“Alone we can do so little; together we can do so much.” – Helen Keller.

This quote can be applied to almost every aspect of our lives. Personal relationships, athletic competition, organizational achievement, etc. It highlights the fundamental idea that we are better off with others – that sharing ideas, encouraging one another, and embracing different perspectives can bring about the best result. I view the IIA, and our local Portland Chapter, in this same light. We are a community of over 400 individuals with an incredibly deep well of knowledge and experience, and “together we can do so much.”

Thanks to the hard work of many, the IIA Portland Chapter had another successful year. Perhaps the most noteworthy evidence of success is the addition of 33 new members! The only meaningful way to grow a member population is to ensure said membership has value. At the Portland Chapter, we’ve made every effort to increase this value by encouraging member engagement and soliciting feedback. Said another way: we want and welcome your ideas, and we do our best to put them into action!

Another modicum of success is the IIA’s “Chapter Achievement Program.” This program prescribes various requirements for each local chapter and then rewards points based on those achievements; the points then yield either a Bronze, Silver, or Gold rating. If a chapter receives a Gold-level rating for 10 consecutive years, the chapter is deemed Platinum. This year, for the 9th consecutive year, the IIA Portland Chapter achieved a Platinum status! And if we can maintain this highest level of success for one more year, we will reach the next level of Ruby.

Other successes this year include the adoption and roll-out of our new technology platform – this is being used for all events, as well as email. (Don’t forget our new address is chapter49@iiachapters.org). We were also deemed a “Chapter of Excellence” for our support of the CIA certification.

As I depart my role as President, I leave knowing the Chapter is in good hands. The 2019-2020 Chapter Officers and Board of Governors are eager to move this Chapter forward, and I look forward to their successes. I thank you – the members – for allowing me to serve in this role, and I thank my fellow officers and board members for their immeasurable support.

Sincerely,

Andy Willis
2018-2019 IIA Portland Chapter President
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Membership Survey Results

Highlights

- Cybersecurity & IT, Auditing, Fraud, Personal Development & Soft Skills and Data Analytics are the topics IIA members are most interested in.
- Over 97% of respondents felt that the IIA meets or exceeds their needs for networking and volunteer opportunities, and chapter-to-member support.
- IIA members ranked “date and time” of trainings as the top factor in their training decisions followed by “topic relevance to my job/assignment”.
- Respondents are interested in seeing more jobs, news and educational opportunities posted on the IIA Portland chapter’s website.

Member Information

- 414 Members
- 33 New Members
- 16 Newly Certified Members
- 6 Chapter Officers
- 16 Board of Governors Members
- 12 Volunteers
- 13 CAE
- 2 CRMA
- 1 CCSA

Respondent Demographics

- Staff/Senior
- Other
- External Auditor
- Manager
- Not Answered
Chapter Achievement Program

The Portland Chapter has earned platinum status for its 9th consecutive year! If our chapter continues to maintain high levels of achievement, we will reach Ruby status in 2020.

The Chapter Achievement Program (CAP) is an achievement/recognition program for chapters in North America that uses points to recognize chapter activities that align with the North American Strategic Plan in three service categories: Service to Members, Service to the Profession, and Chapter Administration.

<table>
<thead>
<tr>
<th>Category</th>
<th>Points Earned</th>
<th>Examples of how points are earned:</th>
</tr>
</thead>
</table>
| Service to Members      | 2,019 (required: 325) | • Providing educational programs and social events for members  
                          |                                           | • New IIA certifications received by members |
| Service to the Profession | 350 (required: 200) | • Submitting resource documents to Audit Executive Center library  
                          |                                           | • Speaking engagements completed by members |
| Chapter Administration  | 685 (required: 160) | • Conducting member and CAE Surveys  
                          |                                           | • Reviewing Chapter Bylaws |
| Total Points            | 3,054         |                                                                                                  |

