

ABOUT OUR UPCOMING EVENTS

JANUARY 13, 2005

TAX UPDATE SEMINAR
AT THE MARRIOTT HOTEL,
189 WOLF ROAD, COLONIE, NY.

JANUARY 25, 2005

5TH ANNUAL TECHNOLOGY SEMINAR
AT THE POLISH COMMUNITY CENTER,
WASHINGTON AVENUE EXT., ALBANY, NY.

FEBRUARY 10, 2005

**PROFESSIONAL CERTIFICATION
INFORMATION SEMINAR**
AT THE HOLIDAY INN TURF,
205 WOLF ROAD, COLONIE, NY.

FEBRUARY 15, 2005

SARBANES-OXLEY UPDATE
AT THE QUALITY INN,
WATERVLIET AVENUE EXT., ALBANY, NY.

RESERVATIONS: ONLINE AT
WWW.AGANYCAP.ORG OR
CONTACT CATHY PRESCOTT AT (518)
427-4750 OR CPRESCOTT@KMPG.COM
NO-SHOWS WILL BE BILLED THE
FULL COST OF THE EVENT.



Information Security Top Tech Issue for 2005 According to Annual AICPA Survey

For the third consecutive year, Information Security is the country's number one technology concern, according to the results of the 2005 Top Technologies survey of the American Institute of Certified Public Accountants.

The survey, conducted annually since 1990, seeks to determine the 10 most important technology issues for the coming year. There were more than 300 participants in the 2005 survey, a 30 percent increase over the previous year.

Interestingly, Spam Technology – an issue closely associated with Information Security – apparently has lost some currency. It made its debut on the 2004 list at number two. On the new list, it falls to number four.

“Because our work and personal lives are now inextricably linked to information systems, security will always be top of mind,” said Roman Kepczyk, CPA/CITP, Chair of the AICPA's Information Technology Executive Committee. Commenting on Spam Technology's lower placement on the list, he said, “We've seen major improvements to filtering systems, which have allowed us to bring Spam under greater control. This most likely is the reason that Spam Technology doesn't command the importance it did in the previous survey.”

A different issue closely allied with Information Security – Electronic Data Management, or the Paperless Office – moved up to second place. It was number three last year.

There are two debuts on the Top Technologies list: Authentication Technologies and Storage Technologies. Another issue, Learning and Training Competency, reappears at number 10 after an absence of three years.

The following are the 2005 Top 10 Technologies (new issues are indicated):

1. Information Security: The hardware, software, processes and procedures in place to protect an organization's information systems from internal and external threats.

2. Electronic Document Management (paperless or less-paper office): The process of capturing, indexing, storing, retrieving, searching and managing documents electronically. Formats include PDF, digital and image store database technologies.

3. Data Integration: The ability to update one field and have it automatically synchronize between multiple databases, such as the automatic/seamless transfer of client information between all systems. In this instance, only the data flows across systems from platform to platform or application to application. Data integration also involves the application neutral exchange of information. For example, the increased use of XBRL (eXtensible Business Reporting Language) by companies worldwide provides for the seamless exchange and aggregation of financial data to meet the needs of different user groups using different applications to read, present and analyze data.

Continued on page 17.

CAPITAL IDEAS

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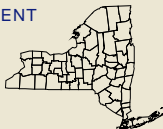
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President's Message

from
Lori Vaccaro



Happy New Year! We have completed another calendar year. And yet, we are right in the middle of an exciting AGA year, on the verge of the end of the State year and somewhere between the beginning and the middle of the Federal year. How do you keep track of it all?! Well, I know many of you, like I, attended the Holiday Luncheon in December where we listened to the entertaining stories shared by the delightful **Sr. Anne Bryan Smollin, CSJ PhD**. For me, the humor helped release the tension that is too often brought on when trying to keep track of and do too much at once. I sincerely hope that Sr. Anne had a similar effect on you, offering a nice break from the hustle and bustle of the holiday season and the coming of the new year.

There are many topics that I could share with you in my message this month, but there is one in particular that I have been intimately involved with and I believe is very important in the history and future of AGA. That topic is the AGA name change issue. I would like to pass along an update on the historical name change issue along with a chronological synopsis of how we arrived at this point.

As you may recall, the name change was most recently instigated by a document prepared in 2003 by Past **National President William J. Anderson Jr., CGFM**, at the end of his term. Mr. Anderson had initiated discussion of changing the name from Association of Government Accountants to the Association for Government Accountability—still AGA, but with the emphasis placed on the Association's mission. The emphasis would be taken off the word "accountants" to better enhance recruitment within other disciplines.

At the Chapter Executive Committee (CEC) meeting on May 11, 2004, we were tipped off by our own **Ray Harris, CGFM** that a vote would likely take place at the AGA National Board of Directors (NBD) Annual Meeting at the PDC in June 2004 to determine whether the association name should be changed. Our chapter's Board and Officers, agreeing with Mr. Anderson's objective, passed a motion to endorse a proposal to change the name to the Association for Government Accountability with the word "Professionals" under the Association title.

At the NBD Annual Meeting, a spirited debate commenced among the NBD members present, with alternative names suggested and with some members suggesting the name not be changed at all. The membership appeared to be split down the middle. The discussion culminated in a motion from the floor to form a Focus Group, charged with the responsibility to determine whether AGA's name should be changed and, if so, determine a single name to be forwarded to the (National Executive Committee) NEC and then NBD for consideration. **National President Bobby A. Derrick, CGFM**, was charged with appointing the Focus Group members and overseeing the name change process.

Continued on page 17.

State Audit Sparks Major Change in Drug Industry Practices

by David Fleming and Laura Brown, New York State Office of the State Comptroller

Are prescription drugs expensive? Of course. Can New York State save money on drugs for Empire Plan members? Absolutely! And the beneficiaries of many millions of dollars in costs savings will be State taxpayers, thanks in great part to the auditors in the NYS Health Insurance Program Audit Unit at the State Comptroller's Office. Our work led directly to a year-long investigation by the State Attorney General's Office, which culminated in a highly visible \$100 million lawsuit against Express Scripts, Inc., a pharmacy benefit manager. Media reports credit the Comptroller's audits for the initiation of the State Attorney General's investigation, and analysts predict the investigation and lawsuit will change the way pharmacy benefit managers do business. Read on to find out what pharmacy benefit managers are, what the auditors and investigators discovered about Express Scripts' practices, and how the auditors and the Attorney General's Office are cooperating to force one of the nation's biggest pharmacy benefit managers to pay up.



Pharmacy benefit managers are companies that administer drug benefit programs for employers. Pharmacy benefit managers, which manage pharmacy benefits for nearly 200 million Americans, paid about \$121 billion for prescription drugs in 2001 and 2002 - about 80 percent of total spending on prescription drugs in the United States. Express Scripts is the country's third largest pharmacy benefit manager. New York State contracts with CIGNA, an insurer, and Express Scripts, a pharmacy benefit manager, to manage prescription drug benefits for the approximately one million members of the Empire Plan, the State's primary health benefit plan. Through Express Scripts, the State spends about one billion dollars annually on prescription drugs.

One billion dollars is a lot of money, so the NYS Health Insurance Program Audit Unit began to examine Express Scripts' operations by doing a risk assessment of Express Scripts' practices in 2001. Since we had little prior experience auditing Express Scripts, we approached this assignment with a willingness to learn and with wide-open minds. We met with Express Scripts officials to discuss their mission and procedures; we reviewed the State's contract with CIGNA/Express Scripts, related contract correspondence; Express

Scripts' annual reports; and audit reports for other health insurance plans' prescription drug programs. We then researched prescription drug industry practices and attended conferences sponsored by national healthcare and investigative organizations. We also analyzed an electronic file containing two years of Express Scripts' paid claims (about 20 million transactions), doing searches for patterns and trends, and tests for compliance with various contract terms.

While reviewing correspondence between Express Scripts and the State, we noted that Express Scripts seemed to be in violation of a key drug pricing assertion made during the contract negotiation process. We also identified issues concerning Express Scripts' manufacturer rebate program, and concluded Express Scripts could be retaining some rebates that rightfully belonged to the State. To find out whether this happened, and to what extent, we designed a series of audits to find out whether Express Scripts owed money to New York State.

In our first audit, we concluded that Express Scripts charged the State inappropriately high prices for generic drugs dispensed at out-of-state pharmacies (Report 2001-S-52). This audit was released in September 2002, and received widespread media attention. Media interest included a FOIL request from, and subsequent article in, *The Wall Street Journal*; coverage in *The New York Times*; and mention in several Internet news sites, such as Reuters and Bloomberg. As a result of the media exposure, the Attorney General's staff met with us to discuss our audit work at Express Scripts.

