

**ASSOCIATION OF GOVERNMENT ACCOUNTANTS  
NASHVILLE CHAPTER  
ANNUAL HISTORY REPORT**

**For the Year Ended June 30, 2012**

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**I. CHAPTER EXECUTIVE COMMITTEE**

**A. Officers**

Shirley Henry, President, CGFM, CPA	State of Tennessee Comptroller of the Treasury Division of State Audit
Ray Register, President-Elect	State of Tennessee Department of Environment and Conservation Fiscal Services
Melvin Jones, Jr., Past President, CGFM	State of Tennessee Department of Revenue Internal Audit & Consulting Services
Mary Anne Queen, Secretary, CGFM, CFE	State of Tennessee Comptroller of the Treasury Office of Management Services
Kayla Shewcraft, Treasurer, CPA	State of Tennessee Comptroller of the Treasury Office of State and Local Finance

**B. One-Year Directors**

Keevia Battle, CPA	State of Tennessee Department of the Treasury Tennessee Consolidated Retirement System
Hank Clay	Metropolitan Nashville Public Schools Office of Federal Programs
Cynthia Setters, CPA	State of Tennessee Military Department Construction, Facilities, and Maintenance Office
Corey Tester	State of Tennessee Comptroller of the Treasury Office of Management Services

Rhonda Williams	State of Tennessee Department of Health Office of Vital Records
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**C. Two-Year Directors**

Jerry Durham, CGFM, CPA, CFE	State of Tennessee Comptroller of the Treasury Division of Local Government Audit
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David Lannom, Jr., CGFM	Metropolitan Government of Nashville and Davidson County Division of Accounts
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Valerie Oliver, CPA	State of Tennessee Department of Health Fiscal Services
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Scarlet Sneed, CGFM, CPA, CFE	State of Tennessee Comptroller of the Treasury Division of State Audit
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Britt Wood, CGFM, CPA, CFE, CISA, ACDA	ACL
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**II. MONTHLY CHAPTER MEETINGS**

Except for the May Awards Luncheon, chapter luncheon meetings were held the first Thursday of each month at the Nashville City Club in downtown Nashville. The average attendance at the luncheon meetings was 80 attendees. The meeting dates and speakers were as follows:

September 1, 2011	Tre Hargett, Secretary of State State of Tennessee	Attendees: 92
October 6, 2011	Richard O. Bunce, Jr., CGFM, CPA AGA National President Senior Adviser to the President Virginia Commonwealth University	Attendees: 71
November 3, 2011	Rebecca R. Hunter, Commissioner Department of Human Resources	Attendees: 77
December 1, 2011	Ellen Lehman, President The Community Foundation of Middle Tennessee	Attendees: 63
January 5, 2012	Prentice Morgan Legislative Systems Analyst	Attendees: 67

	Comptroller of the Treasury	
February 2, 2012	Jeremy Finley Chief Investigative Reporter Channel 4 I-Team	Attendees: 140
March 1, 2012	Andrew Valentine, CFP Senior Vice President Morgan Stanley Smith Barney	Attendees: 73
April 5, 2012	Ralph J. Shulz, Jr., President and CEO Nashville Area Chamber of Commerce	Attendees: 58
May 3, 2012	Awards Luncheon at Doubletree Hotel	Attendees: 80

### III. SPECIAL CHAPTER EVENT

April 14, 2012	Spring Social - Nashville Sounds Game - Great food, fellowship, and fireworks, and the Sounds won the game!
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### IV. EDUCATION OFFERED OR SPONSORED BY THE CHAPTER

<u>Date</u>	<u>Topic and Event</u>	<u>CPE Credit</u>
August 24, 2011	Building a Sustainable Performance Management Framework - Supporting Government Programs with Valuable Data Audio Conference	2 hours
September 28, 2011	Continuous Monitoring - Management's Window to Preventing Fraud, Waste and Abuse Audio Conference	2 hours
October 5, 2011	SSAE 15 Reporting on Controls - Revised SAS 70 Report and Service Organization Control Reports Audio Conference	2 hours
October 6, 2011	Ethics (And Why Good Leaders Go Bad) Chapter Meeting	1 hour
October 18, 2011	Financial Crimes Fall Breakfast Seminar	2 hours
November 2, 2011	Major Challenges to the Public Sector Auditing Profession Audio Conference	2 hours

