



VIRGINIA
PENINSULA
CHAPTER



Next Meeting:

November 16, 2011

Audio conference seminar

[Using XBRL to Improve
Accountability, Transparency and
Efficiency in Government](#)

**Bayside Library
936 Independence Blvd,
Virginia Beach, VA 23455**

2 – 3:50 p.m (2 CPEs)

FREE for members –\$10 *guest*

An e-mail with a link to register through 123signup has already been sent...please be sure to register by 11/11 if you plan to attend.

For more information contact
Melissa Saunders at
msaunders@wittmares.com



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Chapter President’s Message

Trick or Treat! I don't think I'll ever get tired of this phase. Halloween is one of my favorite times of the year. Why? Not because I like getting dressed up as my favorite scary ghoul, or because I get to raid the kid's basket of goodies, but because I can see myself inside each one of those little kids. Brave and adventurous, donning their little masks and matching up to our door, urged on by mom and dad standing watch at the sidewalk's end. With nervous little hands clutching their baskets they reach out, and with the cutest voice they can muster they squeak "Trick or Treat!" I think I get as much joy from handing out the candy as those kids get from getting it.

I'm not sure about the 'trick' part...don't know of anyone who has ever gotten a 'trick...but it reminds me of one of my favorite poems, by an unknown author, "I Bargained with Life for a Penny". You see, unlike the trick or treaters, life gives you exactly what you demand of it, as long as you pay the asking price. No more, no less.

*I bargain with life for a penny.
And life would pay no more
However I begged at evening
When I counted my scanty store.*

*For life is a just employer
He gives you what you ask.
But once you have set the wages,
Why you must bear the task.*

*Only to learn dismayed,
That any wage I had asked of life
Life would have willingly paid.*

What are you demanding out of life? Are you getting it? If not, why not? Is it that you're not willing to pay the asking price or is it that you're not asking for much? As we wrap up the harvest season, I challenge you to take stock of your harvest. Is it as bountiful as you'd like? If it is, I say kudos to you, keep reaching for the stars, and not only that, but reach back and give someone a helping hand. If your answer was no, then I urge you to take a glance at your requisition, because I've found this poem to be true in my life, that we always get from life what we bargain for, after having paid the price.

Curtis P. Joachim, CPA, MBA
President
AGA VA Peninsula Chapter



What's Happening?

This month:

- **November 16, 2011**, Chapter Meeting - Audio conference seminar. (POC is Melissa Saunders at msaunders@wittmares.com)
- **November 19, 2011** – Early Career Social, Romano's Macaroni Grill in Towne Center (<mailto:brittany.renica@gmail.com>)
- **November 12, 2011** 10:00am – 12:30, community service at the Union Mission, 5100 East Virginia Beach Blvd., Norfolk, VA 23502 (contact: tia.m.godwin@uscg.mil):
Other community service projects this month (see page 4 for more details):
 - *Stockings and Bears for Christmas*: Chapter members contribute by filling holiday stockings with books, toys, games and gifts for area children and donate them for Christmas distribution by the Salvation Army. Members can also dress & return Christmas Bears provided by the Salvation Army (Coast Guard, DODIG & GAO drop offs)
 - *Adopt-A-Troop*: Send one care package to service members in Iraq. Collect items as identified on the Wish List. A list of suggested snack food and miscellaneous items is available.

XBR What?!

Attend our November meeting to find out how this data standard can improve business processes!

In November, our chapter meeting is purchasing a line for the popular AGA audio conference series. Take an advantage of this opportunity to earn TWO free CPES – and invite a guest to attend for free as well!

Participants will be able to gain a better understanding of how using an interactive data standard such as XBRL can improve accountability, transparency and efficiency. The State of Nevada will show how they have used XBRL for debt collection and single audit reporting and how in the process of using it they have improved their business processes. XBRL is not a passing trend, it is here to stay. It is the data standard that has been adopted around the world by various governments.

To share her knowledge and expertise in using XBRL is **Kim R. Walling, CPA, CMA, CFM**, State Controller, State of Nevada.

Please join us for two hours of lively discussion about this important and timely topic. In addition to the speaker's commentary, there will be approximately 20 minutes for Q & A so that the participants can ask the speaker questions and share their own experiences.

