

ASSOCIATION OF GOVERNMENT ACCOUNTANTS
“Advancing Government Accountability”
AUSTIN CHAPTER – History Report
June 2015 – May 2016

<p>The Executive Committee</p>	<p>The Austin Chapter began its <i>50th Anniversary</i> year under the leadership of President Bhakti Patel. Meetings of the Executive Committee continued to be held monthly at the Employees Retirement System with some committee members participating via conference call at various locations, including the Department of Family & Protective Services and Grant Thornton LLP. Members that volunteered their time and energy to serve on the Executive Committee and ensure the Chapter’s success included:</p> <p>President, Bhakti Patel; Interim President-Elect, Ben Lyons; Secretary, Vacant; Treasurer, Lorna Schwimmer; Research Chair, Debi Weyer; Education/Programs Chair, John Barnes; Education/Programs Committee Co-Chair, Paul Morris; Communications, Piotr Bartkow; CGFM Chair, Vacant; Community Service, Priscilla Suggs, Membership Committee Chair, Vacant; CPE Events Committee Chair, Patti Aguilera; Accountability Chair, Vacant; By Laws and Procedures Chair, Vacant; Early Careers Chair, Vacant; Chapter Historian, Sharita Jefferson; and Webmaster, Eddie Chan.</p> <p>Kaki Roberts served as Regional Vice President. Kaki’s term expires 6/30/2016.</p>
<p>Luncheons</p>	<p>Chapter luncheons were primarily held each month from 11:30 am to 1:00 pm at Pappadeaux Seafood Kitchen located at 6319 North Interstate Highway 35 in Austin, Texas. Chapter luncheons were also held once each at the following Austin, Texas locations: The Clay Pit located at 1601 Guadalupe Street; and Texas Land & Cattle Steak House located at 6007 North Interstate Highway 35.</p> <p>The Chapter was successful in recruiting speakers for nine luncheon presentations; however, one event had to be cancelled due to an emergency situation within the city. The eight remaining engagements provided members and guests an opportunity to earn a total of 8 CPE hours for the year. The speakers for those events include the following:</p> <p><i>September 2015:</i> Joey Longley, former director of the Sunset Advisory Commission; presented on the <i>Navigating the Sunset Process</i> and its relevance to audits. (1 hour CPE Credit)</p> <p><i>October 2015:</i> Cathy Terrell, the Deputy Executive Director of the Employee Retirement System of Texas discussed the debate over defined benefit plan. (1 hour CPE Credit)</p> <p><i>November 2015:</i> Eric Kuntz, the former State Coordinator- Recovery, from the Texas Division of Emergency Management; Mr. Kuntz oversees recovery efforts due to natural disasters and emergency situations, including floods, fires, hurricanes, etc. He has overseen drastic recovery efforts, coordinating with the Federal Emergency Management Administration (FEMA) related to Hurricane Ike, the Bastrop fires and most recently, the Texas Floods that impacted the majority of the State of Texas in May 2015; he presented on disaster recovery efforts in Texas. (1 hour CPE Credit)</p>

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December 2015: **Kathryn Tesar, MPA**, the Director of Communication from the Employee Retirement System of Texas, and has more than 20 years of experience in corporate communications. In her current role, she oversees the agency’s myriad communications to ERS members and stakeholders, and works closely with other ERS divisions and often external groups to ensure key audiences receive accurate, relevant and timely information about the benefits provided through ERS; she discussed the Employees Retirement System of Texas (ERS).(1 hour CPE Credit)

January 2016: **Catherine Melvin, CPA, CIA, Certified Law Enforcement Auditor (CLEA)**, Chief Auditor of Department of Public Safety Internal Audit; and **Susan Oballe, CIA, CGAP Audit Manager**, Department of Public Safety Internal Audit. Ms. Melvin and Ms. Oballe presented on how the impact and importance of adequate, effective, and efficient processes is critical to financial and business managers, and they shared their ideas on how a process-based approach will assist you in both improving overall internal controls and in working with external and internal auditors (1 hour CPE Credit)

February 2016: **Jerry Hill**, General Counsel of the Texas State Board of Public Accountancy (TSBPA) for 15 years; prior to that he spent 15 years as the General Counsel and a Division Director at the Railroad Commission (which has nothing to do with railroads), for a total of 30 plus years in Texas government. He presented on a topic we all face every day: risk-taking, ethics, and government practice. (1 hour CPE Credit)

