IIA YEAR-END REPORT
Portland Chapter
June 2020 - May 2021
When we started our Chapter year in June 2020, life was very different. We were all adjusting to what “new normal” meant during a pandemic. Zoom and other virtual platforms became our friends and, in many cases the only way we could see loved ones. If we did meet others, we were outdoors, 6 feet apart, and with masks on! We found that you could buy everything on Amazon and that breakfast, lunch, and dinner could be delivered right to your doorstep. In our work life, we invested in new desks/chairs/office equipment, spent numerous hours on virtual calls in meetings and training, and learned to audit differently. We have been through a lot over the last 12 months – but we are agile and pivoted through the changing times!!! With summer quickly approaching, outdoor picnics and barbeques will resume, gardens will thrive, and a renewed hope will guide us to a brighter tomorrow.

The IIA Portland Chapter adjusted to the new normal, as well. The Chapter transitioned all training and events to our Zoom platform to ensure the Chapter continued to provide members with quality training, networking opportunities, and resources for continued growth and learning. We collaborated with the other West District 1 chapters (Seattle, Salem, Spokane, Nisqually, Mid-Columbia, Boise, and Alaska) to bring The IIA President and CEO, Richard Chambers, to the Pacific Northwest (virtually) and we provided free CPE to our members throughout the year, including our last event, Ethics and the Internal Auditor’s Role.

2020 was another successful “GOLD” year! Through the “Chapter Achievement Program”, the IIA Portland Chapter achieved Ruby status for the first time! Go Portland! I am proud of what the Chapter accomplished over the last 12 months and am thankful for all of our wonderful volunteers! Our officers, Board of Governors, and other key volunteers dedicated numerous hours to ensuring that the Chapter year continued without a hitch. I think they did a great job and deserve a round of applause! Also, I’m thankful to you, our members, without you we wouldn’t be a chapter! My last two years serving the membership as President has been an inspiring and rewarding experience – one that I will not soon forget! Thank you for letting me represent the Portland Chapter!

Take care, stay safe, and enjoy your summer!

Lauren Toda
2020–2021 IIA Portland Chapter President
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Membership Survey Results

Highlights

- Cyber Security & IT Auditing, ERM, 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, 87% 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

- 323 Members
  - 20 New Members
  - 15 Newly Certified Members
  - 7 Chapter Officers
  - 14 Board of Governors Members
  - 3 Volunteers
  - 12 CAE Members
  - 2 CRMA Members
  - 1 CFSA Member
  - 323 Members including
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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The Portland Chapter performed at the gold level once again this year!
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 2020/2021, the Portland Chapter held 7 events, hosting up to 240 attendees per event, and offered 67.5 CPE hours.

Speaker Spotlight

Jenitha John

Jenitha John (CIA, QiAL, CA, CD, SEP) presented the 2020s: Covid 19, Disruption, and the Decade Ahead for Internal Audit in January 2021. Jenitha is Chief Executive Officer at the Independent Regulatory Board for Auditors (IRBA). Jenitha is the 2020-21 Chair of the Institute of Internal Auditors (IIA) Global Board of Directors. Jenitha’s prior volunteer roles included serving as the Global Board’s Senior Vice Chair (2019-20), member of IPPF Relook Task Force, Committee of Research and Education Advisors, Financial Services Guidance Committee, and on the Global Board’s Executive Committee. Jenitha was also recognized as “South Africa’s Internal Auditor of the Year” in 2014.

Mike Fucilli

Risk Assessment Training and Operational Auditing was presented by Michael Fucilli (CIA, QiAL, CGAP, CRMA, CFE) in November 2020 and March 2021, respectively. Mike has over 40 years of internal auditing experience in the private and public sector. He has since retired as Auditor General at Metropolitan Transportation Authority, the largest Public Sector Transit Authority in North America with Operating Revenues in excess of $15 billion and a Capital Program of $5 Billion. Mike has an extensive background in internal auditing that includes Financial Services, Public Sector, GRC, Technology, Forensic Auditing and SOX Reporting. Mike managed a staff of 85 professionals. He has served on The IIA’s North American and Global Boards and is a frequent speaker and presenter for The IIA.
Chapter Events (Cont.)

Speaker Spotlight

**Tiffany Couch**

Fraud seminar was presented by Tiffany Couch (CPA/CFF, CFE) in May 2021. Tiffany Couch is CEO/Founder at Acuity Forensics, a nationally recognized forensic accounting firm based in the Pacific Northwest. She has more than 24 years of experience in the field of accounting with the last 17 years focused on forensic accounting related engagements. Her expertise is in matters involving fraud investigation, forensic accounting, contract and regulatory compliance, internal control risk assessment, and complex litigation. She has provided expertise as a source to the New York Times, Forbes, CNBC, NPR, and the Wall Street Journal. Ms. Couch is the winner of the 2014 James R. Baker Speaker of the Year.

**Richard Chambers**

Richard Chambers (CIA, QIAL, CGAP, CCSA, CRMA) presented the 2020s: Covid 19, Disruption, and the Decade Ahead for Internal Audit in January 2021. Richard F. Chambers, is president and CEO of The Institute of Internal Auditors (IIA). Prior to taking the helm of The IIA in 2009, he was national practice leader in Internal Audit Advisory Services at PricewaterhouseCoopers; inspector general of the Tennessee Valley Authority; deputy inspector general of the U.S. Postal Service; and director of the U.S. Army Worldwide Internal Review Organization at the Pentagon. He has served on the Committee of Sponsoring Organizations of the Treadway Commission (COSO) Board of Directors; the International Integrated Reporting Council (IIRC); and The IIA Board of Directors; as well as the Georgia State University School of Accountancy Advisory Council and the University of Alabama Culverhouse School of Accountancy’s Professional Advisory Board. Chambers also has served on the U.S. President’s Council on Integrity and Efficiency. Accounting Today has ranked Chambers as one of the Top 100 Most Influential People shaping the accounting profession, and he has been recognized by the National Association of Corporate Directors (NACD) as one of the most influential leaders in corporate governance.
Walkthroughs—More than a walk in the park
Webinar
Willard Shively