Our initial meeting with officials from the Attorney General's Office took place in March 2003. We discussed the issues addressed in our audit report, as well as the issues we were examining in our in-progress audit that focused on Express Scripts' inappropriate generic drug pricing of New York State pharmacy claims. We also told Attorney General officials about our next audit, in which we planned to determine whether Express Scripts remitted all manufacturer rebates due to New York State. Generic drug pricing and manufacturer rebates became the two leading issues in the Office of the Attorney General's lawsuit. These initial meetings were the start of a relationship with the Attorney

General's Office that has evolved into a collaborative partnership. Our role in this partnership is to share our knowledge of Express Scripts' business operations and practices with Attorney General's staff, and to do the essential data analysis to build the Attorney General's case against Express Scripts. This work was very extensive, and soon became our major focus.

In June 2003, the Office of the Attorney General issued a subpoena to Express Scripts requesting documents relating to a wide range of company business practices. Express Scripts provided the Attorney General's Office with several hundred boxes of subpoenaed documentation. Attorney General staff undertook the monumental task of categorizing each document into several organizational areas. Fortunately, we were not involved in this process. Our job was to analyze voluminous electronic data files received, including several million claim records; rebate files; pricing files; pharmacy network files; drug manufacturer rebate files; and much more. It was a challenge to understand what each file represented, and the relationships between files. This task was made more difficult by our lack of direct access to Express Scripts staff. Instead, as a result of the Attorney General subpoena and related investigation, Express Scripts funneled all contacts through their outside counsel. This was a cumbersome and time-consuming process.

During our collaboration with the Office of the Attorney General, we developed a greater appreciation for the importance of documentation. There are times, although infrequent, when we had viewed documentation as something to be endured to get an audit through the internal review process. However, we learned the importance of documenting

our sources, methodologies, and conclusions to support a major legal action. After all, it's very possible our work may need to be defended in a formal legal setting.

As an interesting highlight, our partnership with the Attorney General gave us a rather unique opportunity to review documentation we would not have seen during the normal audit process. For example, we reviewed numerous Express Scripts internal correspondences and comments related to our audits. Due to strict confidentiality provisions, we cannot disclose details. However, it was very clear that we had their attention, certainly much more than their official responses indicated. Top corporate management was concerned about our audit and how to control its impact. It is not always clear what kind of impact audits have. Official responses often downplay the significance of audit findings, sometimes even criticizing audit methodologies and conclusions. If other auditors had the kind of access to internal auditee documentation that we did, I think many would be surprised at the impact they have.

In August 2004, the Attorney General formally filed a lawsuit against Express Scripts. The Attorney General's press release accused Express Scripts of "conducting elaborate schemes that inflated by millions of dollars the costs of prescription drugs to New York State's largest employee health plan, the Empire Plan." The Attorney General's Office press release credited our audits for sparking their investigation, and acknowledged our role in the investigation. We are looking forward to continuing our collaboration with the Attorney General's Office on this important lawsuit that promises to save the State millions of dollars, and alter many of the business practices of the pharmacy benefit manager industry.

How Did I Get to Be Me?

We are pleased to announce that the speaker for AGA's April 2005 Breakfast Club *How Did I Get to Be Me* is **Mr. John C. Egan**.

John Egan began his career in his hometown of Dannemora, New York. At just 16-years-old he worked at Clinton State Prison, shoveling coal into the prison's boiler. Mr. Egan's commitment to "Getting it Done," put him on a 40-year governmental career track which saw him rise to become Commissioner of General Services, Executive Director of the New York State Dormitory Authority and

Commissioner of the New York State Department of Transportation.

After leaving State employment, Mr. Egan became CEO of the Albany County Airport Authority. Under Mr. Egan's leadership, the Authority initiated a \$100 million Terminal Improvement Program (TIP) which saw the construction of a new terminal. Following the initial TIP, an additional \$157 million in projects such as the parking garage, cargo facility, executive hangar, Airport Industrial Park, remote parking and numerous land acquisitions for noise protection and runway safety improvements were completed.

Shortly after the new terminal opened in June of 1998, Mr. Egan began his

effort to stimulate airline competition and reduce Albany's high fares by attracting Southwest Airlines to Albany. During his period as CEO, Albany's fares have fallen to the 5th lowest in the nation according to the U.S. Department of Transportation. Mr. Egan, the Authority Board and staff have worked diligently to position the Airport for its next level of expansion including extension of the existing terminal to accommodate 2 million enplanements annually.

The Chapter's next Breakfast Club will be at the Wolfert's Roost Country Club on April 6, 2005. Check your e-mail and the Chapter's website for further information.



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NEW YORK CAPITAL CHAPTER

TOPIC:

- **TAX UPDATE SEMINAR**

DATE:

- **THURSDAY, JANUARY 13, 2005**

TIMES:

- **7:30 AM – 8:30 AM – REGISTRATION AND
BUFFET BREAKFAST**
- **8:30 AM – 10:30 AM – SEMINAR**

GUEST SPEAKER:

**DAVID WOJESKI, DIRECTOR, WOJESKI & COMPANY,
CPAs, P.C.**

CPE: Two (2)

LOCATION:

- **MARRIOTT HOTEL**
189 WOLF ROAD, COLONIE, NY

COST:

- **\$20 FOR AGA MEMBERS**
- **\$30 FOR OTHERS**

This year we are bringing back the tax update seminar. Over the past few years there have been significant changes in many areas of the tax law, both Federal and State. We are fortunate this year to have Dave Wojeski from Wojeski & Company CPAs, PC. as our speaker.

The seminar will focus on those areas that have had the most changes, most notably these areas:

- Child tax credit
- Qualifying dividends, capital gains
- College tuition/Education
- Depreciation
- Automobile deductions
- Estate and gift
- Retirement plans
- Alternative Minimum Tax
- Recent legislative changes
- Changes enacted since the publishing of this brochure

Additional areas of interest will be covered as well.

Dave is the Managing Director of Wojeski & Company CPAs, PC. The firm is located in East Greenbush, NY and has a staff of eighteen people including ten certified public accountants. Dave graduated summa cum laude with a B.S. degree from State University of New York at Albany and started his career with the Big Four firm of Ernst & Young. He is a registered CPA in the State of New York and a member of the American Institute of Certified Public Accountants, New York State Society of CPAs, and National Association of Certified Valuation Analysts. He focuses his practice on tax and consulting issues for closely held companies and individuals.

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NEW YORK CAPITAL CHAPTER

TOPIC:

- TECHNOLOGY SEMINAR

PRODUCTIVITY-ENHANCING TECHNOLOGY

DATE:

- TUESDAY, JANUARY 25, 2005

TIMES:

- 7:45 AM – 8:30 AM – REGISTRATION

- 8:30 AM – 4:00 PM – SEMINAR

GUEST SPEAKERS:

**MICHAEL SANTARGANGELO, MICHAELANGELO
GROUP**

JIM KAPLAN, AUDITNET®

CPE:

- SEVEN (7)

LOCATION:

- POLISH COMMUNITY CENTER

WASHINGTON AVENUE EXT., ALBANY, NY

COST:

- \$75 FOR AGA/IIA/ISACA MEMBERS

- \$125 FOR OTHERS

Technology should help auditors be more productive – whether it knows how to get your computer to work faster, how to monitor its use to ensure your organization staffs web-surfing activities are productive, where to get information about a person or business quickly and affordably, or even where to find that unique audit program.

This year's Technology Seminar will teach you how to address all this and more!

The Albany Chapters of the AGA, IIA and ISACA will welcome the following:

Michael Santargangelo, the interactive and energetic founder of The Michaelangelo Group, will show how improving your security will help protect against things that rob you of productivity at work and at home, like Adware, Spyware and Spam. He'll also discuss best practices for ensuring a focused and creative employee during working hours (instead of surfing the 'net).

There will also be a presentation on Accurint® to showcase the world's most comprehensive and accurate locate and research tool designed to achieve better results at a lower cost. Accurint® software helps you find people, businesses and their asset and get deep background information, like bankruptcies and criminal histories. Accurint® makes searching easy by providing instant access to billions of linked records.

Jim Kaplan, is the creator of AuditNet®, the Web portal with links, tools and resources developed for the benefit of the auditors. His web site contains over 1,000 audit programs, a Sarbanes-Oxley center, a virtual audit library and many other audit links. Jim will show us how best to use this resource to improve audit productivity.

