

AGA Phoenix Chapter (www.agaphoenix.org)

PY 2016-2017

December 2016



Message From the President



The next Chapter meeting will be held on December 7th at ASU Sky Song. This meeting will host a live speaker, Sharon Cini, City of Scottsdale's diversity manager, on the topic of Diversity. This will also be our holiday luncheon for the year with feature special chances to win prizes, as well as an opportunity for you to participate in donating unwrapped clothes, toys, or a monetary gift for the Salvation Army's Christmas donation drive. Lunch begins at 11:30 AM followed by the seminar at 12 PM.

Also, if you or someone you know is currently enrolled in a college or community college as a sophomore or higher, in an Accounting, Finance or Public Administration curriculum, please take note that Phoenix AGA will be offering an opportunity to obtain a scholarship of \$1,000 as a first place winner, or \$500 as a second place winner. See the application within this newsletter for more details. All scholarship applications must be received by December 31, 2016.


Additionally, Phoenix AGA would like to let you know about a volunteer opportunity that we are partnering with the City of Phoenix on. VITA is looking for volunteers during the tax season to prepare tax returns, greet customers, or act as site coordinators and instructors. If you are interested in any of these opportunities, please contact Briselda Rodriguez with the City of Phoenix at 602-534-0543.

Thank you for supporting the Phoenix Chapter! We hope that you have a wonderful and safe holiday season, and as always, if you have any feedback for us, please do not hesitate to let us know. We can be reached at e-mail: aga@agaphoenix.org.

Gergana Kovatcheva, CPA, CGFM

President, Phoenix AGA Chapter

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CGFM Study Resources Available:

For AGA members interested in taking the CGFM please contact our CGFM chair Elisa Gin at cgfm@agaphoenix.org for more information. Currently there is 3 complete set of materials available for check out.

Also, successful CGFM candidates can apply for reimbursement of the application and examination costs.

Contact our CGFM chair for step by step instructions on the CGFM process:

cgfm@agaphoenix.org

CGFM Study Group: If you are interested in joining a CGFM Study Group, please contact John Schutter at john.schutter@asu.edu

12/7/16 Meeting (2 CPE)
Topic: Diversity
 Lunch (11:30 AM)
 Audio Conference (12:00—1:50 PM)

Bldg 3, Synergy II #135



Canned Food Drive: Please support your local, greater Phoenix area food banks by bringing in your canned food items to any meeting, for program year 2016-2017

Community Service Opportunities

- November: AGA Phoenix is scheduled to help at the Cambridge Ronald McDonald House on November 29th at 5 PM. The location is 1980 E. Cambridge Ave. Phoenix, AZ 85006. If you are interested in helping during set-up or cleanup, please contact John Schutter at John.Schutter@asu.edu. We will plan a similar event for the Springtime, too.
- December: Please consider bringing donations of unwrapped clothes or toys to the December 7th meeting. Additionally, you can donate gift cards or cash. These items will be Christmas donations to the Salvation Army for needy families.
- January through April: VITA is looking for volunteers to prepare tax returns for free for low-to-moderate income individuals and families. If you are interested in participating in VITA as a member of AGA Phoenix, contact Briselda Rodriguez at 602-534-0543.
- Ongoing: AGA Phoenix will be accepting your canned food donations at each meeting for local Phoenix area food banks.

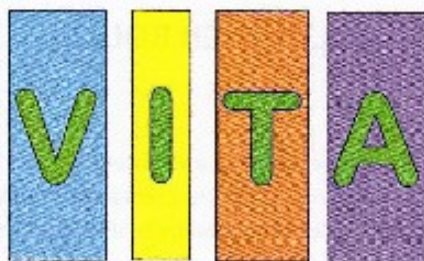
Goals for 2016-2017 and Beyond

- Membership & Education:
 - Provide 36 education credits throughout the program year. Audio conferences and live speakers.
 - Reach out to new members within first month of membership.
 - Reach out to all non-renewing members in May/June.
 - Provide social/recruiting event in Spring.
- Accountability:
 - Prepare chapter’s Citizen Centric Report (CCR) by September 30, 2016 and post to website.
 - Submit chapter’s CCR to AGA’s Certificate of Excellence Review Program.
- CGFM Goals:
 - Continue reimbursements for chapter members who pass all three sessions of the CGFM tests. Reimbursement includes the cost of the three exams and application fee.
 - Communicate and promote CGFM designation to Chapter members .
 - Provide CGFM study guides to members on a first come first serve basis.
 - Seek State proclamation for March as CGFM month and provide recognition to CGFM members.
- Early Career & Scholarship:
 - Reach out to college accounting clubs to present about jobs in governmental accounting and discuss what AGA is and how it can impact students’ careers.
 - Annually award up to two scholarships for students enrolled in an Accounting, Finance or Public Administration curriculum.