Jun

Competencies to Improve Your Audit Skills: A Focus on the Soft Skills
Webinar
Janitha John and Richard Chambers

Sept

2020: Covid-19, Disruption, and the Decade Ahead for Internal Audit
Webinar
Teresa Snedigar, Goli Trump, Jay Madges

Oct

Operational Audit
Webinar
Mike Fucilli

Dec

Cybersecurity
Luncheon
FBI, SA Phil Slinkard

Jan

Data Analytics
Webinar
Trent Russell

Feb

Risk Management
Luncheon
Eric Jenkins

Mar

Oregon Economic Update
Luncheon
Mark McMullen

Apr

CIA Review Course
Webinar

May

Fraud Seminar
Webinar
Tiffany Couch

Ethics and the Internal Auditor’s Role: A Discussion
Luncheon
Dan Dickson & Eli Ritchie
Ethics and the Internal Auditor’s Role: A Discussion

In May 2021, the IIA Portland Chapter organized a luncheon discussion on ‘Ethics and the Internal Auditor’s Role.

The event was presented by Dan Dickson – Director, Integrated Advisory Services, Nike, and Eli Ritchie - Chief Audit Executive, Oregon Department of Corrections. The event received an overwhelming response and was attended by nearly 100 people.
Chapter Leadership

Officers

Lauren Toda, CIA
President
Years in IIA: 8
Employer: PeaceHealth

Previous Roles
President, VP of Seminars

Katrina Velasco, CPA
VP of Seminars
Years in IIA: 4
Employer: Cambia Health Solutions

Previous Roles
Luncheon Coordinator, Social Media Chair, Committee Member (Academic Committee)

Joann Montero, CIA
VP of Luncheons
Years in IIA: 7
Employer: Portland General Electric

Previous Roles
Newsletter Writer; Certification Committee Member; Secretary

Sarrah Axelson
Treasurer
Years in IIA: 9
Employer: PeaceHealth

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

Trevor Hutchinson-Flaming
Secretary
Years in IIA: 5
Employer: Cambia Health Solutions
Officers (cont.)

**Andy Willis, CIA**
Membership
**Years in IIA:** 13
**Employer:** PeaceHealth

**Previous Roles**
President, VP of Seminars

**Georgia Robertson, CPA, CIA, CFE**
Certifications
**Years in IIA:** 17
**Employer:** The Greenbrier Companies

**Previous Roles**
Board Member; President; Treasurer; Volunteer Coordinator
Board of Directors

James Alexander, CIA, CFE, CISA
Board Member; International Chair; Membership
Years in IIA: 20
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 Co-Chair
Years in IIA: 15
Employer: Moda Health

Previous Roles
Board Member, Academic Relations Chair, Treasurer

Ann Calkins, CIA, CFE
Board Member, CAE Committee
Years in IIA: 19
Employer: KinderCare Education

Previous Roles
Board Member

Joel Brandenburg, CIA, CISA, CRMA
Board Member
Years in IIA: 12
Employer: Umpqua Bank

Ed Dassow, CIA, CFSA, CISA
Board Member; CAP Coordinator
Years in IIA: 23
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: 13
Employer: Nike
Chapter Leadership (cont.)

Board of Directors (cont.)

**Michael Freudenthal,** CIA, CISA  
Board Member  
**Years in IIA:** 22  
**Employer:** Bonneville Power Administration  

*Previous Roles*  
Board Member

**Mandy Jolly-Santiago**  
Board Member, CAE Chair  
**Years in IIA:** 13  
**Employer:** Columbia Sportswear  

*Previous Roles*  
VP of Luncheons

**Tenzin Gonta,** CIA  
Board Member; Nominations Committee  
**Years in IIA:** 12  
**Employer:** City of Portland  

*Previous Roles*  
Board Member; Government Chair;  
Academic Relations Committee

**Kellie Marx,** CPA, MBA  
Board Member  
**Years in IIA:** 12  
**Employer:** M Financial Group  

*Previous Roles*  
CAE Roundtable Collaborator

**Jon Keithley,** CPA, CISA  
Board Member; Technology Coordinator  
**Years in IIA:** 7  
**Employer:** Columbia Sportswear  

*Previous Roles*  
Board Member
Chapter Leadership (cont.)

Board of Directors (cont.)

Jason Miller, CISA, CRISC, CISSP
Board Member; Marketing Chair
Years in IIA: 10
Employer: Cambia Health Solutions

Previous Roles
President; VP of Seminars; Board Member

Dawn Mittelbach, MBA, CIA, CFE, CISA
Board Member; Website Administrator
Years in IIA: 20
Employer: PeaceHealth

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

Corri Sanders-Lee, CIA, CISA, CFE
Board Member; Volunteer Chair
Years in IIA: 16
Employer: Portland General Electric

Previous Roles
Board Member; Volunteer Chair
Volunteers

Ingrid Choy-Harris, CIPP/E, CIPM, CISA
Social Media
Years in IIA: 6
Employer: BSI

Sheila Kelly, CIA
Newsletter Editor
Years in IIA: 6
Employer: Avangrid

Shweta Kide, CA, CIA, CRMA
Year-End Report Editor
Financial Reviewer
Years in IIA: 5
Employer: Talbot, Korvola and Warwick, LLP
Thank you!

Thank you to all of our Officers, Board Members, and Volunteers for making 2020-2021 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.