



*AGA*  
*Leadership*  
*Handbook*  
*for National,*  
*Regional &*  
*Chapter Leaders*

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## **Acknowledgements**

AGA's National Office of the Executive Director developed this handbook. However, we did not start from scratch and would therefore like to gratefully acknowledge the Membership Department's hard work in developing the bulk of AGA's Chapter Leadership Manual from which this leadership handbook was borne. We also borrowed very heavily from the Community Associations Institute's own leadership manual.

**Our leaders are vital to our success!**

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# INTRODUCTION—BEFORE WE BEGIN

## Thank You

Thank you for your interest in serving the premier association for government accountability professionals. The tremendous strides we have taken as an organization are a direct result of the service and commitment of our volunteer leaders and we are grateful for your time, energy, insights, skills and knowledge.

## Using This Handbook

Whether you are embarking on your first AGA leadership term, finishing up one of several terms, or just considering an AGA leadership role—welcome.

This handbook provides you with much of the information you need to succeed as an AGA leader and enjoy an exciting and productive term. It is organized into six sections that provide an overview of AGA, give you a good idea of what is expected of you as a leader, tell you what you can expect when you start your term and tell you how you can get the job done. This handbook should be used in conjunction with other resources such as the National Officer position descriptions, bylaws and AGA's Operating Plan.

How much of this handbook you need to read depends on what you already know and what you want to know. Are you a brand new committee member who has not been involved at the National level before? Then you might want to read Sections I, II and III (and reference Section VI). However, if you are a veteran leader who is simply accepting another AGA leadership role, then you might just want to hone in on the section of this handbook that covers the details of that particular position.

Finally, please feel free to copy any portion of this manual, pass it along, cut it up, whatever. If it is of help to you and you think it can be of help to someone else—terrific, pass it along.

## Handbook Organization

This handbook is organized as follows:

### Section I—General AGA Overview

- provides a broad overview of AGA membership, programs and services
- explains the governance structure
- lists boards, committees and task forces

### Section II—Leadership Overview

- addresses the leadership nomination process
- includes a general leadership and AGA event calendar
- discusses the National Board of Directors
- answers questions such as, “How much of a time commitment will this be?” “How do I get reimbursed?” and “How do I schedule a teleconference?”

### Section III—National Leadership

- focuses on the day-to-day administration of National leadership roles such as National President and National Treasurer as well as board and committee members
- lists possible projects for boards, committees, task forces and senior advisory council members
- defines the role of the chair, vice chair and member

### Section IV—Regional Leadership

- explains the regional governance structure and leadership roles
- explains the Regional Vice President position:
  - includes helpful hints and guidelines for getting the job done
  - provides details for developing and managing a Regional Chapter Officer Workshop
  - summarizes the various regional reports due each quarter

### Section V—Chapter Leadership

- focuses on chapter-level leadership
- discusses working with the regional team and the National Office
- includes draft chapter officer position descriptions
- covers committee responsibilities, developing chapter programs and chapter communications

### Section VI—Resources

- compiles the resources referenced throughout the handbook into one convenient place
- supplies additional ideas

# INTRODUCTION—BEFORE WE BEGIN

## Acronyms

The following is a list of acronyms you will find throughout this handbook.

**AGA**—Association of Government Accountants

**CEAR**—Certificate of Excellence in Accountability Reporting

**CED**—Chapter Executive Committee

**CGFM**—Certified Government Financial Manager

**COE in SEA Reporting**—Certificate of Excellence in Service Efforts and Accomplishments Reporting

**CRP**—Chapter Recognition Program

**GAR Report**—Growth, Acquisition and Retention Report

**GFM Courses**—Government Financial Manager Courses

**LTW**—Leadership Training Workshop

**NBD**—National Board of Directors

**NEC**—National Executive Committee

**NLC**—National Leadership Conference

**PDC**—Professional Development Conference and Exposition

**RCOW**—Regional Chapter Officer Workshop

**RVP**—Regional Vice President

**RVP-Elect**—Regional Vice President-Elect

**SVP At-Large**—Senior Vice President At Large

**SVPRS**—Senior Vice President for Regional Services

## Mini AGA Quiz

Just for fun, see if you know the answers to the following questions. The answers are below.

1. What is AGA's Mission Statement?
2. How many individuals hold the CGFM designation?
3. How many members does AGA have?
4. What (approximately) is AGA's current operating budget?
5. Name five AGA educational products.
6. How many sections and regions does AGA have?
7. For RVPs: What section are you in and what is the name of your Senior Vice President for Regional Services?
8. True or False—AGA Chapter Presidents sit on the NBD.
9. When is the NBD meeting traditionally held?
10. You are a current RVP and want to attend a chapter's educational symposium. You go ahead and book your plane ticket. How do you get reimbursed?
11. You need contact information for all AGA National Office staff, but the National Office is closed for the New Year's holiday. What do you do?
12. You are planning your Regional Chapter Officer Workshop. You have one chapter that wants to send 10 chapter officers! What is AGA's Travel Guidelines in this regard?
13. Name five resources that help AGA leaders do their jobs.

## Answers

1. See page 7: AGA serves professionals in the government financial management community by providing quality education, fostering professional development and certification, and supporting standards and research to advance government accountability.
2. Approximately 13,000 individuals.
3. See page 7: AGA has approximately 15,000 members.
4. AGA's fiscal year 2003-2004 budget is \$3.4 million.
5. See page 7: GFM in-class Courses 1, 2, and 3; GFM Course 1 Online; CPE Online; AICPA/AGA Federal Accounting, Reporting and Auditing video; Journal CPE quizzes
6. See page 18: Four sections (I, II, III and IV) and 15 regions.
7. See Appendix A for a list of sections. Since the Senior Vice Presidents serve on the National Executive Committee, refer to the NEC roster for their names and contact information.
8. See page 8: This is true.
9. See page 11: The Sunday prior to the start of the Professional Development Conference and Exposition.
10. See page 22: Complete the Reimbursement Form and submit it with the original receipts.
11. See page 40 or go to the AGA website.
12. See page 22: AGA pays the costs for one chapter officer from each chapter to attend. If others want to attend, AGA pays for their hotel and food – not transportation.
13. See pages 39-42: AGA website, other leaders, staff, Topics, NEC minutes.

# SECTION I—WHAT YOU NEED TO KNOW ABOUT AGA

## AGA's Mission

AGA serves professionals in the government financial management community by providing quality education, fostering professional development and certification, and supporting standards and research to advance government accountability.

This section introduces AGA's mission, provides an overview of membership, programs and services, outlines AGA's governance structure and lists boards, committees and task forces.

## AGA Overview

AGA is the premier educational organization dedicated to the enhancement of public financial management. AGA serves the professional interests of accountability professionals from local, state and federal governments, as well as private sector organization, responsible for effectively using billions of dollars and other monetary resources every day.

The Association serves the public through its constant efforts to improve accountability and disclosure and to enhance the professionalism of public sector financial managers. As part of a national, professional organization devoted to public sector financial management, the individual members are professionals in various aspects of the field of public financial management, such as accounting, auditing, budgeting, evaluation and systems; representing the public, private and academic sectors.

