

**ASSOCIATION OF GOVERNMENT ACCOUNTANTS (AGA)
NASHVILLE AREA CHAPTER
ANNUAL HISTORY REPORT**

For the Year Ended June 30, 2008

I. CHAPTER EXECUTIVE COMMITTEE

A. Officers:

Ann Collett, President	State of Tennessee Department of Finance and Administration Division of Accounts
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Kathy Anderson, President-Elect	State of Tennessee Comptroller of the Treasury Division of State Audit
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Gerry Boaz, Past President	State of Tennessee Comptroller of the Treasury Division of State Audit
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Jennifer McClendon, Secretary	State of Tennessee Comptroller of the Treasury Division of State Audit
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Terry Mason, Treasurer	State of Tennessee Department of Finance and Administration Division of Accounts
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B. One-Year Directors:

Nathan Abbott	State of Tennessee Comptroller of the Treasury Division of County Audit
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Robbie Hunter	State of Tennessee Department of Labor and Workforce Development
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Hellens Kruszynski	State of Tennessee Comptroller of the Treasury Office of State Assessed Properties
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Angela McElrath-Prosser	Metropolitan Government of Nashville & Davidson County Department of Finance Division of Accounts
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Mary Anne Queen
State of Tennessee
Comptroller of the Treasury
Office of Management Services

C. **Two-Year Directors:**

Ed Burr
State of Tennessee
Comptroller of the Treasury
Division of State Audit

Michelle Earhart
State of Tennessee
Department of Finance and Administration
Division of Accounts

Teresa Kennedy
State of Tennessee
Comptroller of the Treasury
Division of State Audit

Joe F. Kimery
State of Tennessee
Comptroller of the Treasury
Division of County Audit

Beth Pugh
State of Tennessee
Tennessee Housing Development Authority

II. **REGULAR MEETING DATES**

Luncheon meetings were usually held the first Thursday of each month at the Nashville City Club, in downtown Nashville. The average attendance at the luncheon meetings was approximately 111 attendees. The dates and speakers were as follows:

September 6, 2007	Barry Monson State Valuation Coordinator Division of Property Assessments Tennessee Comptroller of the Treasury	Attendees: 115
October 4, 2007	Jim Bartoo Director of Marketing and Public Relations Nashville Zoo	Attendees: 106
November 1, 2007	Jenneen Kaufman Controller Tennessee Titans	Attendees: 115
December 6, 2007	James P. Anderson, III Director, Unemployment Insurance Integrity Tennessee Department of Labor & Workforce Development	Attendees: 97

January 10, 2008	Dr. Melvin Johnson President Tennessee State University	Attendees: 117
February 7, 2008	John Robinson Director of Property Tax - Southeast AT&T	Attendees: 110
March 6, 2008	Karl Dean Mayor Metropolitan Government of Nashville & Davidson Co.	Attendees: 130
April 3, 2008	Linda Biek Director of Governmental, International, and Professional Relationships National Association of State Boards of Accountancy (NASBA)	Attendees: 100

III. SPECIAL MEETING DATES

March 4, 2008	The Chieftains The Schermerhorn Symphony Center
May 3, 2008	AGA Day at the Zoo The Nashville Zoo at Grassmere
May 9, 2008	Nashville Chapter's 30 th Anniversary Gala The Musicians Hall of Fame

IV. EDUCATION OFFERED OR SPONSORED BY THE CHAPTER

<u>Date</u>	<u>Event</u>	<u>CPE Credit</u>
August 23, 2007	Business Tax Seminar Bartlett Performing Arts & Conference Center, Bartlett, Tennessee	8 hours
September 6, 2007	CGFMs and CPAs received CPE credit for attending monthly meeting Nashville City Club, Nashville, Tennessee	1 hour
September 20, 2007	Making the Transition to Management: What It Takes to Succeed Audio Conference Suite 1500 James K. Polk Bldg Nashville, Tennessee	2 hours

