

## From Kristy's Desk

As we near the start of Spring, I would like to welcome everyone to the Spring Seminar on Thursday, March 28<sup>th</sup> (see more details in this newsletter). We're excited to be offering this full day of great speakers and continuing educational opportunities. Speakers include incoming AGA National President, Ernie Almonte, and a two hour innovation tournament that's sure to get your brain thinking.

Don't forget that your annual membership dues are included in your seminar registration costs. Be sure to check out [www.agacgfm.org](http://www.agacgfm.org) to learn more about the benefits of your AGA membership. Whether you have attended one of our all day seminars or just a monthly meeting, please think of a friend or colleague that would enjoy our Chapter and invite them along.

We hope to see as many as possible this month.

Kristy



Association of Government Accountants  
Ozarks Chapter  
PO Box 5212  
Springfield, Mo 65802



## 2019 Spring Seminar

There is still time to reserve your spot at our 2019 Spring Seminar. Registration deadline is March 22, 2019. The agenda and registration form are included in this newsletter. We are excited to have Ernie Almonte, our National President-Elect, joining us this year. Don't miss out!

March 28, 2019  
Bass Pro White River Conference Center  
600 W Sunshine St  
Springfield Mo 65807  
8:00 AM—4:30 PM

Check-in and continental breakfast begin at 7:30 AM.

Bring a canned food item for our food drive to benefit the [Ozarks Food Harvest](#).

Thank you to Bank of Kansas City for sponsoring the 2019 Spring Seminar.



Follow us on Facebook  
[@OzarksAGA](#)

Visit us on the Web  
[www.ozarksaga.org](http://www.ozarksaga.org)

## Ozarks Chapter Calendar

April 2019 Monthly Meeting  
425 Downtown  
April 16, 2019  
12 PM – 1 PM

May 2019 Monthly Meeting  
Tour  
May 21, 2019  
12 PM – 1 PM

ENJOY YOUR SUMMER BREAK!



Our CEO, Ann Ebberts, is hosting this episode of the “[Accountability Talks](#)” podcast. She’s joined by Nick Hart from the Bipartisan Policy Center and Robert Shea from Grant Thornton LLP to discuss bridging the gap between evidence, cost and performance. You don’t want to miss it.



### March Reading List

Missouri State Treasurer’s Office, “[Missouri Public Fund Investment Guide](#)”

Skillsyouneed.com, “[Top Tips for Effective Presentations](#)”

T. David Colgren, “[Modernizing Government Financial Reporting](#)”, Strategic Finance Magazine, February 2019

### Upcoming AGA Webinars

[AGA Women’s Leadership Series](#)

March 14, 12 PM CST

[Cybersecurity](#)

March 27, 1 PM CST

[Ethics](#)

April 10, 1 PM CST



[Ozarks Chapter Citizen Centric Report 2017-2018](#)

[AGA Citizen Centric Report 2017-2018](#)



## AGA Student Benefits

Our National AGA office has 2019 [academic scholarships](#) available for both undergraduate and graduate studies.

College students can also apply for a free one-year [AGA student membership](#).



## Upcoming Regional Events

Kansas City AGA Spring Seminar  
March 26, 2019  
Johnson County Community College  
Regnier Building

[Des Moines AGA Spring Seminar](#)  
April 11, 2019  
Noah's Event Venue  
West Des Moines, IA

[St Louis AGA Spring Seminar](#)  
April 18, 2019  
Location: TBD



Our National AGA office is excited to offer new [online and on-demand trainings](#) to help meet your CPE needs. Topics include tax reform updates, real-life fraud investigations, new Yellow Book updates and more.

## Local Job Postings

[Missouri State — Accounting Specialist](#)

[Drury University — Controller](#)

Congratulations to Dr Penny Clayton, Professor Emerita at Drury University, on being a member of the 2019 induction class of Drury University's Breech School of Business Administration's Hall of Fame!

## DID YOU KNOW??

Yellowstone was declared America's first national park on March 1, 1872.

The federal government, under the U.S. Constitution, began March 4, 1789.

Congress approved Daylight Savings Time on March 19, 1918.





**PARENTS RELY ON US FOR HELP DURING DIFFICULT CRISES, INCLUDING**  
Homelessness, domestic violence, stress and mental health, unsafe housing, and hospital stays.

