



SOUTHERN  
WISCONSIN  
CHAPTER

# Monthly Footnotes

JANUARY 2015



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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 22, 2015

**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 1 p.m. on Friday, January 16, 2015 with your name, membership status, meal choice, and for carpooling information at (608) 266-2814/email: [sherriv@live.com](mailto:sherriv@live.com)

**\*\* Reservations may be made from our website \*\***

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

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## 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.

**Subscribe to AGA Southern Wisconsin Chapter News**  
at  
**[www.aga-wis.org](http://www.aga-wis.org)**  
for updated employment opportunities and important news breaking  
announcements. Also, register online for luncheons, easy and convenient.

**PRESIDENT'S MESSAGE**  
**Mary Laufenberg, CGFM, CPA**

I hope everybody has had a safe holiday while traveling to their various events. The weather has definitely cooperated with all our travelers.

Just a reminder that the Annual Tax Update at the Imperial Garden East is scheduled on January 22nd.

A confirmed future monthly luncheon is as follows: John Pohlmann from DNR speaking about plans, budget and funding regarding the Badger Ammunition Plant scheduled on April 23rd. Other tentative speakers are still being arranged for our February 26th and March 26th luncheon dates.

Stay tuned to our future newsletters. I am hoping that we can again dodge the ice and snow for these future continuing education dates.

The board is planning the spring Symposium. If you have any suggestions on topics of speaker recommendations, please send them.

/s/

## 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

## 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:

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.

**In case you missed it: A chapter member was featured in a National Publication!**  
**From the AGA National TOPICS electronic newsletter, November 24, 2014**



**Meet Your Fellow AGA Member**  
**David Mellem, CGFM, CIA, CISA**  
Auditor, Office of the Inspector General  
U.S. Department of Health and Human Services  
Southern Wisconsin Chapter

**Q: What do you think is the most important issue in government financial management, today?**

**A:** I believe the most important issue in government financial management is public trust in financial information that is reliable, relevant and readily understandable. Busy people do not have time to dig into mountains of information. People who differ on issues sometimes pick only the data that seems to support their positions. Financial information that is clearly presented can help preclude misuse of that information. One of my accounting professors used to say that “anything that can be misunderstood will be misunderstood.” Independent auditors can help by presenting unbiased factual information in way that is useful and gets to the heart of issues.

**Q: What AGA product, program or service do you find most useful?**

**A:** I find up-to-date information on current issues via AGA publications, training opportunities and networking most useful.

**Q: What’s the biggest challenge you’ve faced professionally and how did you overcome it?**

**A:** One of the more unusual challenges was conducting audit exit meetings at an auditee about to lose its funding. Its director held a pair of sharp pointed scissors to my throat in a non-verbal attempt to intimidate me. I used tact and diplomacy to defuse the situation.

**Q: Would you like to highlight anything from your AGA chapter? (Beneficial resource, interesting program, take-away, best practice, outstanding member/leader, etc.)**

**A:** Our Southern Wisconsin Chapter endeavors to provide cost-effective continuing education on a variety of topics. It has a rich history of members, guest speakers, programs and conferences, and many networking opportunities. We have been blessed with some very dedicated officers and members.

**Q: Do you have a professional ‘lesson-learned’ you would like to share?**

**A:** Define your terms and do not assume. Many misunderstandings could be avoided if we agreed on what our terms meant and did not assume. One example is a state agency that routinely prepared not only final accounting reports, but also prepared later ‘final-final’ reports and even still later ‘final-final-final’ reports. The problem was that not everyone knew that final reports were not final, nor were final-final reports.

**Q: What does AGA mean to you?**

**A:** AGA is a great organization for meeting other like-minded professionals, developing organizational leadership experience, learning from the best and gaining recognition. I acquired a lifetime of learning and experiences from AGA.

**Q: Why did you decide to earn the CGFM certification?**

**A:** I decided to earn the CGFM certification because I could see from the start that this was going to be a significant certification for government financial management.



**Don't Forget – There is Still Time!**  
**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**

**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

## **Perspective: What Agencies Can Do to Prepare for the DATA Act**

Federal agencies should aim to play a proactive, participatory role in the implementation process. [Read more](#)

## **COFAR Releases Rule to Implement OMB Guidance on Federal Grant-Making**

The final guidance 'Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards' released. [Read more](#)

## **Young Professionals: Attend PDT 2015 via Scholarship**

Apply for a scholarship to attend AGA's [2015 Professional Development Training](#), July 12-15, 2015. [Read more](#)

## **Congratulations!**

Ann Scott, Linda Brown and Sandra Healy who updated their AGA profiles and were each randomly selected for an American Express gift card.

## **AGA Announces Selections for Collegiate Leadership Program (CPL)**

Five full-time college students were selected to engage with and learn from leaders in government financial management. [Read more](#)

## **AGA Staff Member Elected to ICGFM's Executive Committee**

AGA's Director of Education, Kevin Johnson, was elected to serve on the ICGFM executive committee. [Read more](#)

## **Perspective: Talent Science—A New Method to Hire Smarter and Faster in Government**

Talent science technology gives agencies the ability to engage happy, productive employees. [Read more](#)

## **Meet Fellow Member: Glenda Ostrander, CGFM, CIA, CFE, CGAP, CRMA**

"My government career actually found me! I aimed for a corporate job, but landed a state audit position and LOVED it." [Read more](#)

## **From the National President: William D. Miller, CGFM, CIA**

I am proud of our members and leaders and wish everyone a happy holiday season. [Read more](#)

## **Reminder! Update Your Member Profile Today**

Update your member profile by the end of today and be eligible for one of three \$50 American Express gift cards. [Update today!](#)

## **AGA Research Release: Control Challenges over Federal Grants and Benefits**

Improving controls to prevent and detect improper payments, assessing grantee risks and measuring performance are essential. [Read more](#)

## **Government's Big-Picture at NLT 2015**

**Feb. 11-12 | Washington | 14 CPEs**

National Leadership Training sessions offer current tactics for agency success and best practices. [Read more](#)

## **AGA Member, David A. Vaudt, CPA, Receives NASBA Award**

Vaudt received the William H. Van Rensselaer Public Service Award from the National Association of State Boards of Accountancy. [Read more](#)

## **Web Conference: Strengthening Grants Management**

**Jan. 28 | 2-3:50 p.m. | 2 CPEs**

Learn how to apply the new guidance to the management of federal grant funds. [Read more](#)

## **FMSB Sends Comment Letter to GASB**

FMSB commented on the Governmental Accounting Standards Board's 'Proposed Implementation Guide' (Project No. 33 - 2 ED). [Read more](#)

## **Web Conference: Strengthening Grants Management**

**Jan. 28 | 2-3:50 p.m. ET | 2 CPEs**

Learn how to apply the new guidance to the management of federal grant funds. [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.



## **CGFMs: Do You Know Your CPE Cycle?**

If you earned your CGFM in an even year (1996-2012), your two-year CPE cycle ends Dec. 31. [Read more](#)

## **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](#)

## **www.aga-wis.org**

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

## **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 [radiojevich@danesherriff.com](mailto:radiojevich@danesherriff.com)  
Deadline for submission of articles is the 25th of the month.

## 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, Common Audit Findings and Ways to  
Prevent Them, State Auditor

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 McGaffin, CGFM, CPA, DPI, [michele.mcgaffin@dpi.wi.gov](mailto:michele.mcgaffin@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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