



SOUTHERN
WISCONSIN
CHAPTER



Monthly Footnotes MARCH 2019

Welcome Members/Non-Members

Thursday, March 28 Lunch Meeting

TOPIC: Ice Age Trail Joint Partnership—
Funding and Operations

SPEAKER: **Amy Lord** – Outreach & Education
Manager, Ice Age Trail Alliance

Kevin Thusius – Director of Land
Conservation, Ice Age Trail Alliance

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

COST: \$6 for Members, \$12 for Non-Members,
CGFMs can attend for free!

PLACE: Vintage Brewing Co, 674 South Whitney
Way, Madison, WI 53711

MENU: Meals served with sides as noted and
beverage (soda, coffee, and tea)

- Cheeseburger with fries
- Cup of Turkey Chili with a House Salad (please note dressing choice)
- Cup of Turkey Chili with 1/2 Turkey Panini sandwich
- House Salad with 1/2 Turkey Panini sandwich (please note dressing choice)
- Cheese Flatbread

RESERVATIONS: Contact Sherri Voigt by 9:00 a.m.
Monday, March 25, 2019 with your name, membership
status, and meal choice at (608) 576-6473 or by email at
sherri-aga@hotmail.com

Register on-line at www.aga-wis.org

Inside This Issue:

1.	Lunch Meeting March 28 Ice Age Trail Alliance
2.	Lunch Speaker Information
3.	April 10 Webinar: Ethics
4.	Webinar Speaker Information
5.	Presidents Message
6.	City of Madison CGFM Proclamation
7.	State of WI CGFM Proclamation
8.	Save the Date: Symposium May 8
9.	Chapter News
10.	National News
13.	Calendar
14.	Chapter Contacts

ABOUT THIS MONTH'S LUNCH SPEAKERS



**Amy Lord
Outreach and Education
Manager**

As Outreach and Education Manager, Amy is responsible for promoting the Ice Age Trail and the Ice Age Trail

Alliance to a wide audience by leading outreach programs, actively engaging new and existing volunteers and developing Trail-based educational opportunities.

Fun Facts:

- Amy's a farm kid from southwest Wisconsin who grew up raising and showing black Angus cattle; back-to-back Grand Champions at the Richland County Fair in 1994 & 1995 (yes, that is a long time ago).
- She operates a vacation rental farmhouse in Richland County adjacent from her parent's farm just outside of Gotham where families can get away and enjoy life in the country.
- Her vacations revolve around fishing, hiking, and live music, like a memorable trip to Rocky Mountain National Park and Estes Park where besides hiking, she and her husband made sure to see Tom Petty and The Heartbreakers at Red Rocks in Denver.



**Kevin Thusius
Director of Land Conservation**

As Director of Land Conservation, Kevin manages the Land program by protecting lands for the Ice Age Trail, monitoring Ice Age Trail Alliance easements and managing lands owned by the Alliance.

Fun Facts:

- First conservation job involved canoeing 100 miles of the Milwaukee River – a pretty cool gig!
- Published author of 6 scientific papers in esteemed journals such as *Behavioral Ecology*, on topics like vocalizations in ruby-throated hummingbirds and breeding synchrony in the common yellowthroat.
- Tends relationships with landowners, maintaining 127 valuable handshake agreements where the Trail crosses private land.

SAVE THE DATE
Wednesday, April 10
Webinar

April 10 | 1–2:50 p.m. | 2 CPE

TOPIC: Ethics

SPEAKER: Nathan Mueller
Fraud & Ethics Awareness Speaker
Co-author of Lessons From An \$8
Million Fraud

REGISTRATION: 1:30 p.m. - Webinar 2:00 p.m.

COST: Attendance is free to the first 35
people who register. A wait list
will be created if more than 35
people sign up.

PLACE: State Education Building, General
Executive Facility 3 (GEF 3)
125 South Webster Street
Madison, Wisconsin 53703-3474
Rm P41 (ground floor).

Register on-line at www.aga-wis.org
or by e-mail (sherri-aga@hotmail.com) by 1 pm on Monday,
April 8, 2019.

Note: The AGA Chapter signs up for a single-site group
webinar license. We can only award CPE for on-site
attendance.

