President’s Message & Annual Report

Welcome to the 2021 – 2022 IIA Chapter year and thank you for your continued involvement. The previous year has been like nothing we’ve ever experienced as either individuals or as a chapter. Given the continued evolution to the “new normal”, I remain extremely grateful for strong member engagement, along with the ongoing efforts of Chapter Officers, volunteers and Board Members in moving the Chapter forward.

While we faced strong head-winds due to the impacts of COVID-19 on our work and personal lives, the overall chapter year still marked a success for our ongoing organization. This success can be broken down into the following areas:

**Chapter Achievement Program – Platinum Status**

The 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 service categories. For the 2020 – 2021 Chapter year the Fox Valley / Central Wisconsin Chapter was able to achieve all required activities and retain its “Platinum” status. Platinum is only bestowed upon chapters who have completed all required activities for over 10 years.

**Certifications**

In 2020 the Chapter offered in-person Certified Internal Auditor (CIA) training courses (which ultimately moved online with the pandemic) and resulted in 5 new IIA certified members. A big congrats to all the newly minted IIA certified professionals, as well as thank you. This strong growth in certifications was a big part of our CAP program success. We look forward to continued success in this area in 2021 and beyond.
Training

While the move to virtual training was definitely a big change for all involved, we remain proud of the 4 events that were offered during the 2020 – 2021 chapter year. Topics offered this year included Crucial Communication, Agile Auditing, Robotic Process Automation, and IT for non-IT auditors. As we move into the new chapter year the Board remains committed to listening to member feedback & preferences. We fully expect virtual events to remain an ongoing part of the chapter; however, we want nothing more than to offer the opportunity for in-person training and networking.

University Involvement & Scholarships

In 2020 we continued to advocate for the Internal Audit profession through ongoing outreach to campuses across our geographic footprint, as well as our continued investment in an annual scholarship program. In 2020 we announced two $500 scholarship winners and are currently in the process for finalizing our selections for 2021 winners.

Financial Stewardship

The Chapter Board continues to prioritize fiscal responsibility and places a strong emphasis on providing effective and reasonably priced CPE to its members. The organization’s balance sheet remains well positioned, with its largest financial outlays relating to individual training expenses and support for our annual scholarship awards.

The Future

Moving into my final year as Chapter President, I’d like to thank everyone who has attended chapter events, as well as those who have worked behind the scenes to make events happen, make sure we meet chapter minimum requirements, and finally put up with my ramblings at our scheduled Board Meetings. This Chapter has a plethora of strong capable leaders across numerous industries and geographies, and I feel extremely privileged to get to work & interact with many of you. While this Chapter remains highly successful, that continued success is reliant on continued commitment from organizations and individuals. I encourage anyone interested in becoming further involved in the chapter to reach out to me, the chapter email (chapter167@IIAChapters.org) or an other Board Member.

I hope you all have a continued safe 2021, and I really look forward to hopefully seeing you in-person soon.

Matt Rotter — Chapter President (Matthew.Rotter@associatedbank.com)
May Event Recap:
What Every Auditor Should Know About IT

On May 25th the Fox Valley/Central Wisconsin Chapter of the IIA was pleased to offer a great IT training titled, “What Every Auditor Should Know About IT”. The training was presented by Robert Berry, also known as “That Audit Guy”. Robert was a fantastic and engaging presenter with a long list of industry experience, knowledge and certifications.

The training spanned a 4 hour session which covered ways to help non-IT and IT Auditors work better together by arming non-IT auditors with the knowledge to collaborate with the techies on their team and in their organization.

Special thanks to all the members who attended, and what turned out to be a very successful event.

Upcoming IIA Webinars

Topic: Members-only Webinar: Writing Actionable Audit Observations and Laser Focused Reports
Date: July 20, 2021
Time: 2:30 pm to 3:30 pm CST
CPEs Available: 1

Topic: Members-only Webinar: Modern Audit: How to Create Attention-grabbing Audit Reports That Drive Action
Date: August 17, 2021
Time: 2:30 pm to 3:30 pm CST
CPEs Available: 1

Topic: Members-only: Audit Cybersecurity Operations
Date: September 21, 2021
Time: 2:30 pm to 3:30 pm CST
CPEs Available: 1
New! ESG Reporting White Paper:
Download the latest white paper from The IIA, “Internal Audit’s Role in ESG Reporting: Independent assurance is critical to effective sustainability reporting.” It provides an overview of risks related to ESG reporting, along with context on the growing sustainability movement. It also outlines how to support ESG objectives and add value.
IIA members, access now.

New! Critical Thinking Online Course
Critical thinking is often the central ingredient necessary for providing insights that help management better manage risk and create a sustainable control environment. This one-day course examines the various facets and components of this important core competency, and demonstrates how it can be weaved throughout key elements of the audit process.
Register for this online course.

First Stop Toward Success
The Internal Audit Practitioner designation is a great way to demonstrate your internal audit aptitude. Plus, the revised program requirements make it possible for students or new internal audit practitioners to apply their foundational knowledge as they pursue the Certified Internal Auditor® certification.
Learn more and share.
Annual Scholarship Awards

In June, the Fox Valley/Central Wisconsin Chapter awarded two $500 scholarships to two local college students with an interest in internal auditing. Both recipients were extremely deserving, and look to have bright futures ahead of them. The chapter looks forward to awarding future scholarships in our next chapter year.

Quincy Kabe:

My name is Quincy Kabe and I am from Buffalo, MN. I am a sophomore at UW-Eau Claire and am studying accounting with plans to get my CPA license. When I am not busy with school, I can often be found in the pool. I have been diving for 7 years and am on the swim and dive team at UW-Eau Claire. I look forward to seeing what the year ahead brings in both my education and athletic career.

Madison Twitchell:

My name is Madison Twitchell and I’m originally from Holmen, Wisconsin. I’m currently entering my junior year at UWEC, with plans to graduate in December 2023, and hoping to pursue a career in a mid-size accounting firm in the audit service line. Upon graduation, I plan to take the Certified Public Accountant (CPA) exam and become an auditor. I’m extremely thankful for this honor and hope to continue to keep in touch with The Institute of Internal Auditor, Fox Valley/Central Wisconsin Chapter as I continue to pursue my future career in audit!

Congratulations!