

IIA Annual Report

Chattanooga Area Chapter



The Institute of
Internal Auditors
Chattanooga Area

June 2022 – May 2023

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President's Message

Members/Friends,

As another chapter year comes to a close, I find myself reflecting on the significance of networking. The 22/23 year marked a period of transitioning back to in-person events enabling us the chance to foster genuine connections and personally benefiting from the invaluable experiences they offered.

First and foremost, I would like to express my heartfelt gratitude to everyone who actively participated in these in-person networking opportunities. Your presence and engagement have played a pivotal role in expanding our professional networks, creating opportunities for growth, and fostering a sense of community. Each and every one of you has contributed to the success of our local chapter, and for that, I am sincerely thankful.

As we embark on a new year, I am filled with excitement as I envision the continued growth, networking, and career advancement of our chapter officers, volunteers, and members. Through the networking events and comprehensive CPE offerings that the Chattanooga Area Chapter will consistently provide, I am confident that our stakeholders, shareholders, and employees from various companies will benefit immensely, experiencing enhanced controls, improved ethical behavior and operational efficiency.

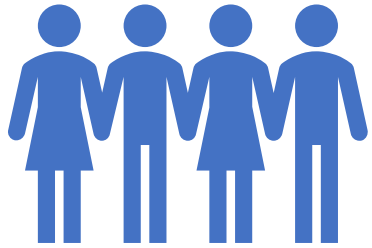
Sincerely,

Rob Zunt, CPA, CISA, CIA, CFE, CRMA

President | Chattanooga Area Chapter

Chapter Membership

Membership by the Numbers*



Total
Members

119



Certified
Members

39



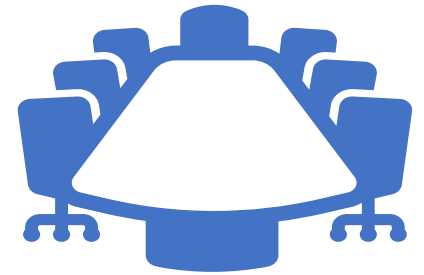
New
Members

20



Chapter
Officers

4



Board of
Governors

6

Chapter Achievement Program

Gold Chapter Status for 25+ Years!

The Chapter Achievement Program (CAP) is a recognition program for chapters that align with the North American Strategic Plan in four primary service categories – Programming, Certifications, Advocacy, and Membership. Each North American Chapter works to achieve one of three performance levels – Bronze, Silver, or Gold.

Each year, our chapter officers diligently work to achieve gold status through planning activities, monitoring progress, and providing all necessary reporting.

For the 2022-2023 year, we completed all requirements to achieve gold status. Currently, we have been awarded Sapphire status for achieving gold status for over 25 consecutive years. The Chattanooga Area Chapter is in the process of submitting all necessary documents for the 2022-2023 Chapter Achievement Program.

Academic Relations

The Chattanooga Area IIA Chapter is committed to increasing awareness within and educating the next generation of Internal Auditors. To aid in that mission, the Academic Relations Committee partners with local universities and colleges. Student members also receive copies of the newsletter and free access to events.

This year, our chapter was able to present for classes at the *University of Tennessee at Chattanooga* and *Lee University*.



Student Members

10



11/08/22 – Pasta with Professionals

03/28/23 - Beta Alpha Psi Presentation



09/08/22 – Career Fair

11/14/22 – Mock Interviews & Two Class Presentations

02/28/23 - Business Etiquette Dinner

Chapter Events



Analytics & Organizational Value

- Kenny Schneider, CPA, CIA, CISA
- Partnership with Nashville Chapter
- 1 hour (virtual)



TN State Specific Ethics

- Dr. Perry Moore
- Partnership with East TN Chapter
- 2 hours (virtual)



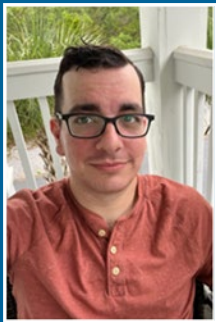
Incorporating Consulting... & Communicating Effectively

- Jami Shine, CIA, CRMA, CISA, CRISC
- Partnership with East TN Chapter
- 2 hours (virtual)



End of Year Networking and Last-Minute CPE (ESG & Root Cause Analysis)

- Rob Zunt CPA, CISA, CIA, CFE, CRMA
- Bambi Gifford, CPA, CIA
- 2 hours (in-person)



Social Media Risk Management

- Alex Cooze
- 2 hours (hybrid)



Mystery Fraud Event

- Tim Hungerford, CPA, CIA, CISA, CMA, CFE
- 4 hours (in-person)

Provided 13 hours of Continuing Education (8 in-person)

