

# AGA Phoenix Chapter (www.agaphoenix.org)

PY 2017-2018

June 2018



## Message From the President



June marks the end of our program year. It has been a pleasure to serve as your president over the course of these last two years. This year was particularly active. We provided a total of 42 CPEs through our education program, held a CGFM review course, prepared the third ever Citizen Centric Report for the Chapter, provided an information session on Government Financial Management at

the Grand Canyon University's accounting club monthly meeting, awarded two scholarship awards, recognized our CGFMs and announced Governor Ducey's proclamation naming March 2018 CGFM month, held our annual Professional Development Training and in June will provide the first ever joint educational seminar with the Southern Arizona AGA chapter.

Moreover, the year is not quite over. We still have two more events for this program year that I hope you will consider attending. We have a joint meeting with the Southern Arizona chapter in Casa Grande, titled Reporting to Our Citizens, for four CPEs. This will be held on June 8<sup>th</sup> at the Public Safety Facility in the City of Casa Grande. Our second event for the month is titled Leadership and it will be for two CPEs. The event will be held on June 13<sup>th</sup> at Skysong. To register for these events, visit our website: <http://agaphoenix.eventbrite.com>.

Thank you for your support of the Phoenix Chapter this year! Please consider participating on the Board, or providing us feedback on what topics you would like to see covered in the coming year. This feedback is extremely important as we begin our planning for the upcoming program year. You can contact us at: [contact@agaphoenix.org](mailto:contact@agaphoenix.org). Thank you.

Gergana Kovatcheva, CPA, CGFM  
President  
AGA Phoenix Chapter

### 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.

**6/8/18 Meeting (4 CPE)**  
**Topic: Reporting to Our Citizens**  
 Education Seminar (10:00 AM—2:00 PM)  
 Lunch served at 11:00 AM