## National Programs and Services

For more than 50 years, AGA has been addressing the issues and challenges facing government financial managers. Our organization has been instrumental in developing accounting and auditing standards and in generating new concepts for the effective organization and administration of financial management functions, including the passage of the Inspector General Act of 1978 and the Chief Financial Officer's Act of 1990. AGA conducts independent research and analysis of all aspects of government financial management.

As a national organization, AGA operates within a national/chapter structure. It is through this successful relationship that we have become THE premier association for government financial managers. The success of this partnership relies upon the strengths of both the national and chapter teams combined with a willingness to collaborate and cooperate in areas of mutual interest.

The national organization works to develop programs and services for members that are larger in scale and generally outside the scope of a local chapter. AGA National also works very hard to support chapters in delivering the local services and programs the chapters provide to members.

### AGA serves 15,000 members around the world:

- 32% represent the federal government sector
- 30% represent the state government sector
- 14% represent the local government sector
- 13% represent the private sector
- 11% represent retirees, academia, students and other

### AGA organizes its programs into three business lines:

#### MEMBER SERVICES, including:

- Publications (the *Journal* and *TOPICS*)
- Membership
- Website
- CEAR Program
- COE in SEA Reporting Program
- Awards

#### EDUCATION, including:

- Conferences
- Online CPE

#### CERTIFICATION, including:

- The CGFM designation
- The GFM Courses

### AGA's Educational Products Include:

- CGFM Professional Designation
- GFM Courses 1, 2, and 3
- GFM Course 2 Self-Study Guide
- GFM Course 1 Online
- Monthly Audioconferences
- CEAR and SEA Program Training
- *Journal* CPE Online quizzes

# SECTION I—WHAT YOU NEED TO KNOW ABOUT AGA

## Current AGA Initiatives

AGA's Operating Plan outlines the details of the various program initiatives. For program year 2004-2005, initiatives include a variety of projects such as:

- Continue to advance the awareness, knowledge and value of the CGFM designation at all levels of government
- Deliver the GFM Courses
- Offer series of monthly audioconferences
- Develop self-study guides for the GFM Courses 1 and 3
- Wrap up Pilot Phase of the Sloan Foundation-funded COE in SEA Reporting Program and begin Implementation Phase
- Build recognition of the CEAR Program and expand reviewer pool
- Expand the Corporate Partner Membership Program
- Encourage the National Intergovernmental Audit Forum to develop core competencies for auditors in federal, state and local government agencies
- Wrap up review of all AGA Chapter bylaws
- Overhaul of Policies and Procedures Manual

## Organizational Structure

### Organizational Structure—Overview

AGA operates under a National-Chapter partnership with AGA's 85+ chapters grouped into 15 regions, each led by a team comprised of the Regional Vice President, Regional Vice President-Elect and Immediate Past Regional Vice President.

Each region has six Regional Coordinators who head a program area in Certification, Education, Membership, Early Careers, Community Service and Chapter Development and Assistance.

The 15 regions are then clustered geographically into four "Sections," I, II, III and IV each lead by a Senior Vice President for Regional Services. See Appendix A for governance related charts and maps.

## Governance

### National Board of Directors

The AGA is governed by a National Board of Directors (NBD) whose roles and responsibilities are outlined in Article VI of the Association's Bylaws. In general, the NBD is responsible for:

- Promulgating the policies and programs of the Association.
- Reviewing the NEC approved budget.
- Establishing dues schedules for all classes of members and special rates for categories within each.
- Adopting amendments of the Bylaws.

## The National Board of Directors Consists of the Following Positions:

- National President<sup>1,3</sup>
- National President-Elect<sup>1,3</sup>
- Immediate Past National President<sup>1,3</sup>
- National Treasurer<sup>1,3</sup>
- National Treasurer-Elect<sup>1,2,3</sup>
- Immediate Past National Treasurer<sup>1,2,3</sup>
- Senior Vice Presidents At Large<sup>1,3</sup>
- Senior Vice Presidents for Regional Services<sup>1,3</sup>
- Regional Vice Presidents<sup>3</sup>
- Regional Vice Presidents-Elect<sup>2,3</sup>
- Immediate Past Regional Vice Presidents<sup>2</sup>
- Immediate Past Five National Presidents
- Remaining Past National Presidents<sup>2</sup>
- Immediate Past Five National Treasurers
- Remaining Past National Treasurers<sup>2</sup>
- Chapter Presidents
- Student Chapter Presidents<sup>2</sup>

<sup>1</sup>National Executive Committee Member

<sup>2</sup>Ex officio member (without vote)

<sup>3</sup>National Officer

## Who Serves on the NEC?

The NEC consists of 16 individuals:

- National President
- National President-Elect
- Immediate Past National President
- National Treasurer
- National Treasurer-Elect (*ex officio*)
- Immediate Past National Treasurer (*ex officio*)
- Five Senior Vice Presidents At Large
- Four Senior Vice Presidents for Regional Services
- Executive Director (*ex officio*)

## National Executive Committee

AGA's National Executive Committee (NEC) acts for the NBD. It meets quarterly to discuss operational issues. See the above National Board of Directors listing for those positions that serve on the NEC.

The NEC's responsibilities include:

- implementing operational policies
- reviewing all actions and programs of national boards, committees and task forces
- appointing and assessing the executive director
- authorizing the size and function of National Office staff and determining their salaries and benefits

# SECTION I—WHAT YOU NEED TO KNOW ABOUT AGA

The minutes from the NEC meetings are distributed to all NBD members and the highlights of those meetings are published in AGA's monthly newsletter, *TOPICS*.

## AGA's National Boards

As of February 2004, AGA was operating with six National Boards. They are the:

- Academy for Government Accountability Board
- Certificate of Excellence in Accountability Reporting Board
- Professional Certification Board
- Professional Ethics Board
- Financial Management Standards Board
- Journal Editorial Board

## AGA's National Committees

AGA currently has 11 National Committees. They are the:

- Audit Committee
- Awards Committee
- Bylaws and Procedures Committee
- Emerging Issues Committee
- Finance and Budget Committee
- International Development Committee
- Long-Range Strategic Planning Committee
- National Executive Committee
- National Leadership Conference Committee
- Nominating Committee
- Professional Development Conference Committee

## Board and Committee Descriptions/Charter's Online

Visit [www.agacgfm.org](http://www.agacgfm.org) and click on "About AGA" and then "National Boards & Committees." You can even use our online form to indicate your interest in serving!

## Advisory Groups and Task Forces

AGA currently has one Advisory Group:

- Corporate Partner Advisory Group

As of February 2004, AGA has no task forces.

## Senior Advisory Councils

AGA's Bylaws grant the National President the authority to establish Senior Advisory Councils. As of February 2004, AGA does not have any Senior Advisory Councils.

## Implementing Our Mission

The documents referenced below are a vital part of implementing the AGA mission. See Section VI for details about getting copies for your weekend reading:

- **Bylaws.** This important document outlines the legal guidelines that specify AGA's rules of operation.
- **AGA's Mission Statement.** This statement summarizes

AGA's purpose.