APRIL 10TH WEBINAR INFORMATION

Ethics

Program Level: Overview

Prerequisite: None

Advance Preparation: None required

Field of Study: Behavioral Ethics (BETH)

This is a real-life example of fraud and the lessons that can be learned about the importance of controls, segregation of duties, system controls, processing controls, physical safeguards, controls in a time of change and the reality of the fraud triangle. In this webinar, we will cover a number of strategies to prevent fraud including fraud awareness training, ethics training, forensic analytics, internal control framework testing, goal setting, core values, fear of failure, transparency, and positive organizational behavior and how those would have affected this fraud.

Speaker



Nathan Mueller

Fraud & Ethics Awareness Speaker, Co-author of *Lessons From An \$8 Million Fraud*

Learning objectives:

Participants will be able to identify:

- What was missing at ING that allowed the Fraud?
- Lack of segregation of duties (Check Retrieval)
- Lessons learned on prevention
- Importance of controls
- Physical safeguards (Checks, inventory)

PRESIDENT'S MESSAGE
Sherri Voigt, CGFM, CPA

We are winding down the second half of the program year with a busy schedule. Please consider one of our upcoming CPE opportunities.

- The March lunch meeting will feature the Ice Age Trail Alliance and their trail funding partnerships with state and local government. **This is also our celebration of March is Certified Government Financial Manager month; CGFMs can attend for free!
- April 10 is an ethics webinar. This is free to the first 35 people who register. Many certifications require annual ethics training and we strive to provide this.
- May 8 is the Annual Spring Symposium at UW-Madison Union South. The schedule is finalized and registrations are open!

We will be collecting items for the Salvation Army at the March and April training events. See page 9 of the newsletter for more information on items they are looking for. A reminder will be included in the registration confirmation e-mails.

March is CGFM Month! We received signed proclamations from Governor Evers and Madison Mayor Paul Soglin. This year celebrates the 25th anniversary of the certification program.

Sherri Voigt, CGFM, CPA



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MARCH IS CGFM MONTH

TO RECOGNIZE THE CGFM PROGRAM AND ITS ACCOMPLISHMENTS, AGA HAS DECLARED THE MONTH OF MARCH "CGFM MONTH".

CELEBRATING 25 YEARS OF CGFM EXCELLENCE

25^{YEARS}
CGFM[®]

Certifying excellence for 25 years

**Official Southern Wisconsin Chapter AGA “March is CGFM Month”
Proclamations: State of Wisconsin - Governor Tony Evers and City of
Madison - Mayor Paul Soglin**

For the past twelve-years, thanks to the initiative and dedication of AGA regional and chapter leaders, states and local governments have been declaring March CGFM month. This project has been a great example of AGA leadership and teamwork and continues to help spread the word about the CGFM Program. Your AGA Southern WI Chapter is proud to continue this tradition in 2019.



STATE of WISCONSIN



OFFICE of the GOVERNOR

Proclamation

WHEREAS; the Southern Wisconsin Chapter of the Association of Government Accountants (AGA) is a professional organization belonging to the Association of Government Accountants, which has more than 15,000 members in 100 chapters in the United States and around the world, and approximately 90 active members representing state, federal, municipal, and private sector accountants, auditors, and financial managers in Wisconsin; and

WHEREAS; the Southern Wisconsin Chapter of the Association of Government Accountants have responded to the AGA's mission of advancing government accountability, as it continues its broad educational efforts, with emphasis on high standards of conduct, honor, and character in its code of ethics; and

WHEREAS; the Southern Wisconsin Chapter of the Association of Government Accountants is making significant advances both in professional ability and in service to the citizens of Wisconsin by mastering increasingly technical and complex requirements; and

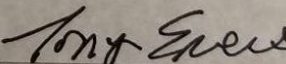
WHEREAS; the Certified Government Financial Manager (CGFM) program of AGA provides a means of demonstrating professionalism and competency by requiring CGFM candidates to have appropriate educational and employment history and to pass a three-part examination requiring expertise in the Governmental Environment, Governmental Financial Management and Control, and Governmental Accounting, Financial Reporting, and Budgeting, and requires each CGFM holder to maintain certification by completing comprehensive training sessions totaling 80 hours over a two-year period;

NOW, THEREFORE, I, Tony Evers, Governor of the State of Wisconsin,
do hereby proclaim March 2019 as

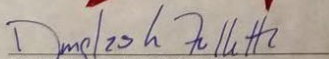
CERTIFIED GOVERNMENT FINANCIAL MANAGER MONTH

throughout the State of Wisconsin and I commend this observance to all of our citizens.

IN TESTIMONY WHEREOF, I have hereunto set my hand and caused the Great Seal of the State of Wisconsin to be affixed. Done at the Capitol in the City of Madison this 15th day of February 2019.


