



2019 Newsletter Award Winner - Group D

The Ozarks Ledger



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From Josefina's Desk

Hello, fellow AGA Members! I would like to extend a great *THANK YOU* to everyone who attended our fall seminar. We put these events together for and because of you. So, thank you for participating!

Aside from the educational opportunities that our great lineup of speakers shared, we were also able to raise \$101 through our 50/50 raffle which benefited *Rescue One*. Again, thank you!

I would like to encourage every one of you to continue with this spirit of camaraderie and generosity as we move into the holiday season. From your Chapter Executive Committee, have a wonderful Thanksgiving and Holidays!

Best wishes,
Josefina Garcia



Josefina García, CMA, CPA



Chapter Meetings

No December Meeting

Monthly Meeting

January 16, 2020
425 Downtown

Monthly Meeting

February 20, 2020
425 Downtown

2020 Spring Seminar

March 26, 2020
White River Conference Center

Monthly Meeting

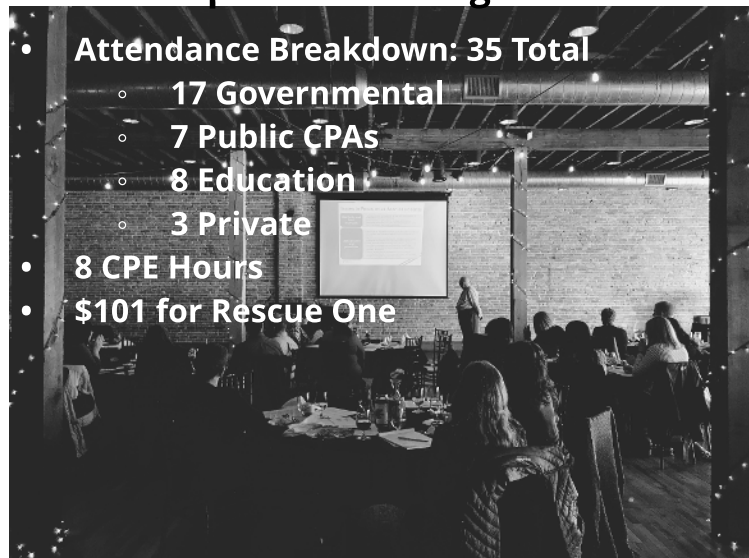
April 16, 2020
425 Downtown

May Meeting - TBD

Summer Break



AGA Ozarks Chapter Fall Professional Development Training in Numbers



- Attendance Breakdown: 35 Total
 - 17 Governmental
 - 7 Public CPAs
 - 8 Education
 - 3 Private
- 8 CPE Hours
- \$101 for Rescue One

Certified Government Financial Manager (CGFM) Training Program

- Sponsored by the AGA Oklahoma City Chapter
- Five-day training March 2-6 in Oklahoma City
- 40 NASBA-approved CPE hours
- Program to expand knowledge of governmental accounting, auditing, financial reporting, internal controls and budgeting
- Also helps CGFM candidates prep for the three CGFM examinations
- Fee: \$1,200 by February 1, 2020 or \$1,500 February 2-March 1, 2020
- To register or for more information, contact **Riley Shaull** or agaokc@gmail.com.

News from National/NCC Rep



Hello, everyone!

We made it through Halloween, and the holidays are fast approaching. 2019 is quickly coming to an end! Have you thought about your tax-deductible giving this holiday season? Did you know there is a way you can help support students and our future financial leaders?

Our national AGA leaders recently announced the ["Season of Giving" campaign](#), which set a goal to raise \$10,000 by the end of 2019 to help fund programs that meet the needs of the future of our profession.

Your contribution supports student outreach (including scholarships and college visits by AGA leaders), enhances understanding of government financial management and encourages collaboration among all levels of government. For example, a tax-deductible gift of just \$30 would provide a student with one year of e-membership. Other ways you can help include

- \$50 would provide one webinar for a young professional member.
- \$100 would cover the cost of the CGFM application fees for 3 student members.
- \$300 defrays the cost for a student to attend the National Leadership Training (NLT) in Washington, D.C.
- \$500 funds part of an academic scholarship offered by AGA.

Follow the link above to give online. If you prefer, send a check for the amount of your choice to

AGA

Attn: Donations

2208 Mt Vernon Ave

Alexandria, VA 22301

I'll update you next month with more news from National.

