

# OBSERVATIONS

JANUARY 2015

## CHAPTER NEWS!

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### MEMBER NEWS!

Please update us with current member news and events within your respective offices. We would love to feature our members and share their news with the membership!

Promotions, retirements, births, job openings—if your office has some news to share, we would gladly insert the news into our newsletter!

### MEMBER ANNOUCEMENTS! CONGRATULATIONS!!!

**Andrew Masiewicz** got married on 12/13/14 to Lindsay Parrott from Chicago, IL. Andy is our Assistant for Early Careers and he is a local account manager working for Becker Professional Education. They got married in downtown Chicago at Union Station

**Deborah Kinsey** retired at the end of December 2014 after 37 years and 11 months of service to the Social Security Administration where she served in various roles. Deborah is currently president of the Chicago Chapter of AGA.

### SPECIAL POINTS OF INTEREST:

- February Continuing Education Seminar
- 2015 Professional Development Training
- CGFM® Renewal Information





## President's Message



New Year's 2015 Greetings,

It is hard to believe that six months have passed since my term as AGA's Chicago Chapter president for 2014-2015 began. We have issued a Chapter citizen centric report, sponsored several training events offering a total of 8 CPEs, held a community service event to help the homeless, held a leadership training meeting with a past national president in attendance to provide leadership guidance for board members, issued 6 newsletters, maintained an informative website, completed an assessment of the Chapter's 2013-2014 financial statements, reported Chapter recognition points to the national AGA office to keep them abreast of our progress, and many other activities. I am looking forward to six more months of leading our charge to advance government accountability through AGA's Chicago Chapter.

This year two of our Chapter's areas of focus are service and leadership development. Our newest board member, Deidra Smith, has volunteered to accept the role of newsletter editor, which is a high call to service. As an early career member, this role will assist her in developing valuable leadership skills. Our previous newsletter editor of 11 years, Alexandria Hayden, is providing important mentoring to Deidra. This is an excellent opportunity for Deidra to begin to learn more about AGA's Chicago chapter and its important role in helping advance government accountability. Please join me in welcoming Deidra to her new role with a hearty thank-you for her much welcomed public service. And thank you Alexandria for your 11 years of stellar service to the Chicago chapter and AGA.

Those of us leading AGA chapters nationwide are public servants who know that means we must put others first. Sometimes our service takes courage and determination and we must set self aside to do that. In these lean and mean times of diminishing work forces, we are finding we must do more with much less in both the work place and in every leadership role we take on. We can use these lean times to truly tap into our ability to use our resources to the fullest.

Thanks to Matt Matczynski and Raul Nieto for their service to the chapter in December 2014 to get us connected to the Webinar sponsored by AGA 's National office on Fraud and to feed us well. Thanks to the education and program teams lead by Frank Moy and CJ Carter, respectively, for the work they do continuously to lead training events on various topics related to government financial management, ethics, etc. Thanks to our treasurer Tom DiLisio for his ongoing service to keep our financial transactions and records in good order. It takes a dedicated team to allow the chapter to thrive. We appreciate their selfless service and dedication to the chapter. Thanks also to Rick Urbanowski who faithfully keeps our Chapter recognition points up-to-date with the national office and thanks to Olga Gesell our website director for her hard work and dedication to keep the site active and informative. Director Chanel Castaneda is working with a team to develop a scholarship program for the chapter and to document proce-



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Chicago*

*Advancing  
Government  
Accountability*

*Association  
of Government  
Accountants*

*Chicago Chapter  
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dures for future scholarship efforts. We thank Chanel for this service. Thanks Lorraine Jamison for helping us with flyers and updates of information to members via email. We appreciate your service as well. Finally, here is a shout-out to all not mentioned by name for your ongoing service to the Chapter. It is not going unnoticed.

Dan Conrod of Dale Carnegie Chicago will provide a training presentation in January called "1+1=3... Collaboration: Because Two Heads are Better than One." We must all work on teams at one time or another, so this training on how collaboration can enhance our ability to thrive in our work should prove very beneficial. We hope you can join us for this event on Wednesday, January 14, 2015.

In closing, I retired from 37 years and 11 months of federal service at the end of 2014. As I neared my last day at the Social Security Administration, a colleague shared some heartwarming thoughts with me. She told me "you would be surprised at the lives we touch along the way." She shared how my previously leading a public service activity with Baltimore's AGA Chapter spurred her on to serve many more in need in Baltimore. Had she not taken the time to share that information with me, I may not have ever found out how I sparked her interest in community service. I hope you each have a wonderful new year as we all enter new chapters in our lives in 2015. And remember, everything you do, and don't do, makes a difference in some way to society and the many lives we all touch each day.

Here are some quotes on service and trust. Please enjoy a safe, happy and healthy New Year!

