MISSION
The Institute of Internal Auditors - Houston is a professional association of internal auditors involved in promoting professional growth and progress for the practice of internal auditing.

PURPOSE AND OBJECTIVES
To provide value and service to our members in Houston, Texas, principally through effective education, training and certification programs.

To build the profession of internal auditing locally through enhanced training and programs, including supporting targeted universities.

To promote the global internal audit profession through contributions of resources to research and professional programs, primarily through The IIA.

To establish and maintain an adequate and sustainable governance and organizational infrastructure to manage the Chapter activities, and to develop leadership continuity and effective succession planning.

To ensure adequate financial resources through the exercise of appropriate financial stewardship to support the mission of the Chapter.

BOARD OF GOVERNORS

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A MESSAGE FROM THE PRESIDENT

Houston continues to be a leader and flagship Chapter among the 161 globally recognized Chapters. Based on The IIA’s CAP program, we were recognized as a Platinum Chapter for the 10th straight year and are well on our way to Ruby status for 2019 for 20 straight years as gold or better. This would not be possible without the passionate group of dedicated volunteers at the Board and Officer ranks as well as many key volunteer roles.

Our Board and Officers (pictured below) met for a full-day leadership retreat to identify ways we could best serve our members by promoting professional growth and progress for the practice of internal auditing. We identified several challenges, including how to best serve nearly 2,500 members with a large geographical reach spanning over 80 miles from Galveston to The Woodlands.

The commitment of the Board and Officers helped to charter the path to navigate to the future. While met with an unprecedented flooding caused by Hurricane Harvey, our Chapter remained resilient and committed to our mission. Our Board and members approved a $10,000 donation to the Houston Food Bank along with other contributions made by The New Jersey Chapter and Bob Kodzis.

This report is intended to highlight our fun-filled events, programs and many accomplishments from the Chapter year.

I want to thank each and every Board member, Officer and volunteers for your time and efforts this year!

Sincerely,

Greg
The Houston Chapter is proud to have over 785+ credential holders with 40 new adds during the Chapter year! New credential holders are recognized quarterly during our Chapter luncheons. Our Chapter was recognized as a Center of Excellence for promoting the CIA Learning program and sponsoring an instructor led CIA review courses.
Our Chapter also supports the CIA certification program through the efforts of our Test Development Team who works diligently to provide fresh content for the CIA Exam. The team provided another meaningful contribution to the profession by submitting 170 questions of which 115 were accepted.
The Academic Relations Committee promotes the Internal Audit profession, through the advancement of curriculums at the collegiate level, financial support to local universities, and presentations to students.

UNIVERSITY OF HOUSTON

The Houston Chapter has continued to work with UH faculty and students to provide financial support and promote professional development. The Chapter donated $50,000 toward the Institute of Internal Audit Research program, of which $25,000 was earmarked for UH. An Additional $25,000 was donated to the UH Internal Audit department and presented during our luncheon.

TEXAS A&M

Texas A&M’s Internal Audit Education Program (IAEP) received an award at the International IAEP Networking Conference in Orlando for advancing their program to the “Comprehensive” level. The Houston Chapter continues to support the program with representation on the university’s Advisory Board.
SCHOLARSHIPS

Academic scholarships are open to all students who 1) have completed the first IA Course, 2) have a minimum GPA of 3.0 and 3) submit a one page essay on why they chose IA as a program of choice and future career.

Rubia Zaheer and Joselin Lopez from UH were awarded scholarships.

JUNIOR ACHIEVEMENT – INSPIRE1

Our Houston Chapter’s Academic Relations team participated in the Junior Achievement Inspire event held at UH. Approximately 8,000 middle school students learned about the various professions and career paths, including Internal Audit.
Our Ninth Annual Conference themed “Navigating the Future” was another huge success with a record breaking crowd! The event featured Mike Peppers (Board Chair) kicking off the morning session, a futurist and a former Miss USA contestant. We appreciate the hard work of the Annual Conference Chair Deanna Sullivan and the Committee (pictured below) for organizing a first class event and experience for our members.
There were great opportunities for networking and interactions with the exhibitor booths during breaks, lunch and the post conference reception. The IIA HQ Bookstore and CIA Learning Center were also on site with discounts on exam prep materials and new releases to help our members gain new insights as they Navigate the Future.
The Houston Audit Challenge Golf Challenge was a fun filled member event where over 100 golfers participated. There were many contests, prizes, give-a-ways, awards and the big championship trophy up for grabs. Congratulations to the winning team pictured below (Ted Lieux, Drew Martinak, Todd Freeman, and Dwight Ternes) who were awarded with the championship trophy during the awards ceremony following play.
The Houston Chapter continued to provide various fun networking events which included a day at the ball park (pictured below). We also had an afternoon at Karbach Brewery where Larry Dierker share his story of 40 years in the game as a pitcher, broadcaster and coach.
PROFESSIONAL DEVELOPMENT

Our members received over 14,700 CPE hours through a wide variety of individual learning opportunities and topics!

**Wide Range of Events**
- Annual Conference
- Full-day and multi-day trainings
- Monthly luncheons and extended seminars
- Networking events with Astros and ACFE
- CIA Review Course
- New hire and senior Auditor Bootcamps
- CAE and manager roundtables
- Focused training for government and EH&S auditors

**Various Learning Topics**
- Continuous auditing and script writing
- Cybersecurity
- Staying in demand in your Career
- Auditing the cloud
- Integrity and fraud
- Benefits of IA involvement in implementation projects
- Auditing social media
- Robotic process automation
- Presentation skills
- Crisis management
The Houston IIA Chapter is a volunteer based organization which makes active member participation critical to our success. We hosted a volunteer appreciation luncheon to recognize the individual contributions of over 60 Chapter members who generously donated their time and effort.
CHAPTER ACHIEVEMENT PROGRAM

One of the ways we gauge our success as a Chapter is through the Chapter Achievement Program (CAP). CAP points are earned for our accomplishments in three areas: Service to Members, Service to the Profession, and Chapter Administration.

Gold is the highest level that can be earned in a given year. After 10 consecutive years of Gold, the Chapter earns platinum status and then Ruby status after 10 consecutive years of platinum status has been achieved.

With the hard work of our leaders and volunteers, we earned 2,300+ points and achieved the IIA’s Platinum Status for the 9th consecutive year and are well on our way to Ruby status.
CHAPTER OFFICERS

GREG BONE
Crestwood Midstream Partners
President

WILSON VAN TINE
Phillips 66
VP Administration

JOHN WONG
Deloitte
VP of Communications

JAY QATATO
Calpine
VP of Academic Relations

RYAN GENTRY
Deloitte
VP of Technology

MATTHEW MARCINEK
RSM
VP of Membership
CHAPTER OFFICERS

ANNE SLATTERY
RSM
VP of Seminars

ROWEN CHEN
Protiviti
VP of Finance

RADHA AHYA
Twitter
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Thank you to our volunteers!
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