Greg Drake, 2019-2020 Ozarks Chapter NCC Representative



Randall Gordon, audit Director for the State Auditor's Office, was at the October AGA monthly meeting and talked about some impressive examples of fraud they have caught in Missouri. In 2019, the Office of Missouri State Auditor has completed 109 audits and audited \$9.8 billion federal funds. That's \$9,800,000,000!!

Everyone, meet Teresa Allen



In case you haven't had a chance to meet Teresa, who has been a member of AGA for 14 years, I will tell you she is a must-meet person with a youthful spirit and hard work ethic. Teresa was basically Leslie Knope (Parks and Rec) for 14 years with the City of Springfield Parks Department and has been in the Finance Department for the last nine years, currently serving as the Budget Coordinator. She basically works to support her travel habit - she's been everywhere, man, and she also loves a good true crime podcast. She started traveling back when she moved from the small town of Plattsburg, MO to Springfield, MO where she graduated from SMS.

Strictly Business:

What was your first job?

Parking Lot attendant and tram tours at Worlds of Fun

A Little More Personal:

What advice would you give your teenage self?

You can do more than you think you can

Just For Fun:

If you could eat one item for every meal the rest of your life, what would it be?

Hands down, pizza!!

"Breaking Buzzwords"

They say: "After careful consideration, we have decided to pivot"

They mean: "After careful consideration, we have decided to change direction"

They "really" mean: "We made a mistake"



Anniversaries, Milestones & Achievements

- AGA Ozarks Chapter is on the path to success for another Platinum year! September 30 marked the end of the first quarter in which your chapter racked up 6,450 credits.
- Check out the Chapter Recognition Program on page eight for more info.

Job Opportunities

- Accounting Technician II/III at City of Lebanon
 - [View Details Here](#)
- Finance Co-op Financial Technology at City Utilities of Springfield
 - [View Details Here](#)
- Finance Co-op Forecasting at City Utilities of Springfield
 - [View Details Here](#)

Quote of the Month

"Lead from the back and let others believe they are in front" - Nelson Mandela



AGA wants to partner with you. Start studying this fall!



GET MORE INFORMATION TODAY!

Contact Monica to see how the AGA Ozarks Chapter can support you! - mrobinson@marshfieldmo.gov

**Association of Government Accountants
Ozarks Chapter
Fiscal Year 2020
Oct 1, 2019 Through Oct 31, 2019**

	FY20 Budget	FY20 Actual	Oct '19
<u>General Operating Activities:</u>			
Revenues:			
Chapter Dues	322.00	70.00	10.00
Charity Fundraiser - Annual Choice	418.00	-	-
Other Misc Revenue	22.00	-	-
Interest	8.00	3.17	0.78
Expenses:			
Community Service	418.00	-	-
Educational (Post Secondary Ed) Scholarships	1,500.00	-	-
CGFM (Member) Scholarships	125.00	-	-
PDC (CEC) Travel Stipend	3,000.00	458.15	-
Speaker Gifts	230.00	-	-
Other Misc Expense	480.00	249.86	0.06
Net Revenue	(4,983.00)	(634.84)	10.72
<u>Monthly Meetings:</u>			
Revenue	1,500.00	420.00	420.00
Expense	1,500.00	537.57	238.92
Net Revenue	-	(117.57)	181.08
<u>Fall Seminar:</u>			
Registrations	4,087.00	-	-
Sponsorships	500.00	-	-
Expenses	2,700.00	-	-
Net Revenue	1,887.00	-	-
<u>Spring Seminar:</u>			
Registrations	13,240.00	-	-
Sponsorships	1,500.00	-	-
Expenses	3,604.00	-	-
Dues (remitted to National)	7,507.00	-	-
Net Revenue	3,629.00	-	-
<u>Member Appreciation Night(s):</u>			
Revenue	-	-	-
Expense	250.00	-	-
Net Revenue	(250.00)	-	-
<u>Membership Drive/Recruiting:</u>			
Revenue (received from National)	-	-	-
Expense	-	-	-
Net Revenue	-	-	-
<u>Lead Event</u>			
Revenue (fees received from Attendees)	-	-	-
Expense	200.00	-	-
Net Revenue	(200.00)	-	-
Total Net Revenue:	\$ 83.00	\$ (752.41)	\$ 191.80
Change in Fund Balance:			
	Projected	Actual	Actual
Beginning	16,006.16	16,006.16	15,061.95
Net Change	83.00	(752.41)	191.80
Ending	\$ 16,089.16	\$ 15,253.75	\$ 15,253.75



Chapter Recognition Program

2019 - 2020 Chapter Recognition Program Credits

<u>Program Category</u>	<u>Credits Earned</u>
Leadership	650
Certification	475
Education	750
Communications	1,975
Membership	1,650
Accountability	950
Community	0
<u>Awards</u>	<u>0</u>
Total Credits	6,450

The objective of the Chapter Recognition Program is to support, encourage and promote AGA's mission.

