

**Year-End Report June 2021 – May 2022**

# President’s Message:

Wow! What a Year!!!

It has been a very busy and successful year for our Chapter! A huge “Thank You” to our Chapter Officers, Board of Governors, guest speakers and you, our members!! Our success is because of you!!!

**Chapter Highlights:**

* Maintained the Chapter’s CAP Sapphire status and hope to reach Diamond status by 2027. Chapter Achievement Program (CAP) is an achievement/recognition program for chapters that uses points to recognize chapter activities that align with the North American Strategic Plan in four service categories: programming, certifications, membership, and advocacy. Chapters earn either a bronze, silver or gold achievement level based on yearly activities. To reach Sapphire status Chapters must have 25 years of Gold Achievement and 35 years for Diamond.
* Our Chapter is now an official member of the NASBA National Registry of CPE Sponsors for Group Live Events and Group Internet Based.
* Hosted the annual Mid-Atlantic District II Conference in March 2022. This year’s conference offered 3 tracks: A Government track, an IT track, and a General Auditing track. We had over 248 registrants and 27 guest speakers with Richard Chambers, former President and CEO of the Institute of Internal Auditors as our keynote speaker. A big shout out and thank you to our Conference Committee Chairperson Lamar Norwood and members Christine Passaretti Norwood, Peggy Davis, Shauna McLaughlin, Deron Rossi and Dorothy Burns who all worked hard to organize and make this conference possible. They ARE absolutely the best!!!

If you have ideas for a session topic or a speaker recommendation or would like to volunteer to help with the Conference, please contact the Chapter at Chapter113@iiachapters.org.

It has been a pleasure and an honor to serve as your President for the 2021-2022 Chapter year! Sincerely,

***Terrie L. Butts***

# Chapter Members & Leadership:

As of May 31, 2022, the Chapter has 721 members. During chapter year 2021-2022, we had 17 new certifications (CIA, IAP, and CRMA).

The Chapter has 7 Officers, 2 Assistant Officers, 14 members of the Board of Governors

# Chapter Events:

Even though the challenges of COVID continued, the Chapter was successful in offering valuable learning opportunities virtually. During 2021-2022, we offered:

Training Events – 12 Networking Events – 2 Hours of CPE Offered – 54.5

Total Attendees at Chapter Events – 1,365

# Membership Meetings:

|  |  |  |  |
| --- | --- | --- | --- |
| **Date** | **Topic** | **Presenter(s)** | **No. of****Attendees** |
| October 12, 2021 | Maximizing PersonalLeadership Power | Seth Paterson | 109 |
| November 9, 2021 | Practices of High- Quality Ethics and CompliancePrograms | Robert Kuling | 115 |
| January 11, 2022 | Law and InternalAudit | J. S. Fargason | 139 |
| February 8, 2022 | Critical Thinking | Patricia K. Miller | 159 |
| April 14, 2022 | We Can See the Future: How to Identify EmergingRisks | Sarah Kuhn | 165 |

**Seminars:**

|  |  |  |  |
| --- | --- | --- | --- |
| **Date** | **Topic** | **Presenter(s)** | **No. of Attendees** |
| October 8, 2021 | CIA Review (Part 1) | Garland Granger | 23 |
| October 15, 2021 | CIA Review (Part 2) | Garland Granger | 21 |
| November 12 & 19, 2021 | CIA Review (Part 3) | Garland Granger | 16 |
| March 29-31, 2022 | Mid-Atlantic District II Conference | 27 Speakers | 248 Registrants - Average daily attendance 222 |

**Networking Events:**

|  |  |  |  |
| --- | --- | --- | --- |
| **Date** | **Topic** | **Presenter(s)** | **No. of****Attendees** |
| October 27 & 28, 2021 | CAE Roundtable | Tim Lietz & Joe Oringel | 18 |
| May 17, 2022 | Social – Crabtree Ale House | N/A | 34 |

**2021-2022 Chapter Officers:**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Role** | **Years in IIA** | **Employer** |
| Terrie Butts, CIA, CRMA | President | 7 | Administrative Office of theCourts |
| Peggy Davis, IAP | 1st Vice President | 15 | Blue Cross Blue Shield ofNorth Carolina |
| Lamar Norwood, CIA, CISA, CRMA, CGAP | 2nd Vice President | 21 | City of Raleigh |
| Jeanette Rousseau, CPA, CIA, CFE, CICA | Secretary | 12 | NC Department of PublicInstruction |
| Jill Adams, CIA, CRMA | Assistant Secretary | 11 | PNC Bank |
| Dorothy Burns, CPA | Treasurer | 24 | NC Department of Health andHuman Services |
| Christine Passaretti Norwood | Assistant Treasurer | 15 | The Catholic Diocese ofRaleigh |
| Nanda Jones, CRMA, CRCM | Certifications Officer | 13 | KS Bank |
| Lara Craven, CIA, CRCM | Membership Officer | 20 | Truist |
| Lamar Norwood, CIA, CISA, CRMA, CGAP | Programs Officer | 21 | City of Raleigh |

**Incoming 2023-2024 Officer Team:**

* **President:** Lamar Norwood, Cherry Bekaert LLP
* **1st Vice President:** Shirley McFadden, North Carolina Department of Public Instruction
* **2nd Vice President and Academic Relations Chair:** Theodore Hudson, Envolve Health
* **Secretary:** Jill Adams, PNC Bank
* **Assistant Secretary:** Jeani Rousseau, North Carolina Department of Public Instruction
* **Treasurer:** Christine Passaretti Norwood, Catholic Diocese of Raleigh
* **Assistant Treasurer:**
* **Certifications:** *Open*
* **Membership:** Peggy L. Davis, Blue Cross Blue Shield of NC
* **Programs:** Shirley McFadden, North Carolina Department of Public Instruction

# Board of Governors:

* **Holly Atkins**, Swissport International
* **Tanya Bullock,** Community Care of North Carolina
* **Dr. Al Chen**, North Carolina State University
* **Lori Daniels,** Cherry Bekaert, LLP
* **John Gagnon**, North Carolina Office of State Budget Management
* **Nancy Hurstfield-Meyer**, First Citizens Bank
* **Jennifer Jones**, Forvis
* **Tim Lietz**, Jefferson Wells
* **Shauna McLaughlin**, PNC Bank
* **Deron Rossi**, Deron Rossi Consulting
* **Lynne Sanders**, University of North Carolina, General Administration
* **Holly Suttles**, State Employees’ Credit Union
* **Katrina Szadek**, Enact

# Committee Chairs and Chapter Volunteers:

Sarah Bernstein

Jessica Gidney (Bioventus), Audit Committee Chair

# Call for Volunteers & Feedback:

If you are interested in getting involved in Chapter leadership or one of our many activities (District Conference, academic relations, programming, social media, profession advocacy, and more) or have feedback for the Chapter leaders, email us at Chapter113@iiachapters.org.

THANK YOU FOR YOUR SUPPORT!