

# AGA Phoenix Chapter (www.agaphoenix.org)

PY 2019-2020

October 2019



## Message From the President



Thank you so much to all who participated in the Success in Government with Lean Principles meeting that we held on September 11, 2019 at the Arizona Department of Education. Our speakers Teri O'Brien and Otto Sticca did a great job presenting the information, in a highly interactive way. This was also our very first meeting available to participants virtually. We also offer the option

to purchase a package deal as a member, which includes 14 regular chapter meetings for the price of 9. This is a great way to get all of your training needs met, and secure affordable CPE!

Looking ahead to October, our next meeting will be held on October 23rd, and the topic is – How Automation Can Take the Robot Out of the Human. We will hear from speaker, Duc Duong from Grant Thornton, who has more than 20 years of experience providing enterprise architecture, systems development, IT transformation, cloud strategy, and Agile/DevOps implementation and coaching services. The event will be held at the AZ Department of Education, and it is worth two (2) CPE. You can attend in person, or virtually. To register for any of our events, you can head over to the [events section](#) of our website.

In September, the Phoenix Chapter of AGA also participated in the Meet the Firms Night at ASU on 9/16/19, and the Career event at GCU on 9/18/19. This was a great opportunity to tell students about the opportunities in working in Government Financial Management. We shared information about available government jobs in the local area, and our [scholarship opportunity](#) that must be applied for by December 31st. It was great experience. Thank you, ASU and GCU for welcoming us!

Here are some other noteworthy items from September:

- We welcomed our newest members JJ, Matthew, Daniela and Deanne.
- Many congratulations to Jordan from Maricopa County, and Tami from the Arizona Department of Administration, in achieving their CGFM designations

Thank you for your continued support of the Phoenix Chapter, and we hope to see you in October! In the meantime, let us know how we can help, by providing your questions and comments to us at [contact@agaphoenix.org](mailto:contact@agaphoenix.org). We would love to hear from you!

Michelle Huckabay, CPA, CGFM, President of the AGA Phoenix Chapter

### Inside this Issue:

Message from the President	1
Executive Board Information, Purpose Statement	2
2019-2020 Goals, Budget	3
CGFM Tips & Resources	4
Education Plan	5-6
Treasurer Reports, July & August	7-8
How to Join AGA	9

Check out the Phoenix Chapter Citizen Centric Report (CCR) for FY18-19.

<https://www.agacgfm.org/CMSSiteImages/Chapters/Chapters/Phoenix-Chapter/libraries/files/2019%20Citizen%20Centric%20Report-Phoenix%20Chapter.pdf>

# AGA Phoenix Chapter Executive Board Program Year 2019-2020

**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	Michelle Huckabay, CGFM, CPA
President Elect	Cindy Smith, CPA
Past President	Gergana Kovatcheva, CGFM, CPA
Secretary	Paola Matson
Treasurer	Gergana Kovatcheva, CGFM, CPA

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

**EMAIL:** [contact@agaphoenix.org](mailto:contact@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:

[contact@agaphoenix.org](mailto:contact@agaphoenix.org)



## Goals for 2019-2020 and Beyond

- Membership & Education:
  - Provide 42 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.
  - Send out survey to members annually.
  - ✓ • Provide student members the option to attend three meetings for free.
- Accountability:
  - ✓ • Prepare chapter’s Citizen Centric Report (CCR) by September 30, 2018 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. Purchase two new sets this year.
  - Seek State proclamation for March as CGFM month and provide recognition to CGFM members.
- Young Professionals:
  - 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 Ad-

2019 & 2020 Budget and Spend through 8/31			
Budget Category	'19 Spent	'20 Budget	'20 Spent
Education	\$19,328.16	\$19,050	\$0
Membership	\$680	\$750	\$0
Travel	\$2,873.47	\$1,000	\$700.60
Board Expenses	\$100	\$100	\$87.75
Scholarship	\$1,000	\$1,000	\$500
CGFM	\$125	\$1,550	\$250
Community Ser-vice	\$695	\$500	\$150
Website	\$0	\$0	\$0
Early Career	\$0	\$750	\$0
Audit	\$150	\$150	\$0
Misc.	\$180.56	\$200	\$24
Total	\$25,132.19	\$25,050	\$1,712.35

