

AGA Phoenix Chapter (www.agaphoenix.org)

PY 2015-2016

September 2015



Message From the President



The 2015-2016 program year starts this month on September 23rd. Brent Stockwell, assistant city manager at the City of Scottsdale, will speak about the Citizen Centric Report. The session will be held at Skysong with lunch starting at 10:30am and the meeting starting at 11:00am.

The program schedule is posted on the website and Eventbrite. You can register for any of the meetings at: www.agaphoenix.eventbrite.com.

Also, we added a nonmember package, which includes all 11 monthly meetings.

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Type	Member	Nonmember
Single meeting	\$20	\$30
Package	\$180	\$330

If you have any comments or suggestions, please email me at aga@agaphoenix.org. Thank you for supporting the Phoenix chapter.

Joshua Consier
President
AGA Phoenix Chapter



9/23/15 Meeting (2 CPE)

1. Lunch (10:30 AM)
2. Citizen Centric Reporting (11:00—12:50 PM)



Goals for 2015-2016 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, 2015 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 2015-2016 Budget	
Education	\$24,250
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	\$35,450

2015-2016 Community Service Plan

In the upcoming year as your Community Service Representative, I will reach out once again to the Ronald McDonald House to feed the families staying there. I am planning to do this in November and May. I will be scheduling these events to be held in Mesa and Phoenix.

I will also be contacting the Salvation Army to see if we can obtain a family to adopt this year along with helping out with the Christmas Angel Program. I would also like to have a can food drive done in December to give those items to the Salvation Army.

I will also work with Briselda Rodriguez with the City of Phoenix to see if we can partner with them on the 2016 VITA program.

If you would like to participate in any of these programs, or if you know of another organization that needs help, please feel free to contact me. Serving others not only helps them, but brings joy to those that serve. Thank you for all of your support and let's make this year great.

John Schutter

AGA Community Service Chair

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



CGFM Study Resources Available:

For AGA members interested in taking the CGFM please contact our CGFM chair Elisa Gin at cgm@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:

cgm@agaphoenix.org



City of Phoenix

Earned Income Tax Credit Campaign

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

For more information or a copy of this publication in an alternative format, Contact 602-262-4520 voice.
The city's TTY Relay phone number 7-1-1 may be used if needed.

Volunteer Roles



Site Coordinator

- Provide coordination, organization and supervision for a Volunteer Income Tax Assistance Program site
- Ensure that all volunteers adhere to the city of Phoenix's VITA policies, IRS Volunteer Standards of Conduct and Quality Site Requirements
- Coordinate a schedule for volunteers
- Compile reports and volunteer hours on a monthly basis
- Complete site coordinator training
- Complete mandatory Volunteer Standard of Conduct and Site Coordinator Training
- Complete advanced tax law training, including the use of electronic filing software

Tax Preparer

- Prepare basic or advanced 1040 tax returns and related schedules for eligible taxpayers
- Interview taxpayer to determine if all income, deductions and allowable credits are claimed
- Prepare only those returns for which certification levels were completed
- Complete mandatory Volunteer Standard of Conduct Training
- Complete tax law training, including the use of electronic filing software
- Certified Public Accountant and Enrolled Agents can receive Continuous Professional Education (CPE) credits

Greeter

- Greet the taxpayers and sign them in
- Ensure the taxpayer has all the necessary documentation
- Monitors site traffic to ensure all taxpayers checking in receive assistance
- Complete mandatory Volunteer Standard of Conduct and Greeter / Screener Training

Instructor

- Instructs tax law and tax preparation software
- Complete mandatory Volunteer Standard of Conduct Training
- Complete IRS Link & Learn tax law training and become certified in advanced
- Become familiar with the Link & Learn Practice lab
- Attend an instructor Train – the –Trainer class
- Certified Public Accountant and Enrolled Agents can receive Continuous Professional Education (CPE) credits

