



May 2022

Ames Chapter #158

THE SPOKESWOMAN

Websites

National: <http://www.afwa.org>

Local: <http://amesafwa.org>

LinkedIn: <https://www.linkedin.com/groups/13567139>

MISSION STATEMENT

The mission of the Accounting & Financial Women's Alliance is to enable women in all accounting and finance fields to achieve their full potential and to contribute to their profession.

MEETING INFORMATION

Trusted Professionals Gone Bad

Date: Tuesday, May 10, 2022

Time: 5:30 p.m. Networking

6:00 p.m. Program

7:00 p.m. Business Meeting

Location: Jethro's

1301 Buckeye Ave

Ames, IA 50010

Presenter: William Dilla, Iowa State University Professor of Accounting

Presenter Bio: William N. Dilla, Ph.D, CPA (Texas) is the Union Pacific/Charles B. Handy Professor of Accounting and chair of the Department of Accounting at Iowa State University. He teaches courses in auditing and fraud examination. His research focuses on information display effects with respect to accounting-related judgments, the relationship between internal audit activities and information security effectiveness, fraud in online environments, and management control systems for corporate sustainability.

He currently serves as an associate editor at the *Journal of Forensic Accounting Research*. Bill received his Ph.D. from the University of Texas at Austin and his MBA from Syracuse University. Prior to entering graduate school at the University of Texas, he served on the audit staff of Deloitte.

Field of Study: Auditing

Program Level: Basic

Program Prerequisites/Advance

Preparation: None

Instructional Delivery Method: Group Live and Group Virtual

Recommended Amount of CPE Credit: 1 credit hour

Administrative Policies: Please respond to the Evite by Sunday, May 8th. In your response, please note whether you will be attending in person or via Zoom/WebEx. Login instructions will be forwarded to attendees prior to the virtual meeting.

PRESIDENT'S MESSAGE

I'm hoping for better weather this month! I am sorry we had to cancel the April meeting, but it seemed the proper thing to do considering the uncertainty of storms we had in Ames and surrounding areas. I can't



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believe it's May already. This year is flying by! This month is "membership appreciation", so let's all think about bringing a finance or accounting colleague to the meeting this month!

I'm looking forward to seeing all of you!
Cheryl

MAY MEMBERSHIP MEETING AGENDA

1. Call to Order
2. Quorum (30% of 16 active members=5)
3. Approval of Minutes – March 2022 (no April meeting due to weather)
4. Treasurer's Report
5. Old Business –
 - a. Dues Simplicity – update – our changes were submitted to National
 - b. Chapter bylaws change – vote
6. Committee Reports
 - a. Membership/Publicity - Lisa
 - b. Programs - Jenny
 - c. Scholarship - Karen
 - d. Newsletter - Jaimie
 - e. Webmaster - Jaimie
7. New Business –
 - a. CPE slides distribution- to all members following CPE or just to CPE Coordinator
 - b. Newsletter distribution list- remove old members?

8. Announcements
 - a. National AFWA Membership Appreciation Month – check out the Events on the National website
 - b. Free 1 hour CPE Webinars – see the National website to register:
 - QuickBooks Online Training Tuesday, May 17, 1pm CDT (2 EST)
 - "Evaluating the SECURE Act" Tuesday, May 24, 12pm CDT (1 EST)
 - c. The National Connect/Advance/Lead Virtual Conference will be held June 23-24
 - d. The National Conference – Chicago October 25-28
9. Adjournment

MARCH MEETING MINUTES

Accounting and Financial Women's Alliance
Ames Chapter #158
Membership Meeting
March 8, 2022

The monthly membership meeting was held March 8, 2022, at Jethro's BBQ in Ames with eight members attending in person and one member attending virtually. The meeting was called to order by President, Cheryl Carlile at 7:32 pm. Those in attendance were members Cheryl Carlile, Karen Jacobson, Annmarie Kurtenbach, Lisa Palmersheim,



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Catherine (Kate) Mulder, Margaret Munson, Kayla Sander, Cindy Sippel, and Jenny Sturgill. Eight members attended in person and one virtually. A quorum was present.

Minutes

Karen Jacobson made and Kate Mulder seconded a motion that the February 2022 membership meeting minutes be approved as printed in the bulletin. Motion carried.

Treasurer's report

Cindy Sippel presented the Treasurer's report for February 2022. As of February 28, 2022, the Chapter has a balance in the general fund of \$7,157.94 and \$5,233.44 in the scholarship fund. Of the scholarship fund, \$3,600.00 is restricted for the Kathleen M Strum scholarship, leaving an unrestricted balance of \$1,633.44 in the scholarship fund. The \$300 donation budgeted for the AFWA Foundation was paid from the scholarship fund in February and additional member donations of \$1,550 were received by the scholarship fund in February 2022.

The Treasurer's report will be placed on file for Chapter inspection.

Old Business

National Dues Simplicity Subcommittee:

Classes and Rates: Margaret Munson reported that the National Board approved recommendations from the National Dues Simplicity Subcommittee:

- 1) Combine the chapter dues rates for

- regular and affiliate member classes;
- 2) Combine the chapter dues rates for associate and student member classes;
- 3) Set the chapter dues rate for emeritus members at \$0 for all chapters. The National Board also approved the following rate structure from which chapters can choose for the 2022-2023 membership year: \$0, \$10, \$25, \$35, \$45, and \$55.