<u>Date</u>	<u>Event</u>	<u>CPE Credit</u>
September 25, 2007	Business Tax Seminar Willis Conference Center Nashville, Tennessee	8 hours
October 25, 2007	Breakfast CPE The Health of the TCRS Nashville City Club Nashville, Tennessee	2 hours
October 25 & 31, 2007	Directed Study – Governmental Accounting, Financial Reporting and Budgeting Suite 1700 James K. Polk Bldg Nashville, Tennessee	0 hours
November 1, 2007	CGFMs and CPAs received CPE credit for attending monthly meeting Nashville City Club Nashville, Tennessee	1 hour
November 14, 2007	Tools for Performance Audit Efficiency Audio Conference Suite 1500 James K. Polk Bldg Nashville, Tennessee	2 hours
November 8, 15, & 29, 2007	Directed Study – Governmental Accounting, Financial Reporting and Budgeting Suite 1700 James K. Polk Bldg Nashville, Tennessee	0 hours
December 12, 2007	Anatomy of Fraud: Case Examples of Greed, Collusion, and Override of Controls Audio Conference Suite 1500 James K. Polk Bldg Nashville, Tennessee	2 hours
January 8-9, 2008	AGA Winter Seminar – “Increasing Accountability in an Ever-changing World” William R. Snodgrass Tower Nashville, Tennessee	16 hours
January 14, 17, & 24, 2008	Directed Study – Governmental Accounting, Financial Reporting and Budgeting Suite 1700 James K. Polk Bldg Nashville, Tennessee	0 hours

<u>Date</u>	<u>Event</u>	<u>CPE Credit</u>
January 31, 2008	CGFM Exam 2 Training session: Governmental Accounting, Financial Reporting and Budgeting Suite 1600 James K. Polk Bldg Nashville, Tennessee	8 hours
February 6, 2008	Using Internal Controls to Improve Operations Audio Conference Suite 1500 James K. Polk Bldg Nashville, Tennessee	2 hours
February 7, 2008	CGFMs and CPAs received CPE credit for attending monthly meeting Nashville City Club, Nashville, Tennessee	1 hour
February 21 & 28, 2008	Directed Study – Governmental Financial Management and Control Suite 1700 James K. Polk Bldg Nashville, Tennessee	0 hours
March 5, 13, 20 & 27, 2008	Directed Study – Governmental Financial Management and Control Suite 1700 James K. Polk Bldg Nashville, Tennessee	0 hours
March 26, 2008	Emerging Issues at FASAB and GASB – The Landscape is Changing Audio Conference Suite 1500 James K. Polk Bldg Nashville, Tennessee	2 hours
April 2, 10, 17 & 24, 2008	Directed Study – Governmental Financial Management and Control Suite 1700 James K. Polk Bldg Nashville, Tennessee	0 hours
April 3, 2008	CGFMs and CPA’s received CPE credit for attending monthly meeting Nashville City Club, Nashville, Tennessee	1 hour
May 9, 2008	CGFM Exam 3 Training session: Government Financial Management and Control Suite 1600 James K. Polk Bldg Nashville, Tennessee	8 hours
May 14, 2008	Anatomy of Ethical Slips in Government Audio Conference Suite 1500 James K. Polk Bldg Nashville, Tennessee	2 hours

<u>Date</u>	<u>Event</u>	<u>CPE Credit</u>
June 27, 2008	CGFM Exam 2 Training session: Governmental Accounting, Financial Reporting and Budgeting Suite 1600 James K. Polk Bldg Nashville, Tennessee	8 hours

V. PUBLICATIONS

Nashville Notes The chapter newsletter published monthly from August through May.

VI. SPECIAL ACTIVITIES

Sept 2007 – May 2008 The Chapter adopted Alex Green Elementary School through the Project Pencil Foundation. Members donated school supplies to the school. Over 2,000 items worth over \$1,100 were donated to the Project Pencil supply drive. This is our seventh year to participate.

September 29, 2007 The Chapter Early Career committee hosted an Early Career Member social at Buffalo Billiards to promote networking among the Early Career members.

October 20, 2007 Chapter members participated in the *Making Strides Against Breast Cancer Walk 2007*. Donations were over \$1,700.

November 28, 2007 Chapter members volunteered to serve dinner and help with other kitchen services at the Nashville Union Rescue Mission.

