

## PROFESSIONAL DEVELOPMENT COMMITTEE (PDC)

Chair First Vice President	Sarita Tapscott Chief School Financial Officer Muscle Shoals City Schools 1028 Jodi Circle, S.E.   Hartselle, AL 35640 (256) 426-6663 <a href="mailto:stapscott@mcs.k12.al.us">stapscott@mcs.k12.al.us</a>
Co-Chair Second Vice President	Derek Reeves Business Analyst City of Tuscaloosa 2230 6th Street   Tuscaloosa, AL 35401 (205) 248-5513 <a href="mailto:dreeves@tuscaloosa.com">dreeves@tuscaloosa.com</a>
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Director	Cody Patterson, CSFO Russell County Schools 506 14th St   Phenix City, AL (706) 321-2224, ext. 7106 <a href="mailto:pattersonc@russellcsd.net">pattersonc@russellcsd.net</a> (256) 478-0209 - cell (if needed)
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	Michael L. Rushing AL Department of Revenue 50 North Ripley St, Ste 4116   Montgomery, AL 36132 (334)242-1063 <a href="mailto:michael.rushing@revenue.alabama.gov">michael.rushing@revenue.alabama.gov</a>

2017 Summer Conference Coordinator Allison D. Edge

2017 GAA Forum Representatives Allison D. Edge | Melinda J. Lopez | Derek Reeves

2018 Annual Conference Coordinator Cathy C. Hoekenschnieder

2018 Summer Conference Coordinators Derek Reeves | Sarita Tapscott

2018 GAA Forum Representatives Derek Reeves | Vita Smith-Parker | Michael Rushing

2019 Annual Conference Coordinators Keren Deal, Ph.D. | Sarah L. Williams

## **PDC RESPONSIBILITIES**

### **A. CGFO Certification**

Review and approve the annual CGFO renewal applications.

Respond, in writing, to renewal applications that do not meet the CPE requirements.

Notify Administrative Assistant and Public Information Officer of any certificate revocations.

### **B. Certified Governmental Accounting Technician (CGAT) Program**

Promote the CGAT program to maintain the minimum enrollment needed per class

Annually in January, solicit instructors for each CGAT class

Organize the Annual CGAT Summer Conference

Maintain a CGAT directory of attendees and graduates

### **C. Education and Conferences**

Maintain the continuing education programs for the membership.

Plan and organize the GFOAA Summer Conference & Training Program.

The workshop provides 16 hours of continuing professional education hours from the Alabama State Board of Public Accountancy.

Select three GFOAA representatives from the committee to serve on the planning committee of the Government Accounting and Auditing Forum (GAAF).

GFOAA joins with the Alabama society of CPA's and the Association of Governmental Accounts, Montgomery Chapter in sponsoring the annual two-day forum in Birmingham.

Annually, at the December board meeting, notify the GFOAA President of the names of the representatives to the Forum Committee.

Plan and organize the GFOAA Annual Conference and Training Program.

The annual conference is held during the first quarter of each calendar year. Participants receive 16 hours of continuation professional education hours from the Alabama State board of Public Accountancy. The conference is rotated each year among Montgomery, Mobile, Auburn, Tuscaloosa, Birmingham, and Huntsville.

Monitor the training needs of GFOAA members

Maintain and analyze standardized evaluation forms for GFOAA conferences and seminars

Facilitate GFOA webinar training programs in Alabama at regional locations.

After each conference, ensure that the required CPE documentation is provided to the Administrative Assistant.

#### **D. Scholarship and Awards**

Administer the 2018-19 Newton D. Becker Scholarship.

Contact the Becker representative to ascertain the initial class enrollment date and the initial class start date.

Administer the annual GFOAA Patrick W. Kelly scholarship program.

Administer the annual Awards for Innovation program.

Administer the annual Edward and Judith Kamnikar Award of Merit.

## SCHOLARSHIPS AND AWARDS

### NEWTON D. BECKER SCHOLARSHIP

The Newton D. Becker Scholarship program, via GFOAA, will award two 50% CPA Exam Review Scholarships to GFOAA members. Each scholarship includes the 4-part review course. The first Becker class will begin **April [REDACTED], 2018**.

#### **Application Instructions**

##### Criteria for Eligibility

In order to be considered for a scholarship, you must:

Be an accounting professional or student not currently enrolled in Becker's CPA Exam Review at the time of scholarship notification.

Meet the requirements to sit for the CPA Exam at the time of enrollment in Becker's CPA Exam Review.

Be a member of GFOAA.

Be a U.S. resident.

Selected recipients must enroll in Becker's CPA Exam Review **by April [REDACTED], 2018**.