**92%**  
of children who have stayed at Isabel's House go home with their families. (1715-17)

your gifts have provided **26,300+** nights of safe care for more than **3,875** kids in our community. (since 2007)

*Celebrating 10 Years!*



**isabel's house**

**88%**  
of parents who have trusted our team during a crisis report **less stress** at discharge. (1715-17)

Where kids are loved and families are supported

417.865.2273  2750 WEST BENNETT SPRINGFIELD, MO 65802

 

10 years of purpose	10 years of impact	10 years of success
<p>The <b>mission</b> of Isabel's House is to <b>provide immediate refuge for children</b> ages birth to 12 whose families are in crisis. By partnering with families and the community, we will <b>strengthen families and prevent child abuse and neglect.</b></p> <p><i>The average length of a child's stay is <b>12 days</b> We have a <b>1 year</b> family follow-up program</i></p>	<p><i>"Isabel's House has been an extra support, help, and shoulder for me and my family in my darkest hours. You have taught me there are still loving hearts, good people, and someone who understands. Thank you so much for caring for my daughters. May God bless you always."</i></p> <p><i>Sandra   AN ISABEL'S HOUSE MOM</i></p>	<p>A crisis can happen to <b>any family at any time</b>, and Isabel's House has been here to help - at no cost to families - since June, 2007. <b>Your contributions</b> provide <b>hope</b> for parents and <b>24/7/365 complete care</b> for kids - food, new clothing, safe shelter, nurse needs, transport to school, and so much more.</p>

DONATE VOLUNTEER GET INVOLVED **WWW.ISABELSHOUSE.ORG**  

 <p>Support Isabel's House with your Children's Trust Fund "License to Care"</p>	<div style="border: 2px solid black; border-radius: 50%; width: 60px; height: 60px; margin: 0 auto; display: flex; align-items: center; justify-content: center;"> <span style="font-size: 24px; font-weight: bold;">50%</span> tax credits         </div> <p>Up to 50% Missouri Tax Credits may be available for qualified \$100+ contributions</p>	 <p>A little love each month really adds up: join our monthly giving family!</p>
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## March is CGFM month

Congratulations to all of our Chapter's CGFM's!

Teresa Allen	Pam Elsaesser	Marian Rader
Sharla Bailey	Rick Findley	Melissa Robbins
Tammy Beeman	Brandie Fisher	Monica Robinson
Donna Christian	Kathryn Gill	Shari Wyly
Rhonda Christopher	Kim Hamm	
Larry Cox	Rachel McGinnis	
John Delzell	Jerry Mitchell	
Greg Drake	Daphne Pevahouse	

To celebrate CGFM month, National AGA reduced the cost of the [CGFM application](#) for members and student members to \$25 during the month of March.

Your Ozarks Chapter wants to help you with your studies! Study guides for the 3 exams are available and may be checked out for free. Once you pass all 3 exams and if you are not reimbursed by your employer, the Chapter will reimburse for the application and exam fees.

Ozarks AGA is celebrating the 25<sup>th</sup> anniversary of the CGFM certification with a canned food drive for the Ozarks Food Harvest during our Spring Seminar. Our goal is to collect 25 pounds of food. The most needed items are

- Tuna or other canned meat
- Peanut butter
- Beans, soups or stews
- Boxed meals, rice and pasta
- Canned fruits and vegetables
- Cereal

If you have any questions or would like to check out a study guide, contact [Monica Robinson](#).

## **CEC Meeting Minutes**

**March 1, 2019**

**Busch Municipal Building, 840 Boonville Ave  
1st floor conference room**

### **Members Present:**

Kristy Bork, President; Teresa Allen, Webmaster; Greg Drake, Communications;  
Brandie Fisher, Accountability; Renee Vines, Education; Sarah Burrows, Secretary/Treasurer;  
Tammy Beeman, Membership; Julie Ravenscraft, Early Careers; Monica Robinson, CGFM;  
Jennifer Schatzer, Education

### **Members Absent:**

Jo Garcia, President-Elect; Shari Wyly, Community Service

### **Call to Order**

President Kristy Bork called the meeting to order at 12:00 PM

### **Approval of January 2019 Minutes**

Motion: Greg Drake      Second Motion: Jennifer Schatzer      Motion Passed 8-0

### **Approval of Financials (December 2018, January 2019, February 2019)**

Motion: Brandie Fisher      Second Motion: Teresa Allen      Motion Passed 9-0

### **Discussions**

Spring seminar: Currently 34 people have signed up for the seminar, aiming for 70+.