December 2007 Chapter members sponsored 40 children through the Little Soldiers program with the National Guard Armory.

January 25, 2008 The Chapter provided VITA services – Columbia, TN.

January 28, 2008 The Chapter Early Career committee hosted an Early Career Member social at Bailey’s to promote networking among the Early Career members.

February 1, 8, 15, 22 & 29 The Chapter provided VITA services – Columbia, TN.

February – March 6, 2008 Brown Dog Foundation: Chapter members participated in collecting pet food, pet supplies, and cash contributions. This organization is dedicated to offering disadvantaged dogs and cats a chance at a quality life.

March 6, 2008	Chapter members assisted NPT Channel 8 during its pledge drive. Volunteers answered phones and took pledges during the evening. Chapter member donations and the \$400 chapter donation were matched by the AGA National Community Service Fund.
March 13, 2008	The Chapter Early Career committee and the Membership Committee hosted a combined Early Career Member/New Member social at The Sports Page to promote networking among the Early Career members and New members.
April 3, 2008	The Early Career Committee hosted a Government Career Fair. Eight employers from federal, state, and local government agencies hosted tables for 37 students from 11 institutions. \$100 scholarships were awarded to five students in attendance. Two free student AGA memberships were awarded.
April 4, 2008	The Chapter provided VITA services – Columbia, TN.
April 5, 2008	Chapter members assisted with building a local Habitat for Humanity house.
April 18, 2008	The Chapter provided VITA services – Columbia, TN.
April 26, 2008	Chapter members assisted with the Country Music Marathon, which benefited the Leukemia Society of America.

VII. CHAPTER AWARDS, CONTRIBUTIONS AND OPERATIONS

A. Scholarships

- The William R. Snodgrass Scholarship (\$1,500) was awarded to Christina Winch.
- The Fawn Ellis Memorial Scholarship (\$1,500) was awarded to Stephanie Gordon.

B. Chapter Recognition

- The chapter received the Platinum Chapter Designation.
- The chapter received National Community Service Award for Group A.
- The chapter received National CGFM Award for Group A.

- The chapter received National Website Award. 1st Place for Group A.
- The chapter won the National Community Service Photo Contest and received a conference registration.
- Gerry Boaz received National CGFM Regional Coordinator Award.
- Karen Hale received National Education Regional Coordinator Award.
- Deborah Loveless received a National President's Award.

C. National Committee Members

- Deborah Loveless, National Senior Vice President, At-large Member
- Dianne McKay, Financial Management Standards Board
- Katherine J. Anderson, Financial Management Standards Board
- Michelle Earhart, Emerging Leader Focus Group
- Patrick Cooper, Emerging Leader Focus Group

D. Regional Recognition

- Gerry Boaz, CGFM Regional Coordinator
- Karen Hale, Education Regional Coordinator
- Melinda Parton, Regional Vice President-elect

E. Nominations for National Awards

- Ted Fellman was nominated for the Excellence in Government Leadership Award
- Deborah Loveless was nominated for the Einhorn-Gary Award
- Education, CGFM, and Community Service Activities nominated for National Awards
- Gerry Boaz and Karen Hale were nominated for the new Regional Coordinator Awards for their respective areas.
- Website reviewed by a National committee and Newsletter submitted for National Awards

- Submitted a PowerPoint presentation of photos for National Community Service Photo Contest

F. Member Awards

- Jennifer Lewis and Terry Mason received President's Awards.
- Britt Wood received the Member of the Year Award.
- Phil Carr and Melvin Jones received the Newsletter Awards.
- Amy Abbott won the Early Career MVP Award.
- Amy Abbott won the Early Career Newsletter Award.
- Patrick Cooper won the Early Career CGFM Application Subsidy Award.
- Tammy Fruscione won the Community Service Award. A donation of \$100 was made to the charity of her choice, the Brown Dog Foundation.
- Melissa Boaz won the drawing for members who sponsored new members. She received \$100 and two tickets to Universal Studios in Orlando FL.
- Tommie Pendergrass won \$100 in the sponsor drawing.
- Brian Brechon won the \$50 drawing out of all members who had paid their dues by March 31.
- Michelle Earhart won a drawing at the Committee Appreciation Luncheon for a National Hotel Scholarship.
- Da Norm won the drawing for the trip to the National PDC in Atlanta, GA.
- Chris Gingles was recognized as a retiring member.
- Special recognition at the Chapter's 30th Anniversary Gala:
 - Ron Anderson – Puzzle King Award
 - Deborah Loveless, Richard Norment, and Charles Harrison – Dedication to AGA Awards
 - Gerry Boaz – Continued Involvement Award
 - Karen Hale – Save the Day Award

