



The Institute of  
**Internal Auditors**  
Springfield

# IIA Springfield Chapter

Annual Report for Chapter Year Ending May 31, 2026

## Annual Report 2025-26 Chapter Year

### Message from the President

We are pleased to close the book on the 2025-2026 Chapter Year! During this Chapter Year, we were able to provide a total of 66 CPE hours of training for our members! We were able to bring almost all new speakers for our members, which was very exciting!

We have some dedicated Board Members and Officers who have decided to continue their roles for the upcoming Chapter Year, which includes Katrina Woodcock back as Programming Chair, [REDACTED] as Co-Treasurer, and myself as the President; and two previous officers returning as Secretary, Angie Bartlett, and as a Board member, Matt Ulmer. The various levels of experience and guidance from returning Officers and Governors is essential to the success of this Chapter. I am grateful for your willingness to continue to provide your time and energy for this Chapter and to be able to lead this Chapter into a more successful year.

We also have a few new faces to the Board. [REDACTED] has stepped up to take on the role of the 2<sup>nd</sup> co-treasurer. I'm sure he will bring a fresh perspective on our reporting and provide excellent stewardship over our Chapter's funds. Additionally, we had 3 new individuals joining the Board, Trevor Hebert, Evonne Thompson, and Christina Robinson. We appreciate you stepping up, and we look forward to seeing what fresh new ideas you have for the Board. Lastly, after some time away, Kelly Guerrero has decided to come back to help the Chapter prepare for success in the coming years. Getting new volunteers on the Board is the best way to help this Chapter grow and succeed, so I'm very excited to have all of you on-board!

I would like to thank a few long-time members of the Board who have fulfilled both Officer and Governor roles with such care. We have six members rolling off the Board this year that I would like to recognize: Kristen Drainer for 2 and a half years of consecutive Officer service, Molly Wilcockson for 4 years of consecutive Officer service, Charla Bond-Jones for two years of service, David Brink for 7 years of consecutive service, Candice Long for 4 years of consecutive service, and Butch Stillwell for 3 years of consecutive service. We will do our best to continue growing the Chapter you have spent many years serving.

The biggest "thank you" I have is to all our members. Your continued participation in the training sessions have made our Chapter what it is. I am looking forward to continuing to lead this Chapter and trying my best to create a lasting, positive impact on our Chapter.

Warm Regards,  
Kayla Routh

# Become an IIA Volunteer

Volunteers help to maintain the Chapter and keep services available for members. There are many ways you can get involved with the IIA. Whether you are an experienced leader or just entering the field of internal auditing, there is a place for you at the IIA. If you are interested in volunteering on a large or small scale, please email the Springfield IIA at [Chapter145@iiachaptercommunications.org](mailto:Chapter145@iiachaptercommunications.org).

## Chapter Achievement Program (CAP)

CAP is an achievement/recognition program for chapters that uses points to recognize chapter activities that align with the North American Strategic Plan in four to five service categories:

1. Chapter Health. Focuses on items from your reporting calendar and chapter standards.
2. Service to Members. Focuses on growing your chapter's membership, volunteers, certification holders, and accounts for the programming your chapter offers their members.
3. Professionalism. Focuses on giving back to the profession.
4. HQ Partnership. Focuses on active promotion of IIA HQ conferences and webinars.
5. Advocacy. Focuses on engaging with stakeholders at the local, regional, and national levels and promotion of internal audit profession.

The CAP program awards chapters Bronze, Silver, Gold, Platinum, Ruby, Sapphire, and Diamond recognitions. Springfield Chapter has always held the highest level of Chapter Achievement possible and has been a Sapphire Chapter since 2017 – first year the Sapphire achievement was available. This year was the last year for these designations, and we anticipate receiving the highest level again.

The Chapter Achievement Program is shifting to a strategic plan model in the coming year. This is to help Chapters focus on goals important to their members which align with the strategic goals of Headquarters. The six goals the Chapter is focusing on in the upcoming year are as follows: 1) Encourage Continuing Professional Education; 2) Learning Collaboration, which is to co-host events; 3) Certification Promotion for the IIA Certification; 4) Conference Promotion for IIA events; 5) Conduct a Member Needs Assessment, which we did around SIAAB last year with great results; and 6) A Day in the Life, Volunteer Experience. Most of these will be found throughout the year in our Monthly Newsletters. Be on the lookout for all of these in the upcoming year and if you need to be added to the newsletter distribution list, please let us know!