"Do not let what you cannot do interfere with what you can do." -- John Wooden

"Never doubt that a small group of thoughtful, concerned citizens can change world. Indeed it is the only thing that ever has. " -- Margaret Mead

"What counts in life is not the mere fact that we have lived. It is what difference we have made to the lives of others that will determine the significance of the life we lead." -- Nelson Mandela

"When people feel trusted, they'll do almost anything under the sun not to disappoint the person who gave them the gift of trust." -- Rob LeBow

Regards, Deborah Kinsey, President  
Chicago Chapter AGA 2014-2015

**New to AGA? Here are the highlights of our last year!**

**[2013-2014 Year-End Review](#)**





## February 2015 Continuing Education Seminar

**Topic:** Contract Fraud

**Speaker:** **Stuart G. Berman** Special Agent-in-Charge, Central Regional Investigations Office

**Summary:** Stuart Berman has served as Special Agent-in-Charge, Central Regional Investigations Office, Office of Inspector General (OIG), since August 2008. In this role, he oversees the regional program preventing and detecting illegal and/or improper activities involving GSA programs, operations, and personnel.

Stuart began his GSA career in 1998 as a Special Agent and has led successful case conclusions such as multi-million dollar civil settlements, criminal cases with multiple defendants and multiple year sentences, suspensions, and debarments. Prior to joining GSA, Stuart investigated multi million dollar promissory note Ponzi scheme investigations and conducted proactive and for-cause audits for the Illinois Secretary of State, Department of Securities.

Stuart graduated Summa Cum Laude from DePaul University with a Bachelor's Degree in Liberal Arts and Sciences.

**Format:** Live Speaker

**When:** Wednesday February 11, 2015  
12:00 PM – 1:00 PM (doors open / lunch 11:30 AM)

**Location:** GSA Conference Room 328  
Metcalfe Federal Building  
77 W. Jackson Blvd., Chicago, IL 60604

**CPEs Provided:** 1 CPE

**Cost:** **Members: \$10 / Non-Members: \$20** (Includes Complimentary Box Lunch)

**To attend this event, you must RSVP by Monday February 9<sup>th</sup> at noon to: Matt Matczynski at [Mmatczynski@hudoig.gov](mailto:Mmatczynski@hudoig.gov)**



## UPCOMING EVENTS

DATE	CPEs	TYPE	TOPIC	DETAILS
February 11, 2015	1	CES Speaker	Contract Fraud	11:30am-1:00pm Metcalfe Federal Building Featured Speaker: Stuart G. Berman, GSA-OIG Special Agent In Charge
March 4, 2015	2	AGA Webinar	Government Financial Mgmt.	12:30pm –3:00pm TBD
May 13, 2015	6	PDT: Day One	Various	9:00am-4:00pm Metcalfe Federal Featured Speaker: Various
May 13, 2015		PDT Mixer		
May 14, 2015	6	PDT: Day Two	Various	9:00am-4:00pm Metcalfe Federal Featured Speaker: Various





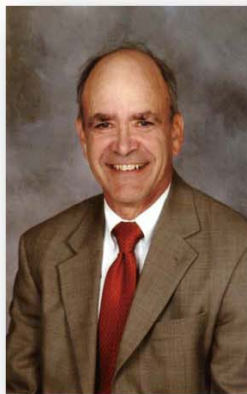
# 2015 Professional Development Training

May 13 – 14, 2015

9:00am – 4:00pm



## Keynote Speakers



**William D. Miller, CGFM, CPA**  
2014–2015 AGA National President  
*“Audit Report Writing”*



**Rebecca S. Busch**  
RN, MBA, CCM, CFE, CPC, CRMA, CICA, FIALCP, FHFMA  
President and CEO, Medical Business Associates, Inc.  
*“Healthcare Fraud: How to Audit & Detect”*

### PDT Topics:

- Auditing
- Ethics
- Financial Mgmt Systems
- Fraud
- Government Finance
- and more...



**Metcalf Federal Building  
Conference Room 331  
77 West Jackson Boulevard  
Chicago, Illinois 60604**

Submit registration to:  
[mmatczynski@hudoig.gov](mailto:mmatczynski@hudoig.gov)



## 2015 Professional Development Training May 13<sup>th</sup> & 14<sup>th</sup> ~ 9:00am – 4:00pm

### General Information

**Location:**

Metcalfe Federal Building  
GSA Conference Center, Room 331  
77 West Jackson Boulevard  
Chicago, Illinois 60604

- ❖ All attendees will receive a certificate of completion.
- ❖ There are no prerequisites for the conference.
- ❖ Breakfast, lunch and snacks will be provided both days.
- ❖ Materials will be furnished via a link for printing on your own or viewing on electronic devices at your leisure.