TONY EVERS
GOVERNOR

By the Governor:


DOUGLAS LA FOLLETTE
Secretary of State



**2019 ANNUAL PROFESSIONAL
DEVELOPMENT SYMPOSIUM**

**42nd ACCOUNTING AND
FINANCIAL MANAGEMENT CONFERENCE**

CPE CREDITS 7 HOURS

Wednesday, May 8, 2019

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

The Association of Government Accountants
Advancing Government Accountability

Wednesday, May 8, 2019

7:30 a.m. Registration -- 8:00 a.m. – 3:45 p.m. Conference

Objective: The intended audience is financial managers, controllers, treasurers, auditors, IT personnel, and accountability professionals 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 42nd 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 & Answer
Level: Update/Overview
CPE Credits: 7 hours
Fee: AGA Member \$40
Non-Member \$80
Retired AGA Member \$30

Chapter News

AGA Board Meeting Minutes

Date/Time: March 5, 2019

5:15 pm to 6:30 pm

Location: Parkway Family Restaurant

Treasurer's Report

Balance as of 3/5/19 is \$19,641.52

Present

Sherri Voigt, Mary Laufenberg, Roger Birkett, and Lillian Radivojevich.

Membership

As of 2019, 68 active members.
Actively recruiting board members.

CGFM

2019 celebrates 25 years of CGFM certification. Proclamations received from the State and the City of Madison received, to be included in March newsletter.

Community Service

Collecting items for Salvation Army at luncheons. Requesting gloves, jackets, diapers, baby bottles, pull ups, baby wipes, and hotel sized hygiene products.

Website

On going discussion regarding hosting plan and support platform for the Chapter website.

Chapter Recognition

March 31, 2019 is the deadline to report activity.

Newsletter

Submit articles and photos to Lillian Radivojevich by the 25th of each month.

Education

Finalized 2019 symposium brochure.

Topics discussed for future lunch meetings/trainings:

- Education funding, school district formula increase

- Status of road funding
- Wisconsin pension system
- Status of STAR

National/Regional Update

Nation Council of Chapters (NCC) member needed and SLM now LEAD, to be held May 2-4, 2019



2018 – 2019 Chapter Board Members

(left to right): David Mellem, Mary Laufenberg, Roger Birkett, Lillian Radivojevich, Sherri Voigt

Salvation Army Donations

The Salvation Army greatly needs the following items:

- Gloves
- Jackets
- Diapers
- Baby Bottles
- Pull Ups
- Baby Wipes
- Hotel Sized Hygiene Products

Items will be collected at luncheon meetings.

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.

National News

Celebrate CGFM Month with \$25 Applications

If you missed our CGFM 25th anniversary promotion in January, no worries! We're giving AGA members *another* chance to apply to the CGFM program for only \$25! Act quickly — this offer is only valid through March 31!

[apply today](#)

Volunteer for AGA

More than 300 members give back to their community and serve on AGA's national boards and committees. Join them and share your expertise!

[learn more](#)

25 REASONS *to be a CGFM*

Reason #5

Raise your level of
self-confidence

25 YEARS
★CGFM.

Save a Stamp ... Renew Online!

There's no time like the present! Log in and renew your AGA membership dues and/or your CGFM certification by March 31, 2019.

Renewing is easy! Simply:

1. Go to agacgfm.org/renew
2. Log in using your ID # and password
3. Click "**Proceed to Checkout**"
4. Verify AGA membership dues and/or CGFM renewal amount(s)
5. Click "**Check Out**" and enter credit card payment
6. Click "**Submit Payment**"

[questions?](#)



2019 ERM WORKSHOP

April 11 | Washington, D.C. | 5 CPEs

Introducing Self-Learning by AGA

You asked and we delivered! AGA now offers online, on-demand training with access to limited session recordings from AGA events. Each session is self-paced, providing you a convenient new option for professional development! Topics include Enterprise Risk Management, fraud, tax reform, Yellow Book and OMB A-123.

[learn more](#)

Webinar: The Power of Being You — Insights, Influence and Innovation

Join leaders in government financial management on March 14 from 1–2 p.m. for the next installment of our Women's Leadership Webinar Series. Attendees will learn best practices to enhance the skills and potential of women leaders within the government accountability community. This webinar is FREE for all AGA members and is worth one CPE.

[register](#)



Upcoming Events

Check out **AGA's calendar** for national and chapter events.