October Meeting Recap – Get More out of Meetings

Ever go to a meeting and ask yourself, “Why am I here”? According to Kelly Stefanko, fellow member and October meeting speaker, that’s a sign that you’re in a bad meeting! Stefanko gave a number or reason that meetings go bad and provided tips on things that can be done before, during and after meetings to better ensure they are a productive use of time for everyone. Before a meeting, clearly define the purpose for meeting and the outcome(s) it is intended to achieve. Set an agenda and consider setting ground rules for participants to follow. Afterwards, send out meeting notes with action items clearly stating what needs to be done by whom.

This was believed to be the first time that the AGA chapters of the VA Peninsula held a joint meeting. Nearly and 60 people attended and enjoyed pizza, soda pop, candy bars & cup cakes. Many thanks to Dr. Ziegenfuss, Melissa Saunders and MAAC president Renee Nettles for coordinating all of the logistics. AGA has a lot to be proud of and certainly this joint meeting was a unique opportunity for professionals and students to interact.

At right – yours truly, Kelly Stefanko, wowing the crowd at the October meeting. Below - Chapter President Curtis Joachim opens the joint meeting.

Virginia Peninsula Chapter 2011-2012 Calendar of Events

- December 1 & 2, Fall PDC to be held jointly with the Richmond Chapter in Williamsburg, *Navigating through Uncertainty* (contact cjoachim@thejoachimgroupcpas.com)
 - Fundraiser to benefit the Make-a-Wish Foundation at the Fall PDC in Williamsburg, VA
- January 19, 2012, Chapter Meeting - joint with ASMC (POC is Melissa Saunders at msaunders@wittmares.com)
- January community service - “Coats for Kids”. AGA will collect gently used coats for kids working with the local News Channel, Wavy TV10 and businesses (contact tia.m.godwin@uscg.mil).
- February 16, 2012, Chapter Meeting - joint with IIA (POC is Melissa Saunders at msaunders@wittmares.com)
- February community service- Food Collection for local area Food Banks. Chapter will collect food items and money donated by for each Food bank (Southside and Peninsula). Also, prepare breakfast for the families of the Ronald McDonald House.
- March 14 & 15 – Spring PDC (joint with ASMC) in Virginia Beach
- April 19, 2012. Chapter Meeting (POC is Melissa Saunders at msaunders@wittmares.com)
- April community service - March of Dimes Walk America – Sponsor and participate in this fundraising event. Also, Chapter will help provide manpower to register walkers and count donations after the event for deposit (contact tia.m.godwin@uscg.mil).
- May community service projects (contact tia.m.godwin@uscg.mil):
 - Equikids Therapeutic Riding program for special children. Chapter will contribute \$250 to sponsor a hole for the fundraiser and/or help sponsor a team to participate. Point of Contact will be Joe Rutecki.
 - Hampton Veterans Affairs Center - Volunteers provide many important functions throughout the Medical Center and help make patients' stay more enjoyable. Volunteers will be performing a number of services.
- July 28-August 1, 2012 – AGA National PDC, *Navigating the Winds of Change*, San Diego, CA.



Membership News

By Traneisha Bailey-Williams, Membership Chair



Reaching out to Accounting Students at CNU

On Thursday, October 13th, Traneisha Bailey-Williams, Director of Membership, spoke at Christopher Newport University's Accounting Club meeting. Approximately 30 accounting students attended to listen to Traneisha talk about AGA and her career with Deloitte. Traneisha introduced the CNU students to AGA and the CGFM certification as one of their many opportunities they can pursue after graduation. She also shared how AGA has helped her grow as a financial management professional while the students enjoyed a pizza provided by our chapter. We wish the accounting students well in their college journey and look forward to seeing them at future AGA events.



Traneisha Bailey-Williams, Director of Membership, speaks at Christopher Newport University's Accounting Club meeting in October.

Support our Next Early Career Event

Our September Early Career happy hour at Gordon Biersch was a success, despite rainy weather! We're doing it again, this time across the street at Romano's Macaroni Grill in Towne Center, on November 19th. We have reached out to the local colleges and universities asking them to invite their students to come out and get to know about AGA and meet its local members. Please contact me if you need more information at

<mailto:britanny.renica@gmail.com>

-- *Britanny Renica, Emerging Leaders Chair*

AGA Fever Is Catching On!

