



2016 AFWA Chapter Achievement Awards

APPLICATIONS IN THE PROGRAMMING CATEGORY

The following content has been pulled directly from each Chapter's Chapter Achievement Application. The first Chapter is the winner of this year's award for this category. All other Chapters are listed in no particular order. We hope the ideas presented here will inspire your own Chapter to reach for new goals and achievements.

WINNER: Chattanooga

Chapter Website:	www.chattanoogaafwa.org
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60th Annual Public Relations Luncheon

Overview:

The annual public relations luncheon has a dual purpose:

1. to highlight the local AFWA chapter to the Chattanooga community by offering a premier financial event that is educational and inspiring and
2. to raise funds for scholarships for both undergraduate and graduate accounting and finance students in area colleges and universities

In order to achieve this goal a committee of Chapter members is established in July. This committee is organized in a manner that allows all the members to participate in a meaningful way and has over the years developed a Planning Guide that is a template for any organization preparing for a large event.

Execution:

For our 60th Public Relations luncheon, Robin Shields was selected to serve as chair of the thirteen member Public Relations (PR) committee. An initial budget was submitted to the board of directors and planning began.

As with the planning of any major event the balancing the selection and availability of the speaker and an appropriate venue is a the first task to be overcome. Partnering with Mark Thomas, Managing Partner of the local Ernst and Young firm, the speaker for the luncheon was selected: Janet Truncale the Assurance Managing Partner of Financial Services, EY New York offices. Ms. Truncale chose as her topic: Current Accounting Landscape and Emerging Topics and The Chattanooga (a coveted site) was booked as our venue.

The committee executed the plan, following Robin's leadership, to secure sponsors, coordinate day of event activities, and report final results.

Results:



- Attendees: 295
- Gold sponsors: 4
- Silver sponsors: 5
- Blue Sponsors: 10
- Funds Raised for Scholarships: \$ 5,650

The event was extremely successful in gaining community participation and support. And the speaker was well received and the responses by our event evaluations were very positive and encouraging to continue this caliber of educational event.

We recognized 6 area students and awarded: 2 graduate and 4 undergraduate scholarships

The success of this event required coordination of Public Relations committee, the special events committee and the scholarship committee. The camaraderie involves both veteran members and the new members working together to bring about a successful event.

Education Seminars

We are formally submitting our nomination of the Chattanooga chapter for the *2016 Chapter Achievement Award* in the programming category in recognition of our semiannual education seminars. Our chapter has produced these seminars twice a year since 2011. Our success with these 8 hour CPE Education Seminars truly encompass achievements in member recruitment, member inclusivity and involvement, mentorship, affiliations and partnership, communications and diversity.

These seminars are open to anyone in the Chattanooga and surrounding area as well as to our members. The diverse topics we target have included Investing, Healthcare Reform, Ethics, Existing Industry, Monetary Policy Updates, Fraud, A & A Updates and Tax along with a myriad of soft topics. At our most recent seminar in the spring of 2016, we significantly reduced the cost for members to attend to \$25 and had the highest turnout of members in attendance. These events draw on average 70 to 90 in attendance. Many non-member attendees return year after year. The result of this increased exposure has enabled our recruitment of new members and increased the branding of AFWA within the Chattanooga community. On average we profit \$5,000 to \$7,000. All proceeds benefit an established National Conference Expense Fund which we use to provide key members monetary support to attend the annual national conference. This past year, we provided financial assistance to four chapter members who attended the National Conference in Pittsburgh. This year, we hope to assist seven chapter members in attending the conference in Denver. The proceeds remaining after reimbursement to members to attend the National Conference have enabled us the ability to provide member scholarships to defray the costs associated with achieving advanced certifications such as the CPA, CMA, etc. This past year, we awarded one scholarship to a member working on passing the CPA exam. In addition, we have sponsored numerous recruitment and member social networking events.