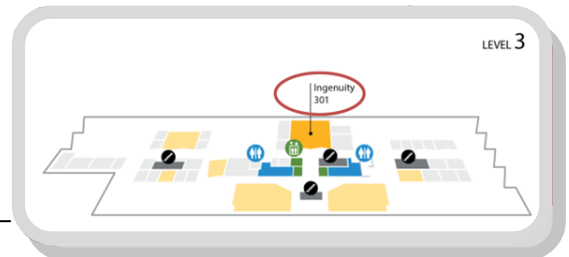


**Public Safety Facility**  
**373 E. Val Vista Blvd.**  
**Casa Grande, AZ 85122**

**6/13/18 Meeting (2 CPE)**  
**Topic: Leadership**  
 Lunch (10:30 AM)  
 Education Seminar (11:00 AM—12:50 PM)



**Sky Song 1475 N Scottsdale Rd., Bldg 1, Ingenuity Room**  
**301, Scottsdale, AZ 85257**



**Association of Government Accountants  
Phoenix Chapter  
Education and Meeting Plan  
2017-2018 Program Year**

Date	Event	Topic	CPE Credit	Registration Dead-line	Location
9/13/17	Chapter Meeting-Lunch 10:30am-11:00am, Seminar 11:00am-12:50pm	Advanced Excel presented by Gregory Cleveland	2	9/8/17	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
10/11/17	Chapter Meeting-Lunch 10:30am-11:00am, Audio Conference 11:00am-12:50pm	Internal Control	2	10/6/17	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
11/15/17	Chapter Meeting-Lunch 11:30am-12:00pm, Seminar 12:00pm-1:50pm	"Who's On Your Bench?" - Tips for Succession Planning presented by Pat Childress	2	11/10/17	AZ Department of Education Room 312 1535 W Jefferson St. Scottsdale, AZ 85007
12/6/17	Chapter Meeting-Lunch 11:30am-12:00pm, Seminar 12:00pm-1:50pm	Holiday Social—Cost Allocation presented by Donna Sandoval	2	12/1/17	ASU Skysong Bldg. 3, Synergy II #135 1475 N. Scottsdale Rd. Scottsdale, AZ 85257
1/10/18	Chapter Meeting-Lunch 11:30am-12:00pm, Audio Conference 12:00pm-1:50pm	Grants Management	2	1/5/18	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
1/19/18*	8:00am-8:30am Continental Breakfast 8:30am-12:00pm Class	Ethics—ASCPA	4	1/12/18	MCCCD Governing Bd Rm 2411 W. 14th Street, 2nd Floor Tempe, AZ 85281
2/7/18	Chapter Meeting-Lunch 11:30am-12:00pm, Seminar 12:00pm-1:50pm	Fraud Awareness—How much do you really know?	2	2/2/18	ASU Skysong Global Room 301 1475 N Scottsdale Rd. Scottsdale, AZ 85257
2/16/18*	Chapter Meeting-Lunch 11:30am-12:00pm, Seminar 12:00p-12:50pm 1:00pm-1:50pm 1:50pm-2:40pm 2:40pm-3:30pm Total	ASRS Deferred Comp Federal Tax Update State Tax Update	1 1 1 4	2/9/18	ASU Skysong Bldg. 3, Synergy II #135 1475 N. Scottsdale Rd. Scottsdale, AZ 85257
3/7/18	Chapter Meeting-Lunch 11:30am-12:00pm, Audio Conference 12:00pm-1:50pm	Infrastructure Financing	2	3/2/18	ASU Skysong Global Room 201 1475 N Scottsdale Rd. Scottsdale, AZ 85257

**Association of Government Accountants  
Phoenix Chapter  
Education and Meeting Plan  
2017-2018 Program Year**

Date	Event	Topic	CPE Credit	Registration Deadline	Location
3/28/18	Chapter Meeting- Lunch 10:30am- 11:00am, Audio Con- ference 11:00am- 12:50pm	Cybersecurity	2	3/23/18	ASU Skysong Global Room 301 1475 N. Scottsdale Rd. Scottsdale, AZ 85257
4/11/18	Chapter Meeting- Lunch 10:30am- 11:00am, Seminar 11:00am-12:50pm	Audit Risk and Other Considerations by Lisa Grace (ASU)	2	4/6/18	ASU Skysong Global Room 301 1475 N. Scottsdale Rd. Scottsdale, AZ 85257
4/27/18*	8:00am-4:30pm PDT	Professional Resiliency—AGA President John Lynskey	1	4/20/18	Rio Salado College 2323 W. 14th St Tempe, AZ 85281
		Government Revenue—GASB 33	1		
		Arizona Management System—Ryan Allison	1		
		IT Cyber Security—M Hiett and Ricardo Car- rillo	1.5		
		Treasurer's Updates— Treasurer Representa- tive	1		
		GASB Updates— Michael Stelpstra	1		
		Issues in Implement- ing Accounting Systems—Panel	1.5		
<b>Total</b>	<b>8</b>				
5/16/18	Chapter Meeting- Lunch 10:30am- 11:00am, Audio Con- ference 11:00am- 12:50pm	Fraud Data Analytics	2	5/11/18	ASU Skysong Global Room 301 1475 N. Scottsdale Rd. Scottsdale, AZ 85257
6/8/18*	Reporting to our Citi- zens	John Arnold (Regents), Brent Stockwell (Scottsdale) and Michelle Hucka- bay (AGA)	4	6/7/18	Public Safety Facility: Fire Department 377 E. Val Vista Blvd. Casa Grande, AZ 85122
6/13/18	Chapter Meeting- Lunch 10:30am- 11:00am, Seminar 11:00am-12:50pm	Presented by Heinfeld, Meech & Co., P.C.	2	6/8/18	ASU Skysong Global Room 301 1475 N. Scottsdale Rd. Scottsdale, AZ 85257
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**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:**

\$25 each monthly chapter meeting, or package deal—\$220 for all sessions\*

**Non-Members**

\$40 each monthly chapter meeting

\*excludes special events (Ethics, Tax Update and Professional Development Training—PDT)

To RSVP, please go to our online registration site: <http://agaphoenix.eventbrite.com> . Thank you for your interest!