## Springfield Chapter Board of Governors Meetings

The Board had 3 meetings during the Chapter year, plus the Annual Meeting:

- July 10, 2025
- November 17, 2025
- February 9, 2026
- April 30, 2026 (Annual Meeting)

# 66 CPE Hours of Training Provided During the Year

Throughout this past year, the Springfield Chapter worked with the Central Illinois Chapter of the IIA to co-host an in-person event. Additionally, we virtually co-hosted many events with the Chicago Chapter and Central Chapter. Event descriptions are noted below.

We also were able to bring one event in person that was not our large conference which was well attended and held at the Hilton Garden Inn. It was a nice change of pace from our normal venue, and we got rave reviews! You can look forward to more in-person events in the upcoming year!

## **09/24/25 Data Analytics by Dr. Al Marcella (4 CPE), co-hosted by Central IL IIA Chapter**

This presentation covered the basic concepts of data analytics, big data, and methodologies for analyzing structured and unstructured data, as well as addressing a wide range of data analytics techniques and concepts. Discussion is structured around the broad frameworks of the different types of data analytics, namely descriptive, diagnostic, predictive, and prescriptive analytics. The increasing usage of data analytics for audit applications within the internal audit function was also examined. This course is intended for professionals who need a thorough understanding and have an interest in assessing and establishing well-designed data analytic programs.

## **09/25/25 Cybersecurity (including auditing and the IIA topical requirement) by Dr. Al Marcella (4 CPE), co-hosted by Central IL IIA Chapter**

In this training, Dr. Marcella presented on the IIA's Cybersecurity Topical Requirement areas and covering material as one would approach preparing for and performing an IT audit of the specific areas (i.e., cybersecurity risk management). His presentation on Cybersecurity will be covered in the following three parts to provide an approach for assessing cybersecurity in an organization:

- Cybersecurity Governance
- Cybersecurity Risk Management
- Cybersecurity Control Processes

## **10/21/25-10/22/25 SIAAB Fall Government Auditing Conference (14 CPE)**

The State Internal Audit Advisory Board (SIAAB) held the annual Fall Government Auditing Conference in person. Presentations included:

- Status of the Audit Profession in the State of Illinois
- Cybersecurity and Information Technology Governance
- Enterprise Risk Management
- Professional Ethics
- Navigating Excel with MrExcel – *All attendees get a copy of Mr. Excel's 70th book, Navigating Excel!*
- Red Collar Crime and Fraud Offenders

## **10/24/24 SIAAB Roundtables (4 CPE)**

Participants broke out into the following small groups to discuss various topics affecting the internal audit world: Chief Internal Auditor Roundtable Group, IT Roundtable Group, and Staff Internal Auditor Roundtable Groups (Small Agencies and Large Agencies).

## **10/23/25 The People Puzzle from Elizabeth McDowell (4 CPE), co-hosted by Central IL IIA Chapter**

The People Puzzle covered Interviewing, Body Language, and Generational Insight for Auditors. Auditing is as much about people as it is about procedures. This session built key interpersonal skills — interviewing, body language, and generational awareness — to help internal auditors communicate effectively, read the room, and build trust during audits.

### **01/28/26 Liar, Liar Pants on Fire by Traci Brown (4 CPE) ), co-hosted by Chicago IIA Chapter**

Learn to read fraudsters like a book with renowned body language expert Traci Brown. Discover how to win the game of 'Two Truths and a Lie' you play every day with clients, boss, your team, and prospects. Protect your company's hard-earned profits and catch would-be fraudsters before they can take away everything.

You can quit second-guessing your instincts and immediately tell fact from fiction when Traci teaches the nine telltale signs someone is lying, how to quickly uncover the truth, and how to keep nefarious people from making you a victim.

### **01/29/26 Audit Report Writing and Communication Strategies by Tracie Marquardt (4 CPE)**

Tracie Marquardt shared strategies for efficient, truly meaningful messaging that engages stakeholders and drives action. She also discussed AI's role in streamlining audit reporting and effective communication strategies to achieve better results at work and in creating successful relationships. It's time to rethink how we communicate audit insights, drive accountability, and leverage technology to stay ahead.