I am humbled by the involvement our members have selflessly offered to ensure these events run smoothly and flawlessly. These semiannual seminars are an excellent opportunity for our chapter to



provide education to our members, even those who don't require CPE, as well as an opportunity to participate on the committee and learn soft skills with planning, organization, delegation, leadership & communication. These seminars are a prime example of how our chapter fully embraces our mission statement: *To enable women in all accounting and finance fields to achieve their full potential and to contribute to their profession.*

CHAPTER: Ames

Chapter Website:	http://Amesafwa.org
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Our chapter had long been discussing having a **workshop for treasurers of local not-for-profit organizations** to help them understand their control responsibilities and tax reporting requirements. In conjunction with the 25th anniversary celebration of our chartering, we made this workshop a reality this year. The workshop was held on Saturday morning, May 7, 2016. There were 22 attendees including chapter members, Des Moines chapter members, and leaders from not-for-profit organizations.

The chapter partnered with Iowa State University who graciously allowed free use of a classroom for the event. Additionally, one of the speakers was an Iowa State faculty member and an Ames chapter member. Another speaker was from RSM in Des Moines and did an amazing job presenting the complex IRS form 990.

The event consisted of three blocks. The first was on the Form 990 and was presented by Katie New from RSM. The second covered state compliance issues presented by Cheryl Carlile, an Ames chapter member who has extensive experience in volunteering in not-for-profits. The third was on accounting and control and was presented by Jan Duffy, Ames chapter member and ISU faculty member. Attendee evaluations scored the speakers consistently above 4.0 on a 5.0 scale and verbal feedback indicated that people were very satisfied with the overall presentation.

There were six members of the committee who worked many hours to put the program together. One initiated the process by preparing an exhaustive outline of all that should be presented at the workshop and pulling together many reference materials. Another spent countless hours trying to pull together a list of potential beneficiaries and ended up with over 500 organizations to invite. Another handled all the hospitality arrangements including selecting, purchasing, and hauling in all the food on the event day. This saved a great deal of money over catering and also provided an excellent assortment for our attendees. One served as a speaker and committee chair and another served as a speaker. The sixth committee member pitched in on all the small jobs that needed to get done. Additionally, the speakers met on two separate occasions to coordinate their presentations. Overall, the committee members put in well over 100 hours on this project.



The project also served as a fundraiser for our scholarship fund. The modest fee to attend depended on whether the attendee was a member of AFWA and whether CPE was requested. The workshop netted \$1,200 for the chapter scholarship fund. This will allow us to provide an additional \$1,000 scholarship this year without having to solicit members for donations.

In conclusion, this event served the community by providing valuable education for local treasurers. Additionally, the event provided CPE to our members and other accountants, and publicized AFWA and our chapter. We are considering repeating the workshop next year, so this could become an ongoing event for our chapter. Our primary promotional is also attached to our application.

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The Ames Chapter of The Accounting & Financial Women's Alliance
invites you to attend:

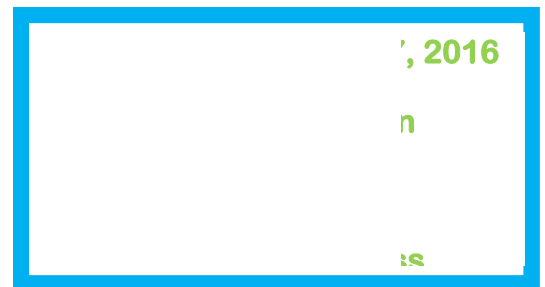
SO YOU SAID YOU'D BE TREASURER – NOW WHAT?

Learning Objectives and Program Content:

- Have you agreed to be treasurer for a local organization and are not quite sure what all is involved?
- Are you a board member who is concerned about the finances of your organization?
- Are you a CPA interested in learning more about the roles of a treasurer in a not for profit?

