



**ASSOCIATION OF GOVERNMENT ACCOUNTANTS
CENTRAL KENTUCKY CHAPTER
ANNUAL HISTORY REPORT**

For the Year Ending May 31, 2012

I. CHAPTER EXECUTIVE COMMITTEE

| | |
|---------------------------------|--|
| President | Linda Hinton, CPA, CGFM Commonwealth of Kentucky Auditor of Public Accounts (502)564-5841 Linda.Hinton@auditor.ky.gov |
| President-Elect | Lee Ann Watters, CPA, CPM Mountjoy Chilton Medley, LLP PO Box 5630 Frankfort, Ky. 40601 (502)227-9000 Leeann.watters@mcmcpa.com |
| Past President Webmaster | Amy Small Commonwealth of Kentucky Auditor of Public Accounts (502) 564-5841 Amy.Small@auditor.ky.gov |
| Secretary | Laura Johnson Commonwealth of Kentucky Auditor of Public Accounts (502) 564-5841 LauraW.Johnson@auditor.ky.gov |
| Treasurer | Lee Ann Watters, CPA, CGFM Mountjoy Chilton Medley, LLP PO Box 5630 Frankfort, Ky. 40601 (502) 227-9000 Leeann.watters@mcmcpa.com |
| Directors: Newsletter Editor | Sarah Feltus Commonwealth of Kentucky |

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| | Auditor of Public Accounts (502)564-5841 Sarah.Feltus@auditor.ky.gov |
| Program Coordinator | Mary Hudson Commonwealth of Kentucky Auditor of Public Accounts (502)564-5841 Mary.Hudson@auditor.ky.gov |
| Historian | Tommy Richie, CPA Commonwealth of Kentucky Office of the Controller (502)564-8637 Tommy.Richie@ky.gov |
| Early Careers/Awards | Angi Brown, CPA, CFE Commonwealth of Kentucky ABC Division of Enforcement (502) 782-1037 Angela.Brown@ky.gov |
| Education & Training | Sandra Rudic, CPA Commonwealth of Kentucky Auditor of Public Accounts (502)564-5841 Sandra.Rudic@auditor.ky.us |
| Community Service | Linda Hinton, CPA, CGFM Commonwealth of Kentucky Auditor of Public Accounts (502)564-5841 Linda.Hinton@auditor.ky.gov |
| Attendance/CPE | Phil Nally, CGFM Commonwealth of Kentucky FAC – Statewide Accounting (502)564-2994 Phil.Nally@ky.gov |
| Membership | Roy W. Hunter, CPA rhuntr@aol.com |
| CGFM | Catherine Hunt Commonwealth of Kentucky Auditor of Public Accounts (502) 564-5841 Catherine.Hunt@auditor.ky.gov |

II. REGULAR MEETING DATES

Luncheon meetings, ordinarily the first Thursday of each month, took place at the fellowship hall of Crestwood Baptist Church or the fellowship hall of Holly Hill Church of Christ in Frankfort, Kentucky with catering by A Family Affair. The average attendance for the year was 32, a decrease of three (3) from the previous year. The chapter charged \$10 to members for lunch and program, \$15 to non-members, and \$5 to members and \$10 to non-members for program only. The dates, speakers and attendance for each meeting were as follows:

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|-------------------|---|
| June 9, 2011 | Greg Harkenrider, Executive Director State Budget Office Qualified for 1 hour of CPE Attendance: 27 (17 members, 9 guests, speaker) |
| August 11, 2011 | Adam Edelen Candidate for Auditor of Public Accounts Did not qualify for CPE Attendance: 28 (17 members, 10 guests, speaker) |
| October 13, 2011 | John Kemper Candidate for Auditor of Public Accounts Did not qualify for CPE Attendance: 18 (13 members, 4 guests, speaker) |
| November 10, 2011 | Charlie Harmon, Kentucky Dept. of Education School district audits and budget process Qualified for 1 hour of CPE Attendance: 34 (24 members, 8 guests, speakers) |
| December 8, 2011 | Susan Garfield Kentucky Employee Assistance Program Verbal De-Escalation Skills Qualified for 1 hour of CPE Attendance: 19 (13 members, 5 guests, speaker) |
| January 12, 2012 | Mark Schmitt, CPA and Amy Sandlin, CPA Mountjoy Chilton Medley Tax Update Qualified for 1 hour of CPE Attendance: 39 (28 members, 9 guests, speakers) |
| February 9, 2012 | Richard G. Carroll, Executive Director Kentucky Society of Certified Public Accountants KSCPA Update Qualified for 1 hour of CPE Attendance: 41 (34 members, 6 guests, speaker) |
| March 8, 2012 | Cynthia Teddleton, CGFM, AGA |

Southeastern Region Vice-President
Leadership Skills
Qualified for 2 hours of CPE
Attendance: 38 (30 members, 7 guests, speaker)

