

# The Working Papers

## Chapter Newsletter

*Advancing Government Accountability*

VOLUME XXXV, ISSUE 5

March 2008

### PROFESSIONAL DEVELOPMENT MEETING

**Topic:**  
**Tax Updates**

**Speaker:**  
**Roger Oakland, CPA**

**Time: 11:30 AM -  
1:00 PM**  
1 hour CPE

**Place:** Pedro's  
Restaurant  
3935 Freedom Circle,  
Santa Clara, CA.  
2<sup>nd</sup> Floor  
(Off Freeway 101)  
Tel. (408) 496-6777

### What's Inside?

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## MARCH 2008 IS A CGFM MONTH

AGA has declared March 2008 as 'Certified Government Financial Manager (CGFM) Month'.

Proclaiming the month of March as 'CGFM Month' does not only recognize the over 14,000 Certified Government Financial Managers and members nationwide, but also inspire them to continue to demonstrate professionalism and competency to promote government accountability. AGA has long been advocate in promoting government accountability and the CGFM program levers that advocacy.

**Governor Arnold Schwarzenegger** joins us in our observance of March as Certified Government Financial Manager Month.

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## CGFM of the Year Award



In observance of March as 'CGFM Month', the Executive Board of AGA Silicon Valley Chapter has chosen **Sharon Winslow Erickson, CGFM**, as the recipient of the chapter's 'CGFM of the Year Award' for 2008 for her major contributions to advancing government accountability.

Sharon originally joined the City of San Jose's City Auditor's Office in 1989, serving in positions of increasing responsibility until 2001, when she accepted the position of City Auditor for the City of Palo Alto, California.

While in Palo Alto, Sharon issued a series of award-winning performance and revenue audits that identified numerous operational efficiencies and more than \$2 million in additional revenue for the City. She also developed the City's highly regarded annual *Service Efforts and Accomplishment's Report* to provide the City Council, staff and the public with an independent, impartial assessment of past performance to

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## CHAPTER EXECUTIVE BOARD

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## Message from AGA National President Rick Fair, CGFM



For those of you with the Certified Government Financial Manager (CGFM) designation after your name, I congratulate you on a career-enhancing move. For those of you who have not earned the privilege to use those letters- I urge you to join your colleagues.

The Certified Government Financial Manager designation is quickly becoming the preferred certification for those of us who work in or for governments. More than 14,000 individuals have received the CGFM and the number is growing annually. Many government employers and contractors have recognized the importance of the CGFM.

The CGFM is the first certification broad enough to cover the whole field of government financial management--federal, state and local. It deals not with testing a person in a specific area, but with measuring a wide range of knowledge and skills that a professional need to succeed in the federal government financial environment, or to meet the unique challenges faced by state and local government financial managers.

This designation is already recognized as a professional standard. Since the 2001, federal legislation authorizing federal government agencies to use appropriated funds to pay for expenses to obtain professional credentials, three agencies including the U.S. Department of Defense and twelve of its components, have issued formal professional certification policies, with other agencies soon to follow suit. The CGFM designation is listed as one of the certifications.

To date, seven states have formally recognized the CGFM--Idaho, Maine, Mississippi, Missouri, Tennessee, Virginia and Washington. Also, various counties, including Contra Costa County in California, and cities, including Topeka, KS, have also formally recognized the CGFM. Each year more and more federal agencies and state and local governments are realizing the value of the CGFM and are formally embracing the designation.

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## Chapter President Corner

Jerry Gandara, JD, MBA



Our invited guest speaker at last month meeting was **Larry Stone**, Assessor of Santa Clara County. The presentation was well received by those in attendance

as Mr. Stone gave us an overview of how the housing sales slump, the overall Santa Clara County current tax rolls and how the future looks. His presentation shed lights on what was happening in our Valley. I want to thank Mr. Stone for his outstanding presentation.

March is Certified Government Financial Manager (CGFM) Month and our **CGFM Coordinator Alex Guiang** was again able to receive proclamations from City of Milpitas and County of Santa Clara, and a letter of congratulations from **California Governor Arnold Schwarzenegger** and City of Sunnyvale . You may view the proclamations and video presentation link at our chapter web site - [www.agasiliconvalley.org](http://www.agasiliconvalley.org). Good job Alex! AGA has been promoting the CGFM as its primary certification for government financial managers.