These categories and their subcategories provide guidelines and suggestions for activities to create a more well-rounded Chapter.

Each Chapter, along with the National office, selects their annual level goal. The Chapters that reach their goal earn recognition and a plaque at the National Professional Development Conference.

For more information on these categories and the Chapter Recognition Program, take a look at the [Program Handbook](#).

<u>Recognition Level</u>	<u>Credits Needed</u>
Platinum	19,501 - 25,000
Gold	17,001 - 19,500
Silver	14,501 - 17,000
Bronze	12,000 - 14,500
None	0 - 11,999



Ozarks Chapter Recognition History

<u>Program Year</u>	<u>Recognition</u>
2018 - 2019	Platinum
2017 - 2018	Silver
2016 - 2017	Platinum
2015 - 2016	Platinum
2014 - 2015	Platinum

CEC Meeting Minutes

October 24, 2019

I. Call to order

- The meeting was called to order at 12:00 pm noon by Josefina Garcia, President.

II. Welcome – Josefina Garcia, President

III. Roll Check-In

Name of Attendees and Absentees

Attendees:

- Josefina Garcia, CPA - President
- Shika Morgan - Secretary
- Greg Drake, CGFM - National Council of Chapters Representative
- Nathan Ziegler, CPA - Communications Chair
- Tammy Beeman, CGFM - Membership Chair
- Kristy Bork, CPA - Education Co-Chair
- Monica Robinson, CGFM - Professional Certification
- Julie Ravenscraft, CPA - Early Careers Chair (call-in)

Absentees:

- Sarah Burrows, CPA -Treasurer
- Renee Vines, CPA - Education Co-Chair
- Jennifer Schatzer, CPA-Community Service Chair
- Teresa Allen, CGFM – Historian
- Brandie Fisher, CGFM - Accountability Chair

CEC Meeting Minutes, Continued

Secretary – Shika Morgan

· The secretary emailed the minutes to the CEC members prior to the meeting. The minutes were read by CEC members prior to the meeting. Shika Morgan, secretary, asked if anyone had any corrections to the minutes sent out. There were none. Shika asked for someone to make a motion to approve the minutes from the August 28, 2019 CEC meeting.

· **Kristy Bork made the motion to approve and Tammy Beeman seconded the motion. The minutes were approved and there were no opposes.**

V. Treasurer – Sarah Burrows (absent)

· The treasurer emailed the monthly financials for July, August, and September 2019 to the CEC members prior to the meeting. The monthly financials were reviewed.

· **Kristy Bork made the motion to approve and Shika Morgan seconded the motion. The monthly financials for July, August, and September were approved and there were no opposes.**

VI. Committee Reports and Updates

Membership – Tammy Beeman

· Tammy, Membership Chair, provided PayPal updates for both the October meeting and Fall Seminar.

· October Meeting Statistics

· 16 registered (12 online and 4 regular) and there were two no shows.

· 14 attendees (8 paid with PayPal and 6 paid with cash)

· Fall Seminar Statistics

· To date there are 7 registered (6 online and 1 regular).

· We discussed how to treat no shows. If someone registers but doesn't pay, no additional charges are due. Currently if Ozark AGA members registers for a meeting, pays with PayPal and is a no show, no refunds will be made. Monies may be applicable to a future meeting. CEC will discuss and put a policy into place on how to handle no show refunds.

CEC Meeting Minutes, Continued

Communication – Nathan Ziegler

· Nathan provided a status update for the Missouri State University Accounting Club November 20 meeting which will include an AGA four-person panel discussion and presentation. Nathan is still looking for AGA members to participate in the panel discussion. Nathan explained the format and it will consist of AGA video featuring the national president. There will be a planned question and answer for 20 minutes with 5-10 minutes unplanned Q&A. Ozark AGA is sponsoring the meal and it will be paid from the scholarship budget. MSU Accounting Club is fine with AGA providing a pizza meal. Julie recommended that Nathan confirm with Connor. Kristy suggested asking Sarah Burrows and Teresa Allen to participate on the panel. Kristy also volunteered for the panel too. Kristy suggested that Nathan ask Sarah to coordinate the payment for the pizza meal. Julie will be in attendance so that there will be a second check signer on hand. Josefina recommended a slide show presentation play in the background until the panel discussion starts.