There was no community service noted already for Spring Seminar, but Kristy will check with Shari. It was mentioned that an additional item for CRP and the 25<sup>th</sup> anniversary for CGFM was raising 25 lbs of food. Jennifer noted that Ozarks Food Harvest will provide a container and sign, if needed.

## **CEC Meeting Minutes, continued**

**March 1, 2019**

**Busch Municipal Building, 840 Boonville Ave**

**1st floor conference room**

### **Discussions-continued**

Monica noted that this is the 25<sup>th</sup> anniversary for CGFM, and there will be a celebration for current CGFMs. There will be a table set up with balloons and a proclamation for the CGFM 25<sup>th</sup> anniversary.

The scheduling was finalized for Spring Seminar as well (completed after the meeting) so that an agenda can be distributed.

Students at Spring Seminar: Julie mentioned that her MSU students are told they are not to get food since they are only attending one free session. This will be relayed to any other schools inviting students.

There will be several student tables set up at the back of the room, so students can enter and leave as needed. In addition, there will be a speaker table set up for any speakers who may arrive early.

There was discussion to invite to lunch the 3 MSU students who received National AGA scholarships to attend National Leadership Training in February.

April Monthly Meeting: The April monthly meeting was noted as still needing a speaker and topic. A possible topic could be grants. Brandie will see if she can find someone who would be able to speak.

May Monthly Meeting: The May monthly meeting will still be a tour, which is not eligible for CPE. Possible ideas were a tour of Hammons Field or Friends of the Garden.

990 forms: Step 1 of the process to receive reinstatement of the Chapter's non-profit status is complete. As soon as the Missouri Secretary of State accepts the application, Jennifer will move forward with the next step.

CEC recruiting: It was mentioned that CEC recruiting will begin.

Meeting was adjourned at 12:50 PM

**Association of Government Accountants  
Ozarks Chapter  
Fiscal Year 2019  
February 1, 2019 Through February 28, 2019**

	FY19 Budget	FY19 Actual	Feb '19
<b><u>General Operating Activities:</u></b>			
Revenues:			
Chapter Dues	383.05	55.00	-
Charity Fundraiser - ????	479.00	125.00	-
Other Misc Revenue	21.67	-	-
Interest	7.73	6.06	0.67
Expenses:			
Community Service	696.26	125.00	-
Educational (Post Secondary Ed) Scholarships	500.00	-	-
CGFM (Member) Scholarships	250.00	-	-
PDC (CEC) Travel Stipend	1,464.00	2,972.19	2,754.59
Speaker Gifts	394.67	-	-
Other Misc Expense	1,247.09	397.41	25.00
Net Revenue	<u>(3,660.57)</u>	<u>(3,308.54)</u>	<u>(2,778.92)</u>
<b><u>Monthly Meetings:</u></b>			
Revenue	1,400.00	795.00	465.00
Expense	1,476.63	952.35	503.32
Net Revenue	<u>(76.63)</u>	<u>(157.35)</u>	<u>(38.32)</u>
<b><u>Fall Seminar:</u></b>			
Registrations	3,905.00	3,300.00	160.00
Sponsorships	666.67	-	-
Expenses	2,376.54	1,802.71	-
Net Revenue	<u>2,195.13</u>	<u>1,497.29</u>	<u>160.00</u>
<b><u>Spring Seminar:</u></b>			
Registrations	12,688.33	1,660.00	1,660.00
Sponsorships	1,000.00	1,000.00	1,000.00
Expenses	3,500.20	500.00	-
Dues (remitted to National)	7,575.00	100.00	-
Net Revenue	<u>2,613.13</u>	<u>2,060.00</u>	<u>2,660.00</u>
<b><u>Member Appreciation Night(s):</u></b>			
Revenue	65.33	-	-
Expense	222.33	-	-
Net Revenue	<u>(157.00)</u>	<u>-</u>	<u>-</u>
<b><u>Membership Drive/Recruiting:</u></b>			
Revenue (received from National)	8.33	-	-
Expense	-	-	-
Net Revenue	<u>8.33</u>	<u>-</u>	<u>-</u>
<b><u>SLMR Event</u></b>			
Revenue (fees received from Attendees)	207.11	-	-
Expense	215.44	165.68	165.68
Net Revenue	<u>(8.33)</u>	<u>(165.68)</u>	<u>(165.68)</u>
<b>Total Net Revenue:</b>	<u>\$ 914.06</u>	<u>\$ (74.28)</u>	<u>\$ (162.92)</u>
<b>Change in Fund Balance:</b>			
	<u>Projected</u>	<u>Actual</u>	<u>Actual</u>
Beginning	14,923.35	14,923.35	15,011.99
Net Change	914.06	(74.28)	(162.92)
Ending	<u>\$ 15,837.41</u>	<u>\$ 14,849.07</u>	<u>\$ 14,849.07</u>



