



Monthly Footnotes

NOVEMBER 2019

Welcome Members & Non-Members To the New 2019-2020 Program Year!

**Wednesday, November 20
Audio Conference**

November 20 | 1–2:50 pm | 2 CPEs

**TOPIC: Building a Culture of
Ethical Excellence**

SPEAKER: Dr. Lyall Swim

REGISTRATION: 12:45 pm - Webinar 1:00 pm

**COST: Attendance is free to the
first 30 people who
register. A wait list will be
created if more than 30
people sign up.**

**PLACE: Department of Administration, 101 East
Wilson Street (room number sent with
confirmation)**

**Register on-line at www.aga-wis.org
or e-mail (sherri-aga@hotmail.com) by 1 pm on
Monday, November 18, 2019.**

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

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**NEW MEMBERS
FIRST LUNCHEON MEETING
IS FREE!**

ABOUT THIS MONTH'S WEBINAR

An ethical crisis happens in an organization, and the normal response is to create additional rules to handle the breach and ensure that that breach doesn't happen again. But is this the right response? Or by creating more policy - more prescription - do we actually set ourselves up for an even more catastrophic ethical breach the next time?

So if policy or prescriptive rule making isn't the answer; what is?

This webinar will look at four key actions organizations can take to build a culture of ethical excellence and develop the individual and organizational ethical muscle needed to create trust with key stakeholders.

Key Take-aways

Learn about the downsides of a compliance or prescriptive approach to ethical behavior. Gain understanding around a framework that enables you to build ethical muscle and move away from a compliance-only approach.

Learning objectives:

During the webinar you will learn the fundamentals of four tools you can use to create a more holistic approach to building a culture of ethical excellence:

1. Conducting 3 Factors audit;
2. Constructing a values hierarchy;
3. Assessing obligations; and
4. Identifying organization's catastrophic risks.

PRESIDENT'S MESSAGE

Sherri Voigt, CGFM, CPA

Hello All!

We have had an extended break in our program offerings, but we are back in motion. The Chapter will host 5 webinars this year, in addition to some lunch meetings and the annual Symposium. I look forward to seeing you at an upcoming session!

I am sad to share the news that David Mellem, long-time chapter board member, passed away this summer. We have included his obituary and re-run the article published when he retired from federal service in this newsletter. David was committed to government accountability and service throughout his 50 year career. He was a mentor to many of us currently serving in chapter leadership roles. He will be greatly missed.

As we have been planning the agenda for the annual Symposium, a speaker reached out to us noting that David had contacted him. His service inspiration will live on in our memories.

Sherri



=^..^=

Chapter News



In Memoriam

David James Mellem

June 25, 1945 - July 26, 2019

David J. Mellem, age 74, passed away July 26, 2019. He was born June 25, 1945 in Chippewa Falls, Wisconsin. Dave graduated from UW-Eau Claire, after which he took a job as an auditor for the Federal Government, working on programs at or associated with the U.S. Department of Health and Human Services (HHS). This job required a move to Madison where he met and married Laurie J. Baukol in her hometown of Webster, South Dakota on May 17, 1986. Dave retired in March of 2018 after reaching the 50 year milestone with HHS. Dave was a member of the Institute of Internal Auditors and the Association of Government Accountants. Dave was a lifelong fan of the game of golf, playing whenever he had a chance and watching all the major tournaments and enjoyed watching classic movies from the 40s and 50s.

PRESIDENT TRUMP HONORS SOUTHERN WISCONSIN AGA CHAPTER MEMBER

President Donald Trump hand-signed a letter of congratulations to David Mellem, a Member of the Southern Wisconsin AGA Chapter and an AGA Lifetime Member, upon Dave's retirement on March 3, 2018. Dave retired after over 50 years of service to the Federal Government, first for the former Department of Health, Education and Welfare Audit Agency and later for the re-named and re-organized Department of Health and Human Services, Office of Inspector General, Office of Audit Services (OAS).





THE WHITE HOUSE
WASHINGTON

March 3, 2018

Mr. David Mellem
Madison, Wisconsin

Dear Mr. Mellem,

I send my personal congratulations on your retirement after 50 years of service with the Office of Inspector General of the Department of Health and Human Services. Your daily efforts have kept our Government functioning and helped us fulfill our duty to the American people.