Please submit a 1-page essay explaining why you desire to be a CPA by postmark date 2/15/18.

Please submit college transcript by postmark date 2/15/18.

Please submit contact info with transcript and essay.

Scholarship is non-transferable.

##### Application Process

**Applications must be postmarked by February 15, 2018. Scholarship recipients will be notified by email no later than March 23, 2018.**

##### Selection Process

A scholarship selection task force will review all applications and select recipients based on transcript review and a 1-page essay.

**Please send college transcript and essay to:  
GFOAA  
ATTN: Becker Scholarship  
PO Box 240574  
Montgomery, AL 36124-0574  
ATTN: Becker Scholarship**

### **GFOAA Instructions for Review of Newton D. Becker Scholarship Applications**

Applications must be postmarked by February 15. The GFOAA Admin Assistant will retain the original application and email a copy of the application material to the Professional Development Committee (PDC) Chair no later than February 22.

The applicants must be the eligibility criteria. Secondly, consideration should be given to the highest GPAs.

Applications will be reviewed and the two candidates will be selected by March 16. The candidates' name and contact information should be submitted to the Becker representative by March 23. The Becker representative should be requested to notify the selected candidates. The Becker representative is Ashley Stephens, [cstephens@becker.com](mailto:cstephens@becker.com).

The PDC Chair should email denial notices by March 26.

### **PATRICK W. KELLY SCHOLARSHIP PROGRAM**

The Government Finance Officers Association of Alabama (GFOAA) plans to award individual scholarships, which will range between \$1,000 and \$3,000. The scholarships are awarded for a period of one year (for two semesters during the award period - 1/2 of the award will be reimbursed per semester). The 2018-2019 scholarship award period begins summer semester 2018 and extends through spring semester 2019.

Award recipients will also receive a free one-year membership with GFOAA. The membership year will begin April 1, 2018 and end on March 31, 2019.

An undergraduate award recipient may reapply for the scholarship as a graduate student.

To receive the scholarship funds, the recipient must submit receipts for tuition, books, and/or fees, as well as a copy of the transcript at the end of the term to the GFOAA. Checks will be made payable to the scholarship recipient.

### **General Qualifications:**

1. Applicant must be a U.S. citizen.
2. Priority is given to those students who demonstrate a career interest in the area of government finance.
3. The applicant must be attending an accredited Alabama four-year or graduate college or university during the time of the scholarship award period.
4. Recipients may be a GFOAA member, as long as all applicable qualifications are met.

### **Other Qualifications**

#### **Undergraduate applicants:**

1. Must be of sophomore, junior or senior standing.
2. Should have a course of study majoring in accounting, business administration or finance.
3. Must have completed Intermediate Accounting I or equivalent at the time of application.
4. Must have a GPA of 3.0 or greater (computed on a 4.0 scale) in both the major and overall coursework at the time of application.
5. Should reference coursework in government accounting, internship, part time/full time work in government finance, or other information as evidence of interest in the government finance area (if applicable).
6. For reimbursement, a minimum of nine semester hours must be completed during the term of the scholarship award/reimbursement period. In addition, a cumulative GPA of 3.0 overall must be maintained.

#### **Graduate applicants:**

- 1) Must be accepted and/or enrolled into graduate school at the time of application.
- 2) Should have a course of study majoring in accounting, business administration, finance or public administration, as well as:
  - a. An undergraduate degree in accounting, business administration or finance, or
  - b. A concentration in accounting as defined by the Alabama State Board of Public Accountancy
- 3) Must have completed Intermediate Accounting I or equivalent at the time of application.
- 4) Must have a GPA of 3.5 or greater computed on a 4.0 scale if any graduate coursework has been completed at the time of application. Otherwise, the undergraduate GPA criteria applies.
- 5) Should reference coursework in government accounting, internship, part time/full time work in government finance, or other information as evidence of interest in the government finance area (if applicable).
- 6) For reimbursement, a minimum of six semester hours must be completed during the term of the scholarship award/reimbursement period. In addition, a cumulative GPA of 3.5 overall must be maintained.

