



CAPITOL TOPICS

SEPTEMBER 2012

PRESIDENT'S MESSAGE

Executive Committee

Welcome to the start of the 2012-1013 year. As incoming president for the Austin Chapter, I am excited about the direction of our group and the benefits that we offer our members and guests. These are interesting times for government finance, and the approaching Legislative session promises many adventures to come. Our chapter focus for the year includes continuing the outstanding course offerings you've come to enjoy in past years as well as reaching out to young professionals entering the government accounting workforce. This year, our continued outreach efforts will include university students in accounting, management and finance; if you know any students interested in a career in government accounting, please make them aware of our monthly luncheons and networking opportunities.

Dr. Urton Anderson will be our luncheon presenter on September 20th at Scholz Garten. Please mark your calendars accordingly. I'm also excited by our continued interaction with the AGA National Office. Our November 2012 luncheon will include a visit from AGA National President Evelyn A. Brown. Ms. Brown will discuss the journey of our profession over the years and our impact on government at all levels.

As we continue our support this year for government accounting professionals, the Austin Chapter Executive Committee welcomes your input on our ability to meet your needs. This is a dedicated group that strives to serve the profession. Truly, I am lucky to be involved with you all and our supportive Executive Committee Members.

I look forward to meeting and working with each of you and thank you in advance for your continued support. Respectfully submitted,

Paul Morris
President, AGA Austin Chapter

UPCOMING EVENT

Dr. Urton Anderson, University of Texas at Austin presents "Dodd-Frank and the Jobs Act: Developments in SEC and Financial Market Regulation." Dr. Anderson is the Clark W. Thompson, Jr., Professor in Accounting Education at the McCombs School of Business. His presentation will help attendees understand the regulatory environment with various changes coming under the Dodd-Frank and JOBS Act of 2012, and aid in developing an awareness of some of the new regulatory strategies being implemented in these two acts.

Date/Time: Thursday, September 20, 2012 - 11:30am-1:00pm
Location: Scholz Garten - 1607 San Jacinto Blvd Austin TX 78701
CPE Credit: 1Hour
Registration: Send email to Adana Barry - [\(If you prefer a vegetarian dish, please let Adana know when registering\)](mailto:Adana.Barry@austintexas.gov)

President
Paul Morris
(512) 438-5685
paul.morris@dfps.state.tx.us

President-Elect
Priscilla Suggs
priscilla.suggs@dfps.state.tx.us

Immediate Past President
Mara Ash
Mara.Ash@bafsolutions.com

Secretary
Autumn Bellfield
Autumn.bellfield@va.gov

Treasurer
Mari Queller
mari.queller@ers.state.tx.us

Research Chair
LaTosha Goard
Latosha.goard@tceq.texas.gov

Education/Programs Committee
Debi Weyer
debiweyer@gmail.com

Communications Committee
Jeanne Yanga
jeanneyanga@gmail.com

CGFM Committee
Bernard Ndoping-Angandje
Bernard.Ndoping-Angandje@tceq.texas.gov

Community Service Committee
Lynda Baker
bright_sunny_disp@yahoo.com

Membership Committee
Kadie Weyer, Chair
kadie.weyer@tgc.state.tx.us

Membership Committee
Aaron Dvorak, Co-chair
Aaron.Dvorak@ers.state.tx.us

CPE Events Committee
Adana Barry
Adana.Barry@austintexas.gov

Chapter Historian
Vacant

Webmaster
Eddie Chan
eddie.chan@ers.state.tx.us

Awards Committee
Patty Aguilera
Patty.aguilera@ers.state.tx.us

Regional VP
Bob.Broughton@arkansas.gov

HIGHLIGHTS OF MEETING MINUTES

Minutes of the June 23rd 2012 Strategic Planning Meeting

Call to order

Paul Morris called to order the strategic planning meeting of the Executive Team on Saturday, June 23, 2012, in the Central Market Café.

The following members were in attendance: Paul Morris, Kadie Weyer, Kristen Gonzales, Autumn Bellfield, Bernard Ndoping-Angandje, Debi Weyer, Adana Barry, and Jeanne Yanga.

Approval of Minutes

There were no Executive Committee or Luncheon minutes to approve.

Summary of discussions

Using Google Docs for Austin Chapter Archives

- The purpose of using Google Docs is to archive documents over many years, and facilitate a smooth transition between executive committees.
- Each committee will have a separate folder.
- Is there enough space on Google Docs? How are user rights handled?
- Priscilla has offered to take on this project. She will collect and upload all documents.
- Ideally, all documents should be uploaded into Google Docs by September 1, 2012.