**Ozarks AGA Executive Committee**

**President**

[Kristy Bork, CPA](#)

Assistant Director of Aviation—Finance  
Springfield—Branson National Airport

**President-Elect**

[Jo Garcia, CPA](#)

**Secretary**

Vacant

**Treasurer**

[Sarah Burrows, CPA](#)

Audit Supervisor  
KPM CPAs

**Membership**

[Tammy Beeman, CGFM](#)

Accounting Technician  
City of Springfield

**Newsletter/Communications**

[Greg Drake, CGFM](#)

Senior Accountant  
The Arc of the Ozarks

**Accountability**

[Brandie Fisher, CGFM](#)

Transit Grants Analyst  
City Utilities

**Professional Certification**

[Monica Robinson, CGFM](#)

Finance Director  
City of Marshfield

**Education Co-Chair**

[Renee Vines, CPA](#)

Senior Internal Auditor  
City Utilities—Springfield

**Education Co-Chair**

[Jennifer Schatzer, CPA](#)

Audit Manager  
KPM CPAs

**Early Career**

[Julie Ravenscraft, CPA](#)

Accounting Instructor  
Missouri State University

**Community Service**

[Shari Wyly, CGFM](#)

Chief Financial Officer  
United Way of the Ozarks

**Webmaster**

[Teresa Allen, CGFM](#)

Financial Analyst  
City of Springfield

If you have any suggestions for topics for educational events, please let us know! We want to hear from you!

# Ozarks Chapter of AGA

## 2019 Spring Professional Development Training

**Date:** Thursday, March 28, 2019  
**Location:** White River Conference Center  
600 W Sunshine, Springfield, MO 65807  
**Time:** 7:30-8:00 registration and continental breakfast  
**Conference:** 8:00-4:30 lunch included with full day registration

### Seminar Agenda (8 hours of CPE):

**3 Steps to Perfect Presentations** Dale Moore, Professor of Media, Journalism and Film at MSU will present on tips and tricks to improve your presentation skills that you can start using immediately.

**Public Investment Policy** Bruce Ring, Director of Investments Missouri State Treasurer's Office will present on current investment policies/regulations for public entities.

**Leadership Development and Process Improvement** Ernest ("Ernie") Almonte, CGFM, CPA, CFE; is the current AGA National President-Elect and is a partner with RSM, US LLP

**2019 Economic Outlook** Steve Wyett, SVP, Chief Investment Strategist, Private Wealth with BOK Financial will bring us the 2019 Economic Outlook

**Innovation tournament** Health Alloway and Maureen Birchler, of BKD, will moderate an interactive tournament to help answer How can your organization best leverage data to impact growth? This highly interactive session will provide a fun way to collect a large number of new ideas on how to incorporate data into decision making.

**Ethics** This presentation will cover the two hour ethics requirement, and will be presented by Katlin Cundiff, Management professor at Drury University. (2 hours)

### Closing Remarks

Draft schedule, subject to change.



# REGISTRATION FORM

## Contact Information:

- **First Name:**
- **Last Name:**
- **Title:**
- **Organization:**
- **Email:**
- **Address:**
- **Phone:**

## Registration Fees:

**\$200.00 – Registration fee includes your AGA membership dues for 2018**

**\$30.00 – CGFM Renewal Fee (if applicable)**

*I would like to be on the AGA monthly newsletter email list.*

**Amount Due**    \$ \_\_\_\_\_    **Date**    \_\_\_\_\_

## Remit Information:

Please make checks payable to:

Ozarks Chapter AGA

PO Box 5212

Springfield, MO 65801

Please email your registration to Tammy Beeman **by Friday, March 22<sup>nd</sup>**:

Email: [tbeeman@springfieldmo.gov](mailto:tbeeman@springfieldmo.gov)

Or call if you have any questions: **417-864-1631**

Advance registration is required; cancellations must be received by March 15<sup>th</sup> to receive a refund.