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NEW YORK CAPITAL CHAPTER

TOPIC:

**- PROFESSIONAL CERTIFICATION
INFORMATION SEMINAR**

DATE:

- THURSDAY, FEBRUARY 10, 2005

TIMES:

**- 8:00 AM – 8:30 AM – REGISTRATION, COFFEE
AND PASTRIES**

- 8:30 AM – 10:00 AM – SEMINAR

GUEST SPEAKERS:

**FRANCINE MARZINSKY, CGFM, CIA, CCSA,
CGAP, CBM (AGA)**

MARY E. PECK, CIA, CCSA, CGAP (IIA)

ROBIN MACGOWAN (IMA)

CHARLES NORFLEET, CFE (ACFE)

ISACA REPRESENTATIVE

NYSSCPA REPRESENTATIVE

CPE:

- ONE (1)

LOCATION:

**- HOLIDAY INN TURF
205 WOLF ROAD, COLONIE, NY**

COST:

- FREE, BUT YOU MUST PRE-REGISTER

Attend the **Professional Certification Information Seminar** to learn about the:

- Various certifications available to government finance, accounting, auditing, IT, and fraud professionals
- Benefits of the professional certifications
- Requirements for applying and earning the professional certifications
- Exam details
- Maintenance requirements

The seminar will give you a quick overview of the following certifications:

- **Certified Fraud Examiner (CFE)**
- **Certified Government Financial Manager (CGFM)**
- **Certified Information Systems Auditor (CISA)**
- **Certified Internal Auditor (CIA)**
- **Certified Public Accountant (CPA)**
- **Certified Management Accountant (CMA)**
- **Certified in Financial Management (CFM)**

Representatives from each of the certification sponsoring organizations will present an overview of their professional certification and answer questions you may have. Written information and applications will also be available for each certification.

No matter what stage you are in your career, the time is right to consider pursuing Professional Certifications!

CO-SPONSORS:

**- LOCAL CHAPTERS OF THE AGA, ACFE,
NYSSCPA, IIA, IMA & ISACA**

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NEW YORK CAPITAL CHAPTER

TOPIC:

- *SARBANES-OXLEY UPDATE*
*IMPLICATIONS OF SARBANES-OXLEY FOR THE
FUTURE OF THE AUDITING PROFESSION*

DATE:

- *TUESDAY, FEBRUARY 15, 2005*

TIMES:

**- *12:00 PM – 1:00 PM – REGISTRATION AND
LUNCH***
- *1:00 PM – 4:30 PM – SEMINAR*

GUEST SPEAKER:

NANCY VALLEY, NATIONAL PARTNER, KPMG

CPE:

- *FOUR (4)*

LOCATION:

- *QUALITY INN*
WATERVLIT AVENUE EXT., ALBANY, NY

COST:

- *\$65 FOR AGA MEMBERS*
- *\$115 FOR OTHERS*
***(SAVE \$15 IF PREPAYMENT IS RECEIVED BY THE
AGA BY FEBRUARY 1, 2005)***

While Sarbanes-Oxley is consistently called the broadest-sweeping legislation to affect corporations and public accounting since the 1933 and 1934 securities acts, experts agree the resulting changes are just beginning. Yes, Sarbanes-Oxley was precipitated by a slew of corporate scandals, including those at Enron, Arthur Andersen, Tyco, Global Crossing and WorldCom. But it was meant to address systemic flaws in the way corporations have been reporting their numbers for decades.

The Sarbanes-Oxley Act brought sweeping changes to many aspects of the financial reporting, corporate governance, and regulatory landscape for public companies. Section 404 of the Act requires public companies to include with their annual report to the Securities and Exchange Commission (SEC) a separate report on the assessment of the effectiveness of the entity's internal control. Additionally, the entity's external auditors must attest to and report on the assessment made by management. These reporting requirements generally become effective for the end of the entity's first fiscal year ending on or after June 15, 2004.

The Sarbanes-Oxley Act also includes significant reforms intended to strengthen auditor independence and to improve audit quality. David Walker from the GAO has suggested that government auditors and financial professionals listen to the message from the Sarbanes-Oxley reforms and seize the opportunity.

Clearly, a new age of accountability was ushered in by the Sarbanes-Oxley Act. This will have a profound influence on auditing standards and implications for many auditors.

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DISCOUNTS**

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Early Careers Center



Ten Signs of Job Dissatisfaction Don't Ignore Them!

by Deborah Walker, CCMC

The new year is a great time to analyze your job satisfaction. As you make your new year's resolutions, include career fulfillment as a top priority.

There are ten sure signs that you are experiencing job dissatisfaction. If you:

- Dread Mondays or coming to work
- Can't wait for Friday
- Are often bored at work
- Feel tired or chronically fatigued
- Avoid your boss and dread meetings
- Have no enthusiasm or sense of self-worth
- Feel like you are getting nowhere in your job
- Take work stress home
- Question your choice of industry or occupation
- Can't think of a way out

Any of the above signs indicate a need for change. The biggest career mistake is to ignore those indicators. A head-in-the-sand mentality can lead to a downward career spiral that ends with disappointment and "what if" regrets.

Here are three great ways to facilitate positive change.

Analyze your career choice.

Is the problem your boss or employer—or is it that you have chosen the wrong occupation? Before you take any action, make sure you know what needs to change.

Don't make the mistake of throwing away a good career (ex. accounting, sales, finance) when the problem is really the person you work for. On the flip side, if you're not cut out for sales, then changing employers isn't going to help the problem.

A career coach can guide you to determine which of these problems is causing your unhappiness and give you ideas for your next career move.

Update your resume.

Updating your resume can give you a great confidence boost. You'll feel better immediately if you know you are ready whenever opportunity knocks.

Be careful, however, that your resume doesn't resemble a house with too many additions, each resembling a different style. If you have simply added to the same old resume job after job, it's time to "tear down that old shack" and rebuild your resume from the ground up.

If your old resume format doesn't live up to your professional image, you may want to consult a resume writer. You'd never wrap a ruby ring in old newspaper, and you should never present your career with anything less than professional polish.

Brush up your interview skills.

If you have been on the job for a couple of years, your interview skills are probably rusty. Don't make the mistake of blowing off the first few interviews as practice. They might be the perfect jobs for you!

You'll feel much more confident and comfortable if your interview skills are honed before you step into the first interview. To determine your current level of interview expertise, answer the following questions:

- Do you know the toughest interview questions—and how to answer them?
- Can you answer the salary question without compromising the level of starting salary at offer time?
- Can you recognize the most common interview styles—and respond without showing stress?

If you aren't sure, then it may be time to visit with a career coach who can help you prepare to WOW them in every interview.