Discuss and finalize our Executive Team meeting schedule and location

- Executive meetings are held from 12:00 – 1:00 PM on the third Thursday of the month.
- In the past, executive meetings were held via audio conference. This year, the executive team will meet at a physical location, and those unable to attend can call in with a cell phone.
- The first executive meeting will be held at Café Express. Café Express has good cell phone reception.[note: Executive Team meetings were moved to the ERS conference room due to space limitations]

Chapter monthly luncheon locations and visiting speakers

- Monthly luncheons are held on the second Thursday of the month.
- The survey results noted that a central location for the luncheon is preferred by 53.8%, and that 69.2% of survey takers are interested in a Happy Hour/CPE Dinner.
- Locations are being scouted for the luncheons.
- Paul is taking five location suggestions that meet the following criteria: (1) accommodates 45-60 guests, (2) located in central Austin, (3) and can be reserved from 11:00 AM to 1:00 PM every month.
- If you have a location to recommend, send Paul an e-mail with the following information: (1) cost of room, (2) cost of food per person, (3) type of food served (e.g., Italian, Mexican, etc.), (4) type of serving arrangement (e.g., buffet or sit down).
- Paul will create a survey with these location suggestions on Survey Monkey and send it to the Executive Team for a vote.
- A combination of physical speakers and audio conferences will be scheduled for the luncheons.
- It was suggested to host audio conferences at The Department of Veterans Affairs Administrative & Loan Accounting Center in addition to the monthly luncheons to reach federal members that are not able to attend the luncheons. One idea was to offer one year of AGA membership for free when you sign up for 8 hours of CPE.
- Send Debi any ideas and suggestions for speakers.

Review Annual Strategic Planning for Austin Chapter

- Paul went over the Strategic Plan and the budget for each position and committee.
- The Early Careers Membership committee will focus on Texas State University-San Marcos this year. This includes securing a booth at the career fair, providing resume critiques, providing volunteer opportunities, offering scholarships, and wearing AGA shirts.
- Each position/committee is responsible for sending Paul an update on their budget.

Purchasing equipment for AGA presentations

- The AGA Austin Chapter purchased a projector screen years ago.
- Where is the projector screen?
- Comparison shop for projectors.
- More to discuss on this topic.

Potential for hosting a Professional Development Conference in 2013

- The Professional Development Conference should be hosted in 2014, which is the 50th anniversary of the Austin Chapter.

Other discussions

- It was suggested that a general e-mail account be established for membership. Kadie has a general Yahoo! e-mail account, which may be used for the Austin Chapter. Kadie will provide Debi and Paul with the account details.
- Who has the two keys to the AGA mailbox? There should be two keys available. Who has signature authority and how can this authority be updated?
- What position/committee is responsible for certain duties? This question was asked many times throughout the meeting. Paul will put together the responsibilities and run them by Debi before sending out a finalized list to the Executive Team.

For details of our meeting minutes, please visit our website at:

<http://www.agaaustin.org/ECMinutes.html>

The purpose of the Association is to be a professional organization dedicated to the advancement of government financial management. The Association shall serve its members by providing or sponsoring appropriate educational programs, encouraging professional development, influencing governmental financial management policies and practices and serving as an advocate for the profession. The Association shall serve government officials and the public by sponsoring efforts to ensure full and fair accountability for all public monies and by providing a variety of pro bono services throughout the United States and its territories that support that end.

TREASURER'S REPORT

Beginning cash balance per book	\$8,700.14
Plus: Revenues	
Luncheon and audio conferences	255.00
Dividend	0.72
Total Revenues	255.72
Funds Available	8,955.86
Less: Expenditures	
	0.00
Ending cash balance per book	8,955.86
Adjustments:	
Outstanding checks	76.00
Ending cash balance per bank statement	\$8,879.86

For more details please visit our website at:

<http://www.agaaustin.org/TReports.html>

MISSION OF THE AGA

AGA serves government accountability professionals by providing quality education, fostering professional development and certification, and supporting standards and research to advance government accountability.