During your impressive tenure, you have rightfully earned the respect of your colleagues for your diligence, institutional knowledge, and skill. As you open this next chapter in your life, I hope that you feel tremendous pride in your service to our Nation and that you continue to find ways to invest in your community and our country.

Melania and I join your family, friends, and colleagues in celebrating this terrific milestone. We send our best wishes for good health, happiness, and continued success in the years ahead.

Sincerely,

A large, bold, handwritten signature in black ink, which appears to be "Donald Trump".

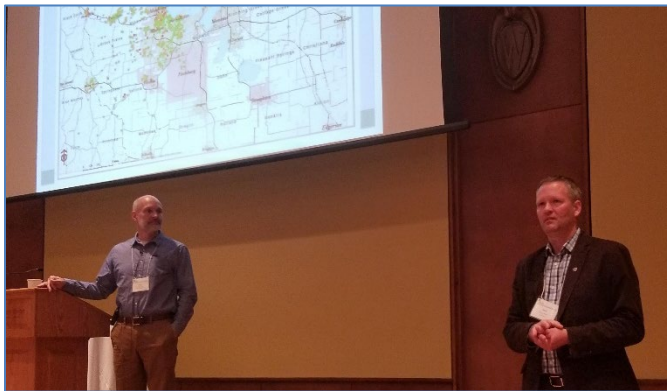
42nd ACCOUNTING AND FINANCIAL MANAGEMENT CONFERENCE RECAP

2019 ANNUAL PROFESSIONAL DEVELOPMENT SYMPOSIUM

May 8, 2019

University of Wisconsin Union South

The Southern Wisconsin AGA Chapter, 42nd ACCOUNTING AND FINANCIAL MANAGEMENT CONFERENCE was a great success! Conference attendees had the opportunity to grow their professions network, build their knowledge base, and expand their professional resources. **Thank you** for attending and making our 42th annual conference such a success!



Flood Panel: Dr. Shane Hubbard, Research Scientist, UW Madison and John Reimer, Deputy Director, Dane Co Land & Water Resources Dept



David Oppedahl, Senior Business Economist, Federal Reserve Bank



Barb Loescher, Chief, Internal Audit Section, WI Department of Health Services



Ruth Ginzberg, Senior IT Specialist, UW System Administration

2019 MARCH CGFM MONTH RECAP CELEBRATING 25 YEARS OF CGFM EXCELLENCE

25 YEARS
CGFM

Certifying excellence for 25 years



CGFMs in attendance, left to right: Sherri Voigt, CGFM, Al Vick, CGFM-Retired, Andrew Stovich, CGFM, Mary Laufenberg, CGFM, Julia Lengyel, CGFM

Our luncheon program featured Amy Lord from the Ice Age Trail Alliance and Chris James from Dane County Parks. They talked about the public-private partnership to purchase and manage lands for the Ice Age Trail in our area.



AGA Board Meeting Minutes
Date/Time: September 24, 2019
5:15 pm to 7:00 pm
Location: Parkview Restaurant

Treasurer's Report

Balance as of 9/24/19: \$20,235.97.

Present

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

Membership

57 active members

CGFM

No updates. Will plan on March is CGFM Month with proclamations.

Community Service

Discussion regarding volunteer work for Beacon Christian Charities Day Shelter for the Homeless.

Accountability

Ongoing discussion on how to promote accountability outreach for Chapter.

Chapter Recognition

Points to be entered for Quarter 1 by 9-30-2019.

Discussion of possible name change and National Council of Chapters member.

Chapter History and CCR Reports to be completed and submitted by 9-30-2019.

Newsletter

Newsletter logo must be updated to receive points for communication.

Get any articles or photos to Lily by the 25th of each month.

Education

Possible audio conference dates discussed as follows:

- 11/20/2019 – Ethics
- 12/11/2019 – Internal Control

- 1/8/2020 – Uniform Guidance
- 2/5/2020 – GASB Update
- 4/8/2020 -- Ethics

Topics discussed for the 2020

Symposium include the following:

- Ethical Hacking – Jack Koziol
- Professional Burn-Out

Discussion regarding questions on the 2019 Symposium Survey.



