What a chapter year it has been! When I reflect back on the last year, I am reminded of an episode of *Friends* (one of my favorite shows). A scene in the episode has Ross trying to move his new sofa up the many stairs of his apartment building. He screams “pivot” at Rachel and Chandler multiple times as they struggle to move the sofa. Unfortunately, the sofa gets stuck and Ross ends up sawing it in half to remove it from the staircase. “Pivoting” is exactly what the year of 2020 has become known for. In this new day with COVID-19 and social distancing, we as a chapter have had to work together to find new solutions for our everyday needs.

The chapter also had to pivot from hosting a number of in-person events to a virtual platform providing our members with training opportunities that you’ve come to rely on us for. The Chapter provided two free webinars to members as we pivoted into this “new norm”. Our last event of the chapter year was a 4 hour webinar using our new Chapter Zoom platform. Adapting to the current environment and embracing technology has allowed us to reach a broader audience and will help us bring more relevant and engaging content to our members in the future. We also noted in the Membership Survey that you asked for more virtual training opportunities. You asked, we are listening!

Now with rising protests for social injustice and racism, we find ourselves pivoting again to stand for what is right to affect change in our nation, our state, and our community. Now more than ever we must stand together as a professional organization and as a community in support of equality and social justice for all! What we do now, will be remembered for years to come.

Despite the challenges that we’ve faced this year, the Chapter was still able to achieve a Gold-level rating through the “Chapter Achievement Program”. If a chapter receives a Gold rating for 10 consecutive years, the chapter is deemed Platinum. This year is the 9th consecutive year the IIA Portland Chapter has achieved Platinum status! A big thank you goes out to all of the chapter leaders, board of governors and other volunteers that helped make this possible. Also, I thank you - the members! I am proud of what our Chapter has achieved this year and look forward to serving you again next year!

With gratitude,

Lauren Toda  
*2019–2020 IIA Portland Chapter President*
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Membership Survey Results

Highlights

• Cyber Security & IT Auditing, Data Analytics, Fraud, and Ethics – Regulatory & Behavioral are the topics IIA members are most interested in.
• Over 95% of respondents felt that the IIA meets or exceeds their needs for education and programming, speakers, networking and volunteer opportunities, and chapter-to-member support.
• IIA members ranked “topic relevance to my job/assignment” as the top factor in their training decisions. Additionally, in the current COVID-19 environment, 83% would be more likely to attend virtually hosted events vs. on-site hosted events.
• Respondents are interested in seeing more educational opportunities, news items, and job postings on the IIA Portland chapter’s website.

Member Information

382 Members including
- 19 New Members
- 8 Newly Certified Members
- 7 Chapter Officers
- 14 Board of Governors Members
- 8 Volunteers

- 6 CAE
- 10 External Auditor
- 3 IA Manager
- 9 Other
- 2 Staff/Senior
The Portland Chapter earned **platinum status** for its 9th consecutive year!
If our chapter continues to maintain high levels of achievement, we will reach Ruby status in 2021.

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>Examples of how points are earned:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service to Members</td>
<td>• Providing educational programs and social events for members</td>
</tr>
<tr>
<td></td>
<td>• New IIA certifications received by members</td>
</tr>
<tr>
<td>Service to the Profession</td>
<td>• Submitting resource documents to Audit Executive Center library</td>
</tr>
<tr>
<td></td>
<td>• Speaking engagements completed by members</td>
</tr>
<tr>
<td>Chapter Administration</td>
<td>• Conducting member and CAE Surveys</td>
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<tr>
<td></td>
<td>• Reviewing Chapter Bylaws</td>
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</tbody>
</table>

The Portland Chapter performed at the gold level once again this year!

The Performance Level Categories are:
- Bronze: 0 - 685 points
- Silver: 686 - 1060 points
- Gold: 1061 - 1560 points

- 10 Years of Gold: Platinum
- 20 Years of Gold: Ruby
- 25 Years of Gold: Sapphire
- 35 Years of Gold: 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 2019/2020, the Portland Chapter held 15 events, hosting up to 93 attendees per event, and offered 69.5 CPE hours.

Speaker Spotlight

Donna Silverberg

The Portland Chapter’s September seminar - Behavior Ethics & Ethical Decision Making - featured Donna Silverberg, J.D. Donna is the owner and principal of DS Consulting and has been a practicing mediator, facilitator, trainer, and conflict coach for 30+ years. Since 1998, Donna has been facilitating large, technically complex natural resource and public health issues in the northwest. Donna also provides coaching, training and assistance to numerous clients in the northwest and beyond.

Linh Truong

October’s seminar - Root Cause Analysis & Agile Auditing – featured Lihn Truong. Lihn (CPA, CIA, CISA) has more than 20 years of audit experience including being the former CAE of Kosmos Energy and Alon USA where she built the respective internal audit departments from ground zero including developing all templates for risk assessments, audit programs, audit reports, and audit committee presentations.