**Register by May 4, 2015**

Members: \$295  
Nonmembers: \$395  
Retired Member: \$95  
Group (5+): \$295/person  
Full-Time Students: \$25  
Life-Time Members: \$0

**Registration Questions:** Please contact:  
Registrar, Matthew Matczynski at [mmatczynski@hudoig.gov](mailto:mmatczynski@hudoig.gov) or  
our Program Director, CJ Carter at [cjcarter@agachicago.org](mailto:cjcarter@agachicago.org)

**Payment Questions:** Please contact our Treasurer,  
Tom DiLisio via email at [dilisio.thomas@dol.gov](mailto:dilisio.thomas@dol.gov)

### Registration Information (If you run out of space, please print additional copy of page or email list.)

FIRST NAME	LAST NAME	ORGANIZATION	EMAIL	PRICE
1.				
2.				
3.				
4.				
5.				

**Order Total:**

<b>Method of Payment</b>	<b>Contact Information</b>
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**Check**  
We will provide an invoice to the identified contact person. Checks should be made payable to AGA-Chicago Chapter and mailed to:  
Post Office Box 1744, Chicago, IL 60604-9998.

Please include the contact information for the person who will coordinate the registration fee payment.

\_\_\_\_\_  
Name/Title

**Electronic Fund Transfer (EFT)**  
We will provide an invoice and our bank routing information to the contact person.

\_\_\_\_\_  
Organization/Address

\_\_\_\_\_  
Phone/Email

**Credit Card**  
Contact AGA-Chicago Chapter Treasurer, Tom DiLisio, via email at [dilisio.thomas@dol.gov](mailto:dilisio.thomas@dol.gov) to process credit card payment.

**Cancellation Deadline: Wednesday 05/6/2015**

Requests for cancellation must be made in writing to [mmatczynski@hudoig.gov](mailto:mmatczynski@hudoig.gov) prior to or on cancellation deadline. Registered participants who give a cancellation notice after the deadline, or who do not attend the event, will be charged the full price of the event. This policy is based on the fact that the Chapter contracts for costs (speakers, catering, etc.) to present its events and is required to pay for these costs whether or not the registered participant attends the event.

[www.agachicago.org](http://www.agachicago.org)

## **Minutes of AGA Chicago Chapter CEC Meeting**

**Thursday, December 4, 2014**

**11:30 a.m. – 12:30 p.m.**

**At Metcalfe Federal Building Room 326 Chicago.**

There were a total of 11 CEC members in attendance (enough for a quorum.)

The following items were discussed:

Minutes from last board meeting held on November 6, 2014.

The only corrections were that instead of “990s” the right IRS form is 1099. Also instead of April, the month cited should be May for the PDT.

Matt made motion to accept the minutes with the 2 changes noted above. Hugh seconded the motion. CEC members voted all ayes. Motion was accepted.

CPE certificate, per Tom DiLisio just received in mail, will give to Frank Moy

Review of chapter financials – Per Hugh Smith he and somebody at his firm did it on pro-bono basis.

They reviewed all the transactions for the 13/14 year (which ended on June 30, 2014) given to him by Tom DiLisio. The review consisted of tracing all the transactions to supporting documentation such as bank statements. The review found that all transactions were supported and no issues were found. Hugh’s review was done in October 2014. Per Hugh, his accounting firm cannot provide anything written on his review and the results, nor is anything in writing required by the AGA. His oral account of what he did is shown above and this write-up will provide evidence that it was done and that it was done within the framework of good governance and that no issues were noted.

Online payments – Right now Chapter website does not have ability to accept on online payments. CFE has this capability. Hugh will see how CFE does it (for example what outside vendor is used). There was a discussion on IT security and risks involved in accepting credit card information.

Board restructuring – Per Tom did not do anything on this yet He will work on this and report out at next meeting.

Affidavits and 1099s.- Per Hugh good idea to draft an affidavit for paid speakers to sign so that there is no question that the speakers are not considered “employees” for tax purposes. Also if chapter pays a speaker \$600 or more that we issue a F. 1099 to the speaker.

Next CEC meeting scheduled for 1-22-15.

CEC member recognition – discussion on reimbursement of AGA membership dues; if \$25 or less, do not have to report to IRS, since considered de minimis.

Social function – Matt, Deborah and Frank agreed to work together to plan a social event for the chapter.

CFE and AGA – Hugh will work with CFE and see if CFE and AGA can partner on events.

Communications – nothing to report on.



Community Service – Eddie Jones not at meeting, Elaine said that our volunteer work for the homeless coalition was welcomed. Good turnout. Plan to do it again.

December 10 webinar on ethics. It was decided that we should go ahead with this education event; need to publicize right away. Mass mailing if possible to members.

Chapter points – Per Rick ahead of last year, most point will be earned at end of chapter year with PDT.