In addition to the AGA National Membership campaign ([Ready, Set, Grow](#)), the Virginia Peninsula chapter is running its own membership recruitment promotion — *AGA Fever!* Current members (excluding officers) and non-members are encouraged to participate. Here's how it works -- attend at least 3 meetings and 1 chapter-sponsored event (conference, community service event, etc.) this year for a chance to earn free membership for the 2012 – 2013 program year. The winners (up to 3) will be announced at the April monthly meeting. It will not be necessary to be present to win. In case of a tie, there will be a drawing.

CPE Certificates

Please ensure that you sign in at the registration table when attending our chapter training events. The attendance sheet with your signature on file is retained by the chapter and allows us to verify your attendance. Once we verify your attendance, you will receive an email with a link from which you can view and print your CPE certificate.

Member News

Did you see? Chapter members **Meena Katwal**, Graduate Research Assistant and ODU Professor Emeritus **Dr. Jesse Hughes** have an article published in the most recent AGA Journal!

Have good news to share? Please e-mail me at tbaileywilliams@deloitte.com

*Traneisha Bailey-Williams,
Membership Chair*



Members Seeking Help Finding Work

Two of our newest members, both part of the winning AGA Graduate Case Challenge team from ODU, are seeking our help in finding work.

Meena Katwal is seeking a tax internship for this tax season. Katwal, who lives in Norfolk, is interested in a career with a public accounting firm and has recently completed the audit section of the CPA exam. Please e-mail her directly if you know of any opportunities or would like a copy of her resume (mkatw001@odu.edu).

Matt Stewart is currently "cramming for the CPA exam and trying to get that behind me". He's passed the audit section also and similarly is hoping to do some tax/audit work when the season rolls around. Stewart, who lives in Gloucester Point, can be reached at mstew024@odu.edu.



Chapter President-Elect Ellen Silvela, Chapter President Curtis Joachim, and Chapter Treasurer Nicole Whitaker led the contingent of AGA members at ODU's Department of Accounting 5k run and walk October 16, 2011

Community Service

By Tia Forte Godwin, Chapter Community Service Chair

Volunteers!



Please Help Support Our Fall Fundraiser!

The Virginia Peninsula and Richmond chapters are sponsoring a fund raiser during the upcoming fall professional development conference in Williamsburg, December 1-2, 2011. It is expected to be attended by approximately 150 participants from the Hampton Roads and Richmond area. Throughout the seminar, we will be conducting a fundraiser to raise funds for the **Make a Wish Foundation**. Last year's fundraiser raised \$826 for the foundation which our AGA National office matched.

We need your support with this community service project. We would appreciate it if you could help identify companies that would donate a gift certificate or other gift item to this fundraiser. We will list contributing organizations in our conference program and encourage patronage of those businesses.

AGA is a 501 (c) (3) not-for-profit professional organization and our AGA tax id number is 54-1194533 in case it's needed for tax deduction purposes.

If you are able to help our efforts to raise money for this generous organization that grants wishes of children with life threatening illnesses, please let me know! If you need any more information or want me pick up a donation, please call Tia Godwin at (757) 412-9207.

Sincerely,

Tia Forte Godwin
Director of Community Service,
AGA Virginia Peninsula Chapter

Last Month



Ellen Silvela volunteers at the Susan G. Komen Race for the Cure on October 15, 2011. Thank you to all the members that volunteered for the race – your passion and commitment made it a success.

November Projects

Union Mission: On November 12th, 2011, members of the AGA Virginia Peninsula Chapter will be coming together to make a difference in the community. Please join us at Union Mission from 10:00 am to 12:30 pm to help in a variety of ways. The Union Mission is at 5100 East Virginia Beach Blvd., Norfolk, VA 23502. Contact tia.m.godwin@uscg.mil for more information.

Blankets and Winter Clothing Drive: Join our *Blankets and Winter Clothing for the Homeless* initiative this winter and make a difference where you live during the cold months to come. A rapidly growing number of kids, women, and men, including veterans, are becoming homeless everyday and the realization is that most shelters seem to run out of blankets for homeless families and individuals. If you would like to donate some gently used items to Union Mission, please call 757.627.8686 to schedule a pick-up. Thank you in advance for your support!