PY 2016-2017 Budget	
Education	\$21,250
Membership	\$2,000
Travel	\$3,500
Board Expenses	\$2,000
Scholarship	\$1,500
CGFM	\$1,000
Community Service	\$600
Website	\$500
Early Career	\$100
Total	\$32,450

PY 2016-2017 Committee Members:

- Membership – Mary Adelman
- Newsletter – Michelle Huckabay
- CGFM – Gergana Kovatcheva
- Scholarship – Leslie De’Reche
- Education – Keith Orr
- Programs – Leslie De’Reche/Mary Adelman (back-up)
- Community Service – John Schutter
- Early Career – Open
- Website – Karie Tepper/Josh Consier



Volunteer Income Tax Assistance

VOLUNTEERS NEEDED!

- The VITA program prepares tax returns for free for low-to-moderate income individuals and families.
- Volunteers receive **FREE** training in how to prepare a basic tax return.
- There are a variety of volunteer opportunities within the VITA program; tax preparers, greeters, site coordinators and instructors.
- The tax preparation sites are located throughout the city of Phoenix with various dates and times of operation.
- Becoming a VITA Volunteer provides **satisfaction** of helping others.

For more information or to volunteer, contact Briselda Rodriguez at 602-534-0543 or go to volunteer.phoenix.gov and search VITA



City of Phoenix

For more information or a copy of this publication in an alternative format, contact 602-252-4570 voice. The city's TTY Relay phone number 7-1-1 may be used if needed.



Association of Government Accountants (AGA)

Education Scholarship Opportunity

The Phoenix Chapter AGA awards one annual scholarship of \$1,000.00 in January 2017, with a possible second place award of \$500.00, to be used for student educational expenses. Scholarship recipients (undergraduate or graduate) will also be awarded a one year Special Student Membership in the Phoenix Chapter AGA. The Phoenix Chapter of AGA supports government accountability professionals. Visit our website at www.agaphoenix.org.

Nationally, AGA has served the government financial management profession for over 50 years. AGA serves the professional interests of its membership that is drawn from federal, state, and local government, as well as higher education and public accounting firms. For additional information on AGA see <http://www.agacgfm.org>. The goal of this scholarship program is to encourage students to graduate with a Bachelor's or a Master's degree in Accounting, Financial Management or Public Administration and to promote the pursuit of public financial management careers.

Eligibility:

All candidates must be at least a sophomore at the beginning of the semester for which the scholarship applies at either a community college or university, and be enrolled in an Accounting, Finance or Public Administration curriculum.

Due Date:

The scholarship deadline is December 31, 2016.

Requirements:

Candidates should complete the application and submit a copy of his/her transcript (unofficial copy is fine) along with a brief essay (no more than one page double spaced). The essay should answer the question:

Why are you interested in a career in Public Financial Management?

Submit application, transcript and essay to:

Fax: "AGA Scholarship Committee"

Attn: Leslie De'Reche

Mail: AGA Scholarship Committee

Phoenix Chapter

PO Box 64911

Phoenix, AZ 85082-4911

Questions:

Email: scholarships@agaphoenix.org

2016-2017

AGA PHOENIX CHAPTER
Scholarship Application



Name	
Address	
City, State, Zip	
Phone:	Email:

College/University:	Spring 2017 Classification: <input type="checkbox"/> Sophomore <input type="checkbox"/> Junior <input type="checkbox"/> Senior <input type="checkbox"/> Graduate	Expected Graduation _____ Major: <input type="checkbox"/> Accounting <input type="checkbox"/> Finance <input type="checkbox"/> Other _____
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If enrolled at a community college, what University do you plan to attend to complete your Bachelor's Degree?

If you are a graduate, what are your extended education plans? Please provide as much details as possible.

List any community activities/organizations you participated in while attending college:

For Office Use Only:

REVIEWED BY:	Date:
APPROVED BY:	Date:
STATUS:	
COMMENTS:	