Our Chapter Executive Board has chosen **Sharon Erickson, CGFM, CIA**, as the recipient of our Chapter crystal award - CGFM of the Year Award - for her major contributions to advancing government accountability. Congratulations Sharon! To honor all CGFM members in our Chapter, the Executive Board voted not to charge them for attending this month professional development meeting. Hope to see all CGFMs at this month meeting.

The date for our next month (April) professional development meeting has been changed to April 10. Please mark your

calendar. Our guest speaker is **Mayor Jose Esteves**, City of Milpitas, who will be presenting "Ethics and Public Accounting". This topic would be a fitting continuing education to CGFM holders and other professional certifications, as well as to accountants and auditors.

This month meeting would be interesting especially now, a tax time. **Mr. Roger Oakland, CPA**, from the FTB (Franchise Tax Board) is our feature speaker and will discuss the changes in the State Tax Laws. I hope you can make this very important meeting. Join us!

### Now Accepting 2008 Academic Scholarship Applications

Are you or a family member pursuing undergraduate or graduate studies in disciplines such as accounting, auditing, budgeting, economics, finance, information technology or public administration? If so, consider applying for an AGA national academic scholarship today!

Each year, AGA National awards:

- ❖ Up to four \$3,000 full-time merit scholarships to AGA members and their family members,
- ❖ One \$1,000 part-time merit scholarships to AGA members and their family members, and
- ❖ One \$3,000 community service scholarship.

The deadline for receipt of applications is March 31, 2008. Visit

<http://www.agacgfm.org/membership/awards/default.aspx> for details.

**If you are CGFM holder and member of AGA Silicon Valley Chapter, attend this month Professional Development Meeting and pay no registration fee.**

## March Professional Development Meeting: TAX UPDATES

The invited guest speaker for this month professional development meeting is **Roger Oakland, CPA**. Roger is a Program Specialist in the Education & Outreach Section of the Franchise Tax Board (FTB). His primary responsibilities include outreach to FTB's external stakeholders through speaking engagements on tax related matters, development of tax brochures/publications, and exploring ways to improve FTB's public website. He has over 12 years of audit experience in corporate and personal income tax. Roger is a graduate of San Diego State University with a B.S. in Business Administration (*Accounting concentration*). In addition, Roger is a Certified Public Accountant and joined the FTB in 1994.



Roger will be talking on the following:

1. The Role of Franchise Tax Board, its programs and responsibilities, including debt collection function.
2. The ever increasing Tax Gap and how FTB is combating it
3. Electronic filing
4. The future of Tax Administration, what to expect and how it affects local government and citizens.

Bring your tax questions relative to your self and job and take advantage of this reasonably priced continuing professional education (CPE) opportunities. Join us!

## CHAPTER MEMBERSHIP DRIVE – NOW UNTIL APRIL 2008

Recruitment of new members should be on the forefront of our chapter members. Bring a new prospective member between now and April 2008 to our luncheon Professional Development Meeting and if they joined AGA, our Chapter will cover their first PDM registration for free and you, too, as recruiter get one half price PDM registration free. It's such a good deal!

As recruiter, your name is entered into the AGA national drawing for a free attendance to AGA Professional Development Conference (PDC), which will be held in Atlanta, Georgia on July 26 to July 30, 2008. You could be the person to attend the PDC for free, saving you around \$900. Visit [www.agacgfm.org](http://www.agacgfm.org) for details.

*In today's complex and changing world, a professional certification provides prospective employers with a degree of confidence that candidates are prepared for the real world." John Radford, CGFM, State Controller, State of Oregon.*

## ANNUAL MEMBERSHIP RENEWAL - By March 2008

The due date for annual membership renewal is March 31, 2008. Please continue to support AGA by renewing your membership. After all, AGA exists because of you. AGA would like to thank you for your continued support! As we progress into 2008, we look forward to continuing to serve you by providing exceptional value for your membership!

You may have received a package including your 2008-2009 AGA membership and CGFM renewal in the mail. Please pay your dues by the due date of March 31, 2008. Take a few minutes and renew online. Visit AGA National Office at [www.agacgfm.org](http://www.agacgfm.org) and go to membership page. Login as member using AGA ID number and your password is your first initial immediately followed by your last name (no spaces), unless you have changed it.

Once you login, you will see your AGA profile. Press the 'billing' button at the right hand corner of the screen to renew with a credit card on our secured server. While you are logged in, please take a moment to review your membership information and update any incorrect items. If you need assistance, please call the AGA Customer Satisfaction Center at 800-242-7211 or contact Kimberly Ferguson, AGA Membership Manager at [kferguson@agacgfm.org](mailto:kferguson@agacgfm.org).