As part of the Ames Chapter of the **Accounting & Financial Women's Alliance's 25th Anniversary celebration**, we are hosting a conference on being a treasurer for a not for profit organization. This program is designed for treasurers and board members of not for profit organizations as well as accounting professionals. Treasurers of all organizations from churches to sports clubs to professional organizations will get an overview of the following topics:

- Creating a Non-Profit Organization in Iowa
- Federal Reporting Requirements
- State Reporting Requirements
- Iowa Sales Tax
- Iowa Fundraising Regulation
- Jeopardizing Exemption
- Charitable Contributions Disclosure Rules
- Recordkeeping
- Budgeting
- Financial Controls
- Cash Handling Procedures



We hope you can join us for the interesting and informative program.

Presented by: Katie New, CPA, Manager – Tax Services RSM
Jan Duffy, CPA, Instructor, Iowa State University
Cheryl Carlile, CPA, Accountant III, Iowa State University

Cost to attend:

- \$50 for community members
- \$80 for AFWA members wanting CPE
- \$100 for nonmembers wanting CPE



Net proceeds from the conference will be used to benefit the scholarship fund of the Ames Chapter of AFWA.

Continuing Education for CPAs:

Earn 4 hours of CPE Credit

Program Level: Basic

Field of Study: Tax (2 hours) and Accounting (2 hours)

Program Prerequisites/Advance Preparation: None

Instructional Delivery Method: Group Live

To register, complete and print the registration form and mail with payment by check to: Anmarie Kurtenbach, PO Box 528; Nevada, IA 50201 by May 1, 2016.

CHAPTER: Central New York

Chapter Website:	http://cnyafwa.org/
Facebook URL:	https://www.facebook.com/AFWACNY/
LinkedIn URL:	https://www.linkedin.com/groups/4551488

On November 6th, 2015, the Central New York Chapter held our 45th annual tax seminar, at Barbagallo's restaurant in East Syracuse, New York. We had a total of forty attendees, and six different presenters, providing our attendees with eight hours of CPA CPE credit.

Our tax seminar included a well-rounded line-up of presenters providing an array of information. We had representation at our seminar from the IRS as well as the New York State Department of Revenue, each providing us with valuable tax updates. Also included in the day's the agenda was a presentation on ethics given by a principal with a local CPA firm, an IT fraud presentation from a Central New York AFWA member, as well as a presentation on the planning for the costs of Long Term Health Care. We used various social media platforms to bring this event to fruition including Constant Contact, Facebook, LinkedIn, and our Chapter Website.

The annual tax seminar is one of our chapter's biggest successes, allowing us to raise funds for our student scholarship program. At the seminar we held a 50/50 raffle, with all proceeds to benefit our scholarship fund. Gross receipts from our 45th annual tax seminar were \$5,650 and our approximate net income from this event was \$4,100.

Due to the success of this event, it continues to bring awareness to the Central New York Chapter of the Accounting & Financial Women's Alliance.



CHAPTER: Washington D.C.

Chapter Website:	http://www.dcchapterafwa.org/
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During the 2015/2016 program year the DC chapter held 8 educational dinner meeting eligible for 1 CPE credit; 1 student night and 2 social events. See below for a description of each of the events as well as the number of attendees.

Educational Events

1. Topic: Taking Control of Your Career

Date: September 15, 2015

Location: Holiday Inn Rosslyn at Key Bridge

Description: During our September meeting, Karlyn Lothery, the Founder of Lothery and Associates LLC, gave a presentation on taking control of your career, answering tough questions, asserting yourself in meetings and more.

Speaker: Karlyn Lothery is the Founder of Lothery and Associates LLC, highly engaging and entertaining public speaker, author and successful communication expert. Karlyn brings with her more than 15 years of communications and diversity training experience, and a passion for coaching her clients to communication excellence. After starting her career in television as a new anchor and reporter, Karlyn successfully transitioned to life behind the camera and in front of live audiences as a communication consultant and trainer.

Karlyn serves professionals at all levels of their career, representing corporations, non-profit organizations, and sports entities to help them find their voice, confidence and ability to communicate with authority and persuasion. Operating with the philosophy that great communication makes the difference between where you are and where you want to be, Lothery & Associates focuses on empowering clients to get the most out of their staff, colleagues, customers, and reporters with whom they interact.