Performance Level Categories

- Bronze
- Silver
- Gold

- 685 Points: 10 Years of Gold
- 1060 Points: 20 Years of Gold
- 1560 Points: 25 Years of Gold
- Platinum
- Ruby
- Sapphire
- Diamond
Chapter Events

The IIA is the leader in innovative internal audit training. Our Chapter provides quality, engaging and facilitated learning opportunities for our members and customers. We are committed to offering a variety of events, delivering the very best in internal audit training and networking opportunities. In 2019 the Portland Chapter held 17 events, hosting up to 44 attendees per event, and offered 73.5 CPE hours.

Speaker Spotlight

Robert Kuling

Robert Kuling is a partner with the Risk Advisory group at Deloitte. He has over 30 years of internal audit and management experience including nearly 20 years as a Chief Audit Executive. He has held Chief Audit Executive roles with major Canadian companies including Tervita, Viterra and Precision Drilling. He has also held audit management positions with the Saskatchewan Wheat Pool, Farm Credit Canada and the Provincial Auditor of Saskatchewan.

As a global leader for the Institute of Internal Auditors (IIA), he is a former Chairman of the North American Board, as has held multiple terms on the Global and Canadian Boards. He has been a national spokesperson for the internal audit profession with regulators, professional associations, training firms, and government organizations.

Mike Fucilli

The Portland Chapter’s May Luncheon on artificial intelligence featured Michael J. Fucilli CIA, QIAL, CGAP, CRMA, CFE. Mike is a Chief Audit Executive with a staff of 85 professionals for a public sector company with Revenues in excess of $15 billion. Mike has 35 years of Internal Audit experience in the private and public sector and his experience includes banking, defense contracting and transportation.

Mike is currently President of the IIA Research Foundation Board of Trustees and the IIA’s Global Board. Mike is Vice Chairman, Research of the IIA Executive Committee.
Events Calendar

**Practical Ethics**
Seminar
Danny Goldberg

**Cognitive Science: A New Perspective**
Seminar
Toby Groves

**CAE Roundtable**

**Audit 2020**
Seminar
Danny Goldberg

**Third-Party Fraud**
Luncheon
Ramsey Pace

**Audit Lightning Talks**
Various Presenters

**Cryptocurrencies**
Luncheon
Joseph Jacoby

**Strategic & Performance Management**
Seminar
Pam Stroebel

**Construction Auditing**
Luncheon
Steve Bacchetti

**Student Night**
Various Presenters

**Tactics (and Courage) to Appraise Corporate Culture**
Seminar
Robert Kuling

**Analyzing Business Processes**
Seminar
Raoul Menes

**CIA Review (I, II)**
Seminar
Mike Fucilli

**CIA Review (III)**
Seminar
Mike Fucilli

**Foundations of Data Driven Internal Audit Organization**
Seminar
Moss Adams/Tableau

**Fraud Detection & Incident Response for Auditors**
Seminar
John Hall

**Artificial Intelligence**
Luncheon
Mike Fucilli
On March 6, 2019 the Portland Chapter held an Internal Audit Student Night at Portland State University (PSU). 60 students from Oregon State University, Portland State University, University of Arizona, University of Oregon, University of Portland, Warner Pacific University, Washington State University, and Willamette University networked with 19 local professionals from organizations such as Intel, Cambia, State of Oregon, and Bonneville Power Administration to learn more about the internal audit profession.

To learn more about Student Night, contact Amanda Bartunek at amanda.bartunek@modahealth.com
The Portland and ISACA Chapters presented the first ever audit lightning talk event in 2019. The goal of lightning talks is to articulate a topic in a quick, insightful, and clear manner.

The lightning talks, moderated by Dana Lawrence (Azlo), featured a variety of presenters who shared their ideas on a topic of their choice for 10 minutes and took audience questions. Topics ranged from audit to robotic process automation, risk and professional development.