Job dissatisfaction is an indication of needed change. Take the steps of change by investing in the appropriate job-search skills and tools, and you will be in a position to change your job—and your life—for the better.

~~~~~  
Deborah Walker, CCMC  
Resume Writer ~ Career Coach  
To see resume samples and read more job-search tips visit  
[www.AlphaAdvantage.com](http://www.AlphaAdvantage.com)  
Email: [Deb@AlphaAdvantage.com](mailto:Deb@AlphaAdvantage.com)

**CGFM**o  
r  
n  
e  
rby Pete Rose  
AGA National Office**CGFM Designation:  
It's Not Just for  
Accountants**

Government financial management is broad in scope. Consider the diversity of AGA's membership: while many are accountants and auditors, AGA members are also budget analysts, program analysts, internal auditors and other financial management professionals. The common goal of our membership is interest in government financial management and advancing government accountability.

The Certified Government Financial Manager (CGFM) Program reflects the diverse range of knowledge required of government financial managers. Look at the content specifications of CGFM Examinations [<http://www.agacgfm.org/cgfm/exams/>]. A CGFM needs to have knowledge about how the government works, how governments are financed, ethical considerations, management techniques, financial analysis, internal controls, budgeting, cost accounting, cash management, investment management, procurement, inventory systems, credit management and financial management systems.

One of the strengths of the CGFM certification is the combination of the detailed knowledge of governmental accounting coupled with a general understanding of other government financial management practices, such as budgetary accounting and cost accounting. A CGFM has to know about the requirements at all levels - federal, state and local. Much of the knowledge required by a CGFM involves theory - why things are done the way they are done. Only a small portion is devoted to practice - the actual entries that are needed for specific transactions.

The CGFM designation demonstrates a person's knowledge, skills and abilities about government in general. If you are in any type of position in government financial management, the CGFM should be at the top of your list as a preferred certification.

On occasion, we are asked how the CGFM compares to the CPA. In a sense, there is no comparison. The CPA is more than a certification - it can also lead to obtaining a license. If your goal is to practice public accounting - the review and audit of financial statements in order to render an opinion - then you must have a license from a state board of

accountancy. To get a license, you have to pass the CPA examinations. That is why the CPA is unique among certification programs.

The CGFM designation, coupled with a CPA, can be a powerful tool in your arsenal. Not only do you possess the knowledge, skills and abilities to practice public accounting, you also have knowledge, skills and abilities about the unique aspects of government.

If you are in a profession that does not require a CPA, then you need to consider obtaining a certification that sets you apart from your peers. If you are in government, as a budget analyst, program analyst, grant manager, or in any other financial management position, then the CGFM should be your first choice for a certification program.

### **Keeping Proper Backup Documentation on Your CPE Activities**

CGFMs need to maintain documentation to substantiate their statements of completed CPE for a minimum of three years. This documentation may be requested by AGA as part of a CPE audit or a reactivation process. The proper backup documentation must clearly state your attendance or completion of the CPE activity. Examples of such documentation include: a certificate of attendance or completion, a certificate of CPE hours earned, a grade report or an official letter from the event sponsor or your employer stating that you have attended the event. The documentation must also include the following information:

- sponsoring organization,
- location of the activity,
- title of the program,
- your name,
- completion date (or dates attended), and
- number of CPE hours earned.

## Important Reminder for CGFMs Certified in 1996, 1998, 2000 or 2002

### The end of the year has arrived—have you earned your 80 CPE hours?

If your CGFM certification was awarded in 1996, 1998, 2000 or 2002, you need to have 80 CPEs earned within the two-year period of January 1, 2003 - December 31, 2004. If short, you can take advantage of the grace period of January 1 - March 31, 2005 to catch up on your CPEs (these hours then cannot also be counted towards your next cycle of 2005-2006).

If you have not yet reached your mark, you still have time. What you have to do is remind yourself that every activity might serve a dual purpose. If you are earning a graduate degree, if you are teaching or writing, or if you are earning CPEs for another certification, you might be able to count these CPEs towards your CGFM certification requirement. Review the opportunities available to you for earning CPE hours, and you will realize that there are many ways in which you can maintain your CGFM certification without undue cost or time demands.

For example:

- Online CPE availability includes Journal CPE Online Program that offers CPEs for reading *The Journal of Government Financial Management* and taking the relevant quiz and online courses offered through Micromash and SmartPros, two educational organizations in partnership with AGA.
- Federal government employees have free access to E-Training through the Gov Online Learning Center.
- CPEs sponsored by AGA chapters, state CPA or other government finance officer societies and other organizations.
- Instructors can earn CPE hours for teaching a course (not to exceed 40 CPEs in any two-year period); writers who publish an article or book that contribute directly to CGFM's professional proficiency can earn up to 20 CPEs; and students who are earning their Masters degree can receive 45 CPEs by completing a 3-credit college course that relates to government financial management.

If you have questions about the CGFM CPE requirements you can also contact AGA National at 800.AGA.7211, ext. 313.

## AGA New York Capital Chapter Financial Condition As of November 2, 2004

|                              |                 |                  |                    |
|------------------------------|-----------------|------------------|--------------------|
| Assets                       |                 |                  |                    |
| Checking/Savings             |                 | \$19,465.25      |                    |
| Accounts Receivable          |                 | 1,857.00         |                    |
| Other Current Assets         |                 | <u>3,225.79</u>  |                    |
| Total Assets                 |                 |                  | <u>\$24,548.04</u> |
| Liabilities and Equity       |                 |                  |                    |
| Accounts Payable             | \$27.78         |                  |                    |
| Prepaid Discount             | -580.00         |                  |                    |
| Prepaid Revenue              | <u>3,300.00</u> | \$2,747.78       |                    |
| Equity                       |                 |                  |                    |
| Retained Earnings            | 22,295.28       |                  |                    |
| Net Income                   | <u>-495.02</u>  | <u>21,800.26</u> |                    |
| Total Liabilities and Equity |                 |                  | <u>\$24,548.04</u> |

## Advancing Government Accountability

Surf over to the New York

Capital Chapter's Website

<http://www.aganycap.org>



## AGA New York Capital Chapter Chapter Executive Committee Meeting Schedule

Chapter Executive Committee Meetings are at KPMG-Albany, at 515 Broadway, Albany, NY are held in the Board Room on the 4th floor behind the reception desk.

|                           |                |
|---------------------------|----------------|
| Tuesday, February 8, 2005 | 8:00 – 9:30 am |
| Tuesday, March 8, 2005    | 3:00 – 4:30 pm |
| Tuesday, April 12, 2005   | 8:00 – 9:30 am |
| Tuesday, May 10, 2005     | 3:00 – 4:30 pm |



**When:** September, 2004  
**Where:** Albany & Saratoga Locations  
 Please consider giving your time to attend to the donors by serving snacks and drinks or to call donors.

## Community Service Corner

We all expect blood to be there for us, but barely a fraction of those who can give do. Yet sooner or later, virtually all of us will face a time of great vulnerability in which we will need blood. And that time is all too often unexpected. From its beginning, the American Red Cross has formed a community of service, of generous, strong and decent people bound by beliefs beyond themselves. The honor, spirit and resources of the American people comes forth with neighbors helping neighbors in need - during earthquakes, floods, fires, storms - and also for the deeply personal and often quiet disasters that require a gift of blood. If interested in volunteering, please contact Debbie Harrington, at dharrington@dot.state.ny.us or 518-457-0543



**When:** October 17, 2004 – Registration 10 a.m. or Pre-register at [www.cancer.org/](http://www.cancer.org/)  
**Where:** Washington Park Lake House, Madison Ave., Albany. AGA walkers, please meet in front of Ralph's Tavern on the other side of Madison Ave. from the Lake House.

If it hasn't already, breast cancer will likely touch you or someone you know. The disease will strike more than 200,000 times this year and claim more than 40,000 lives. Join Making Strides and help make breast cancer a thing of the past. Making Strides is a non-competitive walk designed to raise awareness, foster camaraderie, and raise funds for breast cancer research, patient services, education, and advocacy. For more information or to volunteer, please contact Ann Marsh at 518-473-2020 or [amarsh@mail.nysed.gov](mailto:amarsh@mail.nysed.gov)



### *Lights in the Park*

**When:** December, 2004 **Where:** Washington Park, Albany

Volunteer for an evening to collect admission and direct cars through the park to view the beautiful light displays. In the past volunteers were rewarded with 1 free admission to drive through the park and invited to a party at the end of the season. For more information or to volunteer, please contact Ann Marsh at 518-473-2020 or [amarsh@mail.nysed.gov](mailto:amarsh@mail.nysed.gov)



### *IRS Voluntary Income Tax Assistance (VITA)*

**When:** January 2005

VITA involves IRS-trained volunteers who provide free tax assistance at community locations to individuals who need assistance with basic income tax return preparation. VITA is aimed at those for whom paid professional assistance may be out of reach, those who are non-English speaking, persons with disabilities, those with a low to fixed income, the elderly, and other individuals with special needs. For more information or to volunteer, contact Kirk Schanzenbach at 518-473-2662 or [kschanzenbach@osc.state.ny.us](mailto:kschanzenbach@osc.state.ny.us)



***The Stratton VA Medical Center***  
**When: February, 2005**  
**Valentines and Cookies to Veterans**

We will be baking cookies and delivering the cookies as well as valentines made by school children to the veterans at the hospital. Last year the veterans were touched by the valentines and appreciative of the cookies. It is a fun, heart-warming experience. If you would like to bake cookies or hand out the treats and cards to the veterans, please contact Karen Cushman at [kcushman@lottery.state.ny.us](mailto:kcushman@lottery.state.ny.us) or 518-388-3353



***Golf Tournament for Albany Medical Center's Children's Hospital***  
**When: June, 2005**

The Children's Hospital is the only hospital of northeastern New York and western New England that is just for kids. It serves 35,000 children each year.