Stockings and Bears for Christmas: During the month of November, members of the AGA Virginia Peninsula Chapter will be filling holiday stockings with books, toys, games and gifts for area children. The holiday stockings will be donated to the Salvation Army them for Christmas distribution. Members can also dress & return Christmas Bears provided by the Salvation Army (drop off points at the Coast Guard, DODIG & GAO). Contact tia.m.godwin@uscg.mil for more information.

Military Care Package: The AGA Virginia Peninsula Chapter will be participating in *Operation USO Care Package Holiday Letter Writing Campaign*. Anyone who has ever been away from home for long periods of time, especially during the holiday season, can relate to the excitement and joy of receiving a care package. The USO takes great pride in extending that touch of home to troops deployed overseas. It creates an instant connection between the troops, home, and the citizens they serve. Operation USO Care Packages include an individual letter of support. These letters can range from children's drawings, note cards, post cards or simple letters. Please help the USO complete their mission of having every care package that is sent over the holidays include a hand-written letter of support.

Please send your letter(s) to:

AGA
P.O. Box 1464
Chesapeake, VA 23327-1464

Thank you in advance for your support of these projects.

Member Spotlight



Jennifer Coston

What is your job position?

I am the Branch Chief of the Financial Reports and Analysis Branch at the Coast Guard Finance Center.

Give us a brief description of your job.

I oversee the preparation of the consolidation of the Coast Guard's financial data that produces the Coast Guard wide financial statements. This data is submitted to the Department of Homeland Security as required by the CFO Act. I also oversee the high-level reconciliation of the Coast Guard's Treasury cash. The branch also prepares the consolidation of the Domestic Nuclear Detection Office (DNDO) financial data for financial statement purposes and Treasury cash reconciliation.

What do you like most about your job?

I like the challenge of this job. Treasury guidance is ever changing. It's interesting to see the rationale behind these changes that we have to keep up with order to produce accurate financial statements.

Where would you like to see yourself in five years??

In five years, I see myself still working as a manager with the Coast Guard. I look forward to seeing improvements with the financial system that will assist the Coast Guard in producing timely financial statements with increased accuracy.

What are the benefits of being in a professional association?

Being a member in a professional organization allows you to network with individuals that hold similar positions. This enables you to share ideas and develop best practices.

What is your most memorable AGA experience?

I recently joined AGA. I have had the opportunity in the past to attend some of the luncheons. The luncheons are always enjoyable and informative. During one of these luncheons, I ran into someone that I had worked with over 15 years ago.

Anything else you'd like to share about yourself?

I enjoy spending time with family and value the time that we spend together. My hobbies include snow skiing and scrap booking. I also enjoy going to college football games after year-end closeout!

Chapter News

Chapter Developing Standard Operating Procedures

By Curtis Joachim, Chapter President



Note from the editor: Unfortunately this month's treasurer's report was not available at press time. However, in the spirit of accountability and transparency, if you have any questions or concerns regarding the chapter's finances, please contact chapter Treasurer Nicole Whitaker at nicole.e.whitaker@gmail.com.

During the 2011 Sectional Leadership Meetings in Baltimore MD last spring, the AGA Chapter Development & Assistance Regional Coordinator, Deborah E. Kinsey, CGFM, CPA, let it be known that one of her goals as Regional Coordinator, is for all the chapters in the region to develop and publish a set of standard operating procedures (SOP).

In support of that goal, our chapter has embarked on a process to produce its first SOP. For more than 50 years, the chapter has relied on each board member passing on the duties and responsibilities of their position to the incoming board member. In most cases this has worked well, however, it is certain that the process of leadership turnover will be greatly enhanced with the addition of an SOP. The SOP will also be helpful in recruiting new board members, in that they incumbents will be able to know exactly what their duties will be in deciding whether to accept nomination as a board member. Also in cases when the outgoing board member has moved out of the area, or a position was vacant during the AGA year, an SOP will be helpful in passing on the duties of vacant positions.

Jocelyn Leyeza, the Chapter's By-Laws Director, has agreed to coordinate this process for our chapter. Each director has been asked to provide Leyeza with a document containing the activities they perform in their capacity as a member of the Board of Directors or Chairperson. Leyeza will combine the inputs into one document. The intent is to give reader as much information as possible to enable them to successfully perform the duties of the office to which they are responsible for.