April 12, 2012

B.J. Bellamy, Auditor of Public Accounts Office
Computer Fraud Schemes
Qualified for 1 hour of CPE
Attendance: 48 (33 members, 14 guests, speaker)

III SPECIAL EVENTS

September 27-28, 2011

Accounting and Auditing Update
Dennis Dycus
Office of the Comptroller of the Treasury
State of Tennessee
Frankfort Civic Center
16 hours CPE

May 16-17, 2012

Spring Training Event
Leita Hart-Fanta, CPA
Rita Wallen, USDOT
Keenan Clarke, USDOT
Charlena Young, USDOT
Bryan Lykins, CISA, CFE
Erica Horn, CPA
Michelle Mussachio, CPA
Don Speer
Frankfort Civic Center
16 hours CPE

IV EDUCATION OFFERED BY THE CHAPTER

Regular meetings

CGFM's and CPA's received CPE credit for attending monthly luncheons that qualified for credit. CPE total 8 hours (no July meeting for a summer break, no November or May meeting due to conferences, March meeting featured 2 hours). No CPE offered for August or October because candidates for political office spoke.

September 27-28, 2011

Professional Development Conference –
Accounting & Auditing Update
Dennis Dycus
Frankfort Civic Center
16 hours CPE
Attendance: 168 the 27th, 171 the 28th
27th (43 members, 125 non-members)
28th (39 members, 132 non-members)

May 16-17, 2012

Spring Training Event:
New Yellow Book/Single Audits
Improper Payments Elimination and Recovery Act
Investigations Leading to Board Recommendations
Ethics
Procurement Regulations in Kentucky
Leita Hart-Fanta
Rita Wallen, USDOT
Keenan Clarke, USDOT
Charlena Young, USDOT
Bryan Lykins, CISA, CFE
Erica Horn, CPA
Michelle Mussachio, CPA
Don Speer
Frankfort Civic Center
16 hours CPE
Attendance: 137 the 16th, 138 the 17th
16th (33 members, 104 non-members)
17th (35 members, 103 non-members)

V PUBLICATIONS/COMMUNICATIONS

The chapter newsletter, The AGA Messenger, was published for the months of June 2011 through May 2012 and delivered by e-mail. In addition to covering chapter events, The AGA Messenger informed members of regional and national events. The AGA Messenger and other helpful information may be found on the Central Kentucky Chapter's website at: <http://www.ckyaga.com/>

VI COMMUNITY SERVICE

June 2011 – May 2012

Members collected pop can tabs to benefit the Friends of Indian Summer Camp. The camp allows children who are cancer patients to experience a week at camp.



- July 2011 The chapter donated \$100 and a \$75 gift basket to the silent auction at the National Professional Development Conference.
- October 29, 2011 Seven members participated in the Black Cat Chase 5K Run/Walk to benefit Frankfort YMCA.
- November 2011 A candy sale with drawing for baskets during the fall conference raised \$408 for Friends of Indian Summer, a camp for children with cancer.
- December 2011 The chapter participated in collecting new toys for the Franklin County Fire Department's annual toy drive. The toys were distributed to needy kids in Franklin County at Christmas.
- May 2012 Two \$1000 scholarships were awarded after scoring all applications received. One scholarship was awarded to Rachel Penn from Georgetown College and the other was awarded to Sally Schmachtenberger from Asbury College.

VII CHAPTER AWARDS, CONTRIBUTIONS AND OPERATIONS

A. National Recognition - Chapter

The chapter received Platinum Status for 2011-2012 at the National PDC in San Diego.

B. Regional-level Service

Phil Nally, Central Kentucky AGA's Attendance and Communications Director, continued his service as the SVPRS, Senior Vice President for Regional Services, for Section IV.

C. National-level Participation

Phil Nally attended the National PDC in Atlanta during July 2011 and Catherine Hunt represented the chapter at the National Board of Directors meeting. Chapter member Alice Wilson, who won the registration in a drawing at the May 2011 drawing, also attended.

D. Regional-level Participation

In addition to SVPRS Phil Nally, the Central Kentucky Chapter sent Education Chair Sandra Rudic, Communications Chair Sarah Feltus, and CGFM Chair Catherine Hunt to the Sectional Leadership Meeting in Indianapolis during April 2012.

E. March proclaimed CGFM Month in Kentucky

Governor Steven L. Beshear proclaimed March 2012 as CGFM month in Kentucky. The official proclamation appears in Appendix I.

F. Member Awards

Member of the Year – Daniel Hinton

This award honors member participation. Daniel will receive tickets for free lunch and CPE for six meetings in the coming year.

G. Financial Position

The chapter had a bank balance of \$15,318.33 at June 1, 2011 and \$25,588.20 at May 31, 2012. The education fund comprised \$5,711.30 of that balance, while the remaining \$19,876.90 was the ending general fund balance.