<table>
<thead>
<tr>
<th>Presenter</th>
<th>Topic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eric Jenkins (Umpqua)</td>
<td>Motorcycles and the Art of Risk-Taking as an Auditor.</td>
</tr>
<tr>
<td>Lauren Overton and Taylor Schimbke (Moss Adams)</td>
<td>The Recipe to an Auditor’s Success</td>
</tr>
<tr>
<td>Zefren Edior (Umpqua Bank)</td>
<td>Keys to a Successful Robotic Process Automation (RPA)</td>
</tr>
<tr>
<td>Nancy Wells</td>
<td>Improve the Probability of your Recommendations to be Implemented</td>
</tr>
</tbody>
</table>
Leadership Academy

Lauren Toda, Joann Montero and Yuliya Edwards represented the Portland Chapter at the 2019 Leadership Academy. Valentina Kostenyuk, also a member of the Portland chapter, attended as the District Representative.

Leadership Academy is a training event designed to meet the development needs of IIA chapter leaders by sharpening the skills necessary to lead a successful chapter. The event features general sessions, roundtable discussions, role-specific breakouts, and numerous networking opportunities to more than 350 chapter leaders worldwide.
District Representatives serve as liaisons for the chapters in their district and are part of the IIA Chapter Relations Committee. The Chapter Relations Committee assists chapter leaders as a resource and serves as liaison to The Institute of Internal Auditors.

In 2019 the IIA reached 200,000 members worldwide!

Chapter Leaders divided into groups for shared success/best practices sharing sessions
Chapter Leadership

Officers

Andy Willis, CIA
President
Years in IIA: 11
Employer: PeaceHealth

Previous Roles
President, VP of Seminars

Lauren Toda, CIA
VP of Seminars
Years in IIA: 6
Employer: PeaceHealth

Previous Roles
VP of Seminars

Sarrah Axelson, CIA, CPA
Treasurer
Years in IIA: 6
Employer: PeaceHealth

Previous Roles
Co-Chair Communications (San Diego Chapter)

Mandy Jolly Santiago
VP of Luncheons
Years in IIA: 11
Employer: Moss Adams LLP

Previous Roles
VP of Luncheons

Siobhan Chandler
Membership Officer
Years in IIA: 6
Employer: Kaiser Permanente

Previous Roles
Membership Chair, Volunteer

Joann Montero, CIA
Secretary
Years in IIA: 5
Employer: Cambia Health Solutions

Previous Roles
Newsletter Writer, Certification Committee Member
Chapter Leadership (cont.)

Board of Directors

James Alexander, CIA, CFE, CISA
Board Member
Years in IIA: 18
Employer: Unitus Comm. Credit Union
Previous Roles
Board Member, Member (IIA Intern. Research Found. Board of
Trustees), Vice Chair (IIA Intern. Comm. on Research & Education
Dev.), Member (IIA Intern. Comm. on Quality), Portland Chapter
President, VP of Seminars, VP of Luncheons, Treasurer

Amanda Bartunek, CIA, CFE
Board Member
Years in IIA: 13
Employer: Moda Health
Previous Roles
Board Member, Academic Relations Chair, Treasurer

Ann Calkins, CIA, CFE
Board Member
Years in IIA: 17
Employer: KinderCare Education
Previous Roles
Board Member

Chris Cochran, CIA, CISA, CRMA
Board Member
Years in IIA: 20
Employer: Avangrid Management Co.
Previous Roles
Board Member, IIA International Conference Sponsorship
Committee Member, IIA District Representative

Ed Dassow, CIA, CFSA, CISA
Board Member; CAP Coordinator
Years in IIA: 21
Employer: Standard Insurance Company
Previous Roles
Board Member, CAP Coordinator, President, VP of Seminars,
VP of Luncheons

Michael Freudenthal, CIA, CISA
Board Member
Years in IIA: 20
Employer: Bonneville Power Administration
Previous Roles
Board Member
Chapter Leadership (cont.)