Historian – Teresa Allen (absent)

· There are no updates.

Accountability – Brandie Fisher (absent)

· There are no updates.

National Council of Chapters – Greg Drake

· On October 9, a 10-person work group had a conference call to discuss CRP (Chapter Recognition Points) program and how to revamp it. Also, NCC would like to establish KPIs (Key Performance Indicators) for the Chapter Recognition Points. There will be a virtual meeting on November 7.

· AGA is in the process of finalizing 2 elevator speeches to encourage employer support for AGA. This is expected to be finalized no later than end of December.

· There has been discussion to determine the procedures and policies for opening and closing chapters.

· National Governing Board (NGB) is discussing the possibility of having a combined Lead! 2020 meeting in Dallas. Next NGB meeting will be held on December 5, 2019.

· Greg emailed the Ozark AGA bylaws to the general membership for review prior to the Fall Seminar. These will be voted on and approved at the Fall Seminar on November 14, 2019.

Professional Certification – Monica Robinson

· Monica indicated that we have two or three study guides currently checked out at this time. Updated 2019 CGFM set of study guides are available from national AGA. Each set of study guides cost \$315. There is an online subscription but national AGA has indicated that chapters cannot purchase these to share with its members. During the Fall Seminar, we will determine if the membership is interested in 2019 CGFM study guides. There have been some GASB changes the last few years. Taney County's Auditor currently has one copy checked out and another set or two is in Tammy's office.

· CEC will vote at the December meeting on the number of 2019 CGFM study guides to purchase.

CEC Meeting Minutes, Continued

Education – Renee Vines (absent)/Kristy Bork

- For the Fall Seminar, the committee stills needs to secure a Legislative speaker. Teresa has ordered the speaker gifts, a reversible umbrella.
- Kristy will make two to three 2-sided black and white copies of the by-laws for each table at the Fall Seminar as well as copies of the Fall Seminar agenda.
- Kristy is working on adding the time slots to the agenda for the Fall Seminar.
- We agreed to have a canned food drive. Monetary donations will also be accepted in lieu of canned food.
- No help is needed for setup. CEC members should arrive at 7:30 and registration will be at 8 am. CEC members should park in the free parking garage that is around the corner from 425 location.
- Jim Brown, a member of the GASB board, will speak both in the morning and again after lunch.

Early Career – Julie Ravenscraft

- Julie asked Nathan to provide Connor with a list of the panelists for the upcoming MSU accounting club meeting. Missouri State requires guest speaker information in advance for parking permits. This is a strict requirement. Nathan has indicated that he would provide this information no later than next week. Julia will provide Connor with a list of introduction questions for the panelists.
- We would like to encourage students to register as AGA members. The membership is free to students. Julie has encouraged her governmental accounting students to sign up as AGA members but is unsure if the other MSU professors have done so.
- If Sarah Burrows or Teresa Allen are unable to be panelists, Jeff P from City Utilities was suggested a backup panelist.
- Julie mentioned that last year the AGA National Leadership Training consisted of three MSU students out of the 10 selected. So far, this year there are two that may apply.
- There is a PowerPoint presentation available on the national website under chapter resources that caters to colleges and university. We should use this or a portion of it for the background presentation during the November 20 meeting.
- Julie is on the National Leadership Development Committee. This committee is searching for national leaders such as governing board and chapter directors. It was suggested to recommend anyone who has the potential to serve in this capacity is the near or even far future. If someone would like to work toward this goal, their name should be submitted for future mentoring and training.

Community Service – Jennifer Schatzer (absent)

- There are no updates.

CEC Meeting Minutes, Continued

President – Josefina García

- Chapter Recognition Points: Josefina encouraged CEC members to review the chapter recognition points listing and determine which items that can be submitted to help our chapter obtain the maximum amount of points.
- Succession Planning: We need to find a President-Elect to assist and shadow Josefina.

VII. Final comments

- The next CEC meeting is on Thursday, December 5, 2019.
- Planning meetings for next year will be discussed at the December CEC meeting.

VIII. Adjournment

- Meeting adjourned by Josefina Garcia, President at 12:57 p.m.

Contact Us

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