BUDGET FOR PROGRAM YEAR 2013

Budgeted Revenue

Luncheons and CPE events	\$7,500
Dues from National	550
<i>Total Budgeted Revenue</i>	<u>\$8,050</u>

Planned Expenditures

Chapter Planning (President)	\$ -
President-Elect Activities	350
Secretary	-
Treasurer	60
Program-Education	1,120
CPE Events	4,090
CGFM	250
Research	-
Web Master	100
Membership	945
Early Careers	125
Community Service	550
Historian Document	-
Citizen-Centric Report	<u>100</u>
<i>Total Planned Expenditures</i>	<u>\$7,690</u>

Net to Reserves

\$360

MEMBERSHIP NEWS

MEMBERS ON THE MOVE

Phillip Ashley, CPA, CGFM, was promoted to the position of Director of Fiscal Management for the Texas Comptroller of Public Accounts

Nellie Zhao, former CGFM Chair for the Austin Chapter, accepted the position of staff accountant in the Finance Office of the Harvard Medical School.

Jeanne Yanga accepted an auditor position at the Texas Commission on Environmental Quality.

The following new members joined our chapter during 2012:

Clarisse Roquemore	Ryan Woodward
Cameron Brown	LaTosha Goard
Melanie Holmes	Andrew Dimas
David Floyd	Vanessa Hunt
Michael Moore	Karen Parker
Jeanne Yanga	

ANNIVERSARIES



Join us in congratulating the following members who celebrated milestones during the past year:

1 YEAR

Adana Barry	Annick Barton
Autumn Bellfield	Mary Braden
Michelle Castro	Daniel Funderburk
Bernard Ndoping Angandje	Richard Rivas
Tandra Potts-Gainer	Patricia Robinson
Jose Saucedo	Priscilla Suggs
Kadie Weyer	

If you have an anniversary approaching, please let us know!

HISTORIAN REPORT

THE EXECUTIVE COMMITTEE

The Austin Chapter began its new year under the leadership of President Mara Ash. Meetings of the

Executive Committee continued to be held monthly at the Employees Retirement System with some committee members participating via conference call. Members that volunteered their time and energy to serve on the Executive Committee and ensure the Chapter's success included:

President-Elect, Paul Morris; Immediate Past President, Zulay Sanchez; Secretary, Lynne Pfeffer; Treasurer, Mari Queller; Research Chair, Leita Hart; Education/Programs, Debi Weyer; Communications, Eddie Chan; CGFM Chair, Bernard Ndoping-Angandje; Community Service, Lynda Baker; Membership, Kadie Weyer; Luncheon Chair, Patti Aguilera; Historian, Phillip Ashley; and Webmaster, Lynne Pfeffer.

John Amidon continued serving in his role as Regional Vice President. John's term expired 6/30/2012.

LUNCHEONS



Chapter luncheons were regularly held each month at Corazon at Castle Hill restaurant, which is located on 5th street near downtown Austin. The Chapter was successful in recruiting the following speakers for six luncheons, giving members and guests the opportunity to receive a total of 6 CPE hours.

September 2011: Joe Collins, Certified Fraud Examiner and former financial advisor and licensed broker with a Fortune 500 company, presented on the topic "Collateralized Debt Obligations and the 2008 Stock Market Crash."

October 2011: Irene Lee, representing the Texas Comptroller of Public Accounts, provided attendees with an update on recent GASB activity and highlighted several new GASB Statements.

December 2011: Dr. Carolyn Conn, an Associate Professor of Accounting at St. Edward's University,

presented on how to plan and conduct interviews during the course of audit and fraud investigations.

February 2012: Leita Hart-Fanta, author of The Yellow Book Interpreted and owner of Yellowbook-CPE.com, provided attendees with an update on the 2011 Yellow Book.

March 2012: Osvaldo "Ozzie" Alaniz, Supervisory Special Agent with the FBI, presented on the topic of "White Collar Crime" and discussed his experiences conducting those investigations.

April 2012: Douglas Wilson, Inspector General with the Texas Health and Human Services Commission, presented on the topic of "The Changing Face of Health Care Fraud, Waste, and Abuse in a Managed Care Environment.

Monthly attendance at the meetings averaged **37**, which is a 6% increase over 2010-11 attendance numbers. An attendance breakdown by luncheon follows:

September 2011: **33**
October 2011: **30**
December 2011: **33**
February 2012: **43**
March 2012: **37**
April 2012: **48**

Various members of the Executive Committee carried out the monthly luncheon tasks of checking in members, distributing nametags, and making sure the lunch was served in a timely fashion. **Debi Weyer** introduced the speakers and after their presentations presented them with a small token of appreciation. To ensure all luncheon attendees received proper CPE credit, **Patti Aguilera** provided a CPE certificate to each attendee. In addition, Patti collected program evaluations, compiled the results, 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.