December 14, 2011	Boost Efficiency, Accuracy, Transparency, Fraud Detection and Cost Savings by Preventing Inappropriate Payments Audio Conference	2 hours
January 5, 2012	Internet Security Chapter Meeting	1 hour
January 11, 2012	Getting a Handle on Internal Controls Audio Conference	2 hours
January 18-19, 2012	Various Government Accounting and Auditing Topics Winter Seminar	16 hours
February 2, 2012	Investigative Reporting Chapter Meeting	1 hour
February 8, 2012	The New Stewardship Imperative - Federal Financial Management at the Crossroads Audio Conference	2 hours
March 1, 2012	Historical Perspective on Volatility and the Long-term Investor Chapter Meeting	1 hour
March 7, 2012	Data Mining to Prioritize Investigations of Contract Fraud Audio Conference	2 hours
April 18, 2012	Find Strength in Numbers: Sampling Techniques to Improve Financial Audit, Control and Program Performance Audio Conference	2 hours
May 9, 2012	Carlo Ponzi or Bernard Madoff - Who Was the Bigger Villain? Audio Conference	2 hours
May 23, 2012	Ethical Dilemmas - Recognizing, Analyzing and Resolving Situations Where There Are Two Right Choices Audio Conference	2 hours
June 20, 2012	Dispelling the Five Myths of Performance Management Audio Conference	2 hours
	Total CPE hours provided	46 hours

The chapter received \$5,000 in corporate sponsorship to assist with the Winter Seminar.

## **V. CERTIFIED GOVERNMENT FINANCIAL MANAGER (CGFM) PROGRAM**

The chapter supported the CGFM program by providing training required to maintain the CGFM certification.

The CGFM Committee held drawings for one set of the CGFM exam study guides, one scholarship which covered the cost of all three CGFM exams, and four scholarships which covered the cost of one CGFM exam. The committee also recorded study DVDs to be used in conjunction with the study guides and provided those free to those who committed to taking the CGFM exams.

In recognition of March being designated as CGFM month, the chapter recognized all CGFMs who were in attendance at the March chapter meeting, and the names of the chapter's 166 CGFM members were included in the March Newsletter. The CGFM Committee obtained a proclamation from the House of Representatives establishing March as CGFM Month in Tennessee and also obtained a Certificate of Congratulations from the Mayor of Metropolitan Nashville and Davidson County in recognition of CGFMs.

## **VI. COMMUNICATIONS**

<i>Nashville Notes</i>	A special edition of the chapter newsletter was published in July 2011, to cover the May Awards Luncheon, and eight regular issues of the chapter newsletter were published for September 2011 through April 2012.
Website	The chapter maintained a website at <a href="http://www.nashvilleaga.org">www.nashvilleaga.org</a> that was updated regularly throughout the year.
Listserv	Much of the information communicated to members throughout the year was through the chapter's listserv, <a href="mailto:nashville-aga@googlegroups.com">nashville-aga@googlegroups.com</a> .
Facebook Group	Members could join the Facebook Group at Nashville AGA - Early Careers.

## **VII. COMMUNITY SERVICE ACTIVITIES**

2011 - 2012 school year	For the 11 <sup>th</sup> consecutive year, the chapter partnered with Alex Green Elementary School through the Project PENCIL Foundation. Through this partnership, the chapter enriched the educational experiences of the students and assisted the faculty and staff throughout the school year through such activities as school supply donations, monetary contributions, and member involvement in school activities (Read-to-Me
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Program, Teacher Appreciation Week, and Spring Field Day).

On May 14, 2012, chapter representatives and faculty and staff from Alex Green Elementary School attended the annual BRAVO Luncheon held by the Project PENCIL Foundation. At the luncheon, the chapter received an award acknowledging 10 years of participation, and Tammy Fruscione, Community Service Chair, received an award for serving as the Project Coordinator for 10 consecutive years.

- September 10, 2011 Members assisted the Nashville Area Habitat for Humanity by volunteering to work on a new house under construction in the Park Preserve Neighborhood.
- September 22 - 24, 2011 Members assisted with the Women's Half Marathon and participated in the event.
- October 11, 2011 Members donated money for the *Making Strides to End Breast Cancer* walk at LP Field.
- October 2011 Members donated money for A Kid's Place Child Advocacy Center, and the chapter matched the member contributions up to \$500.
- November 12, 2011 Members assisted with the *Step Out to Fight Diabetes* walk and donated money toward the cause.
- November - December 2011 Members donated canned goods and other nonperishable food items and also donated money for the Second Harvest Food Bank.
- November - December 2011 Through the Little Soldiers program at Fort Campbell, Kentucky, members provided gifts during the holiday season for children of service members deployed in Iraq and Afghanistan.
- December 2011 In the Hats, Coats, and Gloves Drive, members donated items to be distributed to individuals in need through Samaritan Ministries of Temple Baptist Church.
- February 2012 Members donated money for the Elephant Sanctuary, and the chapter matched the member contributions up to \$500.
- February 29, 2012 Members served dinner and helped with other kitchen services at the Nashville Rescue Mission. Members also donated money to assist the Mission in its service to the homeless and others in need in the Nashville community.