- **Long-Range Strategic Plan.** Lays out strategies for meeting the mission over the course of three to five years.
- **National President's Theme and Goals.** Presents those portions of the Long-Range Strategic Plan the National President will focus on.
- **Operating Plan.** The plan for the current fiscal or program year that shows the detail for implementing the Long-Range Strategic Plan. Want to know how many CGFM Examinations we expect to sell during the year? Check this document for the answers.
- **Policies and Procedures Manual.** This comprehensive volume contains policies and procedures that outline the nitty-gritty details of getting the job done. AGA's National Bylaws and Procedures Committee is overseeing a major multi-year overhaul of this important reference product.

## Interested In AGA History?

- Pick up the 50th Anniversary edition of AGA's *Journal of Government Financial Management*, published in the Fall 2000 issue.
- Or, for the very brave, read *From Birth to Maturity—the First Twenty-five Years of the Federal Government Accountants Association*.

# SECTION II—AGA LEADERSHIP IN GENERAL

*This section provides an overview of the leadership nominations process, includes a general leadership and AGA event calendar, discusses the National Board of Directors meeting, and covers basic day-to-day administrative details.*

## AGA Leaders Are Exceptional

**A**GA leaders are innovative, energetic professionals who are ready to be catalysts for change and willing to take risks. Furthermore, our leaders are creating our future, defining how we serve financial professionals, and ensuring our success as the premier educational association for government accountability.

We are exceptionally proud of our leadership team and look forward to working with you as we serve government accountability professionals around the world.

## Benefits of Leadership

Your leadership in AGA might just be the most important contribution you will make to the profession and to your own career. Active participation in an AGA National board or committee can lead to important leadership positions within AGA and perhaps even within your own organization.

AGA leaders take advantage of the exceptional opportunity to:

- Contribute to the growth and success of the premier association for government accountability professionals
- Develop solutions to meet present and future challenges
- Expand your leadership skills
- Gain insight into the financial management and association management arenas
- Network with a dynamic group of financial management professionals
- Stay apprised of hot topics in financial management

## Who Pays For It?

All AGA leadership roles are filled by highly-dedicated professionals who volunteer their time and expertise. AGA reimburses leaders for certain expenses incurred while performing in an AGA leadership capacity. It would be a good idea to read AGA's Travel Guidelines, which outlines the details of reimbursement. Contact Rosanna Ortiz at [rortiz@agacgfm.org](mailto:rortiz@agacgfm.org) for the current policy.

## Your Agency Benefits From Your AGA Leadership!

- Agency recognition
- Management skill building (at no cost)
- Public speaking experience
- Opportunity to make industry contacts

## Leadership Responsibilities

The depth and breadth of your leadership responsibilities will depend on your position. You should review your formal position description and then reference the appropriate section of this handbook to learn more about the day-to-day details.

## Time Commitment

Likewise, the time needed to perform the various responsibilities will depend on your role. Whenever possible, we have included time commitment estimates. Again, go right to the portion of the handbook that covers your position for an idea of what might be expected of you.

## Nominations Process

AGA's Bylaws outline the details of nominating AGA National Officers. In general, each fall, AGA members submit nominations for the various positions and then the National Nominating Committee chooses one individual for each position to take office effective July 1st. (Note: the Nominating Committee sometimes receives more than one application per position and it is their responsibility to choose the candidate.)

Each spring, the National President appoints Board, Committee and Task Force chairs, which are then approved by the NEC. Also, each spring, the National President works in conjunction with the various teams to appoint board, committee and task force members.

Chapter Presidents and other officers are elected at the chapter level.

All National leaders receive a letter from the National President confirming their appointment.

## Staff Liaisons

Each AGA leadership position works closely with a staff liaison. This individual serves as a vital part of the leadership team and provides a range of support that can include:

- Drafting status reports
- Providing program updates and prior reports
- Keeping the team apprised of actions of the National Executive Committee
- Administering day-to-day details such as coordinating conference calls, running rosters, keeping minutes, processing mailings, etc.

As you read more about your particular leadership position, make a special note to remember your staff liaison. They will become an indispensable resource as you progress into your AGA leadership term.

## The National Board of Directors Meeting

All members of the National Board of Directors are asked to attend the annual National Board of Directors (NBD) meeting. (Refer to page 8 for a list of the leadership positions that serve on the NBD.)

# SECTION II—AGA LEADERSHIP IN GENERAL

This meeting is traditionally held in conjunction with the annual Professional Development Conference and Exposition. Therefore, if the conference begins on a Monday, the NBD meeting will be held the Sunday prior.

## Mark Your Calendars!

The NBD meeting is held the Sunday prior to the PDC. All NBD members should plan on attending this important event.

## Who Attends the NBD Meeting?

All NBD members attend this meeting. (See page 8 for a list of NBD members.) All other AGA National and Chapter leaders are encouraged to attend the meeting and are welcome to join us!

## The NBD Agenda

The agenda consists of the presentation of the National President's and National Treasurer's reports, Nominating Committee review of the National Officers slate, presentation of the National President-Elect's theme, and other business as necessary (such as votes to amend the bylaws, etc.).

## Proxy Voting

AGA bylaws explain that proxy voting is allowable in the following cases:

- The Regional Vice President-Elect may vote in the Regional Vice President's absence. The Immediate Past RVP vote in the RVP's and RVPs-Elect absence.
- The National Treasurer-Elect may vote in the National Treasurer's absence.
- The Chapter President-Elect may vote in the Chapter President's absence. In the absence of both the Chapter president and the Chapter President-Elect, the Chapter President may designate in writing the delegate for the chapter.

## NBD-Related Expenses

AGA's Travel Guidelines specifically states that AGA CANNOT reimburse leaders for expenses associated with attending AGA's conferences nor can AGA pick up costs associated with attending the National Board of Director's (NBD) meeting. Many times, AGA Chapters cover these costs. Please ask for a copy of AGA's Travel Guidelines so that you can have a handy reference for your expense reimbursement questions.

## Tip of the Day

Read AGA's Travel Guidelines, which outlines the details of AGA's reimbursement policy. It is available under the Members Only section of the AGA website or you can contact Rosanna Ortiz at [rortiz@agacgfm.org](mailto:rortiz@agacgfm.org).

## Other Leadership Meetings

Traditionally, AGA also hosts Chapter Leadership and Regional Leadership Meetings the Sunday prior to the start of the Professional Development Conference and Exposition. Generally, ALL chapter leaders/officers are invited to these important get-togethers to discuss program updates, chapter accomplishments and challenges, and other issues.

Again, these meetings are usually held right after the NBD meeting, which means the Sunday prior to the start of the PDC is fairly well booked for AGA leaders!

## The AGA Calendars

AGA leaders should be familiar with the structure of the chapter and National program and fiscal year calendars.

### Chapter Calendars

First of all, with 90 AGA chapters, it's no surprise that no two operate on exactly the same calendar. AGA leaders should simply be aware that while some chapters begin their program year April 1, others begin their program year July 1.

## RVPs-Elect Take Note

Although RVPs officially assume office July 1, their program year begins May 1 when they are still RVPs-Elect.