The Children's Hospital brings together the full array of pediatric, medical, and surgical specialties essential to caring for critically ill children. It offers an environment specifically designed to ease the worry of childhood hospitalization, for both kids and their families. The physicians and staff of the Children's Hospital have assumed a leading role in the development of a comprehensive, multidisciplinary team approach to caring for children. As part of the region's only academic medical center, we offer patients and families the benefit of the most informed and experienced experts who are pioneering new treatments everyday. For more information contact Ken Evans at 518-485-5181 or [kevans@dot.state.ny.us](mailto:kevans@dot.state.ny.us)



**When: June 2005**

*Hands On Capitaland*, now in its 13<sup>th</sup> year, is a program organized and planned by the United Way of Northeastern New York.

Organizations from around the Capital Region, including business, organized labor, not-for-profit and many others, adopt an area service organization to spend the day with and perform repairs and other improvement/maintenance projects that are much needed.

The projects include planting, plumbing, painting, roofing, raking and reconstruction, all combined, provide a fulfilling volunteer experience with a tremendous impact for the agencies involved. If interested, please contact Ann Marsh at [amarsh@mail.nysed.gov](mailto:amarsh@mail.nysed.gov) or 518-473-2020.

For updates on events, visit the Community Services Corner in our newsletter or on our website regularly.

## Invitation to Participate in AGA Chapter Leadership

This is the time of year the New York Capital Chapter of the AGA, your chapter, chooses its leadership for the coming year and puts out a call for nominations from its membership. Nominations are due by December 31, 2004.

Participation in AGA activities offers you a great opportunity to enhance your organizational and communication skills, while permitting you the chance to work closely with and network with other finance professionals in State, Federal and local government as well as from the private sector.

Officer and Board Member positions offer an opportunity to participate in the organization at a high level. However, if you don't feel that you are ready for that high level commitment, committee positions offer members an opportunity to become involved in a more limited capacity. A brief description of the various AGA Chapter positions is provided below.

If you are a member and would like to become involved in a leadership or committee position, please contact Jim Nellegar at [president-elect@aganycap.org](mailto:president-elect@aganycap.org) or (518) 473-2559.

**President-Elect:** Assists the President in the execution of his/her duties, performs special functions as assigned by the President, coordinates next year's slate of Officers and Directors and has responsibility for coordinating the National Chapter Recognition program.

**Programs and Education:** Chaired by a vice president, this committee plans and coordinates activities to meet the ongoing educational needs of Chapter members.

**Communications:** Chaired by a vice president, this committee is responsible for organizing, preparing and distributing all Chapter communications, including the newsletter, Internet site and public relations information.

**Membership:** Chaired by a vice president, this committee promotes recruitment and retention of members, maintains membership records and provides liaison with National Office on membership policies.

**Community Service:** Chaired by a vice president, the committee plans, coordinates and promotes our extensive Chapter community service activities.

**Marketing:** Chaired by a vice president, the committee plans, coordinates and promotes activities that promote our Chapter in industry and the community.

**Certification:** Chaired by a vice president, this committee promotes and assists individuals in obtaining AGA's Certified Government Financial Manager certification.

**Secretary:** Performs administrative duties, including keeping minutes of the Chapter Executive Committee meetings.

**Treasurer:** Acts as custodian for all chapter funds and chairs the Chapter Budget and Finance Committee.

**Awards Committee:** Identifies members who have made noteworthy contributions to the Chapter, the profession, or the community.

**Logistics Committee:** Arranges the accommodations for all meetings held during the year.

**Socialization Committee:** Arranges social events to for chapter members.

**TCTC Committee:** The AGA, IIA and ISACA hold an annual training conference (The Conference That Counts). Chapter members serve on a steering committee for the conference that includes scheduling, planning and coordinating the event. Activities of this committee include registration, budget and finance, program development, brochure preparation, and logistical support.

**The Chapter's Board of Directors:** Consists of 10 members who hold two-year terms. In June 2005, five Directors' terms will expire. The Directors help set the goals, objectives and policies of the Chapter, review and approve the budget and programs and provide general oversight for Chapter activities.

## Go-Ahead Given for Purchase of Computers for Legislators Two Reno senators withdraw opposition to purchase of IBM laptops by Ed Vogel, *Las Vegas Review Journal*, December 3, 2004

**CARSON CITY** — The go-ahead has been given for the Legislature to purchase new \$1,500 laptop computers for each legislator and some staff members, an official said.

Legislative Counsel Bureau Director Lorne Malkiewich said Senate Majority Leader Bill Raggio and Sen. Randolph Townsend, both R-Reno, reconsidered earlier opposition and authorized the purchase. They had objected because of concerns some legislators were playing computer games and not paying attention during meetings.

Townsend said computer abuse was “rampant” and a “disgrace” during a Nov. 18 meeting in which the purchase was held up. He contended at a meeting of the Legislative Commission last summer more legislators were reading sports and playing solitaire than paying attention.

But Assembly Minority Leader Lynn Hettrick, R-Gardnerville, and Assemblyman Morse Arberry, D-North Las Vegas, said computers allowed them to do their jobs better. Arberry said it is a matter of personal responsibility for legislators not to abuse the computers.

Malkiewich said leaders of each house could issue policies that govern the use of the computers.

Each house can make policy determinations,” he said. “If they don’t want games on computers, we can take them off. If they don’t want e-mail during committee hearings, we can fix that.”

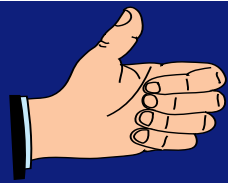
He will purchase IBM T42 model computers for \$1,540 each. Earlier a subcommittee backed the purchase of Gateway M210 models at \$1,325 each.

The M210 purchase was contingent on Gateway providing an upgraded wireless network. The company could not comply with that request by a deadline. The Legislative Building already has an IBM wireless network suitable for the new computers.

The new computers replace IBM laptops purchased four years ago for \$2,700 each.

In advocating the computer purchases, Malkiewich said he told Raggio and Townsend the current computers soon will require \$500 or \$600 each for maintenance and are slower and lack the storage space of the new models.

## “Member Items”



**Linda Zinzow, CGFM** (past Chapter President) was promoted to Contract Audit Director, New York State Department of Transportation. Congratulations Linda!!!!

**Brian Gee** (Chapter Treasurer) has taken a new job with the Office of Mental Retardation and Developmental Disabilities

**Mark Mitchell** (past Chapter President) has been appointed as Internal Auditor at the New York State Energy Research and Development Authority

**Amanda (Shook) Zibella** (Chapter Board Member) was recently married.

Congratulations to the following Chapter members who received promotions at the Office of the State Comptroller’s Division of

Local Government Services:

**Jody Bundick** - Associate Examiner

**Tony Dolan** - Program Manager I

**Jerry Jadowski, CGFM** - Associate Examiner

**Judy Middelkoop** - Associate Examiner

**Lisa Millard** - Associate Examiner

Milestone Years of Continuous Membership in the AGA:

20 Years - **John Brennan, CGFM**, New York State Comptroller’s Office

**Lawrence Emminger, CGFM**, New York State Department of Agriculture and Markets

**Brian Lotz, CGFM**, New York State Comptroller’s Office

25 Years - **James Van Voorst**, Binghamton University

30 Years - **Fred Guilmette**

Congratulations John, Brian, Lawrence, James and Fred and thanks for your continued support of the AGA!!!

Please send any recognition items, including promotions, transfers, accomplishments, etc. to Kirk Schanzenbach at [kschanzenbach@osc.state.ny.us](mailto:kschanzenbach@osc.state.ny.us) or call him at 518-473-2662.

**THE CONFERENCE THAT COUNTS 2005  
THE BEST OF TCTC  
TCTC'S GREATEST HITS... AND MORE!**



**TCTC 2005  
AT A GLANCE**

**TRACK 1 - INFORMATION SYSTEMS**

- SESSION 101** DETECTING FRAUD THROUGH DATA ANALYSIS (CRAIG GREENE)  
**SESSION 102** NETWORK SECURITY: AUDIT AND CONTROL (CRAIG MCGUFFIN)  
**SESSION 103** PRACTICAL APPLICATIONS OF ENCRYPTION (CRAIG MCGUFFIN)

**TRACK 2 - AUDITING**

- SESSION 201** THE AUDITOR'S ROLE IN CREATING AN ANTI-FRAUD ENVIRONMENT (JOHN HALL)  
**SESSION 202** THINK LIKE A THIEF: FRAUD ISSUES AND ANSWERS FOR INTERNAL AUDITING PROFESSIONALS (JOHN HALL)  
**SESSION 203** FRAUD HAPPENS 2005 PART I - REQUIEM FOR THE EASTER EGG HUNT (ART HAYES)  
**SESSION 204** FRAUD HAPPENS 2005 PART II - BAD SIGNS: WHAT'S WRONG WITH THIS PICTURE? (ART HAYES)  
**SESSION 205** RISK-BASED INTEGRATED AUDITING (PETER OSTERIO)

**TRACK 3 - MANAGEMENT**

- SESSION 301** NON-TRADITIONAL AUDIT REPORTING (JERRY SILVA)  
**SESSION 302** MAXIMIZE THE USE OF RISK ASSESSMENTS FOR PERFORMANCE AUDITING (JERRY SILVA)  
**SESSION 303** SELLING IDEAS: THE ART OF ESTABLISHING RAPPORT AND INFLUENCING OUTCOMES (JOHN HALL)

- SESSION 304** CONSULTING SKILLS FOR PROFESSIONAL AUDITORS: HOW TO DEVELOP AND APPLY INTERNAL CONSULTING SKILLS IN THE AUDIT ENVIRONMENT (JOHN HALL)  
**SESSION 305** WORKING TOGETHER FOR THE FUN OF IT (JIM SNACK)  
**SESSION 306** AUDITING THE CONTROL ENVIRONMENT (ANN BUTERA)  
**SESSION 307** CHANGE AGENT AUDITING SKILLS (ANN BUTERA)  
**SESSION 308** CONFLICT RESOLUTION: OVERCOMING CLIENT OBJECTIONS (ANN BUTERA)  
**SESSION 309** BECOMING THE TRUSTED ADVISOR: ENHANCING AUDIT'S IMAGE (ANN BUTERA)

**KEYNOTES**

- TRANSFORMATION CHALLENGES (DAVID WALKER)  
 THE MAGIC OF HUMOR: JEST FOR SUCCESS (JIM SNACK)  
 HOW TECHNOLOGY WILL SHAPE OUR FUTURE (JOANNE WALTER)



**Fall Fraud Seminar - Presenter Photographs**



Thomas Caulfield  
Nat'l Reconnaissance Office



Lisa Gerardi  
U.S. HHS



Joseph Spinelli  
KPMG



Robert Brackman  
NY State Comptroller's Office

## President's Message

*Continued from page 2.*

It was an honor to be selected by Mr. Derrick as a member of the Focus Group. Mr. Derrick informed me that this would potentially be the fourth major change to AGA since its inception in 1950. First, we opened the membership to state and local government employees (which are now the majority); second, we changed the name from FGAA (Federal Government Accountants Association); third, we implemented CGFM, and now, we could be changing the name.

**Past National President Richard V. Norment, CGFM** had the very important role of chairing the Name Change Focus Group that met several times by conference call from September 2004 through December 2004. The first conference call was fairly easy going and feedback from the membership was just beginning to trickle in for our consideration. I think it was the next call after I had read through some of the membership feedback from across the county when I realized the magnitude and severity of the change on the membership as a whole. There was some discussion when our CEC voted to support the name change, but nothing like the discussions that were had by the Focus Group. There were many members against the change who voiced their opinions by email and their reasons were valid. I had originally been in full support of the change, but as a member of the Focus Group I wanted to be sure that I listened to the membership and represented them well.

In the end, it was a very difficult decision. The Focus Group recommended to the NEC that the Association keep its current name—AGA (Association of Government Accountants)—and that the matter of changing the name be tabled at this time. In reaching its recommendation, the Focus Group's discussion focused in on two important factors:

1. There is no groundswell of support among the membership for the name change. The member feedback was split for and against changing the name, and if we changed what is the right name for our association. Changing the name is likely to cause divisiveness among the members.

2. There is no empirical evidence to support the notion that changing the name will cause a big influx in new members. However, there has been some evidence to show that some existing members would leave the Association if the name changes.

On December 10, 2004, the NEC accepted the recommendation provided by the Focus Group and for the time being we will continue to be the Association of Government Accountants.

In my opinion, I do not believe that this is the end of the name change issue, although it may be for the present time. I was delighted to be a part of the process and by seeing this first hand, it has confirmed for me that AGA leadership is listening to the membership. If you feel strongly on an AGA related subject is

concerned, I encourage you to share your thoughts with either AGA National, our local chapter CEC, or myself – we're listening.

On a final note, we have four programs lined up for you during the next two months. The first is a Tax Update on January 13<sup>th</sup> and the second is our annual Technology Conference on January 25<sup>th</sup>. In February, we will be offering a Certification Panel discussion on the 10<sup>th</sup> and a Sarbanes-Oxley Update on the 15<sup>th</sup>. You are always welcome to register by phone or by email, but our most efficient registration is available on-line at [www.aganycap.org](http://www.aganycap.org). I look forward to seeing you at our next program in 2005.

## Top Tech Issues for 2005

*Continued from page 1.*

**4. Spam Technology:** The use of technology to reduce or eliminate unwanted e-mail commonly known as Spam.

**5. Disaster Recovery:** The development, monitoring and updating of the process by which organizations plan for continuity of their business in the event of a loss of business information resources through theft, virus/malware infestation, weather damage, accidents or other malicious destruction. Disaster recovery includes business continuation, contingency planning and disk recovery technologies and processes.

**6. Collaboration and Messaging Applications:** Applications that allow users to communicate electronically, including e-mail, voicemail, universal messaging, instant messaging, e-mailed voice messages and digital faxing. Examples include a computer conference using the keyboard (a keyboard chat) over the Internet between two or more people.

**7. Wireless Technologies:** The transfer of voice or data from one machine to another via the airwaves and without physical connectivity. Examples include cellular, satellite, infrared, Bluetooth, WiFi, 3G, 2-way paging, CDMA, Wireless/WiMax and others.

**8. Authentication Technologies (new):** The hardware, software, processes and procedures to protect a person's privacy and identity from internal and external threats, including digital identity, privacy and biometric authentication.

**9. Storage Technologies (new):** Storage area networks (SAN) include mass storage, CD recordable, DVD, data compression, near field recording, electronic document storage and network attached storage (NAS), as well as small personal storage devices like USB drives.

**10. Learning and Training Competency (End Users):** The methodology and curriculum by which personnel learn to understand and use technology. This includes measuring competency, learning plans to increase the knowledge of individuals, and hiring and retaining qualified personnel with career opportunities that retain the stars.

## Joining the AGA New York Capital Chapter Can Be an ADVANTAGE

The New York Capital AGA Chapter recently authorized that the Chapter extend the benefits of the new AGA group membership program to government agencies that join ADVANTAGE and allow non-members of such agencies to attend events solely sponsored by the Chapter (unless otherwise negotiated with other sponsor/s) at the member rate to the extent of member participation by the agency in ADVANTAGE. Congratulations to the New York State Department of Health for becoming the first government agency in the country to join AGA's ADVANTAGE Program.

### ADVANTAGE Organization Member Program Exclusively for Government Accountability Agencies

**Take ADVANTAGE** of AGA's new Organization Member Program. Join other government accountability agencies that value their staff and are willing to invest in their professional development and continuing education. This program is only open to government agencies at this time.

**Now**, more than ever, it is vital that your government organization show its support of professional staff while benefiting from the savings on a wide range of exciting professional development opportunities. By taking **ADVANTAGE** of AGA's Organization Member Program, your government agency will benefit for years to come.

**For** the purposes of this program, organizations are defined as individual divisions, groups or departments. Examples include the State of Oregon's Department of Administrative Services; the Social Security Administration's Office of Inspector General; the State of New York's Office of the State Comptroller; NASA's Office of the CFO; and Virginia Commonwealth University's Office of Audit and Management Services.

#### Exclusive ADVANTAGE Member Benefits

In addition to offering group members countless opportunities to network with peers, exchange ideas, build leadership skills, make friends and professional contacts and keep up with the latest developments, your government agency will receive these cost saving benefits:

- Reduced registration fees (discounted at member rates) for staff members attending AGA's nationally sponsored conferences and training programs (employees in the group membership are eligible for member rates as well as an equivalent number of employees that are not in the group membership program). These reduced fees DO NOT apply to local chapter events.
- In addition to the group members receiving copies, your agency will receive free additional copies (one for every 10 group members, up to 30 copies) of the *Journal of Government Financial Management*, AGA's outstanding, quarterly magazine that provides in-depth coverage of topics important to the accountability profession.
- A 10 percent discount on numerous AGA products, including study guides to prepare for the Certified Government Financial Manager (CGFM) Exams, audioconferences and other AGA books.

**Special Recognition:** Your government agency will be recognized in AGA promotional materials and at national conferences as an **ADVANTAGE** Member Partner with the Association. Such recognition will enhance the prestige of your agency and AGA.

#### Fees

You decide what level of support your employees receive through this program. At the highest level of support, Platinum, the organization fee is the number of employees in your group times the \$90 full government rate. Or, if you decide upon a sharing approach to membership, at the Gold level, the organization fee is the number of employees in your group times \$45. At this level, the employees share the cost of membership by paying the remaining \$45 each for the full government rate of \$90. At the Silver level, the organization fee is the number of employees in your group times \$30. And the employees share the cost of membership by paying the remaining \$60 each for the full government rate of \$90.

| Organization Support Level | Organization Fee - Group Size x Fee               | Reduced Individual Membership Rate |
|----------------------------|---------------------------------------------------|------------------------------------|
| Platinum                   | Group Size x \$90<br>(Example: 8 x \$90 = \$720)  | \$0                                |
| Gold                       | Group Size x \$45<br>(Example: 12 x \$45 = \$540) | \$45                               |
| Silver                     | Group Size x \$30<br>(Example: 30 x \$30 = \$900) | \$60                               |

The **ADVANTAGE** organization member program is an excellent way to invest in the professional development of your staff!

#### It's Easy to Become an ADVANTAGE Member

Select the **ADVANTAGE** support level appropriate for your government group, complete the application [<http://www.agacgfm.org/membership/downloads/AGAGroupMembership04.pdf>] and mail it to AGA with your list of members (new and existing). Groups as small as five individuals can join the **ADVANTAGE** program. Your group can include all current AGA members, it can include all new AGA members or it can include a combination of current and new AGA members.

Please fill out a Staff Enrollment Form for each individual who will be a part of your group. As it applies, each individual should remit the appropriate individual **ADVANTAGE** membership rate.

# Chapter Executive Committee

November 9, 2004  
Minutes

**In Attendance:** Lori Vaccaro, Mike Abbott, Eileen Chambers, Jill Flinton (via phone), Randall Griffin, Ray Harris, Marcella Junco (via phone), Tracy McComb (via phone), John Samaniuk, Kirk Schanzenbach, Shelly Taleporos, Amanda Zibella, and Linda Zinzow

**Action Items:** (\* Denotes carry over from previous meeting)

- 1 \*Provide Linda Zinzow with a date that the policies and procedures will be completed for respective areas. All Officers. Due ASAP.
- 2 \*Research interest rates for CDs. Brian Gee.
- 3 \*Investigate how other chapters have put on the CGFM classes in the past and how they have paid for them. Francine Marzinsky.
- 4 Send dates the DOT conference room is available to Eileen Chambers. Linda Zinzow. Done.
- 5 Develop a proposal for extending the Advantage program to local events to go out to vote over email and sent out to membership. Eileen Chambers. Done.
- 6 Inquire about the AGA national's credit card. Ray Harris.
- 7 Explore the options of award points on debit cards. Marcella Junco.
- 8 Email reminder to membership about the upcoming education committee breakfast. Ann Marsh. Done.
- 9 Prepare letter inviting state officials to meeting to discuss Advantage Program. Eileen Chambers. Done.
- 10 Follow-up with National regarding brochures about Advantage Program. Eileen Chambers.
- 11 Send a copy of the letter regarding Advantage Program to NYC chapter. Lori Vaccaro.

**Decisions Made:**

1. Motion: Accept minutes for 10/12/04 CEC meeting. Motion by: Jill Flinton; Second by: Ray Harris; passed unanimously.
2. Motion: AGA NY Capital Chapter #77 enhance the AGA National "Advantage Program" by allowing non-members of participating agencies to attend certain local events\* at the member rate.\*Certain local events will be designated at the start of each educational year. Motion by: Eileen Chambers; Second by Ray Harris; 11 votes "no", 2 votes yes; 1 abstain. Motion did not pass.
3. Motion: Send one representative to the National Leadership conference and have the Chapter pay for airfare and registration only for the event. Motion by: Kirk Shanzenbach; Second by: Ray Harris; passed unanimously.

**Other Meeting Notes:**

**Finance:**

The Chapter has been doing well with events held to date. Between 140 and 150 people are already registered for the fraud conference.