Karlyn was an adjunct professor at her alma mater, Georgetown University from 2008-2011 and was honored as one of The Network Journal's 40 Under Forty Most Dynamic Professionals for 2009, Washington Business Journal's Top Minority Business Leaders in 2011, Top 500 Emerging Businesses in 2013 by DiversityBusiness.com, and 2013 RADICAL Entrepreneur. She also serves on the Board of Trustees for the National MS Society, National Capital Chapter, is a member of the Public Relations Society of America, and ColorComm. She has been featured in: The Washington Post, Washington Business Journal, CBS Market Watch, The Boston Globe, the Network Journal and Newsday. She has been a featured guest writer for CIO Magazine and Sports Business Journal.

Attended by 14 Members and 7 Guests



2. Topic: Excel Tips and Tricks

Date: October 20, 2015

Location: Holiday Inn Rosslyn at Key Bridge

Description: For the October meeting, we were joined by Pepper Henkel, the Acting Director of IS Education at Virginia Hospital Center, Arlington, for an excel workshop. She covered a variety of topics including conditional formatting, shortcuts, charts/graphs and pivot tables. At the end of this presentation, participants were able to use Excel more efficiently.

Speaker: Pepper Henkel is the Acting Director of IS Education at Virginia Hospital Center, Arlington. She received her B.S. from Southwest Minnesota State University in Computer Science. She has been teaching desktop applications for 20+ years. Her teaching is centered around the Microsoft Office Suite, but also includes SharePoint, Adobe software and Crystal Reports.

Attended by 16 Members and 2 Guests

3. Topic: Basic Wellness for Modern Living

Date: November 17, 2015

Location: Holiday Inn Rosslyn at Key Bridge

Description: We geared up for the holiday season by learning how to maintain our well-being from health and wellness enthusiast Dr. Lola Capps of Chrysalis Chiropractic. At the end of this presentation, participants were able to make healthy options for the holidays and better prepare for the stressful year-end obligations.

Speaker: Dr. Lola J. Capps achieved her Doctorate from Palmer Chiropractic in Davenport, Iowa. In 2003, Dr. Lola and her husband opened Chrysalis Chiropractic in Alexandria, VA. The goal at Chrysalis Chiropractic is to help people achieve wellness by the use of natural methods without prescription drugs or surgery. With a passion of loving food and being fed up with the Standard American Diet, Dr. Lola incorporated Nutrition Response Testing to the practice. The combination of chiropractic and nutrition has allowed Dr. Lola to help patients get back to whole food eating. Educating people on how to clean up their diet and eliminate inflammatory foods such as dairy, grains, legumes and processed sugars has taken the practice to a whole new level.



Attended by 15 Members and 3 Guests

4. Topic: Developments in Nonprofits

Date: January 19, 2016

Location: Kora in Crystal City

Description: We kicked off the New Year as we hosted Joyce Underwood, CPA to share with us the latest developments in nonprofit tax reporting and legislation affecting nonprofits.

Attended by 16 Members and 8 Guest

5. Topic: Futurist Presentation

Date: February 16, 2016

Location: Kora in Crystal City

Description: At our February dinner meeting, we heard from co-founder and past Board Chair of the Association of Professional Futurists, John Mahaffie. He shared with us a view of the future shaping the accounting industry. This included a discussion of changes in the way we work, the influence of Millennials, advances in automation and artificial intelligence and the changing commercial landscape. With John sharing his thoughts on what's changing in the world and in businesses, together we were able to explore what it means for women in finance and accounting.

Speaker: John Mahaffie is a futurist who speaks, writes, and consults with organizations on how to understand and succeed as society and the world change. He has done this work since 1987, so some of his early forecasts were about this year.

John writes and speaks on future consumers, commerce and production, work and worklife, science and technology, education, global economic change, the environment, and so on—any futures topic can catch his fancy, or better still, someone steps up to pay him to look at it.

John is a co-founder and past Board Chair of the Association of Professional Futurists. Originally trained as an archaeologist, John, obviously, has turned his attention the other way. He points out that the work is much the same, piecing together a useful picture from scant clues, only now he doesn't get dirty...