MEMBER INCENTIVES AND DRAWINGS

Luncheon attendee Eric Cruz from the Employees Retirement System won a \$250 scholarship by raffle at the March luncheon. The purpose of the scholarship is to offset the cost of taking the CGFM exam. Eric intends to take Part I of the exam in the fall.

EDUCATION, CGFM & SCHOLARSHIPS

In addition to the 6 CPE hours offered via the monthly luncheons, the Chapter was able to offer 12 more CPE hours by hosting six audio conferences over the course of three days. The audio conference topics included: Reviewing the CFO Act – Lessons Learned and Observation for Advancing Financial Management Practices; SSAF 16: Reporting on Controls; “Needles in a Haystack” – Data Mining & Predictive Analytics to Prioritize Leads and Highlight Risk for Investigators & Auditors; Achieving Transparency – The Next Step to Integrating Your Data; Major Challenges to the Public Sector Auditing Profession; and, Find Strength in Numbers: Sampling Techniques to Improve Financial Audit, Control, and Program Performance. This year, the Chapter experimented with holding the audio conferences in place of the luncheons so as to maximize the amount of CPE that could be earned at one time. In total, there were 34 attendees for the audio conferences. Collectively, the luncheons and audio conferences provided attendees with an opportunity to earn up to 18 CPE hours.

Texas Governor Rick Perry declared March 2012 to be Certified Government Financial Manager Month, in recognition of the importance of certified government financial managers in ensuring efficiency and effectiveness in government operations.

Additionally, Bernard Ndoping-Angandje, CGFM Chair, spearheaded an effort to write a letter to Governor Perry to ask the Governor to support existing CGFMs and encourage others to obtain this certification by formally recognizing the CGFM as a preferred qualification and offering a pay incentive for government financial managers in the State of Texas who earn and maintain the certification.

MEMBERSHIP

As of May 2011, the Austin Chapter had 102 members. As of May 2012, Chapter membership increased to 109 members, an approximate 7% increase from the previous year. During the year, 17 new members joined the Chapter:

David Floyd, Austin Community College
Michael Moore, Department of Veteran Affairs
Nicholas Cotton, Texas Workforce Commission
Vanessa Hunt, Texas Employees Retirement System

Karen Parker, Texas Employees Retirement System

Alberto Canales

Jeanne Yanga

Andrew Dimas, Texas Department of Information Resources

Patricia Robinson

Priscilla Suggs, Texas Department of Family Protective Services

Autumn Bellfield, Department of Veterans Affairs

Daniel Funderburk, Robert Half Management

Tandra Potts-Gainer, Department of Veteran Affairs

Richard Rivas, Department of Veteran Affairs

Mary Braden, Texas Health & Human Services Commission

Annick Barton, Texas Health & Human Services Commission

Kadie Weyer, Texas Workforce Commission

The following members reached their 5, 10, 15, and 20 year milestone anniversary during the Chapter year. We recognize these longtime members because they continue to show their commitment and support for the AGA by renewing their membership each year and some volunteer to serve on committees or the Executive Committee. Reaching a milestone in 2011-2012:

5 YEARS:

Crystal Russell

Thomas E. Voyce

10 YEAR

Eddie Chan

Deborah Mitchell

Lynne Pfeffer

15 YEARS:

David Gibson

Mitt Salvaggio

Vicki F. Skinner

20 YEARS:

David Griffith

Patty Lynn Hamm

Greg Herbert

The Chapter also held our Annual Chapter Networking Event, organized by our Membership chair, **Kadie Weyer**. The mixer, held at Opal Divine's at Penn Station, was a great opportunity for our members to

promote AGA and mingle with other people who were interested in joining.

MINUTES AND TREASURY REPORTS

Secretary Lynne Pfeffer captured key points made in the luncheon presentations, as well as the monthly Executive Committee meetings in the form of meeting minutes. Lynne sent the meeting minutes via email to the Executive Committee for review and approval prior to publication in the newsletter and posting on the Chapter's website.