**All application material must be submitted together in a single envelope.**

**Deadline: All applications must be postmarked by February 15, 2018. The award recipients will be notified by email no later than March 23rd.**

**Send Applications to:**

**GFOAA  
Attn: GFOAA Patrick W. Kelly Scholarship Program  
PO Box 240574  
Montgomery, AL 36124-0574**

### **Application Instructions to Students**

1. Prepare a statement (not to exceed two pages, typed, double spaced) describing your goals for the completion of your plan of study, your career plans, and your interest in government finance.
2. Submit the following items in one single envelope:
  - a. GFOAA scholarship application
  - b. Personal statement of proposed plan of study, career plans and interest in government finance
  - c. The latest undergraduate and graduate transcript, as applicable (It should be indicated when Intermediate Accounting I or equivalent was successfully completed.)
  - d. Two letters of recommendation from Professors, work supervisors or the chief executive officer of your current employer.
  - e. Resume, including educational and work experiences
3. Mail copies of items a – e as listed above, in a single envelope, to:

GFOAA  
Attn: GFOAA Patrick W. Kelly Scholarship Program  
PO Box 240574  
Montgomery, AL 36124-0574

**NOTE:** Incomplete packages will not be considered.

**DEADLINE: Application packages must be postmarked by February 15, 2018 for the scholarship award period summer semester 2018 through spring semester 2019.**

# Scholarship Application for the Academic year Summer 2018 through Spring 2019

GFOAA member's dependent child: YES ( ) NO ( ) MEMBER'S NAME: \_\_\_\_\_

ARE YOU A GFOAA member: YES ( ) NO ( )

## PLEASE PRINT ANSWERS

### A. PERSONAL

1. \_\_\_\_\_  
Full Name Last First MI  
( ) Mr. ( ) Mrs ( ) Ms. ( ) Miss

2. XXX-XX-\_\_\_\_\_ 3. \_\_\_\_\_  
Social Security Number/Last 4 digits Date of Birth

4. \_\_\_\_\_  
Mailing Address Street & Number City State Zip

5. \_\_\_\_\_  
Legal Residence Street & Number City State Zip

6. \_\_\_\_\_  
Cellphone Number Work Telephone Number

7. Email: \_\_\_\_\_

### B. EDUCATION

8. \_\_\_\_\_  
School in which you will be enrolled Expected Date of  
Graduation

9. \_\_\_\_\_  
Degree Sought Major (Attach transcript)

10. \_\_\_\_\_  
Major Course GPA Overall GPA (Attach  
transcript)

### C. RECOGNITIONS AND HONORS

School: \_\_\_\_\_  
\_\_\_\_\_

Community: \_\_\_\_\_  
\_\_\_\_\_

Professional: \_\_\_\_\_  
\_\_\_\_\_

## **GFOAA Instructions for Review of Paul W. Kelly Scholarship Applications**

Applications must be postmarked by February 15. The GFOAA Admin Assistant will retain the original application and email a copy of the application package to the Professional Development Committee (PDC) Chair no later than February 22.

Applications will be reviewed by March 16. The results will be submitted to the board for approval via electronic vote by March 19.

Award letters are to be emailed to the applicants by March 23. A copy of the award letter will also be sent to the respective dean of each awardee. The Award letter will also include notification of one-year free membership in GFOAA. The membership period will be April 1, 2018 – March 31, 2019. Denial notices will be sent by March 26.

The PDC Chair will update the Scholarship Tracking Report with each awardee's name, contact information and award period. The PDC Chair will forward the report to the Treasurer by March 31. The treasurer will be copied with the emails to each awardee.

Attend the recipients' college/university Honors Day in the spring to present the scholarship.

On November 1, contact each awardee and extend an invitation to the GFOAA Annual Business meeting.

## **AWARDS**

### **INNOVATIONS IN GOVERNMENT FINANCE**

The Government Finance Officers Association of Alabama (GFOAA) Awards for Innovations in Government Finance program recognizes innovations and outstanding contributions in the field of government finance. The program is designed to recognize documented work that provides leadership to the profession and promotes improved public finance. It is our hope that bringing recognition to implemented innovative ideas will provide additional knowledge and create opportunities for all governmental entities to improve their financial practices while inspiring others to seek innovative solutions to fundamental problems in public finance.

Awards for Innovations in Government Finance will be presented annually to governmental entities in each of the following divisions:

Large Governments include the State of Alabama;  
the counties of Jefferson, Madison, Mobile and Montgomery  
and the cities of Birmingham, Huntsville, Mobile and Montgomery.

Medium governments include those that serve populations of 50,000 and more.

Small governments include those that serve populations of less than 50,000.

Awards will be presented in each of the seven major categories within each division. We invite you to participate in GFOAA's annual Awards for Innovations in Government Finance competition. Listed below are the program requirements and instructions for completing the enclosed application form.

### **Eligibility**

All GFOAA members and nonmembers sponsored by an active GFOAA member may submit entries for consideration. Nonmembers may contact GFOAA to obtain a list of active members from their area. All innovative solutions will be considered for the awards program regardless of their implementation date. There are no fees or charges associated with this program; however, we encourage each recipient to have a representative present at GFOAA's annual conference to accept the award in person.

### **Application Submission**

Applications will be accepted during the period of October 1 through January 15. Please respond to all application questions and feel free to add additional pages if needed. Three (3) copies of the completed application form and any accompanying documentation must be mailed to the GFOAA and be postmarked by the January 15 deadline.