## National Calendars

Furthermore, AGA National operates under three different calendars:

- **The Fiscal Calendar of April 1 – March 30**
- **The Chapter Recognition Calendar of May 1 – April 30**
  - This calendar coincides with the RVP Recognition Program period and the Chapter Recognition Program period.
  - Although RVPs assume office July 1 of each year, their program year begins May 1 of each year when they are RVPs-Elects. This early start is necessary for the pre-planning activities that are required of RVP positions.
- **The Program Calendar of July 1 – June 30**
  - This calendar encompasses the activities of the AGA National Officers (except RVPs—see above), Boards, Committees and Task Forces.
  - All leadership terms formally begin on July 1 of each year.
  - The following table summarizes the above information and includes additional details. However, it is not all-inclusive! It is intended only as a general guideline to help leaders get a sense of the AGA cycle.

# SECTION II—AGA LEADERSHIP IN GENERAL

## AGA Leadership Calendar

	AGA Event	National Executive Committee	Boards, Committees, Task Forces	Regional Vice President Terms	Chapter Leaders
<b>January</b>					
<b>February</b>	<ul style="list-style-type: none"> <li>• National Leadership Conference</li> </ul>		<ul style="list-style-type: none"> <li>• Quarterly Reports May Be Due</li> </ul>	<ul style="list-style-type: none"> <li>• Tentative dates for RCOW Due</li> <li>• Quarterly Reports Due</li> </ul>	<ul style="list-style-type: none"> <li>• Chapter Rec. Reports Due</li> </ul>
<b>March</b>		<ul style="list-style-type: none"> <li>• Leadership Training Workshop, SVPRSs plan breakouts with regional leaders</li> <li>• NEC Meeting Reports Due</li> </ul>		<ul style="list-style-type: none"> <li>• Leadership Training Workshop</li> <li>• Regional Goals and Objectives Due</li> </ul>	
<b>April</b>					<ul style="list-style-type: none"> <li>• Chapter Rec. Reports Due</li> </ul>
<b>May</b>			<ul style="list-style-type: none"> <li>• Quarterly Reports May Be Due</li> </ul>	<ul style="list-style-type: none"> <li>• RVP Rec Program Year Begins</li> <li>• Quarterly Reports Due</li> <li>• Welcome to New RVP-Elects</li> <li>• Begin filling upcoming Regional Coordinator Vacancies</li> </ul>	<ul style="list-style-type: none"> <li>• Chapter Rec. Program Year Begins</li> </ul>
<b>June</b>		<ul style="list-style-type: none"> <li>• NBD Meeting</li> <li>• Chapter Leadership Meetings: SVPRSs plan breakouts with regional leaders</li> <li>• NEC Meeting reports due</li> </ul>		<ul style="list-style-type: none"> <li>• NBD Meeting</li> <li>• Chapter Leadership Meetings, plan breakouts with chapter leaders</li> </ul>	<ul style="list-style-type: none"> <li>• Chapter Leadership Meetings, plan breakouts with chapter leaders</li> <li>• Chapter officers/ Director Rosters Due</li> </ul>
<b>July</b>	<ul style="list-style-type: none"> <li>• Professional Development Conference &amp; Exposition</li> </ul>	<ul style="list-style-type: none"> <li>• Formal Term Start Date</li> </ul>	<ul style="list-style-type: none"> <li>• Formal Term Start Date</li> </ul>	<ul style="list-style-type: none"> <li>• Formal Term Start Date</li> </ul>	<ul style="list-style-type: none"> <li>• Formal Term Start Date</li> </ul>
<b>August</b>			<ul style="list-style-type: none"> <li>• Quarterly Reports May Be Due</li> </ul>	<ul style="list-style-type: none"> <li>• Quarterly Reports Due</li> </ul>	<ul style="list-style-type: none"> <li>• Chapter Rec. Reports Due</li> </ul>

# SECTION II—AGA LEADERSHIP IN GENERAL

## AGA Leadership Calendar

	AGA Event	National Executive Committee	Boards, Committees, Task Forces	Regional Vice President Terms	Chapter Leaders
September		• NEC Meeting Reports Due			
October				• National Officer Nominations Due	
November			• Quarterly Reports May Be Due	• Quarterly Reports Due	• Chapter Rec. Reports Due
December		• NEC Meeting Reports Due			

### A Word (Or Two) About Leadership Titles

"Regional Vice President, Regional Vice President-Elect, Regional Vice President-Elect Designate, Immediate Past Regional Vice President!" What are the differences? Although at first glance, a lesson on AGA's leadership titles seems somewhat daunting, it's easy once you know the secret. The secret is, "July 1st" of any given year.

All AGA leaders formally begin their terms as current leaders on July 1, the beginning of AGA's program year. So, for example, on July 1, one begins service as a "Regional Vice President." The individual in line to take office as Regional Vice President after you leave is called a "Regional Vice President-Elect." During the first six months of the program year (remember, for AGA that's July through December), we operate with just these two types of leaders: currents and "elects."

However, during the last six months of the program year (January through June), we operate with a set of three leaders: currents, "elects" and "elects-designate." The "elects-designate" are those individuals who – you got it – will take office as "elects" on July 1st. And the cycle continues. (What's a "Regional Vice President-Elect Candidate? A Regional Vice President-Elect Designate whose nomination has not yet been formally certified by the National Bylaws and Procedures Committee. You get bonus points if you already knew that.). This basic idea is true for all AGA leaders, including the National President and National Treasurer. Here's the visual:

Leadership Title as of June 30	Leadership Title as of July 1 (start of the new program year)
Regional Vice President	Immediate Past Regional Vice President
Regional Vice President-Elect	Regional Vice President
Regional Vice President-Elect Designate	Regional Vice President-Elect

### What if I get stuck?

**Yes, it's a challenge but yes, you're up to it!**

If at any point you get "stuck," don't know where to begin, are asked a question you can't answer or need to tackle a project that seems overwhelming, turn to your support team for help. Each leadership section of this handbook tells you where to turn.

# SECTION II—AGA LEADERSHIP IN GENERAL

## FAQ's About the Day-To-Day Details

We have compiled a list of answers to the most frequently asked questions about leadership administration. If you have further questions, please ask us!

### Do I have to develop and submit an RVP/Board Chair/Regional Coordinator Budget?

In general, no, AGA leaders do not have to develop and submit budgets. We allocate costs for each leadership component, (for instance, each region, each board/committee, etc.) according to past actuals and then monitor expenses each month. However, once in a while, when we see we are getting close to the budgeted cap, we will ask leaders to project expenses for us so that we can monitor the situation even more closely.

### How do I know if AGA reimburses me for a particular item?

If you have already referred to AGA's Travel Guidelines and you still have a question, then you should contact Rosanna Ortiz at [rortiz@agacgfm.org](mailto:rortiz@agacgfm.org) or 800.242.7211, ext. 212.

### How do I get reimbursed?

Once you read the AGA Travel Guidelines and know what costs AGA picks up (and most importantly, doesn't pick up!) you can get easily reimbursed by completing AGA's Expense Report and submitting it along with your original receipts to AGA's Accounting Department.