**Association of Government Accountants
Phoenix Chapter
Education and Meeting Plan
2016-2017 Program Year**

Date	Event	Topic	CPE Credit	Registration Dead-line	Location
9/14/16	Chapter Meeting- Lunch 10:30am- 11:00am, Audio Con- ference 11:00am- 12:50pm	Avoiding Surprises and Assessing Risks: Building on Today's Internal Controls	2	9/9/2016	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
10/12/2016	Chapter Meeting- Lunch 10:30am- 11:00am, Audio Con- ference 11:00am- 12:50pm	Cyber / Big Data	2	10/7/2016	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
11/16/2016	Chapter Meeting- Lunch 11:30am- 12:00pm, Audio Con- ference 12:00pm- 1:50pm	Tools and Strategies for Fighting Fraud	2	11/11/16	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
12/7/2016	Chapter Meeting- Lunch 11:30am- 12:00pm, Seminar 12:00pm-1:50pm	Holiday Social / Diver- sity	2	12/2/16	ASU Skysong Bldg. 3, Synergy II #135 1475 N. Scottsdale Rd. Scottsdale, AZ 85257
1/18/2017	Chapter Meeting- Lunch 11:30am- 12:00pm, Live 12:00pm-1:50pm	TBD	2	1/13/17	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
1/20/17*	8:00am-8:30am Conti- nental Breakfast 8:30am-12:00pm- Class	Ethics—ASCPA	4	1/13/17	Maricopa Community Col- lege 2411 W. 14th Street Tempe, Arizona 85281
2/8/2017	Chapter Meeting- Lunch 11:30am- 12:00pm, Audio Con- ference 12:00pm- 1:50pm	GASB	2	2/3/17	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
2/17/2017	Chapter Meeting- Lunch 11:30am- 12:00pm, Seminar 12:00p-12:50pm	ASRS	1	2/10/2017	ASU Skysong Bldg. 3, Synergy II #135 1475 N. Scottsdale Rd. Scottsdale, AZ 85257
	1:00pm-1:50pm	Deferred Comp	1		
	1:50pm-2:40pm	Federal Tax Update	1		
	2:40pm-3:30pm	State Tax Update	1		
	Total		4		
3/8/2017	Chapter Meeting- Lunch 11:30am- 12:00pm, Seminar 12:00pm-1:50pm	TBD	2	3/3/2017	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257

**Association of Government Accountants
Phoenix Chapter
Education and Meeting Plan
2016-2017 Program Year**

Date	Event	Topic	CPE Credit	Registration Dead-line	Location
3/31/2017*	8:00am-4:00pm PDC	TBD		3/24/2017	Rio Salado College 2323 W. 14th St. Tempe, AZ 85281
		Total	8		
4/12/2017	Chapter Meeting- Lunch 10:30am- 11:00am, Audio Con- ference 11:00am- 12:50pm	Ethics	2	4/7/2017	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
5/17/2017	Chapter Meeting- Lunch 10:30am- 11:00am, Seminar 11:00am-12:50pm	TBD	2	5/12/2017	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
6/14/2017	Chapter Meeting- Lunch 10:30am- 11:00am, Audio Con- ference 11:00am- 12:50pm	Fraud / Data Analytics	2	6/9/2017	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
			36		

*These events are not monthly chapter meetings and will be at an additional cost. Details will be provided in future newsletters and/or on the Calendar of Events page on our website.

Prospective members are welcome to learn more about us by attending a monthly chapter meeting. Registration per monthly chapter meeting date, which includes lunch, is as follows:

Members:

\$20 each monthly chapter meeting, or package deal—\$180 for all sessions*

Non-Members

\$35 each monthly chapter meeting

*excludes special events (Ethics and Professional Development Conference—PDC)

To RSVP, please go to our online registration site: <http://agaphoenix.eventbrite.com>

Thank you for your interest!

AGA Phoenix Chapter, Treasurer's Reports - October 2016

Treasurer's Report

Book Balance 9/30/2016	\$8,691.07
Receipts	\$496.39
Disbursements	\$2,197.79
Book Balance 10/31/16	\$6,989.67
Outstanding Checks	\$0.00
Outstanding Deposits	\$20.00
Adjusted Book Balance	\$7,009.67
<u>Account Balance</u>	
Cash on Hand	\$70.00
Savings Balance	\$5.00
Your Savings Balance	\$429.42
Money Market Account	\$3,164.12
Checking Balance	\$3,341.13
	\$7,009.67
Difference Adjusted Book vs Bank	\$0.00

Balance Sheet

10/31/2016

Cash and Bank Accounts	
Cash on Hand	\$70.00
Savings Balance	\$5.00
Your Savings Balance	\$429.42
Money Market Fund	\$3,164.12
Checking Balance	\$3,341.13
TOTAL Cash and Bank Accounts	\$7,009.67
Inventory	\$22.98
Donated Gift Cards	\$25.00
Speaker Gifts	\$20.00
TOTAL ASSETS	\$7,077.65
LIABILITIES & EQUITY	
TOTAL Liabilities	\$0
Equity	\$7,077.65

Announcements - Job Postings

Assistant Controller—Arizona State Retirement System. Salary up to \$85,000 DOE. The Assistant Controller is responsible for planning, directing and coordinating the day to day accounting functions in the General Accounting unit, which includes supervising and developing five direct reports. Key functions for which the Assistant Controller is responsible includes: general ledger accounting/reconciling and external financial reporting (including CAFR, PAFR and GASB 68 Reporting). Further, the Assistant Controller has key responsibilities for external audit management. This position is also charged with reviewing internal controls and internal processes to ensure unit efficiencies.