Mike Fucilli

Auditing Through the Eyes of COSO was presented by Michael Fucilli (CIA, QIAL, CGAP, CRMA, CFE) in November. 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.
<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
<th>Speaker(s)</th>
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</thead>
<tbody>
<tr>
<td>Behavior Ethics &amp; Ethical Decision Making</td>
<td>Sept</td>
<td>Donna Silverberg</td>
</tr>
<tr>
<td>Auditing Through the Eyes of COSO</td>
<td>Oct</td>
<td>Linh Truong</td>
</tr>
<tr>
<td>Root Cause Analysis &amp; Agile Auditing</td>
<td>Nov</td>
<td>Mike Fucilli</td>
</tr>
<tr>
<td>Auditing Cybersecurity</td>
<td>Dec</td>
<td>Mike Fucilli</td>
</tr>
<tr>
<td>IIA CAE Roundtable</td>
<td>Jan</td>
<td>Mike Fucilli</td>
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<tr>
<td>IIA Portland Chapter Member Social Networking Event</td>
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<td></td>
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<tr>
<td>Implications of Blockchain in Healthcare</td>
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<tr>
<td>IIA Portland Chapter Member Social Networking Event</td>
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<td></td>
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<tr>
<td>Hiring, Developing and Managing Successful Audit Teams</td>
<td>Feb</td>
<td>Jay Russell</td>
</tr>
<tr>
<td>Executing Consulting Engagements</td>
<td>Mar</td>
<td>Joe Holmes</td>
</tr>
<tr>
<td>Forensic Lexicology: How to Quantify Words</td>
<td>Apr</td>
<td>Darrell Dorrell</td>
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<tr>
<td>Travel Policy – Current Practices, Trends and Controls</td>
<td>May</td>
<td>The Lyndon Group</td>
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<tr>
<td>Practical Ethics Webinar</td>
<td></td>
<td>Danny M. Goldberg</td>
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<tr>
<td>Auditing in the New Norm Webinar</td>
<td></td>
<td></td>
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<tr>
<td>Forensic Lexicology: How to Quantify Words</td>
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In January 2020, the IIA Portland Chapter presented the 2020 Leadership Panel.

The Leadership Panel, moderated by Dana Lawrence (past President for IIA Portland chapter), featured a variety of presenters who shared their insights and best practices on how to be an effective leader, their views on leadership, and what makes them successful.

### Leadership Panel Presenters

<table>
<thead>
<tr>
<th>Name</th>
<th>Position / Organization</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jodi Cochran</td>
<td>Chief Audit Executive, Clackamas County</td>
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<tr>
<td>Robert Snoddy</td>
<td>Audit Manager, CareOregon</td>
</tr>
<tr>
<td>Anne Detraglia</td>
<td>Sr. Director, Fraud Risk Mgmt, Nike</td>
</tr>
<tr>
<td>Michael Freudenthal</td>
<td>Chief Audit Executive, Bonneville Power Administration</td>
</tr>
<tr>
<td>Amanda Jo Erven</td>
<td>President &amp; Founder, Audit. Consulting. Education</td>
</tr>
<tr>
<td>Joel Brandenburg</td>
<td>Executive VP and Chief Auditor, Umpqua Bank</td>
</tr>
<tr>
<td>Javier Jurado</td>
<td>Senior Audit Manager, US Bank</td>
</tr>
</tbody>
</table>

Great leaders inspire and influence others!
District Workshop

June 2019 District Workshop held in Redmond, WA at Nintendo.

District Workshops are an annual 1-day training for chapter leaders in the district to get IIA HQ updates, discuss chapter best practices, share speaker ideas, and network. District Workshops are facilitated by the District Representative, usually joined by the IIA HQ Chapter Relations manager.
IIA’s International Conference, which is held in various locations around the globe, was held in Anaheim, CA this year in 2019.

Portland’s District Advisor, Ofelia Tamayo, had the privilege as serving as co-chair. (above)

Valentina Kostenyuk, Portland’s District Representative and chapter member, was part of the Conference Host Committee. (below)
2019 International Conference (cont.)

Nine members of the Portland chapter attended the International Conference. Six are Portland IIA Board Members

Above, from left to right: Tenzin Gonta, James Alexander, Joann Montero, Jon Keithley, Lauren Toda, Valentina Kostenyuk, Aura Rad, Niki O'Hara, Kim Fleischmann

Below, from left to right: Niki O'Hara, Aura Rad, Jon Keithley, Benito Ybarra, Valentina Kostenyuk, James Alexander

Portland members with the Chair of the IIA North American Board of Directors, Benito Ybarra
Chapter Leadership

Officers

Lauren Toda, CIA
President
Years in IIA: 7
Employer: PeaceHealth

Previous Roles
VP of Seminars

Yuliya Edwards, MBA, CFE
VP of Seminars – Programs Officer
Years in IIA: 5
Employer: CareOregon

Previous Roles
Website Administrator

Joann Montero, CIA
VP of Luncheons
Years in IIA: 6
Employer: Portland General Electric

 Previous Roles
Newsletter Writer; Certification Committee Member; Secretary

Sarrah Axelson
Treasurer
Years in IIA: 7
Employer: PeaceHealth

Previous Roles
Co-Chair Communications (San Diego Chapter), Treasurer

Trevor Hutchinson-Flaming
Secretary
Years in IIA: 4
Employer: Cambia Health Solutions
Officers (cont.)