### **02/25/26 ETHICS by Chuck Gallagher (3 CPE), co-hosted by Central IL and Chicago IIA Chapters**

In this powerful presentation, Chuck delivered an unforgettable message based on his own unethical decisions and the consequences that followed. The audience will not only come to realize the impact of the choices they make but also gain an understanding of how to use ethics and integrity to create success on a personal and professional level.

Each choice we make and each step we take provides the foundation for our future. Wherever you are right now — regardless of the circumstance — your choices define who you are and the outcomes you will live. While your employees may be aware of this on some level, do they truly realize the power behind the choices they make on a daily basis? More importantly, what's the risk to your company if they don't?

In his unusually authentic style, Chuck revealed the consequences of the unethical decisions he made in his own attempt to build the great American dream for himself and his family. This powerful ethics presentation is filled with unforgettable messages of success and failure, illusions and reality, and choices and consequences. The audience will discover:

- How easy it is for ethical people to make unethical choices—and what to do about it.
- The impact of life's choices and how that affects your performance, both personally and professionally.
- Real-world practical examples of how to use ethics and integrity to create success in business and life.

### **02/26/26 Forensic Accounting and Fraud by Gary German (3 CPE)**

Fraud is big business. By some estimates over \$1 trillion is lost to Fraud and theft each year. Nevertheless, most fraud goes undetected. Or does it? "Fraud and the Forensic Matrix" is a unique, (and sometimes humorous), look at the subjects of deceit and deception. Gary German will share stories from his own experiences in Fraud investigation and forensic accounting. He will explore such topics as the "ethics" of Fraud. You'll learn to quantify a business' appetite for Fraud and why audits don't find Fraud. He'll share with you his matrix approach to forensic accounting; a combination of objective analysis and the related inferential context to detect and investigate Fraud. No matter what your business segment, you are sure to benefit from this discussion as Gary dissects the dark side of accounting and finance.

**03/25/26 Retrospective on Year 1 of the Global Internal Audit Standards by Harold Silverman (3 CPE), co-hosted by Central IL IIA Chapter**

Designed for audit professionals at all levels, this three-hour session will explore the 2024 Global Internal Audit Standards (GIAS) and provide perspectives on their first year of being effective. Included in the discussion will be perspectives on the issued and planned Topical Requirements.

The session will be led by Harold Silverman, the Chief Audit Executive – Risk Advisory and Quality Services at Cherry Hill Advisory. In addition to experience as the Chief Audit Executive at The Wendy’s Company and Houghton Mifflin Harcourt Publishing, Harold was the Sr. Director of CAE and Corporate Governance Engagement at the IIA. In addition, he is a former member of the IIA’s North American, Standards and Global Boards of Directors.

At the end of the presentation, participants will have:

- An enhanced knowledge of the key components of the Global Internal Audit Standards
- Perspectives on how the internal audit profession has been impacted by the Global Internal Audit Standards
- A greater understanding of what the future opportunities and challenges are for internal audit functions implementing the Global Internal Audit Standards.

**03/26/26 Behind the Invoice: Uncovering Vendor Fraud in Plain Sight by Rick Roybal (3 CPE) – In Person Event**

Embezzlement research has identified various methods by which fraudsters pilfer funds entrusted to them. These criminals engage in techniques, such as skimming or payroll misappropriation. But one method is used most often: vendor fraud. Defined by the AICPA as the “abuse of improper payments to real or fictitious vendors”, this often-overlooked fraud technique has enabled embezzlers to steal right under the noses of their employers.

Rick Roybal is a seasoned professional in the field of Vendor-Risk Management, recognized as a consultant, author, and speaker. With nearly two decades of experience in the oil and gas industry, Rick currently serves as the Vendor Audit Manager at Matador Resources. In this role, he plays a crucial part in ensuring vendor compliance with the company's accounting policies and procedures.