Ideal Candidate: Bachelor's degree in accounting or closely related field from an accredited college or university is highly preferred. The ideal candidate will have a CPA certification. Seven to ten years of accounting experience, which include three to five years as a supervisor. A comprehensive knowledge of generally accepted accounting principles, governmental fund accounting, financial statement preparation, accounting systems and internal controls. Strong computer skills, with an emphasis on Excel and Access. Strong analytical problem solving skills and demonstrated ability to be flexible and able to adapt quickly to change. Proven ability to handle multiple projects simultaneously and use good judgement in decision making and in prioritizing work. Ability to establish and maintain effective working relationships with subordinates, colleagues and managers. Support the agencies PRIDE initiative. Familiarity with MUNIS financial management system is a plus.

Apply for Job #22761 online at: <https://azstatejobs.azdoa.gov/>

Would you like to post your organization's job postings on our website?

Please email AGA Phoenix Webmaster, Karie Tepper, at webmaster@agaphoenix.org.

AGA Phoenix Chapter Executive Board Program Year 2016-2017

PURPOSE: Consists of chapter officers, past president, committee chairs, and other members appointed by the chapter president. Responsible for all chapter business and planning.

OFFICERS:

President	Gergana Kovatcheva, CGFM, CPA
President Elect	Michelle Huckabay, CGFM, CPA
Past President	Josh Consier
Secretary	Kim Prendergast, CGFM, CIA, CPA, CFE
Treasurer	Josh Neidigh

ADDRESS: AGA Phoenix Chapter, PO Box 64911
Phoenix, AZ 85082-4911

PHONE: (480) 731-8582 **FAX:** (480) 731-8560

EMAIL: AGA@agaphoenix.org

Our Purpose

Mission Statement

AGA Phoenix Chapter serves Arizona professionals in the government financial management community by providing quality, low-cost continuing education, promoting professional development and interaction among members, and fostering a commitment to community involvement as well as a sense of responsibility for advancing government accountability.

Vision

AGA Phoenix Chapter actively creates an avenue for membership to share ideas with each other, to share knowledge and time with the community, and to promote the advancement of government standards and accountability within the profession.

We'd Love Your Input!

Please remember to send in any articles of interest, including any that you may have written on the subjects of management, accounting, or auditing. We welcome your comments and suggestions.

In addition, please send us any special announcements in relation to promotions, marriages, births, anniversaries, certifications achieved, or any other significant event for any of our chapter members. Any article submitted by the second week of the month will be included in the next month's newsletter.

Please email your news for forthcoming newsletters to:

newsletter@agaphoenix.org





Check out AGA's Free Toolkits & Guides:

- Sub-recipient vs. Contractor Checklist
- Blended and Braided Funding
- Leveraging Government Resources in Challenging Financial Times
- Risk Assessment Monitoring Toolkit
- Cooperative Audit Resolution and Oversight Initiative
- Fraud Prevention Toolkit
- Candidate Assessment Toolkit for Grant Managers
- How Federal, State and Non-Profit Collaboration Improved Efficiencies in Delinquent Debt Collection
- Citizen Centric Report: How To

<https://www.agacgfm.org/Resources/Tools-To.aspx>

Membership Referral Program

Did you know that you can gain \$50 if you get two individuals who are not currently members to join our chapter? All you have to do is have them put your name down on the sponsor section of the membership form.

It is always nice to have new faces become members to our growing organization!

Board Members Wanted

If you are interested in volunteering for a committee and to be on the Board, please contact AGA at the following e-mail: aga@agaphoenix.org

We Are Always Looking For People Interested In Joining Our Organization

NOTE: Excerpts and links below are from AGA's national website at www.agacgfm.org.

What is AGA?

Briefly, AGA has been serving the government financial management profession for over 50 years As a not-for-profit educational organization, AGA serves the professional interests of financial managers from the local, state and the federal governments, as well as public accounting firms, responsible for effectively using billions of dollars and other monetary resources everyday. Members are accountants, auditors, contract, financial and performance, budget analysts, chief financial officers, information systems managers, finance directors, inspectors

general, professors, students. Membership in AGA is like tapping into a reservoir of actual real-world knowledge and experience of government financial management experts.

Benefits of Joining

If you asked a member which of the benefits they value the most, they probably would say education and networking, which often occur at the same time and place. Here are some of our members' favorites:
Continuing Professional Education and Networking Opportunities
Keep Up-to-Date on Current Issues
Keep Abreast of the Latest Technologies and Financial Systems
Professional Guidance and Certification

How Can You Join?

Click the links below to access the Membership Application and to find out membership types and dues.



Click <https://www.agacgfm.org/Membership/Learn-About-AGA/Join-or-Renew.aspx>

to complete the online AGA Membership Application.

****Did an AGA member inspire you to join? Don't forget to enter your AGA Sponsor's Name and Member ID on the application.****