[learn more](#)



Chapter Spotlight

Virginia Peninsula hosted a three-part lecture series for college students

[learn more](#)

AGA Academic Scholarships Available

Academic scholarships are now available for AGA members or their family members who are pursuing studies in finance, accounting, economics, information systems/technology or public administration. Applications are due April 15, 2019.

[learn more](#)

PDT 2019

NEW ORLEANS
JULY 21-24 | 24 CPES

register today

Train Your Staff at Your Location

AGA will bring the course, Data Reliability Assessments, to your staff. Attendees will learn how to perform a data reliability assessment, when it is required and how to test and document in accordance with various requirements. This course offers an approach for performing the assessments and offers hands-on discussions from real-life experiences.

schedule today

Nominate a Chapter for the 2019 Accountability and Transparency Award

Recognize an AGA chapter that has demonstrated an outstanding commitment to initiatives that increase public awareness and confidence in the integrity, competence and professionalism of the government financial management field. Recipients will be recognized at PDT 2019 in New Orleans. Applications are due by March 31, 2019.

learn more

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

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.

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 Mary Laufenberg, Education Chair, at maryendres6998@gmail.com)

Over the past couple of months, we were contacted with great 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 changes!



SOUTHERN WISCONSIN CHAPTER

Calendar of Events 2018 – 2019

October 2018 – Board Meeting
October 2018 – No Luncheon Meeting

November 6, 2018 – Board Meeting
November 1, 2018 – Luncheon Meeting, Speaker: Cory Fish, Director of Tax, Transportation and Legal Affairs, Topic: Collecting Sales Tax from Online Retailers
November 28, 2018 – Webinar, Topic: Ethics, Presenter: Kevin McCarthy Inspirational Speaker, Best-Selling Author, BlindSpots, LLC

December 2018 – No Board Meeting
December 5, 2018 – Webinar, Topic: Internal Control, Presenters: Mike Wetklow, CGFM, CPA, Deputy Chief Financial Officer and Division Director, NSF and Mark A. Krieger, CPA, Director, Office of Finance, USPTO

January 8, 2019 – No Board Meeting
January 24, 2019 – Luncheon Meeting, Annual Tax Update, Bart Halderson, Senior Manager Tax, BDO, Babe's Restaurant and Grill

February 5, 2019 – Board Meeting, Parkview Restaurant
February 6, Webinar – Webinar, Topic: GASB Update, Location: UWSA Service Center, 660 West Washington Ave, Madison, Wisconsin, 53703
February 28, 2019 – Cancelled

March 5, 2019 – Board Meeting
March 28, 2019 – Luncheon Meeting, Topic: Ice Age Trail Joint Partnership—Funding and Operations; Ice Age Trail Alliance, Vintage Brewing Co, 674 South Whitney Way, Madison, WI 53711

April 2, 2019 – Board Meeting, to be determined
April 10, 2019 – Webinar, Topic Ethics, State Education Building, (GEF 3), 125 South Webster Street, Madison, Wisconsin 53703-3474

May 2019 – Community Service Event – MS Walk – date and location to be determined
May 2019 – Board Meeting, to be determined
May 8, 2019 – Annual Spring Symposium, UW-Madison Union South

June 2019 – Board Meeting, 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 2018 – 2019

President – Sherri Voigt, CGFM, CPA, UWSA, sherri-aga@hotmail.com, 608-576-6473

President Elect – Vacant

Immediate Past President – Mary Laufenberg, CGFM, CPA, maryendres6998@gmail.com, 608-438-9375

Treasurer – Roger Birkett, CPA, jabirk100@yahoo.com

Historian – David Mellem, CGFM, CIA, CISA, US DHHS OIG, djmellem@outlook.com, 608-264-5415 extension 25

Membership Chair – David Mellem, CGFM, CIA, CISA, US DHHS OIG, djmellem@outlook.com, 608-264-5415 extension 25

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

Education Chair – Mary Laufenberg, CGFM, CPA, maryendres6998@gmail.com, 608-438-9375

Awards Chair – Vacant

Accountability Outreach Chair – CGFM, CPA, UWSA, sherri-aga@hotmail.com, 608-576-6473

Webmaster – Scott Thornton, sbthornton@gmail.com

Community Service Chair – To be announced

CGFM Chair – To be announced

Directors

- Roger Birkett, CPA, jabirk100@yahoo.com
- Lillian Radivojevich, radivojevich@danesherriff.com, 608-284-4801

Chapter Website – www.aga-wis.org

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