We request volunteers to serve a minimum of 4 hours a week during tax season

**Association of Government Accountants
Phoenix Chapter
Education and Meeting Plan
2015-2016 Program Year**

Date	Event	Topic	CPE Credit	Registration Dead-line	Location
9/23/15	Chapter Meeting-Lunch 10:30am-11:00am-Education Seminar 11:00am-12:50pm	Citizen Centric Report	2	9/18/2015	ASU Skysong Global Room 201 1475 N Scottsdale Rd. Scottsdale, AZ 85257
10/7/2015	Chapter Meeting-Lunch 10:30am-11:00am-Audio Conference 11:00am-12:50pm	Government Innovation: An Imperative, Not an Oxymoron	2	10/2/2015	ASU Skysong Global Room 201 1475 N Scottsdale Rd. Scottsdale, AZ 85257
10/21/2015	Chapter Meeting-Lunch 10:30am-11:00am-Education Seminar 11:00am-12:50pm	Fraud Prevention	2	10/16/2015	ASU Skysong Global Room 201 1475 N Scottsdale Rd. Scottsdale, AZ 85257
11/4/2015	Chapter Meeting-Lunch 11:30am-12:00pm-Education Seminar 12:00pm-1:50pm	Municipal Finance	2	10/30/2015	ASU Skysong Global Room 201 1475 N Scottsdale Rd. Scottsdale, AZ 85257
12/16/2015	Chapter Meeting-Lunch 11:30am-12:00pm-Audio Conference 12:00pm-1:50pm	Topic TBD Holiday Social	2	12/11/2015	ASU Skysong Global Room 201 1475 N Scottsdale Rd. Scottsdale, AZ 85257
1/13/2016	Chapter Meeting-Lunch 11:30am-12:00pm-Education Seminar 12:00pm-1:50pm	TBD	2	1/8/2016	ASU Skysong Global Room 201 1475 N Scottsdale Rd. Scottsdale, AZ 85257
1/22/16*	8:00am-8:30am Continental Breakfast 8:30am-12:00pm-Class	Ethics—ASCPA	4	1/15/2016	Maricopa Community College 2411 W. 14th Street Tempe, Arizona 85281
1/27/2016	Chapter Meeting-Lunch 11:30am-12:00pm-Education Seminar 12:00pm-1:50pm	Leadership	2	1/22/2016	ASU Skysong Global Room 201 1475 N Scottsdale Rd. Scottsdale, AZ 85257
2/19/2016	Chapter Meeting-Lunch 11:30am-12:00pm, Seminar 12:00p-12:50pm	ASRS	1	2/12/2016	TBD
	1:00pm-1:50pm	Deferred Comp	1		
	1:50pm-2:40pm	Federal Tax Update	1		
	2:40pm-3:30pm	State Tax Update	1		

**Association of Government Accountants
Phoenix Chapter
Education and Meeting Plan
2015-2016 Program Year**

Date	Event	Topic	CPE Credit	Registration Dead-line	Location
3/18/2016	Chapter Meeting-Lunch 10:30am-11:00am-Audio Conference 11:00am-12:50pm	Internal Controls	2	3/11/2016	ASU Skysong Global Room 201 1475 N Scottsdale Rd. Scottsdale, AZ 85257
4/13/2016	Chapter Meeting-Lunch 10:30am-11:00am- Education Seminar 11:30am-12:50pm	DATA Act	2	4/8/2016	ASU Skysong Global Room 201 1475 N Scottsdale Rd. Scottsdale, AZ 85257
5/6/2016*	8:00am-4:00pm PDC	Topics TBD	2	4/29/2016	Rio Salado College 2323 W. 14th St. Tempe, AZ 85281
			1		
			1		
			2		
			1		
			1		
6/1/2016	Chapter Meeting-Lunch 10:30am-11:00am- Education Seminar 11:30am-12:50pm	TBD	2	5/27/2016	ASU Skysong Global Room 201 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

\$30 each monthly chapter meeting, or package —\$330 for all sessions*

*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 - July 2015

Treasurer's Report

Book Balance 6/30/2015	\$9,853.58
Receipts	\$164.44
Disbursements	\$1,718.33
Book Balance 7/31/15	\$8,299.69
Outstanding Checks	\$601.38
Outstanding Deposits	\$0.00
Adjusted Book Balance	\$8,901.07
<u>Account Balance</u>	
Cash on Hand	\$50.00
Savings Balance	\$5.00
Your Savings Balance	\$349.55
Money Market Account	\$3,162.17
Checking Balance	\$5,334.35
	\$8,901.07
Difference Adjusted Book vs Bank	\$0.00

Balance Sheet

7/31/2015

Cash and Bank Accounts	
Cash on Hand	\$50.00
Savings Balance	\$5.00
Your Savings Balance	\$349.55
Money Market Fund	\$3,162.17
Checking Balance	\$5,334.35
TOTAL Cash and Bank Accounts	\$8,901.07
Inventory	\$22.98
Speaker Gifts	\$120.00
TOTAL ASSETS	\$9,044.05
LIABILITIES & EQUITY	
TOTAL Liabilities	\$0
Equity	\$9,044.05

Announcements - Job Postings

Internal Auditor (part time), Maricopa County. Salary range of \$25.52/hr.—\$35.45/hr. The internal auditor assists in conducting audits of County financial and accounting systems, as well as departmental operations, programs, and contracts.

Minimum Qualifications: Bachelor's degree in accounting, finance, management or a related field. Good verbal communications and writing skills. High level of proficiency in Microsoft Office. Knowledge of generally accepted accounting principles and auditing standards.

Submit resume and cover letter to Maricopa County Internal Audit, Wendy Thiele at:
thielew@mail.maricopa.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 2015-2016

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	Josh Consier
President Elect	Gergana Kovatcheva, CGFM, CPA
Past President & Secretary	Kim Prendergast, CGFM, CIA, CPA, CFE
Treasurer	Leslie De'Reche, CGFM, CPA

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.agacgm.org/Tools-Resources/Overview.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.agacgm.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.agacgm.org/Membership/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.****