March 2016: **Jason Hadavi, CPA, CFE**, Deputy City Auditor, and **Andrew Keegan, CIA, CGAP**, Supervising Senior Auditor for the City of Austin. The two work closely together to build/maintain an office culture where auditors and investigators are motivated to perform at exceptional levels. They discussed how the #1 challenge facing organizations is employee engagement and culture, according to a 2015 report from Deloitte; explained what organizational culture is and why it's important; and described the ways Austin's Office of the City Auditor have made their office a better place to work. (1 hour CPE Credit)

April 2016: **Chief Art Acevedo**, Chief of Police for the Austin Police Department (APD) was to be the presenter for this training; however, this event was cancelled on the day of just prior to the meeting due to an unfortunate police matter of unforeseen circumstances involving a SWAT stand-off and an officer involved shooting. Nevertheless, the Chapter's Executive Committee (CEC) members turned lemons into lemonade by hosting a wonderful question and answer session with attendees. As a result, the CEC was able to garner valuable feedback on a variety of topics including recruiting, training subject matter, other events and event locations.

May 2016: **Amy Barrett, CPA, CIA, CISA**, the Chief Audit Executive and **Cindy Haley, CPA** the Financial Reporting Manager both from the Teachers Retirement System of Texas; along with **Jennifer Hymel, MBA** the Director of Compliances

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Assurance from the Texas County and District Retirement System presented on the impact of GASB 67/68 on two public pension plans. (1 hour CPE Credit)

Monthly attendance at the meetings averaged **23**, which is about the same as the 2014-15 attendance numbers. An attendance breakdown by luncheon follows:

- September 2015: **18**
- October 2015: **24**
- November 2015: **22**
- December 2015: **12**
- January 2016: **29**
- February 2016: **32**
- March 2016: **29**
- April 2016: **14**
- May 2016: **32**

The Chapter sponsored a \$20 Gift Card Drawing to merchants such as Starbucks, Regal Cinema, Amazon, iTunes, etc. for luncheon attendees. Each attendee, excluding AGA Executive Committee Members, put their names in the bowl for the drawing held at the end of each event.

Luncheon Gift Card Winners were:

- October-- **Mariana Miranda**, \$20 Starbucks Gift Card
- November/December (held at the December luncheon)-- **Scott Erwin and Patricia Robinson**, \$20 Amazon Gift Cards
- January-- **Stanton Martin**, \$20 AMC Theatres Gift Card
- February-- **Jim Hicks**, \$20 Panera Bread Gift Card
- March-- **Catherine Melvin**, \$20 Darden Restaurants Gift Card (featuring Olive Garden, Longhorn Steakhouse, Yard House, Seasons 52)
- April-- **Patty Hamm**, \$20 iTunes Gift Card
- May-- **Patricia Robinson**, \$20 Regal Cinemas Gift Card

Lorna Schwimmer, along with the help of various members of the Executive Committee on occasion, carried out the monthly luncheon tasks of checking in members and making sure the lunch was served in a timely fashion, introducing the speakers and presenting them with a small token of appreciation after their presentations. To ensure all luncheon attendees received proper CPE credit, **Patti Aguilera** provided a CPE certificate to each attendee. In addition, **Eddie Chan** sent out email announcements and reminders to AGA members and event attendees regarding up coming luncheon engagements and networking events. **Eddie** also compiled program evaluation results from Survey Monkey and shared them with the Executive Committee to use as a tool to make future decisions about topics, speakers and the location of the luncheons.

Membership

As of September 2015, the Austin Chapter had 112 members. By May 2016, Chapter membership increased to 129 members, an approximate **15%** increase from the

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beginning of the year. During the year, 17 new members (no previous affiliation) joined the Chapter.

We recognize longtime members who have reached their 5, 10, 15, 20, 30 year and beyond milestone anniversary during the Chapter year because they continue to show their commitment and support for the AGA by renewing their membership each year. Some even volunteer to serve on committees or are on the Executive Committee. Members reaching a milestone in 2015-2016 include:

5 YEARS:

Michele R. Castro, CGFM
Aaron J. Dvorak, CGFM
W. Scott Erwin, CGFM
Jose M. Saucedo

10 YEARS:

James C. Malone, CGFM

15 YEARS:

Luz Brunilda Bundick, CGFM
Mary V. Heath, CGFM
Robert A. Lagana, CGFM
Kip D. Wilson, CGFM

20 YEARS:

Michael S. Abkowitz, CGFM
Sheila K. Ammons, CGFM
Dwight C. Casey, CGFM-Retired
Leita Hart-Fanta, CGFM, CPA, CGAP
David L. Spencer, CGFM-Retired

