



The Institute of  
**Internal Auditors**

*Lansing*

# ANNUAL REPORT

Lansing IIA

*June 2023 - May 2024*



# Table of Contents

Chapter Information	2
• <i>Member and Certification Information</i>	
• <i>Chapter Achievement Program</i>	
Chapter Events	3
Chapter Leadership	4
Volunteer Opportunities	5
Chapter Financial Health	6

## Member & Certification Information

- The Lansing Chapter values its members and volunteers. The chapter has 139 member from more than 25 companies.
- 47 members currently have at least one IIA certification.
- 5 Members obtained a new certification in the past year.

Congratulations to the following Lansing Chapter members on obtaining the designation of Certified Internal Auditor during the 2023-2024 Chapter Year!

- Alexander Bailey
- Michele Novak
- Courtney Patrick
- Kimberly Poljan
- Shaun Krick

## Chapter Achievement Program

The Lansing Chapter earned **Gold status** for it's 29<sup>th</sup> consecutive year!

The Chapter Achievement **Program (CAP)** is an achievement/recognition program for chapters in North America that uses activities to recognize chapter activities that address the needs of it's members and helps promote the profession of Internal Audit.



# 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.

We are proud to have resumed offering regular in person events for the first time since 2019. In 2023-2024, the Lansing Chapter held 6 events, hosting on average 30 attendees per event, and offered a total of 12 CPEs. Programming topics included:

- Fraud Investigations
- Interviewing Techniques
- Business Ethics
- Social Engineering
- Enterprise Risk Management
- IA Audit and Cybersecurity
- Information Governance
- Model Risk Management
- Ethical Hacking

If you have suggestions or request for training topics or speakers, please reach out to [Chapter163events@iiachaptercommunications.org](mailto:Chapter163events@iiachaptercommunications.org).



# Chapter Officers

## **Chapter Officers**

- Brad Morey – President
- Secretary – Rob Johnson
- Programming – Scot Grygiel
- Membership – Scot Grygiel
- Certifications – Matt Munson
- Audit Committee – Shaun Krick

## **Board of Governors**

Lindsey Malzahn  
Emily Smedley  
Tori Rueckert  
Beth Timmerman  
Ashley Rieves  
Tiffany Ocasio  
Ryan Winsor

Thank you to all Chapter officers and governors for your dedicated service!





# Volunteer Opportunities

All chapter positions are filled by volunteers members of the Lansing Chapter. If you are interested in volunteering with the chapter, please reach out to [chapter163president@iiachaptercommunications.org](mailto:chapter163president@iiachaptercommunications.org).

Volunteer Opportunities include:

- Assisting in planning and running training or networking events
- Assisting in managing and monitoring chapter financial health
- Monitoring chapter member needs
- Helping to advocate for the profession of Internal Audit
- Academic outreach

# Chapter Financial Health

## Monthly Report May 31, 2024

Statement of Position				
	PY Cash Balances 5/31/2023	PM Cash Balances 4/30/2024	CM Cash Balances 5/31/2024	
Checking	\$ 2,641.17	\$ 1,000.00	\$ 740.00	
Business Money Market	\$ 10,374.47	\$ 13,243.43	\$ 10,253.34	
Savings	\$ 5.00	\$ 5.00	\$ 5.00	
PayPal	\$ -	\$ 1,013.12	\$ 383.67	
<b>Total Net Assets</b>	<b>\$ 13,020.64</b>	<b>\$ 15,261.55</b>	<b>\$ 11,382.01</b>	

  

Statement of Changes in Net Assets				
	PY Actual 5/31/2023	CY Budget 2023 - 2024	YTD Actual 5/31/2024	CY - YTD Variance
<b>Revenue</b>				
Meetings/Seminars Income	6,300.20	11,612.50	5,858.59	5,753.91
Allotment from IIA Headquarters	1,350.00	1,350.00	1,350.00	-
Interest and Dividend Income	40.82	30.00	104.07	(74.07)
<b>Total Revenue</b>	<b>\$ 7,691.02</b>	<b>\$ 12,992.50</b>	<b>\$ 7,312.66</b>	<b>\$ 5,679.84</b>
<b>Expenses</b>				
Meetings/Seminars Expense	4,359.40	4,125.00	3,640.71	484.29
Leadership Conference	6,530.53	5,000.00	3,978.93	1,021.07
District Representative Support	326.50	484.25	24.21	460.04
District Advisor Support	31.97	150.00	8.12	141.88
Travel Expense		200.00	168.99	31.01
Chapter Administration & Board Expenses	162.75	170.00	144.20	25.80
Donations to IIA Research Foundation (IARF)	250.00	250.00	250.00	-
Postage, Stationary, Advertising and Communication Expenses	232.00	232.00	248.00	(16.00)
Bank/Credit Card Fees	154.62	352.63	228.94	123.69
Software/License Fees	158.89	158.89	158.89	-
Insurance Expense	100.00	100.00	100.00	-
Scholarship Award Fees		-	-	-
Awards, Plaques, Etc.		300.00	-	300.00
Membership Engagement		-	-	-
<b>Total Expenses</b>	<b>\$ 12,306.66</b>	<b>\$ 11,522.77</b>	<b>\$ 8,950.99</b>	<b>\$ 2,571.78</b>
<b>Change in Net Assets**</b>	<b>\$ (4,615.64)</b>	<b>\$ 1,469.73</b>	<b>\$ (1,638.33)</b>	

The chapter is in an excellent financial position. The chapter is continuing to maintain cash reserves between 75% and 125% of our annual operating expenses in accordance with IIA guidelines.

# Thank you!

Thank you to all our Officers, Board Members, and Volunteers for making 2023-2024 another successful year for the Lansing Chapter!

Follow us on LinkedIn – IIA Lansing Chapter

Check out our website -

<https://www.theiia.org/en/chapters/united-states/michigan/lansing/>

We would love to hear your feedback! Please reach out via email to [chapter163president@iiachaptercommunications.org](mailto:chapter163president@iiachaptercommunications.org).