**Marketing:**

The Advantage program has been launched by the AGA. Letters describing the program will be sent to various state officials, including commissioners, audit directors and finance directors for 34 state agencies covered under the Internal Audit Act. In addition to the letter, all state officials receiving the letter will be invited to a meeting at DOT that will explain the Advantage Program and provide examples of cost savings. Eileen Chambers and Kirk Schanzenbach are working on getting OSC involved in the Advantage program. Randall Griffin shared how he was able to demonstrate cost savings to his agency using the Advantage program.

Part of the Advantage program allows agencies enrolled to send employees who are non-members to the National conferences at member prices. The number of non-members allowed to attend at member prices is limited to the number of members enrolled in the Advantage program for that agency. A proposal was made to extend this benefit on the local level and allow agencies who join the Advantage program to send non-members to local AGA events at member events. The number of non-members allowed to attend at member prices would also be limited to the number of members in the agency. Discussion of the proposal brought up a number of issues: logistics – how to track members and non-members attending at member rates, joint events – is it fair to other organizations to let non-members attend at member rates?, membership - does the proposal create a disincentive to join the AGA. The proposal went out to vote via email so that all CEC members could vote. The proposal was not approved by email vote. A special meeting discussing the topic will take place on December 15<sup>th</sup> immediately following the holiday luncheon.

**TCTC:**

A package containing all the sponsorship materials is ready to be sent to sponsors. The price for non-members has been increased by \$25 per day of attendance (\$75 increase for all three days).

**Education:**

Recent programs have been very well received by attendees. The panel discussion was attended by 40 people. The October 29<sup>th</sup> event in Syracuse was attended by 35 people. The next event coming up is a breakfast on 11/16 featuring Bob Ackerman.

**Credit Cards:**

Marcella Junco researched different credit cards that would be available to the Chapter and the benefits associated with each card. Only 2 credit cards researched did not require a guarantor: Bank of America and the Diner's Club. Marcella's recommendation is for the card from the Bank of America because the main purpose of obtaining a credit card is to get an award for using it, and the Bank of America card awards US Air miles for dollars spent. The Chapter will need to determine how many cards will be issued, how much the card would be used and get a better idea on how much of an award would be received. Marcella will explore other options to obtain awards for money spent, such as awards on bank debit cards.

**In Attendance:** Lori Vaccaro, Laura Brown, Brian Gee, Eileen Chambers, Jill Flinton, Ray Harris, Ann Marsh, Francine Marzinsky, Roger Mazula, John Samaniuk, Kirk Schanzenbach, Karen Stackrow, Shelly Taleporos, and Amanda Zibella

**Decisions Made:**

1. Motion: Approve the nominating committee, consisting of the following members: Linda Zinzow, Ray Harris, Jim Nellegar, Lori Vaccaro, and Kirk Schanzenbach. Motion by: Lori Vaccaro; Second by: Jill Flinton; passed unanimously.
2. Motion: Extend the benefits of the new AGA group membership program to government agencies that join Advantage and allow non-members of such agencies to attend events solely sponsored by the Chapter (unless otherwise negotiated with other sponsors) at the member rate to the extent of member participation by the Agency in Advantage. The Chapter will evaluate the program in August 2005. Motion by: Eileen Chambers; Second by Ray Harris;

# Chapter Executive Committee

December 15, 2004  
Minutes

13 votes “yes” (including 2 email votes), 3 votes “no” (Brian Gee, Roger Mazula, Shelly Taleporos). Motion passed.

#### **Other Meeting Notes:**

This was a special meeting held to discuss the extension of benefits granted under the Advantage program and allow non-members of participating agencies to attend local events solely sponsored by the Chapter at the member rate to the extent of member participation by the Agency. A memorandum was distributed discussing the proposal (see attached). There were several issues brought up regarding the extension of benefits:

*Membership* – because non-members will be able to attend at membership rates, the Chapter could possibly lose members. This is unlikely to happen because it would be difficult for the agencies to determine which employees they would include in their Advantage program and which to exclude. It was determined that the effect to membership would be minimal.

*Level of participation* – would this benefit apply to all levels of Advantage participation (gold, silver and platinum)? The chapter would extend the benefit to every participating agency regardless of level of participation.

*Logistics* – It may be difficult to track the number of non-members and members from each agency that are attending at member rates. Currently there is only one agency enrolled in Advantage and the applications are due into the National office by 12/31/04. With only a few agencies participating in the current year, it is the ideal time to test the program and re-evaluate it next summer (August 2005 budget meeting).

Based on the discussion, the CEC voted to extend the benefits granted under the Advantage program and allow non-members of participating agencies to attend local events solely sponsored by the chapter at the member rate to the extent of member participation by the Agency. Laura Brown will work on creating a new page for registrations that will accommodate the agencies participating in Advantage and registering non-members at member rates.

#### **December Holiday Luncheon Guest Speaker**



Sister Anne Bryan Smollin

#### **Things to Ponder**

- Can you cry under water?
- How important does a person have to be before they are considered assassinated instead of just murdered?
- If money doesn't grow on trees then why do banks have branches?
- Since bread is square, then why is sandwich meat round?
- Once you're in heaven, do you get stuck wearing the clothes you were buried in for eternity?
- Why does a round pizza come in a square box?
- How is it that we put man on the moon before we figured out it would be a good idea to put wheels on luggage?
- Stress is when you wake up screaming and then you realize you haven't fallen asleep yet.
- Why is it that people say they “slept like a baby” when babies wake up like every two hours?
- If a deaf person has to go to court, is it still called a hearing?
- Why are you IN a movie, but you are ON TV?
- Why do people pay to go up tall buildings and then put money in binoculars to look at things on the ground?
- How come we choose from just two people for President and fifty for Miss America?
- Why do doctors leave the room while you change? They're going to see you naked anyway.
- If a 911 operator has a heart attack, whom does he/she call?
- Wouldn't it be nice if whenever we messed up our life we could simply press Ctrl Alt Delete' and start all over?

## New York Capital Chapter Schedule of Events: 2004-2005

|           |       |                                 |                                                                                                                                                                                                                                                                                                                                                              |
|-----------|-------|---------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| September | 15    | Breakfast                       | <i>Kick-Off Breakfast - A Year in Preview</i><br>Wolfert's Roost Contry Club, Van Rensselaer Boulevard Albany, NY                                                                                                                                                                                                                                            |
| September | 21    | Seminar<br><b>CPE: 4</b>        | <i>GASB Update - Reporting Performance Information</i><br><b>Jay Fountain</b> , GASB<br>Century House, Route 9, Lathan, NY                                                                                                                                                                                                                                   |
| September |       | Community Service               | American Red Cross Blood Drive                                                                                                                                                                                                                                                                                                                               |
| October   | 17    | Community Service               | Making Strides Against Breast Cancer Walk-A-Thon                                                                                                                                                                                                                                                                                                             |
| October   | 28    | Seminar<br><b>CPE: 4</b>        | <i>Preparing Today's Auditor for Tomorrow's Challenges</i><br><b>Bobby Derrick</b> , AGA National President; <b>Thomas Amyot</b> , College of St. Rose; <b>Jerry Barber</b> , Office of the New York State Comptroller; <b>Don Colon</b> , Onondaga County; <b>Rick Hannmann</b> , KPMG; <b>James Cox</b> , US HHS<br>Marriott Hotel, Wolf Road, Colonie, NY |
| October   | 29    | Seminar<br><b>CPE: 4</b>        | <i>Fraud and Ethics in Procurement</i><br><b>David R. Hancox</b> , Office of the New York State Comptroller; <b>Eileen Chambers</b> , Office of the New York State Comptroller; <b>Judith K. Miller</b> , SUNY at Buffalo<br>Doubletree Inn, Buckley Road, North Syracuse, NY                                                                                |
| November  | 16    | Breakfast Club<br><b>CPE: 1</b> | <i>How Did I Get to Be Me?</i><br><b>Robert Ackerman</b> , Crown Castle International<br>Wolfert's Roost Country Club, Van Rensselaer Boulevard, Albany, NY                                                                                                                                                                                                  |
| November  | 23    | Seminar<br><b>CPE: 8</b>        | <i>Annual Fraud Seminar</i><br><b>Thomas Caulfield</b> , National Reconnaissnace Office; <b>Robert Brackman</b> , Office of the New York State Comptroller; <b>Joseph Spinelli</b> , KPMG;<br><b>Lisa Gerardi</b> , US HHS<br>Century House, Route 9, Latham, NY                                                                                             |
| December  | 15    | Luncheon                        | <i>Holiday Luncheon</i><br><b>John Gray</b> , FOX23 News<br>Wolferts Roost Country Club, Van Rensselaer Boulevard, Albany, NY                                                                                                                                                                                                                                |
| December  |       | Community Service               | Lights in the Park at Washington Park, Albany, NY                                                                                                                                                                                                                                                                                                            |
| January   | 13    | Seminar<br><b>CPE: 2</b>        | <i>Tax Update Seminar</i><br><b>David Wojeski</b> , Wojeski & Company<br>Mariott Hotel, Wolf Road, Colonie, NY                                                                                                                                                                                                                                               |