### **CGFM Proclamation - (From page 1)**

County of Santa Clara & cities in the Silicon Valley offer proclamation and support for March 2008 as 'CGFM Month', as follows:

1. City of Milpitas - [Mayor Jose Esteves](#)  
(For Video Acceptance Presentation, follow this link - <http://www.ci.milpitas.ca.gov/webcast/video.htm> - and select March 4, 2008 Milpitas Council Meeting. Jump to CGFM Presentation Section, which starts at 15:10 minutes)
3. County of Santa Clara - [Board of Supervisors](#)
4. City of Sunnyvale - [Mayor Anthony \(Tony\) Spitelari](#)

You can view the proclamations at [www.agaslliconvalley.org](http://www.agaslliconvalley.org).

Other States, Counties and Cities all around the nation also issued CGFM Proclamation, which can be viewed at [http://www.agacgfm.org/cgfm/proclamations\\_08.aspx](http://www.agacgfm.org/cgfm/proclamations_08.aspx).

### **CGFM of the Year Award – Sharon W. Erickson, CGFM, CIA**

(From page 1)

strengthen public accountability, improve government efficiency and effectiveness, and support future decision-making. In July 2004, the *Palo Alto Weekly* labeled her "the most trusted person in City Hall."

Sharon returned to San Jose as City Auditor in March 2008. One of six City Council Appointed Officials, Sharon is a graduate of Stanford University, a Certified Internal Auditor, and a Certified Government Financial Manager. She said, "My CGFM certification demonstrates my expertise and commitment to the profession of government finance."

Sharon has been an active AGA member since 1998. Congratulations Sharon!

## AGA National President – Rick Fair, CGFM, CPA

The challenge facing today's government financial managers is to keep up with the changing times. New innovations, new developments and new methods of implementation are creating a new environment in which government financial managers must function.

The government financial management field will be far different tomorrow from what it is today. Having a broad knowledge and a recognized professional designation will be the way to distinguish yourself from the crowd.

March is CGFM Month so there's no time like the present for joining the thousands of other leaders in government financial management who already have discovered the unique value and benefit of the CGFM designation. Please join me in congratulating all of our CGFMs!

### About Rick Fair, CGFM, CPA

Mr. Fair is a State Auditor of the State of New Jersey. He has a bachelor of science with a major in accounting and economics from Rider University. Prior to his appointment as the State Auditor, Rick was the Assistant Director of Taxation for New Jersey and was responsible for the overall tax enforcement activity within the state. Rick has been an active member of the *Association of Government Accountants* for thirty (30) years. He has served as Regional Vice President and various positions in the Trenton Chapter including chapter president.

Rick has extensive experience in public sector auditing. His professional service includes over three years on the Advisory Council on Government Auditing Standards to which he was appointed by the Comptroller General of the United States. The Council advises the Comptroller General on the establishment of Generally Accepted Government Auditing Standards. He also serves on the Comptroller General's Domestic Working Group. The Domestic Working Group (DWG) was established by the Comptroller General in 2001. It consists of 6 Federal Inspectors General, 7 State Auditors, and 6 Local Government Auditors. The DWG meets annually to identify issues affecting the accountability profession and areas of possible mutual collaboration. He also taught governmental accounting at Rutgers University, New Jersey. He was one of the instructors of Alex Guiang, the Chapter Newsletter Editor, at Rutgers' Government Financial Management Program.

### Upcoming Professional Development Meeting Speaker and Topic

**April 10, 2008 (Thursday)**  
**Mayor Jose Esteves**  
City of Milpitas

Topic: Ethics and Public Accountability

**Please mark you calendar!**

**Sponsor our Chapter Newsletter,  
contact Jerry Gandara**

### Are you planning to attend the March 20, 2008 Professional Development Meeting?

**Contact:** Gary Epstein, CGFM,  
[gary.Epstein@vta.org](mailto:gary.Epstein@vta.org), (408) 321-5683  
or Bill Brown at [william.brown@vta.org](mailto:william.brown@vta.org)

#### Meal Selection:

All served with Spanish Rice, Refried Beans, and a Beverage (Coffee, Tea, or Soda)

- Flauta Gringa (Crisp Jack Cheese-Filled Flour Tortilla)
- Chicken or Vegetarian Burrito

**Cost:** Members/Students \$20, Nonmembers \$25