## ***The Association of Government Accountants***

*AGA serves professionals in the government financial management community by providing quality education, fostering professional development and certification, and supporting standards and research to advance governmental accountability.*

**8 HOURS OF CPE ARE PROVIDED FOR THIS SEMINAR**



**AGA KANSAS CITY CHAPTER  
PROFESSIONAL DEVELOPMENT  
SEMINAR**



**TUESDAY, March 26, 2019**

**JOHNSON COUNTY COMMUNITY COLLEGE, 12345 COLLEGE BLVD-REGNIER CENTER,  
CAPITOL FED CONFERENCE CENTER, OVERLAND PARK, KANSAS**

7:45 AM	8:00 AM	<b>Registration/Continental Breakfast</b>
8:00 AM	8:15 AM	<b>Welcome and Announcements</b> – <i>Mari Ruck, Chapter President</i>
8:15 AM	10:20 AM	<b>Myers-Briggs Temperament Inventory</b> – Dr. Rick Olsen, United States Army
10:20 AM	10:35 AM	<b>BREAK – Snacks Provided</b>
10:35 AM	11:50 AM	<b>Current Challenges in Forensic Accounting</b> – Randy Wolverton, CPA, CFF/CFE Federal Bureau of Investigation
11:50 AM	12:30 PM	<b>Lunch Buffet - Networking</b>
12:30 PM	2:10 PM	<b>ETHICS</b> – Kevin McCrary, Federal Bureau of Investigation
2:10 PM	2:25 PM	<b>Break - Snacks Provided</b>
2:25 PM	4:05 PM	<b>Tax Fraud</b> – Adam Jobes, Internal Revenue Service
4:05 PM	4:20 PM	<b>Closing Remarks</b> – <i>Mari Ruck, Chapter President</i>



**DES MOINES CHAPTER AGA  
 SPRING TRAINING  
 APRIL 10 - 11, 2019**



➤ **April 10, 2019**

★ **WEBINAR (2 CPE)**

1:00 p.m. - 3:00 p.m., Grimes Building, 400 E 14<sup>th</sup> Street, Des Moines, Room B-100  
 Check in 12:30 p.m. – 1:00 p.m.

**Ethics** with Nathan Mueller, Fraud & Ethics Awareness Speaker and co-author of *Lessons From An \$8 Million Fraud*

This is a behavioral ethics webinar covering 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.

➤ **April 11, 2019**

★ **SPRING TRAINING SEMINAR (8 CPE)**

7:55 a.m. - 4:30 p.m., Noah’s Event Venue, 1805 90<sup>th</sup> Street, West Des Moines  
 Check in and continental breakfast 7:30 a.m. – 7:55 a.m.

The seminar will feature the following speakers:

- ★ **David Vaudt**, GASB Chairman, *Recently Issued Standards & Current Technical Agenda*
- ★ **John Lynskey**, AGA National President, *Professional Resiliency*
- ★ **Janet Phipps**, Director Department of Administrative Services (DAS), *The Art of Leadership – What Is It?*
- ★ **Kim Hanson**, DAS Training & Development Specialist, *Ethics of Leadership*

**Registration fees include the April 10<sup>th</sup> Webinar and the April 11<sup>th</sup> Spring Seminar. The Seminar will include continental breakfast, lunch, snacks and beverages.**

**EARLY BIRD REGISTRATION – DEADLINE MARCH 15, 2019**

<b>Member</b>	<b>\$115</b>
<b>Non-member</b>	<b>\$150</b>

**REGULAR REGISTRATION MARCH 16 – MARCH 31, 2019**

Member	\$140
Non-member	\$175

**WEBINAR only**

Member	\$20
Non-member	\$32



To register visit the Des Moines Chapter website at: <https://www.agacgfm.org/Chapters/DesMoines/Home.aspx>  
 Up to **10 hours of CPEs** will be offered.