The goal is to complete and publish the SOP by the end of November 2011. Please be on the lookout for the new SOP and consider a position on the board!



Navigating Through Uncertainty

Registration is open for the AGA 16th Annual Mid-Atlantic PDC!

Register now --[Click here!](#)

Who

18 dynamic speakers and
over 150 accountability profession colleagues

What

[View Event Agenda](#)

When

Thursday, December 1, 2011 7:45 AM -
Friday, December 2, 2011 5:00 PM

Where

Williamsburg Hospitality House
415 Richmond Road
Williamsburg, VA 23185 USA

How Much

Member Fee - Full Conference \$200.00
Non-Members \$250

**Register by Monday, November 7, 2011
to receive a \$10 discount!**

[Click here for a full list of conference fees](#)

Attire

Business Casual

Beyond the Chapter

AGA National News

AGA Promotes Transparency Through Citizen Centric Reporting

Bill Miller, Chair AGA Accountability Working Group

What is Citizen Centric Reporting?

Seeing a need to provide more informative government reporting to the general public, AGA launched the Citizen Centric Report initiative. This report is a nicely designed template of 4 pages of information the average citizen would want to know. AGA envisioned the reports to be prepared annually, although each entity would set their own parameters and goals—perhaps issuing them more or less frequently.

This initiative is moving across governmental entities fast and for good reason. The CCR reports are fantastic examples of transparency to the constituency in a format that captures the essential message citizens want to know. The CCR is the “CliffNotes” of governance—within minutes the constituency will know the essential facts, figures, and future issues and initiatives of their governing entity. For the governing entity, CCR is a talking paper and report card, and for the citizens, CCR is engagement. If they know the facts, figures, and initiatives they will be better informed and can judge where their concerns might be.

Why AGA?

So, why is AGA engaged in this process? To quote AGA's Executive Director, “If not us, then who? If not now, then when?” AGA leaders saw a need for understandable transparency with the citizens served by government. It was all too evident that normal government financial reports were too extensive and cumbersome to read much less understand. The financial reports were written for the accountants, not the average citizen. AGA's initiative serves as a bridge to the outside world and window into government. AGA also recognized that the citizens have a need to know and governments need to be transparent.

What is AGA Doing?

With an assigned National Director and with tremendous grass roots support from several members in various chapters, a pilot project was



Certification News

Steve Reagan, CGFM Director

Earn Your CGFM in February; Examinations Are Free

Don't miss the opportunity to take the CGFM Examinations and earn your CGFM at the next Intensive Review Course event in February. AGA is offering a two-day Intensive Review Course on **Monday, Feb. 27, 2012** and **Tuesday, Feb. 28, 2012** and an opportunity to take CGFM Examinations on **Feb. 29-March 2, 2012**. The cost of the course is only \$279 for qualified participants, and it offers 18 CPE hours. **Special Bonus:** The CGFM Examinations are offered at no cost to course attendees.

This course is designed as a supplement to previous preparation for the CGFM Examinations, so this is a perfect opportunity for those individuals who have already attended GFM training courses or have been preparing by using the CGFM Study Guides. Enrollment is limited and participants must first apply and be accepted into the CGFM Program, so don't delay.

[More information and a registration form for this event are available on AGA's website.](#)

Are YOU ready to become a CGFM?

Anyone interested in participating in a study group should e-mail Steve Reagan at sreagan01@verizon.net. Be sure to include which exam you are studying for. Click the following links to learn more about the CGFM!

[CGFM Application](#) and [CGFM Certification--Learn More](#)

[Click here for detailed information on CGFM CPE requirements.](#)

Apply NOW for your CGFM and get a \$20 rebate!

UPCOMING NATIONAL CONFERENCES





A REGIONAL PERSPECTIVE

Mark A. Morehouse, MBA, CGFM
Regional Vice President-Elect for the Mid-Atlantic Region

The AGA Regional Team

Every region within AGA is unique due to geographical peculiarities, its demographic characteristics (federal, state, local, certified or not, and if so what kind), chapter leaders and regional history. However, all regions have much in common such as their goal to help chapters function better. Presently, our region has nine chapters in five states. Other regions are not as spread out and may have fewer chapters. The driving force of any organization is its people and our region is no exception. Regional leadership teams are comprised of the regional vice president (RVP), immediate past RVP, RVP-elect and five regional coordinators.