### **Categories**

Each entry may be entered in one of the following categories. In order to help determine the appropriate category for your entry, bullet points are provided to serve as possible areas for inclusion in each category.

#### **Governmental Accounting, Auditing, and Financial Reporting**

- financial and cost accounting
- interim and annual financial reporting
- internal, performance, and financial auditing

#### **Budgeting and Financial Planning**

- operating and capital budgeting
- financial forecasting
- multi-year budgeting
- long-range financial planning
- revenue and cost analysis
- fiscal trend monitoring
- performance measurement

#### **Cash Management and Investments**

- capital financing techniques and practices
- cash forecasting, monitoring and control
- revenue enhancements

### **Capital Finance and Debt Administration**

- capital financing techniques such as municipal bonds and lease-financing
- debt planning, issuance and control
- creative uses of debt finance in economic development

### **Risk Management and Pensions and Benefits**

- retirement and health benefits and other employment and post-employment benefits, such as family leave, childcare, and wellness programs
- risk management administration
- outstanding RFPs
- innovative system procurement/contracting methods

### **Purchasing/Procurement**

- purchasing administration
- outstanding RFP's
- innovative system procurement/contracting methods

### **Technology**

- electronic commerce
- creative uses of the Web in public finance
- technology outsourcing
- cost/benefit analysis for technology decision
- workflow

### **Judging**

All applications will be reviewed by a panel of experienced government finance professionals. All applications will be evaluated in accordance with standard evaluation criteria that include technical significance, transferability, documentation, cost effectiveness, and originality.

### **Awarding**

Award winners will be notified in writing by February 5. Winning entries will be displayed at GFOAA's annual conference, thereby providing an opportunity for other government professionals to gain insight into successful and innovative practices. Formal presentation of the Awards for Innovations in Government Finance will take place during the annual conference business luncheon.

### **All nomination material must be submitted together.**

**Deadline:** The deadline for submission of nominations is January 15. The awardee will be notified before the annual meeting and the award will be presented during the luncheon.

***Send Nominations to:***

Scholarships, Awards and Services Committee

GFOAA

P.O. Box 240574

Montgomery, AL 36124-0574

## **EDWARD AND JUDITH KAMNIKAR AWARD OF MERIT**

The Alabama Government Finance Officers Association (GFOA) invites nominations for the Edward and Judith Kamnikar Award of Merit. The award of merit has four objectives:

- To recognize outstanding service or achievement in the governmental accounting and finance field by individual members at large (non-directors/officers).
- To recognize outstanding service to the Alabama GFOA.
- To award those selected as having performed in an outstanding manner beyond the normal expectations of job requirements.
- To share ideas, programs and processes recognized as meritorious achievement with the Alabama GFOA membership and others associated with employment in governmental accounting and finance.

**Criteria for the Edward and Judith Kamnikar Award of Merit include the following:**

Nominee must be an Alabama GFOA member during the year in which the nomination is submitted, as well as during the year in which the activity occurred. Eligible nominees may be members employed in governmental accounting and/or finance arena, as well as members in other related organizations (e.g. Association of Government Accountants, Alabama Society of Certified Public Accountants, National GFOA, etc.)

All of the major part of the activity/performance to be considered must have occurred during the calendar year, from January to December. Criteria is based on

- any activity related to or coordinating with governmental accounting and finance.
- outstanding contributions to the Alabama GFOA
- use of professional position to promote sound governmental accounting and finance practices in an outstanding manner

**Nomination Process:**

Submit a written statement of the nominee addressing the award criteria.

The nominations must include a statement of accomplishments which summarize what the individual's accomplishment was, when it was made (dates within judging period), and how it was done. These items can be expanded in the narrative section. One page is suggested.

The narrative should be an expansion of the statement of accomplishments of 3 pages or less. It should focus on the actual accomplishments, or results, of the activity performed during the judging period. Address initiative and originality.

Be sure to provide evidence or documentation with your nomination. Highlight the nominee's name in all evidence/documentation. Include only documentation that relates directly to the accomplishment and judging time frame. When using acronyms or abbreviations, please spell out the first reference. DO NOT submit audio or video tapes.

**All nomination material must be submitted together in a single envelope. (Copied or scanned reproductions are NOT acceptable.)**

***Deadline:*** The deadline for submission of nominations is January 10. The award will be presented at the Annual Conference Business Meeting Luncheon. *The awardee will not be notified in advance.*

***Send Nominations to:***

Scholarships, Awards and Services Committee  
GFOAA  
P.O. Box 240574  
Montgomery, AL 36124-0574