Chapter Bylaws Waiver: National provided a template for chapters to use in requesting a waiver of chapter bylaws for the notification deadline for dues changes. Cheryl will send the letter to chapter members asking them to respond yes/no regarding waiving the January 31, 2022, notice date for setting Ames Chapter dues for 2022-2023.

Ames Chapter Dues Rates for 2022-2023: Karen Jacobson moved and Cindy Sippel seconded that dues for 2022-2023 be set as follows, subject to acceptance by the membership of the waiver of the January 31 notice date: Regular/affiliate -- \$25; Associate/Student -- \$10; Retired -- \$10; and Emeritus -- \$0. (The rates set in November 2021 were Regular, Affiliate, and Associate -- \$20; Student -- \$5; Retired -- \$5; and Emeritus -- \$0.) Discussion focused what dues levels were needed given the account balance in the general account. Following the



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discussion, the motion carried, 8 ayes and 1 nay.

Chapter Bylaws Revision: Margaret Munson also reported that National intends to implement the change approved previously that calls for all memberships to renew on July 1 each year. A minor change to chapter bylaws will make them consistent with the new renewal process. Margaret will send members the proposed language this week in order to comply with the 30-day notice required for bylaws changes, and the proposed change will be discussed at the April meeting.

Nominating Committee

Nominating committee members Margaret Munson, Kate Mulder, and Cheryl Carlile completed the search for board members for 2022-2023. Margaret thanked the current board, the other committee members, and those who have agreed to serve in the coming year. The proposed slate is: Carla Danielson, President; Lisa Palmersheim, Vice President; Margaret Munson, Secretary; Cheryl Carlile, Treasurer; Kate Mulder (Chair), Jan Duffy; Karen Jacobson; and Cindy Sippel, Membership and Publicity; Jaimie Williamson, Newsletter; Kayla Sander and Jenny Sturgill, Program; Annmarie Kurtenbach, Program Coordinator; Jan Duffy (Chair), Karen

Jacobson; and Cheryl Carlile (Treasurer), Scholarship; Cheryl Carlile, Past President; Jaimie Williamson, Webmaster; Cheryl Carlile, Program Setup.

Jenny Sturgill moved and Kate Mulder seconded that the slate of officers be approved as presented. Motion carried unanimously.

Committee Reports

Membership: The Chapter has 16 members.

Programs: Jenny Sturgill reported that the Jethro's location has been reserved through the rest of the fiscal year. Lisa Palmersheim will present a program on mental health in the workplace at the April meeting. Kayla and Jenny are working on the programs for May and June.

Scholarship: No report.

Newsletter: No report.

Webmaster: No report.

New Business

None

Announcements

The National Connect/Advance/Lead Virtual Conference will be held June 23-24.



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Ann Kurtenbach reported that CPAAcademy.org has free and paid CPE available.

The National Conference in October will be held in Chicago. Karen Jacobson asked whether any is planning to attend. Several members said they haven't decided yet.

Kate Mulder reported that she is finding the Business Book Summaries interesting and useful. National has partnered with the providers for a favorable rate for subscriptions to the book synopses. See this link. [AFWA – Special Program – 8 – The Business Source](https://thebusinesssource.com/AFWA8/)
<https://thebusinesssource.com/AFWA8/>

As noted in the March bulletin, long-time member and friend of the chapter, Brenda O'Neill-Smith is moving to Nebraska. We will miss her.

Adjournment

Meeting adjourned at 8:20 pm.

Respectfully submitted,
Margaret Munson, Secretary

PROPOSED CHANGE IN CHAPTER BYLAWS

AFWA National is making some changes to the chapter dues process, including implementing a change approved a couple years ago to have all member renewals fall on July 1. Although details of how the renewal date changes will be implemented are not available today, the Ames Chapter is proposing a change to our bylaws that will be consistent with the new system. We emailed a proposed change to Chapter Bylaws to all Ames Chapter members on March 10, 2022, to provide the 30-day notice needed for us to discuss and act on this change at our April 12 membership meeting. Below is the proposed revised Article III, Section 3.

ARTICLE III MEMBERS

Section 3. The Board of Directors shall establish the dues for all classes of membership limited to one increase annually. Honorary and Emeritus members shall pay no dues. The Board may authorize dues credits, reinstatement fees and initiation fees. By January 31, members will be notified of dues structure, credits, and fees in effect for the following administrative year. Dues are payable in advance on or before the member's ~~anniversary~~ renewal date each year.



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2021-2022 OFFICERS

- President: Cheryl Carlile
president@amesafwa.org
- Vice President: Carla Danielson
vice-president@amesafwa.org
- Secretary: Margaret Munson
secretary@amesafwa.org
- Treasurer: Cindy Sippel
treasurer@amesafwa.org
- Past President: Margaret Munson
past-president@amesafwa.org
- Program: Jennifer Sturgill
programs@amesafwa.org
- Program Coordinator: Ann Kurtenbach
programs@amesafwa.org
- Publicity: Lisa Palmersheim
publicity@amesafwa.org
- Newsletter: Jaimie Williamson
bulletin@amesafwa.org
- Scholarship: Karen Jacobson, Chair
Ann Clem
Cindy Sippel
scholarship@amesafwa.org

MEETING DATES 2022

June 14, 2022

QUOTE OF THE MONTH

“I have not failed. I’ve just found 10,000 ways that won’t work.”

— Thomas Edison

Articles and submissions to the newsletter are welcome. Please contact bulletin@amesafwa.org