### PY 2019-2020 Committee Members:

- Membership – Mary Adelman, CGFM, CPA
- Education – Keith Orr, CGFM, Jerry Snyder, CGFM, Anthony St. George, CPA and Robert Harwood, CPA
- Programs – Michelle Huckabay, CGFM, CPA and Daniela Kunova
- Accountability—Kim Prendergast, CGFM, CPA
- CGFM – Gergana Kovatcheva, CGFM, CPA, Jordan Dale, CGFM
- Young Professionals / Early Career – Getzamany Aragon and Marvin Mendieta, CGFM
- Scholarship – Kelly Alkhoury, CGFM
- Community Service – Cindy Ensign
- Communications Committee – Michelle Huckabay, CGFM, CPA and Jordan Dale, CGFM
- Sponsorship—Anthony St. George, CPA

## **Tips for Preparing for CGFM Exams:**

Begin by **reviewing the CGFM examinations content outlines**, which list the main and subtopics covered in each examination. This should be the focal point of your preparation. It is the core document used as the basis for each examination and a guideline for writing examination questions.

Once you are ready to begin studying for the exam, there are a variety of ways to approach it. You can utilize all, or part of these resources. **The AGA offers instructor led courses**. You can attend an instructor led course in the Washington, D.C. area, or participate in an intensive review course at the annual AGA PDT.

Even if you take the instructor led courses, you will want to perform some self-study following this, in order to prepare yourself for the exams. **CGFM study guides** are available for purchase through AGA National, in hard copy, or as a soft copy. Spend time reviewing these materials and answering the questions from each section of the study guides. Also, the Phoenix Chapter, has CGFM study guides available for check out.

AGA also now offers three online **CGFM practice examinations**, which will help you prepare to take the real exam. These practice examinations, are a must.

**Study groups** can also be helpful. If you know others that are preparing to take the same exam, you can meet regularly to test each others knowledge, and support each other in the journey. Consider joining the AGA Phoenix Chapter study group. To find out more, e-mail [contact@agaphoenix.org](mailto:contact@agaphoenix.org).

Consider these tips, when starting your journey to obtaining your CGFM certification. Good luck and let the Phoenix Chapter of AGA know if we can answer any questions for you, or provide you with any of the Chapter resources.

Link to AGA National study information: <https://www.agacgfm.org/CGFM-Certification/Candidates/Preparing-for-Exams.aspx>



### **CGFM Study Resources Available:**

For AGA members interested in taking the CGFM please contact our CGFM chair at [cgfm@agaphoenix.org](mailto: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:

[contact@agaphoenix.org](mailto:contact@agaphoenix.org)

Association of Government Accountants					
Phoenix Chapter					
Education and Meeting Plan					
2019-2020 Program Year					
Date	Event	Topic	CPE Credit	Registration Deadline	Location
9/11/19	Chapter Meeting- Lunch 10:30am- 11:00am, Education Seminar 11:00am- 12:50pm	Lean Six Sigma in Government	2	9/6/19	AZ Department of Educa- tion Room 311 1535 W Jefferson St. Phoenix, AZ 85007
10/23/19	Chapter Meeting- Lunch 10:30am- 11:00am, Education Seminar 11:00am- 12:50pm	How Automation Can Take the Robot Out of the Human	2	10/18/19	AZ Department of Educa- tion Room 311 1535 W Jefferson St. Phoenix, AZ 85007
11/20/19	Chapter Meeting- Lunch 11:30am- 12:00pm, Education Seminar 12:00pm- 1:50pm	Trends in Budgeting and Forecasting	2	11/15/19	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
12/11/19	Chapter Meeting- Lunch 11:30am- 12:00pm, Audio Con- ference 12:00pm- 1:50pm	Internal Control	2	12/6/19	AZ Department of Educa- tion Room 311 1535 W Jefferson St. Phoenix, AZ 85007
1/8/20	Chapter Meeting- Lunch 11:30am- 12:00pm, Audio Con- ference 12:00pm- 1:50pm	Uniform Guidance	2	1/2/20	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
1/17/20*	8:00am-8:30am Conti- nental Breakfast 8:30am-12:00pm- Class	Ethics—ASCPA	4	1/10/20	MCCCD Governing Bd Rm 2411 W. 14th Street, 2nd Floor Tempe, AZ 85281
1/22/20	Chapter Meeting—Ed- ucation Seminar 2:00pm-4:00pm	TBD—Lealan Miller, CPA, CGFM	2	1/17/20	TBD
2/5/20	Chapter Meeting- Lunch 11:30am- 12:00pm, Audio Con- ference 12:00pm- 1:50pm	GASB Update	2	1/31/20	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
2/28/20*	Chapter Meeting- Lunch 11:30am- 12:00pm, Education Seminar 12:00p- 12:50pm	ASRS	1	2/23/20	ASU Skysong Bldg. 3, Synergy I #130 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		