Regional coordinators work as an interface between chapters and national AGA office staff working as national coordinators for particular chapter functions. Regional coordinators are recruited for their expertise and willingness to serve. Most coordinators have served in this function within their chapters. Our region has the following regional coordinators: (a) certification, (b) accountability & outreach, (c) chapter development & assistance, (d) education and (e) membership & early careers.

Regional coordinators are appointed by the RVP and approved by the Senior Vice President for Regional Services and serve for a term of three years. Coordinators help chapters through direct communication with chapter leaders. In addition, coordinators report on their functional area during quarterly regional team teleconferences. These leaders are important to their region because they convey their experience and knowledge to those chapters who need a little extra help.



Making history – we all hope the ODU and VA Peninsula Chapter joint meeting becomes an annual tradition!

Mid-Atlantic Regional Team

Regional Vice President
Denise Wu (Baltimore Chapter)

Regional Vice President-Elect
Mark Morehouse (VA Peninsula Chapter)

Certification Regional Coordinator
Alfred B. Washington, CGFM (Richmond Chapter)

Chapter Dev & Assistance Regional Coordinator
Kelly Stefanko (VA Peninsula chapter)

Community Svc Regional Coordinator
Dellareese Morton-Smith (Baltimore Chapter)

Early Careers Regional Coordinator
Rashad A. Holloway (Baltimore Chapter)

Want to join our team? The region is always looking for new leaders. Please contact Mid-Atlantic RVP Denise Wu at denise.wu@cliftoncpa.com or RVP-elect Mark Morehouse at mark.morehouse@navy.mil to find out how you can get involved in our region's leadership.

Mark's Letter to the Regional Vice President

*Denise,
I am excited about the joint meeting I attended today at the ODU campus. This historic joint meeting was held at Constant Hall. To my knowledge this is the first joint meeting held. While the chapters have been close through the years, this historic meeting cements a partnership that will benefit both organizations. First for the student members at ODU they can seek out prospective employers and second for the Virginia Peninsula chapter for prospective members in the future. Wow, what a meeting.*

To top it all off, our very own Kelly Stefanko was the guest speaker. I have known her for close to ten years and this is the first presentation I can remember her giving. Her subject was "Effective Meeting Management". Wow, she is one great speaker. Very high caliber. I would recommend her to speak at the next national PDC, she is really that good. Simply outstanding. Her presentations included many useful topics, just to name a few: Tools and Tips for facilitation, meeting design & brainstorming, and pre-meeting planning and the anatomy of a meeting. What a powerful presentation.

The meeting arrangements chair Ms Melissa Saunders coordinated her efforts with the MAAC president Renee Nettles. The meeting was held in a large classroom that nearly was not large enough. I counted 53 attendees with most being student members. The luncheon provided pizza, soda pop, candy bars & cup cakes. The menu was outstanding as well.

Am hopeful that this joint meeting will become an annual event and I excited for both chapters. AGA has a lot to be proud of and certainly this joint meeting demonstrates just how great we can be when AGA is involved.

Keep smiling, Mark



The Virginia Peninsula Chapter Board of Directors 2011-2012

Chapter Officers:

President

Curtis P. Joachim, CPA, MBA
The Joachim Group CPAs &
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cjoachim@thejoachimgroupcpas.com

President-Elect

Ellen Silvela
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esilvela@deloitte.com

Past President

Brad Smith
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Brad.Smith@norfolk.gov

Treasurer

Nicole Whitaker
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Secretary

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Research, Early Careers and Academic Affairs

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Mark Morehouse, CGFM
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mark.morehouse@navy.mil

Regional Vice President- Mid Atlantic Region

Denise Wu
denise.wu@cliftoncpa.com



Honorable
Mention

Have member news or pictures to share via the newsletter? Send to kstefanko@hotmail.com

Visit the Virginia Peninsula Chapter on the web at www.agavapen.org or
AGA National at www.agacqfm.org

Mailing us something? AGA Virginia Peninsula Chapter
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