This is the first time John has presented to a group of finance and accounting professionals. But across so much of his work, he engages with ideas about the future of business, behind which stands the great work of these professions.

Attended by 15 Members and 2 Guests

6. Topic: Public Speaking Presentation



Date: March 15, 2016

Location: Maggiano's Little Italy

Description: Mark McDonald, CEO of Birkdale Media, demonstrated some simple, confidence boosting techniques that will help you deal with tough customers, present yourself effectively, make you a strong advocate in public settings, and bring credit to you and your team.

Speaker: Mark McDonald is the CEO and Chief Coach of Birkdale Media, a boutique coaching and training company specializing in public speaking, communications and media training for professionals, entrepreneurs, and students.

This follows a thirty-year career in international broadcast journalism with the BBC and U.S. Public Broadcasting organizations. Born in Liverpool, U.K., he moved to New York in 1995, and to Washington D.C. in 2001.

He is a Professor of Journalism at American University in Washington, D.C., an instructor at the Olsher Lifelong Learning Institute, and has lectured at Columbia, Georgetown and Howard Universities. Mark is a recipient of both the Edward R. Murrow and DuPont Columbia awards for investigative journalism.

Attended by 17 Members and 8 Guests

7. Topic: Professional Development Panel

Date: April 19, 2016

Location: Maggiano's Little Italy

Description: For our April dinner meeting, we heard from three female executives about how they got to be where they are today. From hearing about the tough decisions they made to get where they are, we were able to develop personally and professionally.

Speakers: The panel included Naseema Shafi, Deputy Executive Director Whitman Walker Health; Sandra Cunningham, Senior Vice-President UBS; and Anne McCabe Triana, President Curo Private Wealth. The discussion was moderated by Laura Lott, President of the American Alliance of Museums.

Attended by 14 Members and 9 Guests

8. Topic: Combat Cyber Crime – Don't Be Vulnerable

Date: May 17, 2016

Location: Maggiano's Little Italy

Description: For the May meeting, Michael W Jackson spoke to us about how to protect ourselves from Cyber Security threats. Also, at this meeting, we collected non-perishable items for the Northern Virginia Community College Annandale Campus Food Pantry, which helps provide items of need to students and families in the NOVA Annandale Campus Community.



Speaker: Michael W Jackson began his career at technical career at Gordon Feinblatt law firm in 2000 as a system support specialist. He started at Hertzbach & Company in 2003 and in 3 short years became the Director of the department. During his time there he managed such tasks as daily workflow strategies, firm growth initiatives, new space acquisitions, department budgeting and managing risk with the handling/storage of information.

His biggest accomplishment is knocking down the communication barriers between the IT staff and the accounting staff. They speak different languages with regards to their profession and care is needed in order to convey IT needs and technology issues that slow productivity. He feels there is a healthy relationship with the accounting staff and high level of confidence gifted from both sides.

Attended by 13 Members and 6 Guests

9. Student Night

Date: February 23, 2016

Location: NOVA Annandale Campus

Description: For our annual student night we had a panel discussion focusing on advice for preparing resumes, interviews, and creating credibility in the workplace as a new employee.

Speakers: **Julien Bois** is a Partner at JustinBradley. He directs the Recruiting & Interim Staffing business lines, overseeing day-to-day operations, advising clients and mentoring JustinBradley recruiters. Julien also leads JustinBradley's Nonprofit Retained Search practice. Before joining JustinBradley, he was a senior manager at Randstad, a global recruiting and staffing firm, and prior to that, served as an Assistant Controller for a professional services company in DC. Julien has an MBA in finance from the University of Delaware. He is an Executive Board Member and Treasurer of the French American Chamber of Commerce and serves on the Advisory Board for NETVA, a New Technology Venture Accelerator.

Eric Fagan received a Bachelor of Arts from Roanoke College with a major in history and a minor in English. While at Roanoke, Eric focused his time conducting research and analysis for the Roanoke College History Department and College Archives. At JustinBradley, Eric is a research associate for the Recruiting and Interim Staffing team. He spends his days researching clients and their competitors, identifying and pre-screening potential accounting and financial specialists, and tracking down top candidates in this talent-driven market.