<b>Association of Government Accountants</b>					
<b>Phoenix Chapter</b>					
<b>Education and Meeting Plan</b>					
<b>2018-2019 Program Year</b>					
<b>Date</b>	<b>Event</b>	<b>Topic</b>	<b>CPE Credit</b>	<b>Registration Deadline</b>	<b>Location</b>
3/4/20	Chapter Meeting-Lunch 11:30am-12:00pm, Audio Conference 12:00pm-1:50pm	Improper Payments	2	2/28/20	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
3/25/20	Chapter Meeting-Lunch 10:30am-11:00am, Audio Conference 11:00am-12:50pm	Cybersecurity	2	3/20/20	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
4/8/20	Chapter Meeting-Lunch 10:30am-11:00am, Audio Conference 11:00am-12:50pm	Ethics	2	4/3/20	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
4/24/20*	8:00am-4:00pm PDT	TBD	1	4/17/20	Rio Salado College 2323 W. 14th St. Tempe, AZ 85281
			1		
			1		
			1		
			1		
			2		
			1		
	Total	8			
5/12/20	Chapter Meeting-Lunch 10:30am-11:00am, Audio Conference 11:00am-12:50pm	Fraud Data Analytics	2	5/8/20	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
5/27/20	Chapter Meeting-Lunch 10:30am-11:00am, Education Seminar 11:00am-12:50pm	Advanced Excel Functionality	2	5/25/20	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
6/10/20	Chapter Meeting-Lunch 10:30am-11:00am, Education Seminar 11:00am-12:50pm	TBD—Brittney Williams, CPA, CGFM	2	6/5/20	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
			<b>42</b>		

# AGA Phoenix Chapter, Treasurer's Reports - July 2019

## Treasurer's Report

Book Balance 6/30/2019	\$10,204.13	
Receipts	\$232.08	
Disbursements	<u>\$1,350.60</u>	
Book Balance 7/31/2019	<u>\$9,085.61</u>	
Outstanding Checks	\$0.00	
Outstanding Deposits	\$0.00	
Adjusted Book Balance	<u>\$9,085.61</u>	
 <u>Account Balance</u>		
Cash on Hand	\$50.00	
Savings Balance	\$0.00	
Your Savings Balance	\$5.00	
Checking Balance	\$0.00	
Checking Balance	<u>\$9,030.61</u>	
	\$9,085.61	
Difference Adjusted Book vs Bank	<table border="1" style="display: inline-table; width: 150px; height: 20px; vertical-align: middle;"><tr><td style="text-align: right;">(\$0.00)</td></tr></table>	(\$0.00)
(\$0.00)		

## Balance Sheet

7/31/2019

Cash and Bank Accounts	
Cash on Hand	\$50.00
Savings Balance	\$5.00
Checking Balance	\$9,030.61
<b>TOTAL Cash and Bank Accounts</b>	<u>\$9,085.61</u>
Inventory	<u>\$0.00</u>
Speaker Gifts	<u>\$0.00</u>
<b>TOTAL ASSETS</b>	<u>\$9,085.61</u>
Outstanding Check	<u>\$0.00</u>
<b>TOTAL Liabilities</b>	<u>\$0.00</u>
<b>TOTAL Equity</b>	<u>\$9,085.61</u>

# AGA Phoenix Chapter, Treasurer's Reports - August 2019

## Treasurer's Report

Book Balance 7/31/2019	\$9,085.61
Receipts	\$0.00
Disbursements	\$361.75
	<hr/>
Book Balance 8/31/2019	\$8,723.86
	<hr/>
Outstanding Checks	\$0.00
Outstanding Deposits	\$0.00
Adjusted Book Balance	\$8,723.86
	<hr/>
<u>Account Balance</u>	
Cash on Hand	\$50.00
Savings Balance	\$0.00
Your Savings Balance	\$5.00
Checking Balance	\$0.00
Checking Balance	\$8,668.86
	<hr/>
	\$8,723.86
Difference Adjusted Book vs Bank	(\$0.00)

## Balance Sheet

8/31/2019

Cash and Bank Accounts	
Cash on Hand	\$50.00
Savings Balance	\$5.00
Checking Balance	\$8,668.86
<b>TOTAL Cash and Bank Accounts</b>	\$8,723.86
	<hr/>
Inventory	\$0.00
Speaker Gifts	\$0.00
<b>TOTAL ASSETS</b>	\$8,723.86
	<hr/>
Outstanding Check	\$0.00
<b>TOTAL Liabilities</b>	\$0.00
	<hr/>
<b>TOTAL Equity</b>	\$8,723.86
	<hr/>





## 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/Tools-Resources/Intergov/Home.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: [contact@agaphoenix.org](mailto:contact@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](http://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.\*\***