G. Special Contributions

- The Nashville Chapter donated \$1,000 to GASB.
- The Nashville Chapter donated \$400 to NPT.
- The Nashville Chapter donated \$300 to Alex Green Elementary, our Project Pencil Partner School.
- The Nashville Chapter donated items for the silent auction and raffle at the PDC in Atlanta.
- Items were donated to be used as door prizes at the Southeastern Regional PDC held in Chattanooga.

H. Statement of Net Assets

- The Nashville Chapter had total assets of \$49,539.99 and total liabilities of \$4,615.16 at June 30, 2008. The total amount of net assets was \$44,924.83 at June 30, 2008.

I. Revenue and Expenses

- The Nashville Chapter had revenues of \$57,317.00 and expenses of \$63,258.12 in fiscal year 2008.

VIII. RELATIONS WITH OTHER PROFESSIONAL SOCIETIES

The Nashville Chapter had joint meetings with the National Association of Black Accountants professional and student chapters January 10, 2008, and the Institute of Internal Auditors February 7, 2008.

IX. CHAPTER MEMBERS THAT SERVED ON COMMITTEES

Awards

Teresa Kennedy, Co-Chair
Scarlet Sneed, Co-Chair
Jim Arnette
Melissa Boaz
Jeff Hughes
Rhonda Williams

CGFM

Ron Queen, Co-Chair
Gerry Boaz, Co-Chair
Rebecca Barr
Bob Boydston
Tammy Fruscione
Karen Hale
Mary Anne Queen

Chapter Recognition Committee

Kathy Anderson, Chair

Community Service

Beth Pugh, Co-Chair
Jennifer Lewis, Co-Chair
Kristy Carroll
Ron Crozier
Pat Finney
Tammy Fruscione
Jacqueline Laws
Jennifer McClendon
Ray Register
Julie Rogers

Early Career Members

Michelle Earhart, Co-Chair
Robyn Probus, Co-Chair
Mary McCalip
Kayla Shewcraft
Clare Tucker
James Wood

Education

Nichole Curtiss, Co-Chair
Nathan Abbott, Co-Chair
Donna Jewell, Co-Chair
Bertha Deweese
Karen Hale
Randall Kinnersley
Jane Lacy
Mary Anne Queen
Suzanne Smotherman
Patricia Wakefield
Lisa Williams

Finance and Administration

Angela McElrath-Prosser, Co-Chair
Mary Anne Queen, Co-Chair
Gerry Boaz
Melissa Boaz
Michelle Earhart
Pat Finney
Lou Goins
Scarlet Sneed
Rhonda Williams

Finance Subcommittee – Sponsorship

Gerry Boaz
Kristy Carroll
Ann Collett
Nichole Curtiss
Brian Derrick
Jennifer McClendon
Richard Normant
Melinda Parton
Mary Anne Queen
Suzanne Sawyers
Dan Willis
Britt Wood

Internet

Nathan Abbott, Co-Chair
Dan Willis, Co-Chair

Meetings and Attendance

Suzanne Sawyers, Co-Chair
Joe Kimery, Co-Chair
Penny Austin
Tammy Fruscione

Membership

Elizabeth 'Britt' Wood, Co-Chair
Ed Burr, Co-Chair
Ron Boniol
Shirley Henry
Jeff Hughes
Kandi Thomas

Newsletter

Karen Hale, Chair/Editor
Amy Abbott
Mary Anne Queen
Rhonda Williams

Nominating Committee

Kathy Anderson, Chair
Michelle Earhart
Hellens Kruszynski
Jennifer McClendon
Melinda Parton

Public Relations

Karen Hale, Chair
Da Norm, Photographer

Program

Robbie Hunter, Co-Chair
Hellens Kruszynski, Co-Chair
Pat King

Anniversary Gala Committee

Deborah Loveless, Chair
Kathy Anderson
Melinda Parton

X. MEMBERSHIP

The Nashville Chapter of AGA had 403 members at the beginning of membership year 2008 and 401 members at the end of the membership year.