2018 – 2019 Chapter Board Members

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

Salvation Army Donations

The Salvation Army greatly needs the following items:

- Bath Towels
- Diapers - All Sizes
- Baby Bottles
- Sanitary Items

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

Nominations Now Open for National Leadership Awards

The National Leadership Awards, presented annually at AGA's National Leadership Training, recognize individuals for their contributions to the government financial management profession. Nominate a federal, state or local official or private-sector financial executive who promotes excellence in the profession by Nov. 30.

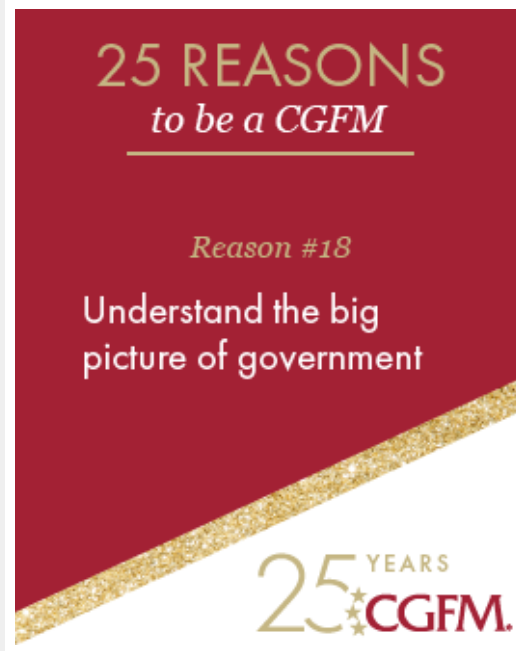
[learn more](#)



The Road to
PDT★2020

This week's stop:
Tallahassee, Florida

To the Batmobile! This week we visit the Tallahassee Chapter and a collection of Bat-vehicles.



25 REASONS
to be a CGFM

Reason #18

Understand the big picture of government

25 YEARS
CGFM.

CGFM Exams Reminder

As a reminder, no CGFM exams will be administered during November or December. If you wish to test this fall, you must do so during the September and October beta period. Regular testing will resume in January 2020.

[learn more](#)



Upcoming Events

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

[learn more](#)



Accountability Talks

Have you listened to AGA's podcast, "Accountability Talks," yet? Episodes feature discussions on data analytics, OMB Circular A-123 Appendix C, FASAB and more!

[listen now](#)

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 radivojevich@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 some great 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!



Calendar of Events 2019 – 2020

September 24, 2019 Board Meeting

October 24, 2019 – Luncheon Meeting

October 30, 2019 – Board Meeting

**November 20, 2019 – Audio Conference “Building a Culture of Ethical Excellence”,
Department of Administration, 101 E Wilson Street**

December 11, 2019 – Board Meeting

December 11, 2019 - Audio Conference Internal Control, location State Education
Building, General Executive Facility 3 (GEF3)

January 8, 2010 – Audio Conference, Uniform Guidance, State Education Building,
General Executive Facility 3 (GEF3)

January 14, 2020 – Board Meeting

January 23, 2020 – Luncheon Meeting, Annual Tax Update, Tara Guler, Baker Tilly
Virchow Krause LLP, location to be determined

February 5, 2020 – Audio Conference-GASB Update, location to be determined

February 11, 2020 – Board Meeting

March 10, 2020 – Board Meeting

March 26, 2020 – Luncheon Meeting, topic and location to be determined, March declared as
CGFM month

April 8, 2020 – Audio Conference-Ethics, Department of Health Services, 1 West Wilson

April 14, 2020 – Board Meeting

May 12, 2020 – Board Meeting

May 2020 – Annual Spring Symposium, UW-Madison Union South

June 9, 2020 – Board Meeting

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

*** Dates, topics, and locations subject to change as more detailed information becomes
available. ***



Officers and Directors 2019 – 2020

President – Sherri Voigt, CGFM, CPA, UW System, 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 – Vacant

Membership Chair – Vacant

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

Webmaster – Scott Thornton, sbthornton@gmail.com

Community Service Chair – To be announced

CGFM Chair – To be announced

NCC Representative – Andrew Stovich, astovich@isosat.net

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