Training – need training calendar, need speaker for March 15.

AGA Chicago Chapter Executive Committee Meeting

Attendance List

Meeting Date: 12/4/14

<b>Name</b>	<b>Title</b>	<b>Present</b>	<b>Absent</b>
Deborah Kinsey	President	X	
Elaine Igelman	Immediate Past President	X	
Janet Kasper	Secretary, Accountability		X
Thomas DiLisio	Treasurer	X	
Hugh Smith	President elect	X	
Frank Moy	Education Chair	X	
Cynthia Carter	Program Director		X
Matt Matczynski	Meetings Director	X	
Nancy Taylor	Membership Director		X
Alexandria Hayden	Newsletter Editor		X
Olga Gesell	Historian, Website Director	X	
Raul Nieto	CGFM Director	X	
Rick Urbanowski	Recognition Director	X	
Chanel Castaneda	Awards Director		X
Eddie Jones	Community Service Director and Early Careers		X
Andy Masiewicz	Early Careers Assistant Director	X	
Lorraine Jamison	PR/Marketing Director	X	
Robert Cherney	Membership Assistant Director		

**CGFM**

## The Certified Government Financial Manager (CGFM®)

CGFM is a professional certification recognizing the unique skills and special knowledge required of today's government financial managers. It covers governmental accounting, auditing, financial reporting, internal controls and budgeting at the federal, state and local levels.

Want more information? Contact the Chapter's CGFM Director, Raul Nieto, at 312/ 730-1634



### Important CGFM® Renewal Information

To maintain the CGFM certification in an active status, CGFM's are required to:

- ◆ Pay the CGFM annual renewal fee by March 31.
- ◆ Complete at least 80 hours of continuing professional education (CPE) in government financial management topics or related technical subjects within each designated two-year cycle.
- ◆ Maintain and, if requested by AGA, provide detailed information on CPE hours completed.

See [Maintaining CGFM Certification](#) for more information on CGFM renewal and CPE requirements.

*"If your actions inspire others to dream more, learn more, do more and become more, you are a leader."*  
-- John Quincy Adams

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# NATIONAL AGA NEWS

## **AGA Seeks Input on Grants Rule**

If you work on grants, AGA seeks your assistance in sending comments to the federal government on the [joint interim final rule](#) issued last month. [Read more](#)

## **Submit Your Ethics Questions for the *Journal***

Do you have an ethics question? [Submit it](#) and an answer to your anonymous question may be published in the summer *Journal*.

## **Ready to Learn and Network? Attend NLT 2015**

National Leadership Training (NLT) offers a full package: network with your colleagues and gain new best practices to apply at work. February 11-12, 2015 | Washington | 14 CPEs [Read more](#)

## **CGFM Intensive Review Course (IRC)**

The CGFM IRC is a two-day concentrated review of the topics covered on the three CGFM Examinations. The next IRC will take place in Washington on Feb. 23-24. [Learn more](#)

**Young Professionals: Attend PDT 2015 via Scholarship** Apply for a scholarship to attend AGA's [2015 Professional Development Training](#), July 12-15, 2015. [Read more](#)

## **Winter *Journal* Focuses on Health Care**

Read about challenges facing hospitals, identifying Medicaid fraud, advantages of electronic medical records and more! Need 3 CPEs? [Read more](#)



# Chapter Recognition Program

The Chicago Chapter earned the following Chapter Recognition Program credits during December:

**Chapter Leadership, Planning & Participation** – 25 credits

**Education and Professional Development** – 500 credits

**CGFM** – 325 credits

**Communications** – 549 credits

**Membership and Early Careers** – 100 credits

**Total** – 1,499 credits



# CHAPTER CEC CONTACT INFORMATION

## **President**

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## **Job Referral Director**

**Vacant**

## **Coordinator/ Accountability Director**

**Vacant**

## **Early Careers Assistant Director**

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BUSINESS NAME

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AGA supports the careers and professional development of government finance professionals working in federal, state and local governments as well as the private sector and academia. Founded in 1950, AGA enjoys a long history as the thought leader for the government accountability profession. Through education, research, publications, certification and conferences, AGA reaches thousands of professionals and offers more than 100,000 continuing professional education (CPE) hours annually.

*Pictures used throughout the newsletter are courtesy of:*  
[www.city-data.com/album/album-Chicago-Illinois.html](http://www.city-data.com/album/album-Chicago-Illinois.html)

**CHICAGO CHAPTER MISSION STATEMENT**

The mission of the AGA Chicago Chapter is to carry out an educational responsibility of enhancing public financial management and accountability.

AGA through its chapters is a leading advocate for improving the quality and effectiveness of financial managers and auditors from local, state and federal governments from the Chicago area.

The chapter provides an opportunity for accountants and auditors to meet on a regular basis for training and networking.