Board of Directors (cont.)

**Tenzin Gonta, CIA**  
Board Member  
Academic Relations Committee  
**Years in IIA:** 10  
**Employer:** City of Portland

*Previous Roles*  
Board Member, Government Chair

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**Jon Keithley, CPA, CISA**  
Board Member  
**Years in IIA:** 5  
**Employer:** XPO Logistics

*Previous Roles*  
Board Member

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**Val Kostenyuk, CPA, CIA, CFE**  
Board Member/Current District Rep  
**Years in IIA:** 8  
**Employer:** Avangrid Renewables

*Previous Roles*  
Board Member, President, VP of Seminars, Treasurer

---

**Dana Lawrence, CIA, CRMA, CFSA, CRVPM**  
Board Member  
**Years in IIA:** 11  
**Employer:** Azlo

*Previous Roles*  
President, VP of Luncheons

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**Jason Miller, CISA, CRISC, CISSP**  
Board Member  
**Years in IIA:** 8  
**Employer:** Cambia Health Solutions

*Previous Roles*  
President, VP of Seminars, Board Member
Chapter Leadership (cont.)

Board of Directors (cont.)

Dawn Mittelbach, MBA, CIA, CFE, CISA
Board Member; Website Administrator
Years in IIA: 18
Employer: PeaceHealth

Previous Roles
Board Member, Website Administrator, President, VP Seminars, VP Luncheons

Ken Peasley, CIA, CISA, CFE
Board Member
Years in IIA: 26
Employer: TrueBlue, Inc. (Retired)

Previous Roles
Board Member, CAE Chair, Portland Chapter President, VP of Luncheons, IIA Regional Conference Mkt Committee Chairman, Advisory Board and Mkt Sub-Committee member

Corri Sanders-Lee, CIA, CISA, CFE
Board Member
Years in IIA: 14
Employer: Portland General Electric

Previous Roles
Board Member, Volunteer Chair

Georgia Robertson, CPA, CIA, CFE
Board Member
Years in IIA: 15
Employer: The Greenbrier Companies

Previous Roles
Board Member, President, Treasurer, Volunteer Coordinator
Volunteers

Jeff Dougher, CPA
Student Night
Years in IIA: 11
Employer: Intel

Yuliya Edwards, MBA
Website Administrator
Years in IIA: 4
Employer: CareOregon

Wendy Godfrey
Student Night
Years in IIA: 3
Employer: Cambia Health Solutions

Eric Jenkins, CAMS, CISA, CRISC
Student Night
Years in IIA: 4
Employer: Umpqua Bank

Sheila Kelly
Year-End Report Editor
Years in IIA: 3
Employer: KinderCare Education

Sarah Landis, CGAP
Student Night
Years in IIA: 1
Employer: Department of Human Services/ Oregon Health Authority
Chapter Leadership (cont.)

Volunteers (cont.)

Doreen Lee, CIA
Year-End Report Editor
Years in IIA: 6
Employer: KinderCare Education

Anne Peterson, CIA, ACDA
Newsletter Editor
Years in IIA: 9

Caytie Siegl
Seminar Support
Employer: PGE

Pam Stroebel, MBA, CPA, CIA, CRMA, CPM
Student Night
Years in IIA: 18
Employer: Powers CPA LLC / Willamette University

Katrina Velasco, CPA
Student Night
Years in IIA: 2
Employer: Cambia Health Solutions

Karen Yeong, CIA, CISA, ITIL, ISO27001, PCI-P
Seminar Support
Years in IIA: 11
Employer: NW Natural
Thank you!
Thank you to all of our Officers, Board Members, and Volunteers for making 2019 another successful year for the Portland Chapter!

Interested in Volunteering?
Email the IIA Portland Chapter at chapter49@iiachapters.org

We love to hear your feedback! Please reach out via email or on social media.