### How do I book travel?

Please use AGA's travel agent to book your travel. This allows AGA to approve each transaction, track expenses, and receive bonus points for the direct billing to AGA's American Express account. Additionally, our agent can use our frequent flyer accounts to book tickets that would otherwise cost \$450 and greater. As you need to book travel, please read our Travel Guidelines and then keep a few items in mind:

- Book your flight AT LEAST two weeks in advance.
- Consider different airports if it reduces your airfare and is more economical in the long run.
- Be prepared to book a flight that includes connections and changing planes.
- Be willing to stay a Saturday night if doing so significantly reduces the cost.

### How do I set up a conference call?

Simply contact your board, committee or task force staff liaison. They will work with you and your team to coordinate the details.

### How do I get a board/committee/staff roster?

All rosters are available by clicking on the "AGA Leadership Resources" link in the Members Only portion of AGA's website at [www.agacgfm.org](http://www.agacgfm.org). Or, you can contact Rosanna Ortiz at [rortiz@agacgfm.org](mailto:rortiz@agacgfm.org) or 800.242.7211, ext. 131.

## Booking AGA-Related Travel

- Call Steve Gardner at Avenue Travel Services at 888.548.5554 or e-mail [steve@avenuetravel.com](mailto:steve@avenuetravel.com)
- Identify yourself as an AGA leader
- Steve will work with you to book your travel and will get AGA's approval of your itinerary and the cost before finalizing

# SECTION III—LEADERSHIP AT THE NATIONAL LEVEL

*This section builds on Sections I and II and focuses on the roles and day-to-day administration of National Executive Committee members and Board, Committee and Task Force leaders.*

Use this portion of the handbook in conjunction with your respective position description. Note that the Senior Vice Presidents for Regional Services role is addressed in this section (and not the regional section) because they serve on the National Executive Committee.

## Time Commitment

The time commitment for each AGA leader varies widely. For instance:

- CEAR Board members only attend one 2-hour board meeting, but they are expected to dedicate 25-27 hours during one 4-week period in the early spring serving as program reviewers.
- Overall, NEC members meet quarterly during the week for one or two-day meetings. They are also sometimes asked to spearhead special projects or act as liaisons to the National Boards.

Your best bet for an estimate of how much time will be involved in serving in a particular position, is to contact the staff liaison.

## National Leadership Roles

Now let's look into the details of the National Executive Committee positions. The following information offers an overview of what to expect and where to turn.

### National President

The National President works very closely with the Office of the Executive Director, who you will have been working very closely with as National President-Elect. Prior to your term, the Executive Director will contact you to help prepare you for your term. In addition to your many duties, you will be working with the Office of the Executive Director to:

- Coordinate implementation of goals/strategies
- Formalize the appointment of board, committee and task force chairs
- Confirm various meeting and conference dates
- Appoint two Past National Presidents to serve on the National Nominating Committee (since the terms technically begin July 1, you actually appoint these individuals in June, the last month of your National President-Elect term)
- Help draft the agenda and structure of the annual Leadership Training Workshop
- Review and finalize the National Awards Committee list of recommended awards recipients
- Choose the recipients of the National President's Award

- Choose a gift to recognize NEC members for presentation at the June NEC meeting

**Staff Liaison:** AGA's Governance Manager will work with you to implement day to day details such as:

- Helping to schedule various speaking engagements at AGA chapters (you can expect to visit 25-35 chapters during your year)
- Preparing for NEC and NBD meetings (agendas, reports, and Decision Memorandums)
- Updating Board, Committee, Task Force and Senior Advisory Council rosters
- Initiating formal letters of leadership recognition, etc.
- Itinerary for PDC week

### National President-Elect

The Office of Executive Director will contact you soon after the National Bylaws and Procedures Committee validates your nomination, (usually in late February) to help prepare you for the job. Some of your first duties as National President-Elect will include:

- Appointing a Senior Vice President At Large to serve on the NEC
- Acting as the liaison to the Regional Vice President teams. This includes updating the RVP Recognition Awards Program, modifying the RVP Reporting Program, and determining the recipients of each year's RVP awards.
- Appointing Vice Chairs for various boards, committees and task forces
  - AGA keeps an updated pool of candidates who are willing to serve.
- Spearheading, in consultation with the National President and SVPRSs, the annual Leadership Training Workshop aimed at training incoming RVPs and NEC members. This includes developing the agenda and updating content.
- Developing and presenting your presidential theme, goals and strategies
- Filling vacancies to the various boards, committees and task forces
- Appointing NEC liaisons to the AGA boards

**Staff Liaison:** AGA's Governance Manager will support you during your term, including:

- Helping to schedule various speaking engagements at AGA chapters (you can expect to visit 5-10 chapters during your year)
- Preparing for NEC and NBD meetings (agendas, reports, and Decision Memorandums)
- Contacting you to receive a formal picture for display at the AGA National Office
- Itinerary for PDC week

# SECTION III—LEADERSHIP AT THE NATIONAL LEVEL

## Immediate Past National President

Ahh, as Immediate Past National President, you can sit back and relax. Somewhat. However, while you will have formally turned the gavel over to your successor, you will still work closely with the Office of the Executive Director to perform a variety of duties, including:

- Serving on the NEC
- Submitting a Past National Presidents' Council Report at the NEC meetings and NBD meeting
- Chairing the National Nominating Committee

**Staff Liaison:** Governance Manager.

## National Treasurer

The AGA National Treasurer, National Treasurer-Elect, and Immediate Past National Treasurer will work very closely with AGA's Finance Department.

- Overseeing the Association's fiscal matters
- Budget preparation
- Presents a report to the NEC each meeting
- Presents an annual report to the NBD

**Staff Liaison:** The Director of Finance and Administration will work with you to implement day to day details such as:

- Preparing for and coordinating quarterly Finance and Budget Committee (FBC) meetings
- Helping you draft and initiate appropriate reports and Decision Memorandums for NEC and NBD meetings

## National Treasurer-Elect

The National Treasurer-Elect will work very closely with AGA's Finance Department, and especially with the Director of Finance and Administration, who will help prepare you for the Finance and Budget Committee and NEC meetings.

- Helps prepare annual budget

**Staff Liaison:** Director of Finance and Administration.

## Immediate Past National Treasurer

The Immediate Past National Treasurer will work very closely with AGA's Finance Department, and especially with the Director of Finance and Administration.

- Serves on the FBC
- Serves on the Nominating Committee

**Staff Liaison:** Director of Finance and Administration.

## Senior Vice President At-Large

SVPs At-Large represent the membership on the NEC. You will work very closely with the Office of the Executive Director.

**Staff Liaison:** Governance Manager.

## Senior Vice President for Regional Services

Our SVPRSs represent the membership from their respective sections and hold a special position that is "National" on one level because they serve on the National Executive Committee, but "Regional" on another level because they oversee the regional teams. These leaders have additional responsibilities that include:

### • Attending Regional Chapter Officer Workshops

Each SVPRS will attend his/her region's events and represent AGA National. During early spring of each year, the Office of the Executive Director will distribute an updated "AGA Initiatives" presentation that you can use to deliver the National initiatives overview to the attendees.