**04/29-30/26\* Better! Auditing by John Hall (8 CPE)**

***\*We had to reschedule to 4/30/26 and 5/11/26, with the option for people to also review the second half via recording.***

Take your audit team and individual auditor results to their highest level yet. This session dives deep into Level 1 Core Skills, Level 2 Behavior & Communication Skills, and Level 3 Internal Consulting Skills for audit professionals across organizations and industries. Discover actions to build speed, measurable value, management action, and a positive lasting impression on those you serve.

- Discover a better method of audit staff skill development—technical, behavioral, and consulting.
- Learn better use of continuous auditing and monitoring of key indicators.
- Educate yourself on better audit project planning, execution, reporting, and follow-up.
- Learn about baked-in risk brainstorming on every project.
- Find out how to perform better audit interviews and presentations.
- Discover how to sell audit ideas and influence management action.
- Learn how to wipe out the boring audit blues.

**05/27/26 Leveraging AI in Audit by Mary Breslin (Verracy) (4 CPE)**

AI is Revolutionizing the Audit Profession—Are you prepared to adapt and lead? Artificial Intelligence (AI) is transforming audit, enhancing efficiency, accuracy, and risk detection. This course provides a practical guide to leveraging AI—especially ChatGPT—in internal auditing, risk management, fraud detection, and compliance. Participants will gain a foundational understanding of AI concepts, including robotic process automation (RPA) and machine learning (ML), and explore real-world applications in audit, such as automated risk assessments, control testing, and financial analysis. The course also covers ethical considerations, data privacy risks, and AI bias. Through discussions, case studies, and demonstrations, attendees will learn how to integrate AI into audit workflows, strengthen fraud detection, and ensure regulatory compliance. Topics include AI's role in SOX auditing, cybersecurity risk assessments, and overcoming resistance to AI adoption. By the end, auditors will be equipped with practical strategies to implement AI effectively, enhance audit quality, and prepare for the future of AI-driven auditing.

**05/28/26 Addressing Unconscious Bias and Making the Best Decisions for Auditors by Dr. Gleb Tsipursky (4 CPE), co-hosted by Central IL and Chicago IIA Chapters**

Unconscious bias can quietly distort audit judgments, from risk assessments to fraud detection. This engaging session equips auditors with science-backed tools to recognize and counteract cognitive biases—such as confirmation bias, anchoring, and groupthink—that undermine objectivity and professional skepticism.

Using insights from behavioral science and emotional intelligence, you'll learn how to:

- Strengthen decision quality in high-stakes audits
- Improve communication and challenge assumptions within audit teams
- Foster a bias-aware culture through psychologically safe collaboration

Through real-world case studies and actionable techniques, this session will help you sharpen your judgment, improve audit quality, and uphold the integrity of your work.

# Chapter Officials 2025-26 (June 1, 2025 – May 31, 2026)

## Officers

### President

Administration  
Audit  
Nominating Committee

### Kayla Routh

[Kayla.Routh@illinois.gov](mailto:Kayla.Routh@illinois.gov)  
[Chapter145President@iiachaptercommunications.org](mailto:Chapter145President@iiachaptercommunications.org)

### First Vice President

Programs and Seminars  
Certifications Program  
Nominating Committee

### Katrina Woodcock, CPA, CIA

[KatrinaAnne.Woodcock@illinois.gov](mailto:KatrinaAnne.Woodcock@illinois.gov)  
[Chapter145Events@iiachaptercommunications.org](mailto:Chapter145Events@iiachaptercommunications.org)

### Second Vice President

Academic Relations  
Memberships

### Charla Bond-Jones

[Charla.V.Bond-Jones@Illinois.gov](mailto:Charla.V.Bond-Jones@Illinois.gov)

### Secretary

Seminar Registration  
Directory, Distribution, PR  
Newsletter

### Kristen Drainer

[KDrainer@isbe.net](mailto:KDrainer@isbe.net)  
[Chapter145support@iiachaptercommunications.org](mailto:Chapter145support@iiachaptercommunications.org)

### 1<sup>st</sup> Treasurer

[REDACTED]

### 2<sup>nd</sup> Treasurer

[REDACTED]