Luncheon meeting minutes can be found on the Chapter web site at:

<http://www.agaaustin.org/LunchMinutes.html>

Executive Committee meeting minutes can be found on the Chapter web site at:

<http://www.agaaustin.org/ECMinutes.html>

Mari Queller expertly carried out her duties as Treasurer. The Chapter began the year with a cash balance of \$6,872.99 and ended the year with a balance of \$8,700.14. Treasurer Reports can be found on the Chapter web site at:

<http://www.agaaustin.org/TReports.html>

COMMUNICATIONS – NEWSLETTER

Eddie Chan, newsletter editor, gave the newsletter extra color, included pictures, and applied a variety of holiday graphics making it enjoyable to read. The newsletter was submitted to the National Office for entry in the annual newsletter contest.

WEBSITE

Webmaster Lynne Pfeffer continued to keep the web site updated with newsletters, training events, job opportunities and other documents for our members and visitors to read.

The Chapter website can be referenced at:

<http://www.agaaustin.org/index.html>

COMMUNITY SERVICE & AWARDS



The Austin Chapter is excited to report that we exceeded the number of volunteer hours that are required for Community Service for the 2011-2012 year. We want to thank everyone who helped make this year a success!

JUNE 2011–MAY 2012

This year, the Austin Chapter again participated in the Community Tax Centers program which provides free tax assistance for low income families and individuals in the Austin area. This program is targeted at helping to lift people out of poverty and increase spending in the Austin economic market. Austin Chapter member **Bernard Ndoping-Angandje** was awarded the Bronze Level United States President's Volunteer service award for contributing over 180 hours to our local tax center.

Lynda Baker helped to organize a Baby Food Drive at the October luncheon. The Austin AGA Chapter competed against the Dallas and San Antonio Chapters to see which Chapter could donate the most baby food products to their local food bank. The Austin Chapter's donations went to the Capital Area Food Bank. A combined total of over 450 members in our chapters made this event possible and a combined total of 4,853 pounds of baby food were donated.

Also in October, Chapter members **Lynda Baker, Michele Bauman, Lesli Cathey and Debi Weyer** volunteered to help with the Play Bingo Ladies Luncheon event organized by the Centers for Child Protection Agency. The Center's mission is to reduce the trauma for children during the investigation and prosecution of child abuse cases.

In November, the Austin Chapter hosted a Thanksgiving Dinner food drive that benefited a low-income family in the Austin area. The Chapter

collected non-perishable food items and HEB gift cards for a family and was able to provide that family a great Thanksgiving.

In December, the Austin Chapter adopted a family of 8 from the Centers for Child Protection and was able to ensure that the family had a great Christmas! Each child received clothes, shoes, toys, gift certificates, and their special requests. A total of \$235 in gift certificates was provided to the family to purchase food and other needed items.

Also in December, Chapter members **Lynda Baker**, **Michele Bauman**, **Lesli Cathey** and **Debi Weyer** participated in the 5th annual *Dancing with the Stars Austin* which is sponsored by the Centers for Child Protection. The event pairs Austin celebrities with professional dancers for a ballroom dance performance to raise money for abused children in Austin.

In January, the Chapter again participated in a job shadowing program with Texas State University. The program provided volunteers with opportunities to interact with students in a variety of ways by having the student spend a day with them on the job.

Many of our members volunteer throughout the year on their own with various non-profits including Habitat for Humanity, Meals on Wheels, etc. A big thank you to all of those who give of their time and talents to help those who are less fortunate.

Chapter and has held positions on the Executive Committee in the past.

AWARDS OF SPECIAL NOTE

- **Bernard Ndoping-Angandje** received the [President's volunteer service award](#) for community service involvement in Austin, with the Foundation Community Tax Center. Bernard helped over 223 clients and saved about \$390,475.00 in taxes for these individuals and their households. Congratulations and thank you for your service.



AWARDS & ELECTIONS

AGA Austin completed the year with the election of new officers: President-Elect, **Priscilla Suggs**; Treasurer, **Mari Queller**, and Secretary, **Autumn Bellfield**. The new officers were elected at our April luncheon meeting. Incoming President, **Paul Morris**, relieves outgoing President **Mara Ash**.

The Austin Chapter was awarded the National Community Service Award for Group C and the Gold Award at the AGA PDC Conference in July 2012. **Lynda Baker** accepted the award on behalf of the Chapter.

Michele Bauman received the 2011 Staff Council Tina G. Schultz Staff Excellence Award from Texas State University. Michele actively participates in our

We look forward to working with you all in
2012 - 2012!

Austin AGA Executive Committee