### • Submitting Quarterly Reports to the NEC

Each SVPRSs receives reports from the RVPs and turns them into quarterly written Sectional Reports for the NEC. The Section Report summarizes the RVP reports and highlights any noteworthy accomplishments and/or problems or concerns. SVPRSs should include their perspectives about each region. During the quarterly NEC meeting, the SVPRSs will be asked to provide a verbal update of their report.

### • Lead a Session at the Leadership Training Workshop

Each SVPRS will be asked to coordinate a session with their RVPs and RVPs-Elect at the annual Leadership Training Workshop.

### • Lead a Session at the Chapter Leadership Meetings

SVPRSs may be asked to coordinate a session with their RVP teams and chapter officers at some time during AGA Chapter Leadership Day.

## National Board, Committee, Task Force and Senior Advisory Council Leadership

AGA's National leadership volunteers serve on National boards, committees, task forces and senior advisory councils. These bodies study issues, make recommendations and carry out assigned responsibilities. Currently, more than 300 AGA members are making things happen as members of these teams. Here's a sample of how these individuals spend their time:

- Drafting policy and procedures for Association programs including the Certified Government Financial Manager Program and the Certificate of Excellence in Accountability Reporting Program
- Creating the technical program for AGA's conferences
- Conducting the Association's policies and procedures compliance audit
- Updating AGA's ethics policy and developing a conflict of interest statement
- Assisting AGA chapters in creating, updating and maintaining websites
- Evaluating policies, regulations and standards affecting government financial management
- Choosing the Association's National Officers

## SECTION III—LEADERSHIP AT THE NATIONAL LEVEL

- Formally commenting on government financial management policies, regulations and standards
- Recommending the recipients of AGA's leadership awards and choosing scholarship recipients

See page 9 for a list of AGA's boards, committees and task forces. Or, access the online list at [www.agacgfm.org](http://www.agacgfm.org)

### The Roles of Board, Committee, Task Force and Senior Advisory Council Members

#### The Role of the Chair

Board, committee, task force and senior advisory council chairs lead their respective teams. Since most chairs assume the role after having served one year as a vice chair, they are usually aware of the team's objectives and goals. However, specific direction will be provided as needed.

In general, responsibilities of the chair can include:

- Taking the lead in developing the teams goals
- Submitting quarterly reports to the National President
- Orienting team members about their expected individual contributions and responsibilities
- Providing necessary background information and/or training to committee members
- Preparing meeting agendas and relevant information to all members prior to meetings
- Leading committee meetings and delegating work of the committee to committee members
- Following up between meetings with members on work assignments
- Assisting in identifying potential leaders among the team
- Helping to recruit members to serve on the team
- Reviewing the various board and committee sign ups to fill vacancies

#### The Role of the Vice Chair

Vice chairs serve as the chair's "right hand" and can expect to assume the chair role after serving one year as vice chair.

#### The Role of the Team Member

The members of the various board, committee, task force and senior advisory council teams work under the direction of the chair to meeting the group's goals and objectives. While most members are regular members, some will serve in an advisory capacity only as an "ex officio" (non-voting) member.

You can expect to hear from your chair or vice chair shortly after being appointed to a board, committee or task force. The chair will help you get up to speed on the team's plan for the year.

# SECTION IV—LEADERSHIP AT THE REGIONAL LEVEL

This section builds on Sections I and II will help Regional Vice Presidents, Regional Vice Presidents-Elect, Regional Vice Presidents-Elect Designate, Immediate Past Regional Vice Presidents and Regional Coordinators do their jobs. (Note that Senior Vice Presidents for Regional Services are addressed on page 16 under the "National Leadership" section.)

## AGA's Regional Team

What could we do without AGA's regional team? Well, quite frankly, not much. Under AGA's regional structure:

- an experienced three-person management team (the RVP, the RVP-Elect and the Immediate Past RVP) manages the region
- a team of functional specialists (Regional Coordinators) are available to recommend and/or help improve services to Chapters and members in the region
- a National Office liaison (National Coordinator) transmits goals, objectives and strategies for the functions and provides general guidance and assistance

This team is responsible for assisting chapters in numerous areas, including education, certification, membership, chapter development and assistance, community service and early careers.

### Regional Team Members

Each of AGA's 15 regions (effective July 1, 2004, the Northern California and Southern California Regions will be combined) has a regional team consisting of the:

- Senior Vice President for Regional Services who oversees the regional team (see page 16 for more information about the SVPRS role)
- Regional Vice President
- Regional Vice President-Elect (and, don't forget that six months out of the year we have a Regional Vice President-Elect Designate)
- Immediate Past Regional Vice President
- Regional Coordinators for Education, Certification, Membership, Early Careers, Chapter Assistance and Development and Community Service
- Plus, a National Coordinator for Education, Certification, membership, Early Careers, Chapter Assistance and Development and Community Service

### Staff Liaisons to the Regional Team

The National Coordinators will work as a part of the Regional Coordinator teams and will help the group remain on track by providing guidance and assistance. (Maintaining files and notes, providing background information to the team, providing status reports when needed, etc.)

The Assistant to the Executive Director will act as the staff liaison to the RVPs, RVPs-Elect and the Immediate Past RVPs. This individual will help you remain on track by providing monthly updates and friendly reminders.

## Regional Teams Manage Each Region. The teams consist of the:

- RVP
- RVP-Elect
- Immediate Past RVP
- Regional Coordinators
- National Coordinator
- SVPRS

## The next 8 pages focus on helping RVPs get the job done:

- Overview of the Role
- Helpful Hints and Guidelines
- Regional Chapter Officer Workshops
- RVP Reports

## The Team Captain—The Regional Vice President

*(Extra special thanks to the RVPs who have contributed tremendously to the development of this section: Angie Billings, CGFM, Bobby Derrick, CGFM, Jeff Hart, CGFM, Joe Kapelewski, CGFM, Cindy Osga, CGFM, Darlene Richard, CGFM, and Joel Wells, CGFM.)*

AGA's Regional Vice Presidents are our superstar ambassadors and it is difficult to overstate their contributions. In their role as the chief elected officers of our 15 regions, they play a critical role in assisting chapters, executing our programs and accomplishing our mission.

RVPs spend the first year of their term as RVPs-Elect, the second year as the official RVP and the third and final year as the Immediate Past RVP.

### So Who Are These Captains and What Do They Do?

The position description contains the broad categories of responsibilities; the following offers more of the nitty-gritty type of details.

### Regional Team Management

- Identify Regional Coordinators, answer questions, point them in the right direction, etc.
- Attend conference calls
- Help as needed

### Chapter Officer Development

- Assisting the RVP-Elect in developing and organizing a Regional Chapter Officer Workshop.
- Helping current chapter officers solicit new officers for the chapter.
- Encouraging chapter officers to seek information and materials from National Office staff throughout their terms of office.