| January   |       | Community Service               | IRS Volunteer Income Tax Assistance (VITA)                                                                                                                                                                                                                                                                                                                   |
| January   | 25    | Seminar<br><b>CPE: 7</b>        | <i>Technology Seminar - Productivity-Enhancing Technology</i><br><b>Michael Santargangelo</b> , Michaelangelo Group; <b>Jim Kaplan</b> , AuditNet<br>Polish Community Center, Washington Avenue Extension, Albany, NY                                                                                                                                        |
| February  |       | Community Service               | Stratton VA Medical Center Valentines and Cookies to Veterans                                                                                                                                                                                                                                                                                                |
| February  | 10    | Seminar<br><b>CPE: 1</b>        | <i>Professional Certification Information Seminar</i><br><b>Francine Marzinsky</b> , <b>Mary Peck</b> , <b>Robin MacGowan</b> , <b>Charles Norfleet</b> , etc.<br>Holiday Inn Turf, Wolf Road, Colonie, NY                                                                                                                                                   |
| February  | 15    | Seminar<br><b>CPE: 4</b>        | <i>Sarbanes-Oxley Update Seminar</i><br><b>Nancy Valley</b> , KPMG<br>Quality Inn, Watervliet Avenue Extension, Albany, NY<br>Wolfert's Roost Country Club, Van Rensselaer Boulevard, Albany, NY                                                                                                                                                             |
| March     | 14-16 | Conference<br><b>CPE: 21</b>    | <i>The Conference That Counts 2005 - 10<sup>th</sup> Anniversary</i><br>Joint Conference with IIA and ISACA<br>Holiday Inn Turf, Wolf Road, Colonie, NY                                                                                                                                                                                                      |
| April     | 6     | Breakfast Club<br><b>CPE: 1</b> | <i>How Did I Get to Be Me?</i><br><b>John Egan</b>                                                                                                                                                                                                                                                                                                           |
| April     | 19    | Seminar<br><b>CPE: 2</b>        | <i>Financial Planning Seminar</i><br><b>Jeffrey Kolcon</b> and <b>Richard Vaccaro</b> , Brighton Security<br>Crowne Plaza, Lodge Street, Albany, NY                                                                                                                                                                                                          |
| June      | 14    | Luncheon                        | <i>Annual Awards Celebration Luncheon</i><br>Marriott Hotel, Wolf Road, Colonie, NY                                                                                                                                                                                                                                                                          |
| June      |       | Community Service               | Golf Tournament to Benefit Albany Medical Center Children's Hospital                                                                                                                                                                                                                                                                                         |
| June      |       | Community Service               | Hands-On Capitaland Project                                                                                                                                                                                                                                                                                                                                  |

Register Online for any Chapter event at [www.aganycap.org](http://www.aganycap.org), or contact Cathy Prescott at [cprescott@kpmg.com](mailto:cprescott@kpmg.com) or (518) 427-4750

## AGA TAKING ACCOUNTABILITY TO THE NEXT LEVEL

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### Membership Application

|                                                                                                                          |                                                                               |                                                       |                                      |
|--------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------|-------------------------------------------------------|--------------------------------------|
| Name                                                                                                                     | <input type="radio"/> Mr.                                                     | <input type="radio"/> Ms.                             | Employer                             |
| Job Title                                                                                                                |                                                                               |                                                       |                                      |
| Employer Address                                                                                                         | City                                                                          | State                                                 | Zip                                  |
| Home Address                                                                                                             | City                                                                          | State                                                 | Zip                                  |
| Work ( )                                                                                                                 | Home ( )                                                                      | Fax ( )                                               |                                      |
| Preferred mailing address                                                                                                | <input type="radio"/> Business                                                | <input type="radio"/> Home                            |                                      |
| Sponsor's Name (if applicable)                                                                                           | Membership# (if known)                                                        |                                                       |                                      |
| Employer:                                                                                                                | <input type="radio"/> Federal                                                 | <input type="radio"/> State                           | <input type="radio"/> County         |
|                                                                                                                          | <input type="radio"/> City                                                    | <input type="radio"/> Private                         | <input type="radio"/> Academia       |
| Field:                                                                                                                   | <input type="radio"/> Accounting                                              | <input type="radio"/> Auditing                        | <input type="radio"/> Budgeting      |
|                                                                                                                          | <input type="radio"/> Systems                                                 | <input type="radio"/> Financial Management            | <input type="radio"/> Other          |
| How did you hear about AGA                                                                                               | <input type="radio"/> Friend.CoWorker                                         | <input type="radio"/> AGA Chapter                     | <input type="radio"/> AGA Conference |
|                                                                                                                          | <input type="radio"/> Employer                                                | <input type="radio"/> AGA Website                     |                                      |
| Age                                                                                                                      | <input type="radio"/> Below 20                                                | <input type="radio"/> 21-30                           | <input type="radio"/> 31-40          |
|                                                                                                                          | <input type="radio"/> 41-50                                                   | <input type="radio"/> 51-60                           | <input type="radio"/> 61 and above   |
| Education: Highest degree attained                                                                                       | Year                                                                          | Accreditation & Certificates:                         |                                      |
| Please list any other financial management or accounting associations you are a member of:                               |                                                                               |                                                       |                                      |
| Dues: AGA dues (full government member \$90/private sector member \$150/early career member \$45/student member \$30) \$ |                                                                               |                                                       |                                      |
| Chapter dues \$ -0-                                                                                                      | Chapter: 77 - New York Capital Chapter                                        | (contact the National Office for chapter information) |                                      |
| Payment Method:                                                                                                          | <input type="radio"/> Check enclosed (payable to AGA, including Chapter dues) |                                                       |                                      |
| <input type="radio"/> MasterCard                                                                                         | <input type="radio"/> Visa                                                    | <input type="radio"/> AMEX                            | <input type="radio"/> Discover       |
| Card number:                                                                                                             |                                                                               |                                                       |                                      |
| Signature                                                                                                                | Expiration date:                                                              |                                                       |                                      |

Please return with your payment to:

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