March 8, 2012	Members assisted the local public television station, WNPT Channel 8, during its membership drive by answering telephones and taking pledges, and members also made pledges.
March 1 - mid April 2012	Through the Volunteer Income Tax Assistance program, members provided assistance to senior citizens and low-income families and individuals in filing their tax returns.
April 26 - 28, 2012	Members assisted with the Country Music Marathon, which benefited St. Jude's Children's Hospital.

### **VIII. SPECIAL CONTRIBUTIONS**

The chapter donated \$500 to the new Naples, Florida Chapter to help with their startup costs.

The chapter donated \$100 to the Georgia Alzheimer's Association, the chosen charity for the regional Professional Development Conference, which was held in Atlanta in April 2012.

The chapter donated \$200 for the Chapter Challenge for the charity fundraiser for the Professional Development Conference, which was held in San Diego.

### **IX. CHAPTER RECOGNITION, PARTICIPATION, AND AWARDS**

#### **A. Chapter Recognition**

The chapter received the Platinum Chapter Designation, which is the highest recognition level in the Chapter Recognition Program sponsored by the National Office.

The chapter received the Group A Community Service Award from National.

The chapter received the Group A Honorable Mention Award from National for the chapter website.

The chapter received a Certificate of Excellence in Member-Centric Reporting from National for its 2011 Member-Centric Report.

#### **B. Chapter Members' AGA National Participation**

- Gerry Boaz, CGFM, Chair of the Professional Certification Board
- Hank Clay, Emerging Leaders Focus Group
- Jeff Hughes, Emerging Leaders Focus Group

- Talia Lomax-O'dneal, CGFM, Awards Committee
- Melinda Parton, CGFM, Chair of the Governance Committee
- Melinda Parton, CGFM, Senior Vice President At-Large
- Kathy Stickel, CGFM, Financial Management Standards Board

**C. Chapter Members' AGA Regional Participation**

- Karen B. Hale, CGFM, Regional Vice President-Elect
- Ron Queen, CGFM, Certification Regional Coordinator

**D. Chapter Members Who Won National Awards**

- Dennis Dycus, CGFM, received the William R. Snodgrass Distinguished Leadership Award at the National Leadership Conference in February 2012.
- Melinda Parton, CGFM, received a President's Award for her strong leadership as Chair of the Governance Committee.

**E. Other National Awards Nominations**

- Chapter Service Award - Jeff Hughes
- Newsletter

**F. Member Awards**

- Outstanding Government Achievement Award - Jan Sylvis, CGFM
- Member of the Year Award - Angela McElrath-Prosser
- Community Service Awards - Jeff Hughes and Scarlet Sneed
- Early Careers Awards - Joseph Waldrum, MVP Award and Newsletter Award; Morgan Jumbi and Doreen Zientar won awards for having more than 20 points in the Member Activity Program
- Membership Awards
  - Top Recruiter May - November 2011 - Scarlet Sneed, CGFM
  - Winner of the Other Recruiters Drawing - Jennifer Whitsel
  - Top Recruiter December 2011 - April 2012 - Angela McElrath-Prosser
  - Winner of the Other Recruiters Drawing - Regina Dobbins
- Newsletter Article Awards - Melvin, Jones, Jr., CGFM, and Joe Waldrum
- President's Star Awards - Scarlet Sneed, CGFM, Meetings and Attendance Committee Co-Chair, and Dan Willis, CGFM, Website Committee Co-Chair
- President's Awards - Penny Austin, CGFM, Newsletter Editor, and Jerry Durham, CGFM, CGFM Committee Chair

- Winner of the PDC Drawing - Melvin Jones, Jr., CGFM, won the drawing, but he deferred to Scarlet Sneed, CGFM, whose name was drawn as first alternate.

**G. Retirees Honored**

At the May Awards Luncheon, the chapter honored two members who retired during the year: Dennis Dycus, CGFM, who was a charter member of the chapter, and Chuck Richardson, who joined the chapter in 1987.

**H. Scholarships**

The chapter awarded the William R. Snodgrass Scholarships to Jennifer Minnis (\$1,500) and Matthew Startup (\$750).

The chapter awarded the Fawn Ellis Memorial Scholarship to Jacob Huffman, son of member Kevin Huffman, CGFM, in the Division of Local Government Audit in the Comptroller's Office.