# SECTION IV—LEADERSHIP AT THE REGIONAL LEVEL

## Chapter Communication

- Keeping apprised of AGA programs and initiatives and summarizing, reiterating, and/or informing chapters of such projects.
- Visiting Chapters and communicating back to the National Office success stories, problems, feedback, etc.
- Assist Chapters in resolving common problems.
- Encourage communication among chapter officers and among the chapters on appropriate national and regional issues.
- Arrange for the exchange of newsletters among the region's chapters.
- Reminding chapter officers of their commitment and responsibilities. All AGA chapter presidents serve as members of the NBD and are responsible for promulgating policies of the Association. Many chapter presidents do not realize they serve on the NBD. This could include encouraging them to submit their votes Bylaws amendments, etc. and reinforcing important deadlines.
- Encourage and monitor chapter participation in national and regional programs and activities, including the Chapter Recognition Program.

## Chapter membership growth and retention

- Work with the Chapter Membership Committee.
- Monitor each chapter's efforts in the Membership Program and encourage chapters to achieve their membership goals.
- Support, promote and encourage chapter growth through involvement in local chapter meetings and other activities.

## Chapter training and educational services

- Provide educational and development activities for Chapter officers and chapter committee chairs, i.e., helping to develop meeting agendas, locating speakers, etc.
- Encourage and promote Regional Education Conferences to provide educational opportunities to all members in their regions.

## Miscellaneous

- Locating candidates for AGA leadership positions (including RVPs-Elect)
- Attending quarterly RVP phone calls
- Attending the annual NBD meeting
- Attending the annual AGA Leadership Training Workshop
- Voting on AGA-related matters when required
- Helping train the RVPs-Elect
- Possibly serving on the AGA Nominating Committee
- Submitting annual regional goals and objectives and completing quarterly reports

In short—anything goes. And yes, that is a lot of responsibility, but:

- You can do it
- You are not alone
- You will learn, grow, connect and.... have fun!

## Helpful Hints and Guidelines

The following incorporates words of wisdom from RVPs who have been there and done that:

### In the Beginning

#### Get Your Bearings

- Learn what section you are in and who your SVPRS is
- Connect with the ENTIRE RVP team – the Immediate Past RVP, the RVP-Elect, the RVP-Elect Designate, the Regional Coordinators and the National Coordinator
  - Consider assigning chapter oversight responsibilities to each member of your team. Spread the joy!
- Know your chapters' history (the Immediate Past RVP or the National Office can provide you with past regional reports)
- Learn your chapter presidents names

#### Obtain Support

- Get a buy in from your employer, supervisor and local chapter by showing your agency the benefits of your AGA leadership position (see page 10).
- Get your boss involved in AGA as a member, a speaker, a guest at a meeting or write an article about him/her for a chapter newsletter

### What a Great Idea!

**Early in your year, connect with the ENTIRE RVP team:**

- the Immediate Past RVP
- the RVP-Elect
- RVP-Elect Designate

**and consider assigning chapter oversight responsibilities to each member of your team.**

### Learn About Your Chapters

- Listen
  - to your chapters who will tell you what issues are important to them
  - to your past RVP who has "been there and done that"
  - to your SVP who has worked with other RVPs in the region
- Read the chapter newsletters
  - Know what your chapters are doing
  - Read the chapter newsletters from other regions
  - Many other chapter newsletters can be found on

# SECTION IV—LEADERSHIP AT THE REGIONAL LEVEL

the chapter websites. You can learn a lot by visiting these websites and gathering ideas to share with your chapters.

- Visit the national website
- Attend chapter meetings
- Contact other RVPs you met at the Leadership Training Workshop and chapter officers you met at the regional meeting, those at the PDC, etc.
- Learn from your mistakes and let others know what went wrong.
- Pass on what you learned to the National Office and your RVP-Elect

## Plan Your Year

- Set Goals EARLY (while your term officially begins July 1, your program year begins May 1)
- Include Past RVP and RVP-Elect in goal setting
- Set specific goals
- The RVP Quarterly Reporting Program is a guide to success—incorporate it into your goals for the year
- Tie your goals into AGA's overall Long Range Strategic Plan
- Review your Goals/Plan each month
- Do not go overboard—go for what you can reasonable achieve but still challenge yourself
- Plan and conduct Regional Chapter Officer Workshop EARLY (see page 21 for more details about this)
- Communicate Expectations
- Provide a copy of your goals to Chapter Presidents and RVP team members
- Provide a “Key Dates Calendar” to Chapter Presidents
- Get to know your chapter presidents. Some need hand holding and cajoling, while others run themselves well and just need a periodic check.
- Collect your Chapter contact information (including names, phone numbers, e-mail addresses).
  - Set up an electronic e-mail list
  - Distribute Regional/Chapter Directory to Chapter Presidents
- Plan your chapter visits early in the year
  - Obtain the Chapter meeting dates and times
  - First visit those chapters who may need assistance. You may want to include the Regional Coordinator for Chapter Development and Assistance for these visits.
  - Try to include those chapters who have not been visited in the last year. While they are generally the ones running smoothly, they like to know they matter and that their efforts are recognized.

## Establish Consistent Communication

- Communication cannot be stressed enough. It is very important that you maintain contact with the chapters. It is essential that you know what they are doing.
- Set aside time to call/e-mail each Chapter at least twice a month. Remember personal communication is best, so try to call at least once each month.
- Also, remember to keep in contact with the RVP team members and regional coordinators.
- Whether a phone call or e-mail you should ask how the chapter is doing (take the good and the bad); ask about programs, educational training events, community service projects; ask if there any issues the chapters would like the NEC to know (if yes, let the SVP know).
- If you do not hear from a chapter after leaving a voice mail or phone call, keep trying. Remember that everyone is busy with their ‘paying’ jobs and home life.
- Remember to keep track of when you called and/or e-mailed the chapter.
- Read the chapter newsletters.
- Check the chapter websites.
- Review the monthly Growth, Acquisition and Retention (GAR) reports.
- Encourage the chapters to participate in the Chapter Recognition Program. Review the reports. This is an excellent resource to stay abreast of the chapter activities. Use this information for discussions with the chapters.
- Encourage the chapters to participate in AGA programs such as submitting nominations for national awards and membership drives.
- Check the national website. It has valuable information for you to communicate with the chapters to keep them abreast of the national and other chapter activities.
- Encourage the chapters to visit the national website.
- Listen to what your chapters and its members want and what they would like to see changed.
- Encourage the use of e-mail.
- Respond promptly to any requests. You will find that sometimes chapters ask you to obtain information they could get themselves. Try to honor the request rather than referring them. You can always tell them later what you did to get the information. But by honoring their request, they feel that you care and are willing to go the extra step to help make them successful.
- Help the chapters get speakers for the monthly meetings and/or educational training events.
- Encourage and praise your chapter presidents and officers at every opportunity. They deserve it and it is amazing how positively they respond.
- Encourage the members to become active with the chapters by serving on the board or committees, and participating in community service events.
- Write an article for the chapter newsletters.