25 Years:

Lesli B. Cathey, CGFM
Stephen H. Niemeier
Tommy Streal, CGFM

30 Years:

Alice M. Garrett

One member’s most notable milestone that is definitely worth mentioning is **47 years** of AGA membership for **James A. Gerick**, CGFM- Retired

The Chapter held a Chapter Networking Event on April 20, 2016 at **BlackFinn AmeriPub**, at The Domain, 11410 Century Oaks Terrace in Austin, Texas from 5:30 to

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	<p>8:30 pm. The networking event was sponsored by Grant Thornton LLP. The event provided AGA Austin Chapter members and employees of Grant Thornton LLP an opportunity to invite colleagues and other professionals to find out more about the AGA Austin Chapter and Grant Thornton LLP. Attendees were afforded a chance to mingle with current and future AGA members and Grant Thornton LLP employees while enjoying a complimentary beverage of their choice along with appetizers. Also in attendance was the Chapter's Regional Coordinator, Kathryn (Kaki) Roberts, who traveled from Little Rock, Arkansas to meet and greet those at the event.</p>
<p>Minutes and Treasury Reports</p>	<p>The Chapter Secretary position captured vital points made in the luncheon presentations, as well as the monthly Executive Committee meetings in the form of meeting minutes. The meeting minutes were sent via email to the Executive Committee for review and approval prior to publication in the newsletter and posting on the Chapter’s website. To help in achieving this mission, voice recorders were utilized to ensure all Executive Committee meeting notes were gathered while offering a more efficient preparation of meeting minutes.</p> <p>Executive Committee meeting minutes can be found on the Chapter website at: http://www.agaustin.org/ec-meeting-minutes.html</p> <p>Lorna Schwimmer proficiently and thoroughly carried out her duties as Treasurer. To help complete her tasks, Lorna continued to utilize a Square Credit Card reader to process payments onsite, which were not paid prior to the luncheon. The Chapter began the year on June 1, 2015 with a cash balance of \$6,650.06 and ended the year with a balance of \$5,708.10 on May 31, 2016.</p> <p>Treasurer Reports can be found on the Chapter website at: http://www.agaustin.org/treasurer-report.html</p>
<p>Communications – Newsletter</p>	<p>Our newsletter was prepared by our Communications Chair, Piotr Bartkow. As the Newsletter Editor, Piotr’s talents were utilized in creating a longer, more exciting, vivid and informative Chapter newsletter through the use of a variety of colorful graphics and images, and Chapter event photos placed throughout. In addition, Piotr added his own unique flare to each monthly newsletter by providing a "Fun Fact" at the end of each article. As a result, the newsletter continued to receive compliments from our readers.</p> <p>Our Newsletter included monthly Research Articles summarized by our Research Chair, Debi Weyer. Topics of the articles for respective months included:</p> <p><i>September:</i> “Payroll Fraud– An Often Overlooked Risk and How to Address It” by Christopher S. Ernest, CPA (<i>reprinted with permission</i>)-- See the article from source at: http://www.blumshapiro.com/kbarticle/payroll-fraud-an-often-overlooked-risk-and-how-to-address-it</p>

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October: "Grantee Implementation of Federal Uniform Administrative Requirements, Cost Principles and Audit Requirements" by Reed W. Risteen, CPA (*reprinted with permission*)-- See the article from source at:
<http://www.blumshapiro.com/kbarticle/grantee-implementation-of-federal-uniform-administrative-requirements-cost-principles-and-audit-requirements>

November: "New Tax Abatement Disclosure Requirements for State & Local Governments" by Connie Spinelli (*reprinted with permission*) --See the article from source at:
<http://www.bkd.com/docs/pdf/New-Tax-Abatement-Disclosure-Requirements-for-State-and-Local-Governments.pdf>

December: "GASB’s Proposed Implementation Guidance, Pension Amendments & Cost-Benefit Analysis of OPEB Standards" (*reprinted with permission of BKD CPAs & Advisors, is a trusted, national CPA & advisory firm*) --See the article from source at:
<http://www.bkd.com/articles/2015/gasbs-proposed-implementation-guidance-pension-amendments-and-cost-benefit-analysis-of-opeb-standards.htm>

January: No research article was completed for this newsletter

February: "Bail-Ins Begin: a Crisis Worse than ISIS?" by Ellen Brown (*reprinted with permission*) -- See the article from source at:
<http://www.counterpunch.org/2015/12/30/bail-ins-begin-a-crisis-worse-than-isis/>