**X. CHAPTER MEMBERS THAT SERVED ON COMMITTEES**

**Accountability Outreach**

Karen B. Hale, CGFM, Chair  
Melvin Jones, Jr., CGFM  
Chas Taplin

**Awards**

Jeff Hughes, Chair  
Rhonda Williams

**CGFM**

Jerry Durham, CGFM, Chair

**Community Service**

Tammy Fruscione, CGFM, Chair  
Alla Cox  
Jeff Hughes  
Melvin Jones, Jr., CGFM  
David Lannom, Jr., CGFM  
Ray Register  
Scarlet Sneed, CGFM  
Jennifer Whitsel  
Rhonda Williams

**Corporate Sponsorship**

Gerry Boaz, CGFM, Chair  
Melissa Boaz

**Finance**

Keevia Battle, Chair  
Bridget Carver  
Angela McElrath-Prosser  
Valerie Oliver  
Doreen Zientar

**Meetings and Attendance**

Cynthia Setters, Co-Chair  
Scarlet Sneed, CGFM, Co-Chair  
Tammy Fruscione, CGFM  
Eugene Hampton, II, CGFM  
Rhonda Williams  
Katie Yarborough

**Membership**

Eugene Hampton, II, CGFM, Co-Chair  
Valerie Oliver, Co-Chair

**Newsletter**

Penny Austin, Editor

**Nominating**

Ray Register, Chair  
Melvin Jones, Jr., CGFM  
Angela McElrath-Prosser  
Mary Anne Queen, CGFM

**Early Careers**  
Ellen Dunkin, Chair  
Joseph Waldrum  
Katie Yarborough

**Education**  
Corey Tester, Co-Chair  
Rhonda Williams, Co-Chair  
Don Ivancic  
Sandra Patterson  
Sharon Shaneyfelt  
Kathy Stickel, CGFM  
Katie Yarborough  
Jennifer Whitsel

Joseph Waldrum

**Program**  
Hellens Cruz-Sanchez, Co-Chair  
Britt Wood, CGFM, Co-Chair

**Public Relations**  
Karen B. Hale, CGFM, Chair

**Website**  
Nathan Abbott, Co-Chair  
Dan Willis, CGFM, Co-Chair

The Committee Appreciation Lunch was held on April 23, 2012, at The Old Spaghetti Factory.

## **XI. MEMBERSHIP**

The chapter had 363 members at the beginning of the membership year, May 1, 2011, and 365 members at the end of the membership year, April 30, 2012.

New and returning members for the year were:

Maya Angelova	Aaron J. Kistler
Tisa Beard	Russell W. Lee
Carrie L. Blair, CGFM	Franklin J. Luppe, III
Janora Bryson	Herbert L. Majors
Bobbye Burge	Joseph Aaron Maynard
Brittney S. Chappell	Phillip McGovern
Bryan Scott Chriske	Cynthia Minnick
LaDonna Copeland	Debra H. Moss
Eric A. Crawford	Gary Pope
Sharon G. Crowell	Torrance T. Randle
Divon R. Crutchfield	Joyce Merrell Raulston
John C. Dunne	Kathy R. Richardson
Robert Fox	Paula J. Rosenberg
Andrew Furlong	Gwendolyn Shanks
Ashley Garrison	Jean Kyoung Suh, CGFM
Charlotte Hobaugh Gentry	Dawn Welker Thomack, CGFM
Glenda Gregory	Latricia B. Tidwell
Felenceo M. Hill, CGFM	Alexander J. Warns
Laura B. Pickett Isbell	John D. Whybrew
Carlette Jones	James A. J. Young

## **XII. EARLY CAREER AND STUDENT MEMBERS**

The Early Careers Committee set up a Facebook page for the chapter.

One of the Early Career members participated in the Meet the Firms event at Tennessee State University.

Shirley Henry, CGFM, President, and Ellen Dunkin, Early Careers Chair, participated in High School Accounting Day at Western Kentucky University on November 4, 2011.

In recognition of February being designated as Early Careers month, the chapter recognized all Early Career members who were in attendance at the February chapter meeting, and the names of the Early Career and student members were included in the February Newsletter.

### **XIII. FINANCIAL INFORMATION**

#### **A. Statement of Net Assets**

The chapter had total assets at June 30, 2012, of \$74,422.11. The total amount of net assets was \$70,972.86 at June 30, 2012.

#### **B. Revenues and Expenses**

The chapter had revenues of \$39,404.86 and expenses of \$43,299.20 for the fiscal year ended June 30, 2012.

### **XIV. RELATIONS WITH OTHER PROFESSIONAL SOCIETIES**

The chapter had a joint meeting with the Nashville Chapter of the Association of Certified Fraud Examiners in February 2012.