**Georgia Robertson, CPA, CIA, CFE**
Certifications
Years in IIA: 16
Employer: The Greenbrier Companies
Previous Roles
Board Member; President; Treasurer; Volunteer Coordinator

**Andy Willis, CIA**
Membership; Marketing Committee
Years in IIA: 12
Employer: PeaceHealth
Previous Roles
President, VP of Seminars
Chapter Leadership (cont.)

Board of Directors

James Alexander, CIA, CFE, CISA
Board Member; International Chair; Membership
Years in IIA: 19
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, Academic Relations Chair
Years in IIA: 14
Employer: Moda Health

Previous Roles
Board Member, Academic Relations Chair, Treasurer

Ann Calkins, CIA, CFE
Board Member; CAE Committee; Website Administrator
Years in IIA: 18
Employer: KinderCare Education

Previous Roles
Board Member

Chris Cochran, CIA, CISA, CRMA
Board Member; Nominations Chair
Years in IIA: 21
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: 22
Employer: Standard Insurance Company

Previous Roles
Board Member; CAP Coordinator; President; VP of Seminars; VP of Luncheons

Daniel Dickson, CIA
Board Member
Years in IIA: 12
Employer: Nike
Board of Directors (cont.)

Michael Freudenthal, CIA, CISA
Board Member
Years in IIA: 21
Employer: Bonneville Power Administration

Previous Roles
Board Member

Mandy Jolly-Santiago
Board Member, CAE Chair
Years in IIA: 12
Employer: Moss Adams LLP

Previous Roles
VP of Luncheons

Valentina Kostenyuk, CPA, CIA, CFE
Board Member/Current District Rep
Years in IIA: 9
Employer: Intel Corporation

Previous Roles
Board Member; President; VP of Seminars; Treasurer

Jon Keithley, CPA, CISA
Board Member; Technology Coordinator
Years in IIA: 6
Employer: Columbia Sportswear

Previous Roles
Board Member

Tenzin Gonta, CIA
Board Member; Nominations Committee
Years in IIA: 11
Employer: City of Portland

Previous Roles
Board Member; Government Chair; Academic Relations Committee
Chapter Leadership (cont.)

Board of Directors (cont.)

**Jason Miller, CISA, CRISC, CISSP**
Board Member; Marketing Chair
**Years in IIA:** 9
**Employer:** Cambia Health Solutions

**Previous Roles**
President; VP of Seminars; Board Member

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**Dawn Mittelbach, MBA, CIA, CFE, CISA**
Board Member; Website Administrator
**Years in IIA:** 19
**Employer:** PeaceHealth

**Previous Roles**
Board Member; Website Administrator; President; VP Seminars; VP Luncheons

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**Corri Sanders-Lee, CIA, CISA, CFE**
Board Member; Volunteer Chair
**Years in IIA:** 15
**Employer:** Portland General Electric

**Previous Roles**
Board Member; Volunteer Chair
Chapter Leadership (cont.)

Volunteers

**Ingrid Choy-Harris**, CIPP/E, CIPM, CISA  
Social Media  
**Years in IIA:** 5  
**Employer:** ComScore, Inc.

**Tami French**  
Luncheon Registration  
**Years in IIA:** 7  
**Employer:** Presolve Consulting

**Wendy Godfrey**  
Luncheon & Seminar Support and Academic Committee  
**Years in IIA:** 4  
**Employer:** Cambia Health Solutions

**Sheila Kelly**, CIA  
Newsletter Editor  
**Years in IIA:** 4  
**Employer:** Avangrid

**Doreen Lee-Bierce**, CIA  
Year-End Report Editor  
**Years in IIA:** 7  
**Employer:** KinderCare Education
Chapter Leadership (cont.)

Volunteers

Pam Stroebel Powers, MBA, CPA, CIA, CRMA, CPM
Academic Committee
Years in IIA: 19
Employer: Oregon Military Department

Katrina Velasco, CPA
Luncheon Coordinator, Social Media Chair, and Academic Committee
Years in IIA: 3
Employer: Cambia Health Solutions

Karen Yeong, CIA, CISA, ITIL, ISO27001, PCI-P
Seminar Coordinator
Years in IIA: 12
Employer: NW Natural
Thank you!

Thank you to all of our Officers, Board Members, and Volunteers for making 2020 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.

Email  Twitter  LinkedIn  Facebook