March: "How Long Should I Keep My Tax Records?" by Jessie Kanter, CPA (*reprinted with permission*) -- See the article from source at:
<http://www.blumshapiro.com/kbarticle/how-long-should-i-keep-my-tax-records>

April: "What Governments Look for in a CFO" by W. Patrick Pate, Laura Allen, and Michael J. Gurgone (*reprinted with permission*) --See the article from source at:
<http://www.gfoa.org/sites/default/files/GFR021638.pdf>

May: "GASB Issues Standard on Not-for-Profit Unit Blending" Issued by Journal of Accountancy, written by Ken Tysiac (*reprinted with permission*) --See the article from source at: <http://www.journalofaccountancy.com/news/2016/feb/gasb-guidance-on-blending-component-units-201613874.html>

Newsletters can be found on the Chapter website at:
<http://www.agaustin.org/newsletters.html>

Website

Webmaster **Eddie Chan** continued to upgrade the Chapter's website and he ensured the uploading of all the Chapter's publications and documents for the year, including newsletters, meeting minutes, treasurer's reports, upcoming CPE events/luncheons and

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	<p>registration, community service opportunities, current job opportunities and Chapter photos. Eddie also implemented the online survey and CPE certificate distribution to the website, and the auto-generation of a community service report to the Community Service Chair for all community service hours input into the website. Both of these upgrades allow for even greater efficiency for the Chapter. Eddie renewed the Chapter's web hosting service and maintained the United States Post Office Box rental for the Chapter, which is reflected on the Chapter's website and official correspondence.</p> <p>The Chapter website can be referenced at: http://www.agaustin.org/index.html</p>
Community Service and Awards	<p>The Austin Chapter would like to thank everyone who volunteered to participate in a community service event this year! Many of our members volunteer throughout the year on their own with various non-profits in the Austin area. A HUGE "Thank You" to all of those who gave of their time, money and talents to help others and in particular, to help those who are less fortunate.</p> <p>JUNE 2015–MAY 2016</p> <ul style="list-style-type: none">* On September 13th, Bhakti Patel and her 4 year old son attended the Austin Annual CASA Superhero Run at The Domain and ran the 1K. Bhakti reports that the turnout was great and the smiles on all of the little superheroes' faces at the event were priceless. CASA raised over \$180,000 for abused and neglected children from the event.* On September 30th, AGA members Mari Queller and Priscilla Suggs partnered with Austin Young Chamber of Commerce to cook dinner for families at the Austin Ronald McDonald House for Dell Children's Hospital. Volunteers at the Ronald McDonald House make a difference to the families and their children who rely on this "home-away-from-home." From cooking, cleaning, comforting or by simply being there and helping out in any way, volunteers help care for central Texas families in need.

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Priscilla & Mari are fourth and fifth from the left



Mari cooks...

A Special Note of Thanks:

The Chapter would like to acknowledge and offer a *Special Thank You* to our Chapter Community Service Chair **Priscilla Suggs**, who dedicated her time and efforts to finding out about available community service engagements, keeping our Chapter well-informed of all of the events in our area, and participating in the events as well. Additionally, the Chapter *thanks* each member along with their family and friends who participated in a community service event on behalf of the Austin AGA Chapter! *Thank You* for your commitment, devotion and support to our communities through service and giving of your time, money and gifts!!!

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**Awards,
Elections and
Recognition**

AGA Austin completed the year with the current President, **Bhakti Patel** and she was elected to return as President for the upcoming year. New officer elections and the swearing-in of our returning Executive Committee members were held at our May luncheon meeting and the following position was filled: Secretary, **Stanton Martin**.

During the year, the Chapter was faced with several vacancies to the Executive Committee. The Chapter Secretary position was supplemented by the Chapter Historian, **Sharita Jefferson**, until a replacement was found in May. The President is still looking to fill the remaining vacant positions, including:

- Accountability Chair
- Awards Chair
- CGFM Chair
- Early Careers Chair
- Membership Chair

The Austin Chapter sent Chapter members **Ben Lyons, President-elect** and **Piotr Bartkow, Communication Committee Chair** to attend the Section Leadership Meeting (SLM) held May 2016 in Salt Lake City, Utah. Additionally, **Chapter President Bhakti Patel** and **Chapter Treasurer Lorna Schwimmer** attended the annual Professional Development Conference (PDC) held July 2016 in Anaheim, California.

Finally, the **Governor for the State of Texas, Greg Abbott**, recognized the special place and need for Certified Government Financial Managers, and declared March 2016 as CGFM Month in the State of Texas.