## Governors

2023-2026	Angela Bartlett, CPA, CIA	<a href="mailto:Angela.Bartlett@illinois.gov">Angela.Bartlett@illinois.gov</a>
	Butch Stilwell	<a href="mailto:Butch.Stilwell@illinois.gov">Butch.Stilwell@illinois.gov</a>
	Candice Long, CPA, CIA, CHC	<a href="mailto:Candice.Long@illinois.gov">Candice.Long@illinois.gov</a>
	David Brink	<a href="mailto:David.Brink@Illinois.gov">David.Brink@Illinois.gov</a>
2024-2027	Nick Barnard	<a href="mailto:Nicholas.Barnard@illinois.gov">Nicholas.Barnard@illinois.gov</a>
	Jackie Hohn, CIA	<a href="mailto:JHohn@surs.org">JHohn@surs.org</a>
	Nikki Lanier, CPA	<a href="mailto:Nikki.Lanier@illinois.gov">Nikki.Lanier@illinois.gov</a>
2025-2028	Casey Evans	<a href="mailto:Casey.Evans@srs.illinois.gov">Casey.Evans@srs.illinois.gov</a>
	Sally Burton, CIA	<a href="mailto:Sally.E.Burton@Illinois.gov">Sally.E.Burton@Illinois.gov</a>
Past President	Staceyann Cabey-Kaufmann	<a href="mailto:Staceyann.Cabey-Kaufmann@illinois.gov">Staceyann.Cabey-Kaufmann@illinois.gov</a>

## Other Volunteers

Newsletter

Dani Berrien

Financial Statements Reviewer

Kristen Bergerud and Tate Snyder

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## Officers

### President

Administration  
Audit  
Nominating Committee

### Kayla Routh

[Kayla.Routh@illinois.gov](mailto:Kayla.Routh@illinois.gov)  
[Chapter145President@iiachaptercommunications.org](mailto:Chapter145President@iiachaptercommunications.org)

### First Vice President

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Certifications Program  
Nominating Committee

### Katrina Woodcock, CPA, CIA

[KatrinaAnne.Woodcock@illinois.gov](mailto:KatrinaAnne.Woodcock@illinois.gov)  
[Chapter145Events@iiachaptercommunications.org](mailto:Chapter145Events@iiachaptercommunications.org)

### Secretary

Seminar Registration  
Directory, Distribution, PR  
Newsletter

### Angie Bartlett , CPA, CIA

[Angela.Bartlett@illinois.gov](mailto:Angela.Bartlett@illinois.gov)  
[Chapter145support@iiachaptercommunications.org](mailto:Chapter145support@iiachaptercommunications.org)

### 1<sup>st</sup> Treasurer

[REDACTED]

### 2<sup>nd</sup> Treasurer

[REDACTED]

## Governors

2024-2027	Nick Barnard Jackie Hohn, CIA	<a href="mailto:Nicholas.Barnard@illinois.gov">Nicholas.Barnard@illinois.gov</a> <a href="mailto:JHohn@surs.org">JHohn@surs.org</a>
	Nikki Lanier, CPA	<a href="mailto:Nikki.Lanier@illinois.gov">Nikki.Lanier@illinois.gov</a>
2025-2028	Casey Evans Sally Burton, CIA	<a href="mailto:Casey.Evans@srs.illinois.gov">Casey.Evans@srs.illinois.gov</a> <a href="mailto:Sally.E.Burton@Illinois.gov">Sally.E.Burton@Illinois.gov</a>
2026-2028	Matt Ulmer Evonne Thompson, CPA Kelly Guerrero, IAP Trevor Hebert Christina Robinson	<a href="mailto:MULMER@ISBE.NET">MULMER@ISBE.NET</a> <a href="mailto:evothom@siue.edu">evothom@siue.edu</a> <a href="mailto:Kelly.Guerrero2@Illinois.gov">Kelly.Guerrero2@Illinois.gov</a> <a href="mailto:Trevor.A.Hebert@Illinois.gov">Trevor.A.Hebert@Illinois.gov</a> <a href="mailto:Christina.Robinson@Illinois.gov">Christina.Robinson@Illinois.gov</a>
Past President	Staceyann Cabey-Kaufmann	<a href="mailto:Staceyann.Cabey-Kaufmann@illinois.gov">Staceyann.Cabey-Kaufmann@illinois.gov</a>

## Other Volunteers

Financial Statements Reviewer

Josh Decker