (contact Chapter President Mary Laufenberg at [maryfred6998@gmail.com](mailto:maryfred6998@gmail.com))



Over the past couple of months, we were contacted with some ideas. If we are able to locate a presenter, we will be offering some additional training over the winter. Keep watching our calendar of events for

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

### **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.agacgfm.org](http://www.agacgfm.org)



### **SHARE YOUR NEWS**

Please submit an article to the Newsletter Editor at [rdivojevich@danesherriff.com](mailto:rdivojevich@danesherriff.com)  
Deadline for submission of articles is the 25th of the month.





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## Calendar of Events 2014 – 2015

August 12, 2014 – Board Meeting, Hometown Buffet, Madison

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

**November 5, 2014 – Web Conference, Are You Prepared for the DATA Act Challenges, WI Department of Transportation**

**November 11, 2014 – Board Meeting, Hometown Buffet, Madison**

**November 20, 2014 – Lunch Meeting, Joe Chrisman, “The Audit Bureau at Work— We Are Here to Help!”, State Auditor, Rigby Tavern**

December 2, 2014 – Board Meeting, Hometown Buffet, Madison

December 10, 2014 – Web Conference, “How do you Spell Success? E-T-H-I-C-S!”, WI Department of Health Services

January 6, 2015 – Board Meeting, Hometown Buffet, Madison

January 22, 2015 – Lunch Meeting, Annual Tax Update, Imperial Gardens

February 3, 2015 – Board Meeting, Hometown Buffet, Madison

February 18, 2015 – Web Conference\*\*, Internal Controls Topic, WI Department of Transportation

March 3, 2015 – Board Meeting, Hometown Buffet, Madison

March 26, 2015 – Lunch Meeting, topic and location to be determined

April 7, 2015 – Board Meeting, Hometown Buffet, Madison

April 23, 2015 – Lunch Meeting, topic and location to be determined

May 3, 2015 – Community Service Event – MS Walk

May 5, 2015 – Board Meeting, Hometown Buffet, Madison

May 12, 2015 – Annual Spring Symposium, UW-Madison Union South

June 2, 2015 – Board Meeting, Hometown Buffet, Madison

June 3, 2015 – Web Conference\*\*, Government Financial Management, location to be determined

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

\*\* *subject to change as more detailed topic information becomes available*



## SOUTHERN WISCONSIN CHAPTER

### Officers and Directors 2014 - 2015

**President** – Mary Laufenberg, CGFM, CPA, [fredmary6998@gmail.com](mailto:fredmary6998@gmail.com), 608-438-8338

**President Elect** – Vacant

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

**Treasurer** – Roger Birkett, CPA, [jabirk100@yahoo.com](mailto:jabirk100@yahoo.com)

**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, [fredmary6998@gmail.com](mailto:fredmary6998@gmail.com), 608-438-8338

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

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

**CGFM Co-Chairs** –

Michele Gundrum, CGFM, CPA, DPI, [michele.gundrum@dpi.wi.gov](mailto:michele.gundrum@dpi.wi.gov)

To be announced

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

– Rachel Zellmer, DPI, [rachel.zellmer@dpit.wi.gov](mailto:rachel.zellmer@dpit.wi.gov)

– Max Brunner, DOR, [maxwell.brunner@revenue.wi.gov](mailto:maxwell.brunner@revenue.wi.gov)

– Sean Walker, CPA, Clifton Larson Allen, [sean.walker@claconnect.com](mailto:sean.walker@claconnect.com)

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

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