## Goals for 2017-2018 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, 2017 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.
  - ✓ • Hold CGFM Review Course in October 2017
- 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 Administration curriculum.

PY 2017-2018 Budget through April 2018		
Budget Category	Budget \$	Spent @ 4/18
Education	\$21,250	\$16,970.71
Membership	\$1,000	\$410.00
Travel	\$3,500	\$0
Board Expenses	\$1,000	\$223.42
Scholarship	\$1,500	\$1,500.00
CGFM	\$16,350	\$15,390.08
Community Service	\$750	\$0
Website	\$150	\$0
Early Career	\$100	\$100.00
Audit	\$100	\$100.00
Misc.	\$100	\$0
<b>Total</b>	<b>\$45,800</b>	<b>\$34,694.21</b>

### PY 2017-2018 Committee Members:

- Membership – Mary Adelman
- Education – Keith Orr, Jerry Snyder, John Schutter, Anthony St. George
- Programs – Michelle Huckabay
- Accountability—Kim Prendergast
- CGFM – Gergana Kovatcheva
- Young Professionals / Early Career – Getzamany Aragon
- Scholarship – Kelly Alkhoury
- Community Service – John Schutter
- Website/Newsletter – Michelle Huckabay

# AGA Phoenix Chapter, Treasurer's Reports - April 2018

## Treasurer's Report

Book Balance 4/01/2018		\$3,028.57
Receipts		\$10,069.63
Disbursements		\$5,518.22
Book Balance 4/30/18		\$7,579.98
Outstanding Checks		\$3,346.51
Outstanding Deposits		\$0.00
Adjusted Book Balance		\$10,926.49
 <u>Account Balance</u>		
Cash on Hand		\$50.00
Savings Balance		\$5.00
Your Savings Balance		\$25.00
Checking Balance		\$231.52
Checking Balance		\$10,614.97
		\$10,926.49
Difference Adjusted Book vs Bank		(\$0.00)

## Balance Sheet

4/30/2018

Cash and Bank Accounts		
Cash on Hand		\$50.00
Savings Balance		\$5.00
Your Savings Balance		\$25.00
Checking Balance		\$231.52
Checking Balance		\$10,614.97
<b>TOTAL Cash and Bank Accounts</b>		<b>\$10,926.49</b>
Inventory		\$0.00
Speaker Gifts		\$0.00
<b>TOTAL ASSETS</b>		<b>\$0.00</b>
Outstanding Check		\$3,346.51
<b>TOTAL Liabilities</b>		<b>\$3,346.51</b>
<b>TOTAL Equity</b>		<b>\$7,579.98</b>

# Announcements - Job Postings

**Internal Auditor Senior—Maricopa County. Salary \$59,238.40—\$64,064.** The Internal Auditor Senior provides objective information on the County's system of internal controls to the Board of Supervisors so they can make informed decisions and protect the interests of County citizens.

**Minimum Requirements:** Bachelor's degree in Accounting, Finance, Business Administration, Management, or a closely related field, and three (3) years' professional auditing experience.

**Apply online at (Job #230IAS011918):** <https://www.governmentjobs.com/careers/maricopa>

**Senior IT Auditor—Maricopa County. Salary \$62,129.60—\$75,774.40.** The Senior IT Auditor provides objective information on the County's system of internal controls to the Board of Supervisors so they can make informed decisions and protect the interests of County citizens. In addition, this specialized position is responsible for performing specialized information technology audit work.

**Ideal Candidate:** Bachelor's degree in Accounting, Finance, Business Administration, Management, Computer Science, or a closely related field, and three (3) years' professional auditing experience, which includes at least two (2) years' IT audit experience.

**Apply online at (Job #230IASS011618)** <https://www.governmentjobs.com/careers/maricopa>

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

Please email AGA Phoenix Webmaster, [michelle@agaphoenix.org](mailto:michelle@agaphoenix.org)

# AGA Phoenix Chapter Executive Board Program Year 2017-2018

**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	Anthony St. George (appointed to complete Josh Neidigh's term)

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

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

**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)







## 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: [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.\*\***