H. Revenues and Expenses

For the chapter's program year ending May 31, 2012 total receipts were \$40,967.65 and expenditures were \$30,697.78.

I. Charitable Donations

First Quarter-The chapter donated \$200 to the American Red Cross.

Second Quarter-The chapter gave \$200 to Simon House a shelter for women and children.

Third Quarter-The chapter contributed \$200 in food and supplies to the Franklin County Humane Society.

Fourth Quarter-The chapter donated \$200 to the American Red Cross to help the victims of recent tornadoes in Kentucky.

J. Speaker Gifts

In lieu of presenting gifts to speakers, the chapter donates \$25 to a charity of each speaker's choice. The year's total came to \$225.

VIII COMMITTEES

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| Fall Seminar Committee | Amy Small Sandra Rudic Linda Hinton Lee Ann Watters |
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| Spring Seminar Committee | Amy Small Sandra Rudic Linda Hinton Lee Ann Watters |
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| Nominating Committee | Laura Johnson Sandra Rudic Lee Ann Watters |
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| Scholarship Committee | Amy Small Sandra Rudic Catherine Hunt |
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IX MEMBERSHIP

Chapter membership at year-end was 112, two less than at the beginning of the year. Included in that number were twenty-two new members:

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|------------------|-------------------|
| Latonya Bell | Cindy James |
| Anna Bratt | Connie Kell |
| Cristy Broughton | Mark Knowles |
| Michelle Buffin | Lise Lunceford |
| Jetta Collett | Kathy Roney |
| Jeffrey Coulter | Ann Sampson |
| Andre Daigle | Claude Smith |
| Casey Dowell | Sharon Sutherland |
| Ramona Gardner | Mark Whelan |
| Marshel Harris | Stacy Woodrum |
| Thelma Hawkins | Laura Johnson |

X CGFM

The Central Kentucky Chapter established a study group for members preparing to take the CGFM exams. The chapter has added three (3) new CGFMs in the past year (Linda Hinton, Kathy Roney and Catherine Hunt). The first study group began meeting in January 2011 and concluded during the summer of 2011. A new group formed in January 2012.

The chapter also supported the CGFM program by providing notice of training relevant to the CGFM examination content. The chapter provided training that met the requirements for continuing professional education for members holding the CGFM designation. Brochures advertising the benefits of obtaining the certification are distributed at each meeting. March 2012 was designated CGFM Month by Kentucky Governor Steven L. Beshear (see proclamation in Appendix I, below).

XI EARLY CAREERS

The Early Careers Director focused her efforts on helping new members become involved with the Central Kentucky Chapter.

XII MISCELLANEOUS

Due to planned renovation work at the Frankfort Plant Board Clubhouse, in January 2011 the monthly meeting location changed to the fellowship hall of Crestwood Baptist Church of US 460. From March 2012 to the present the monthly meetings have been held in the Holly Hill Church of Christ Fellowship Hall. Regular meeting charges remained at \$10 for members (\$5 CPE only), \$15 for non-members (\$10 CPE only).

APPENDIX I

Proclamation

by

Steven L. Beshear
Governor

of the

Commonwealth of Kentucky



To All To Whom These Presents Shall Come:

- WHEREAS, The Central Kentucky Chapter of the Association of Government Accountants (AGA), a professional network of 14,500 members in 101 chapters worldwide, has approximately 125 active members representing state, federal, municipal and private sector accountants, auditors and financial managers in Kentucky; and
- WHEREAS, AGA's Central Kentucky members have upheld the group's mission of advancing government accountability, continuing broad educational efforts on the high standards of conduct, honor and character in its Code of Ethics and making significant advances both in professional ability and service to Kentuckians by mastering increasingly technical and complex requirements; and
- WHEREAS, AGA's Certified Government Financial Manager (CGFM) program demonstrates professional competency by requiring candidates to have appropriate educational and employment history, abide by AGA's Code of Ethics and pass three expert-level exams in both Governmental Environment, Governmental Financial Management and Control, and Governmental Accounting, Financial Reporting and Budgeting; and it requires each CGFM holder to maintain certification by completing at least eighty hours of continuing professional education in government financial management topics or related technical subjects every two years;

NOW, THEREFORE, I, STEVEN L. BESHEAR, Governor of the Commonwealth of Kentucky, do hereby proclaim March 2012 as

**CERTIFIED GOVERNMENT FINANCIAL
MANAGER MONTH**

in Kentucky.



DONE AT THE CAPITOL, in the City of Frankfort the 16th day of February, in the year of Our Lord Two Thousand Twelve and in the 220th year of the Commonwealth.



STEVEN L. BESHEAR
GOVERNOR



ALISON LUNDERGAN GRIMES
SECRETARY OF STATE