Mystery Fraud Event 2023

The Institute of Internal Auditors
Chattanooga Area

ACFE
Association of Certified Fraud Examiners
Chattanooga Area Chapter

CELEBRATE INTERNAL AUDIT AWARENESS MONTH
WITH A FUN, ENGAGING, AND EDUCATIONAL EVENT

MYSTERY FRAUD

May
16th at
8:30 AM

CHATTANOOGA STATE

4 HOURS CPE
LIGHT BREAKFAST
NETWORKING

DISCOUNTED PRICING FOR IIA AND ACFE MEMBERS
DISCOUNTS AVAILABLE FOR GROUPS OF 7+

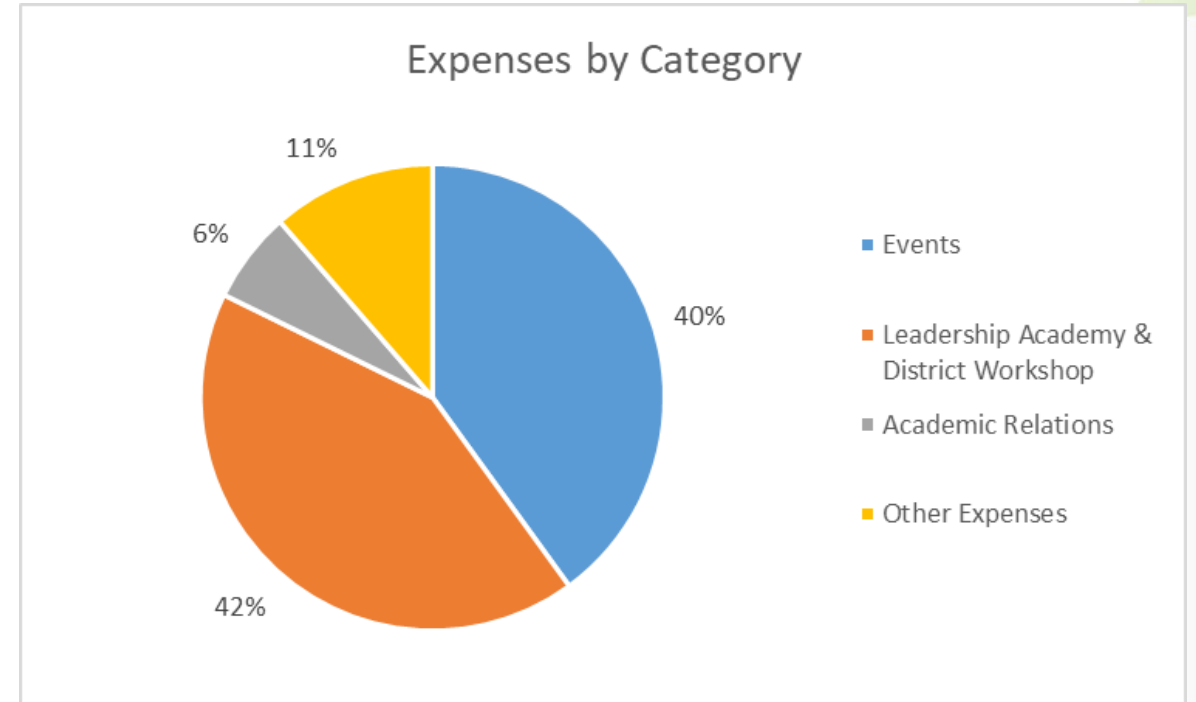


Financial Update

Utilizing Surplus to Focus on Members

Our chapter establishes an annual financial plan to support our mission in a responsible, effective, and sustainable manner. We entered this year in a strong financial position due to our stewardship in prior years. This allowed us to subsidize speakers with existing funds and provide quality CPE to members at a low or no cost.

The Chattanooga Area Chapter receives a member allotment from the national organization, which covered 13% of our event expenses for the year. The remainder is funded exclusively by our event registration fees. We ended the fiscal year with a deficit of \$2,600, which was expected due to the decisions to invest in members. As of year-end, the chapter funds are sufficient to cover approximately 2.28 years' worth of operating expenses if needed.



Leadership in Action



Chapter Officers



Rob Zunt, CPA, CISA, CIA, CFE, CRMA

President



Bambi Gifford, CPA, CIA

Vice President



Amanda Conner, CPA

Treasurer



Amaya Beck

Secretary

Board of Governors & Audit Committee

Kim Clingan

Lisa Culver

Dennis
Cunningham

Karen
Templeton

Amanda
Thacker

Richard Walls

Ashley Lewis

Jennifer
Benefield

Peyton
Webster
(student)








Thank you to all of our members, officers, board members and volunteers for making 2022-2023 a successful year for the Chattanooga Chapter!

Thank you!



-  Chapter177@iia chapters.org
-  <https://www.linkedin.com/company/iia-chattanooga>
-  <https://www.theiia.org/en/chapters/united-states/tennessee/chattanooga/>