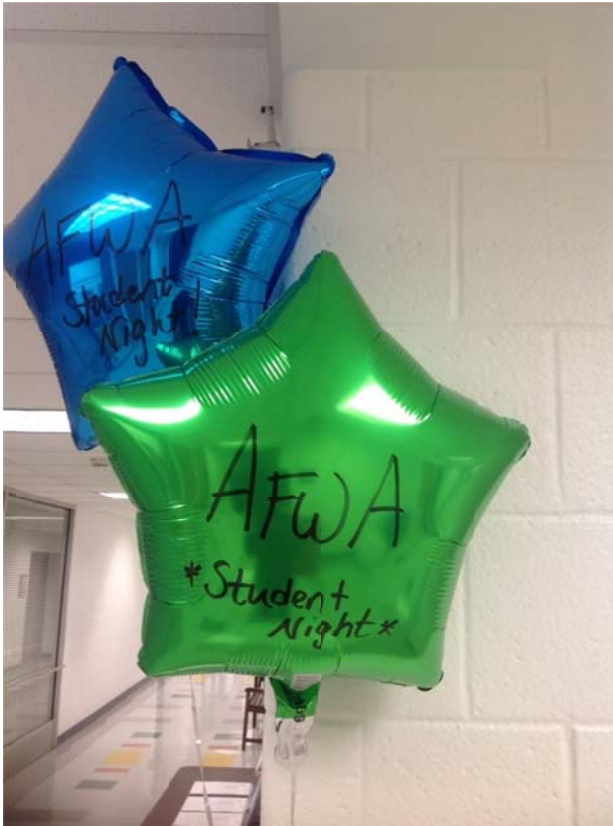
Olga Trusova is responsible for global talent acquisition at FINCA International - a renown, fast paced, energetic organization with a worldwide staff of over 12,000 people in 23 countries who are passionate about the mission to alleviate poverty through lasting solutions that help people build assets, create jobs and raise their standard of living. Olga came to FINCA from MRI

Network, one of the largest and most successful recruitment organizations in the world, where she was the General Manager of the Moscow office. Olga has over 15 years of recruiting senior management and specialists in a variety of fields. With a Masters of Science in Applied Mathematics from Moscow State University, Olga is fluent in English, Russian, French, and has conversational Spanish. She enjoys traveling, trying out new recipes and exploring different cultures. As a runner, Olga is now training for her second full marathon.

Melissa Peters is a senior manager in the US Federal Audit practice at KPMG LLP with ten years of experience providing financial statement audits. She is currently on a two year assignment with KPMG to focus on various people initiatives for the Government Industry at KPMG. Her experiences at KPMG also include serving as a national and local training developer and facilitator and as the Government Knowledge Manager for the US.

Lindsay Sweet is an Audit Senior Manager in KPMG LLP's Risk Management, Independence Group. She achieved her Bachelors of Business Administration in Accounting from James Madison University in 2004. She attained her Certified Public Accountant license in 2006 and her Certified Government Financial Manager license in 2011. Lindsay has been an active member of the AFWA DC Chapter since 2012 and has enjoyed her roles as Vice President in the 2015-2016 program year and Membership Chair in the 2014-2015 and 2015-2016 program years. In her spare time, Lindsay enjoys working out at True Health & Wholeness in Arlington, VA, volunteering with the Foundation for Women's Cancer, and spending time with friends and family.





Social Events

1. AFWA Holiday Social

Date: December 15, 2015

Location: Screwtop Wine Bar

Description: This was a fun holiday celebration of networking. Members were also encouraged to donate money to the scholarship fund.

Attended by 7 Members and 4 Guests

2. Nationals Game

Date: June 14, 2016

Location: Nationals Park

Description: On Tuesday June 14th we saw the Washington Nationals take on the Chicago Cubs. Family and friends were invited to join.