New members for the year:

Ms. Lynn P. Cummings, CPA	Mrs. Kathy R. Richardson	Mr. Vincent Finamore
Mr. Douglas C. Swisher	Mr. C Harvey Joiner	Mr. Jack Hill
Mr. Thomas Patrick Cooper	Mrs. Tammy Grizzle	Mrs. Rhonda D. Williams
Mr. Ronald E. Crozier, Jr.	Mrs. Anne R. Henson	Mr. Emmanuel Marcella
Mr. Alan E. Major	Mr. Ronald A. Hickman	Mr. Jeffrey M. Robertson
Mrs. Cynthia S. Singleton, CGFM	Mrs. Melissa Lahue, CGFM	Mr. James Ralph Cross
Ms. Sandra S. Tulloss	Mr. George Kemp	Mrs. Gail C. Best
Ms. Melinda S. Crutchfield	Ms. Mikhel S. Lindsley	Mr. Gary T. Harris
Mrs. Shelbi E. Tucker	Mrs. Donna F. Nicely	Mr. Victor U. Nwanso
Mr. James H. Westbrook, Jr., CGFM	Mr. Eddie A. Stott, CPA	Mr. Chas K. Taplin
Ms. Sharon F. Barnard, CPA	Mr. Issac Eugene Thomas	Ms. Cynthia H. Setters
Mr. Jeff W. Patterson	Mrs. Tonya L. Vanterpool	Mr. Corey M. Tester
Mr. John W. Tidwell	Ms. Jennifer K. Whitsel	Mrs. Heather L. Lavvorn
Mr. Scott Waller	Ms. Julie A. Bair	Ms. Agenda L. Overton

XI. CGFM

The Nashville Chapter of AGA supported the CGFM program by sponsoring a drawing to subsidize the exam fee for eligible members, offering free lunches for those passing the exam, disbursing brochures at meetings to extol the virtue of becoming a CGFM certificate holder, and providing notice of training relevant to CGFM content. The chapter conducted training classes to prepare members sitting for the CGFM Exam which also provided CPE hours for the attendees. Eight members, Amy Abbott, Patrick Cooper, Nicole Curtis, Paul Fimono, Melissa Lahue, David Lannom, Terry Mason, Suzzie Singleton, and Britt Wood passed the CGFM exam this year.

The committee was able to obtain proclamations from the Governor, the House of Representatives, and the Metropolitan Government of Nashville & Davidson County establishing March as CGFM Month in Tennessee.

XII. EARLY CAREER

The Early Career Committee focused its efforts on recruiting student members for AGA from colleges and universities as well as helping new members become involved with the Nashville Chapter of AGA. The committee sent letters to local colleges and universities to invite students majoring in accounting, systems, and public administration to our 3rd Annual Government Career Fair. Eight tables were hosted by state, local and federal departments/agencies. Students from 11 universities attended the career fair. Michelle Earhart provided a brief introduction to AGA and welcomed the students. Ann Collett spoke about the benefits of AGA membership and announced the opportunity for students to apply for the Snodgrass Scholarship. Ron Queen discussed information about the CGFM designation. Students then visited with the government representatives about opportunities in government. Robyn Probus drew names for the two free Student AGA memberships. Robyn Probus and Ann Collett drew names for the five \$100 scholarships.

The Early Career committee sponsored 7 students' lunches at the January luncheon. The students were members of the local chapter of the Association of Black Accountants. For the first time ever, the committee also awarded a newsletter and MVP award of \$25 and \$100 respectively to a local Early Career member. A random selection was done by the committee each month to invite an early career member to the Chapter Executive Committee meetings to expose the early career members to chapter procedures and leadership.