# SECTION IV—LEADERSHIP AT THE REGIONAL LEVEL

- Remind the chapter presidents that they are members of the National Board of Directors (NBD). Encourage them to attend the NBD meeting held at the PDC and to vote on matters presented to the NBD for action.
- Keep the National President, President-Elect, National Office, SVP, and RVP team informed.
- Provide copies of the RVP Recognition Reports, RVP newsletter and any specialized reports you may develop to the RVP team, SVP, National Office Executive Director, National President, and National President-Elect. Keep them abreast of any pertinent issues.
- Use the RVP-elect to help with chapter visits.
- Get to know the National Office staff. They are great. Contact them for assistance and advice. They have a wealth of knowledge and what they do not know they will find out for you.
- Do your paperwork as you go along. Keep notes and e-mails of your discussions with the chapters. You will be glad you did this when the time comes to prepare your quarterly reports.
- Draft articles for your regional newsletter as they occur to you or as you receive information from the National Office or chapters.
- Constantly review your goals and key dates.

## Visit Your Chapters

- Visit each chapter at least once during the year. As stated earlier, each chapter is unique and a visit allows you to see this in person. You may find a chapter does not communicate with you, causing concern, only to visit and find the chapter is functioning well.
- Visit chapters needing assistance as often as possible. Be there to support them through the difficult times. Provide whatever assistance you and/or the RVP team or regional coordinators can provide. Be sure to work with the Regional Coordinator for Chapter Development and Assistance in regards to troubled chapters.
- Visit with the membership as well as the chapter officers and directors. It is important that you talk with the membership. It is a great way to encourage participation on the chapter board or find out why they are unwilling to participate.
- Offer to serve as a speaker.
- Attend one chapter educational even for each chapter. Try to combine this with the chapter CEC and monthly meetings whenever possible. Not only do you earn CPE, but you gain information about speakers and topics you can share with the other chapters in the region.

## Publish a Regional Newsletter

- A monthly newsletter is best.
- A newsletter of one to two pages should be adequate. If it is too long, you may find that it does not get read because time is valuable to the chapter volunteers.
- Remind the chapters of due dates (recognition reports, national membership drives, nominations for awards, voting on NBD issues, etc.)

- Remind the chapter presidents they are part of the NBD and should vote on issues put before them.
- Recognize chapter successes. It may be something another chapter could use.
- Include a bio of one of the members of the regional management team.
- Feature “best practices” from the regional coordinators.
- Provide some wisdom or motivational quotes.
- Include some humor/funnies. It may give the reader something to look forward to and they may actually read the newsletter.
- Be sure to send you newsletter (e-mail or hard copy) to the RVP team, the regional coordinators, chapter presidents, and the SVPRS.

## Develop a Regional Website

- When considering developing a web site, you should try to keep it simple and informative. And what could be included on the web site?
  - the regional management team information
  - links to the chapter web sites
  - links to the national web site
  - your regional goals
  - your regional newsletter
  - regional speaker information
  - regional and/or chapter educational events
  - anything you think would benefit the region

## Regional Websites

See page 41 for a list of current regional websites

## Regional Chapter Officer Workshops (RCOWs)

RVPs-Elect, start planning your RCOW event early in the year!

### Overview

- One of the first items of business for an RVP-Elect is to develop and organize a regional chapter officer workshop (RCOW).
- Most often, the RVP-Elect (the individual formally taking office as Regional Vice President on July 1st) takes the lead on this project.
- Start planning this event early in the calendar year and let the chapters know the date as early as possible.
- Your challenge is to host an informative, productive, well-attended event for a reasonable cost. Can you get more chapter leaders to attend your event for less than it cost the prior year?

# SECTION IV—LEADERSHIP AT THE REGIONAL LEVEL

## Objectives

### The RCOW....

- Provides an opportunity for chapter leaders to learn more about AGA's mission and initiatives, chapter leadership roles, and chapter administration.
- Allows national, regional and chapter leaders to personally meet, discuss regional goals, and plan for the upcoming program year.
- Provides a forum to share resources, specific ideas, best practices, ask questions, and offer solutions.

## Attendance

Attendance varies from anywhere from five to 30 people, depending on the region. Generally, the following leaders attend:

- RVP
- RVP-Elect
- RVP-Elect Designate
- Immediate Past RVP
- SVPRS
- All chapter presidents in the region
- All chapter presidents-elect in the region\*
- All regional coordinators\*
- All other incoming and outgoing chapter leaders are encouraged to attend!\*

\*See AGA's expense Travel Guidelines for details about reimbursement limitations.

## Structure

The structure of the events depends on the region. Many begin on a Friday night with an informal social hour, continue through Saturday, and then move into Sunday, closing after lunch so participants can travel home. The structure of your event will depend on what you and your team decides is best.

### Planning the Workshop

The following steps will help you and your team develop a quality event:

#### 1. Get an Idea of Your Budget

Your challenge is to host an informative, productive, well-attended event for a reasonable cost.

Read AGA's Travel Guidelines. There it is again—our suggestion to become very familiar with AGA's Travel Guidelines. You will find that it does not outline in detail how RVPs should budget for their Regional Chapter Officer Workshops. Instead, it simply says that AGA pays for all reasonable workshop-related costs for the team to develop a quality event. This includes binders and materials, food, reasonable a/v, travel and lodging.

Then, contact the National Office (Julie Cupp at [jcupp@agacgfm.org](mailto:jcupp@agacgfm.org)) for an idea of what your region paid for the prior year's RCOW. Please keep in mind that although AGA will monitor the cost of your event, we will not be examining the expenses in detail. This is because we trust

### Keeping Costs Down

Clarify to attendees that regarding meals, AGA pays for actual costs up to the max per diem limits. Therefore, attendees should only claim reimbursement for their actual costs.

- Encourage car-pooling when it makes sense
- Book travel well in advance
- Provide hearty sandwiches instead of a sit down lunch
- Get the hotel to waive a meeting room rental fee
- Holding a half-day meeting? Then consider a conference call instead of a face-to-face meeting
- Ask the local chapter to lend their LCD projector or other equipment

### Who Pays For It?\*

AGA pays travel expenses for RVPs, RVPs-Elect, RVPs-Elect Designate, Immediate Past RVPs, SVPRSs and one Chapter officer per chapter in the region.

Eligible expenses include travel, lodging, meeting room expense (if necessary), break and lunch.

Please note that if more than one chapter officer per chapter wants to attend the workshop, AGA will reimburse them for lodging and per diem only. Transportation expenses are ineligible.

that each of you is fully capable of developing and executing these events on or under budget. This will mean ensuring that your attendees book their air travel well in advance through AGA's preferred travel agent, Avenue Travel. To make travel reservations, contact Avenue Travel by e-mail at [steve@avenueustravel.com](mailto:steve@avenueustravel.com), or by phone at 888.548.5554. Julie Cupp will also be able to assist you in negotiating the best room rate with the hotel. Please see section five for details.

Also, make a note that attendees can claim reimbursement for their actual meal costs, not provided as a part of the meeting, up to the max per diem.

Thank you for helping us do whatever it takes to keep our Association fiscally sound.

#### 2. Find Out What Was Done Before

Contact your region's past or current RVP to find out where their event was held, what was on their agenda, what worked for them, who attended, etc. You may also contact Julie Cupp at the National Office for this information.

#### 3. Develop Your Team

Get your immediate past RVP, current RVP, RVP-Elect Designate, SVPRS and Chapter Presidents on board to help you plan and coordinate the event.

# SECTION IV—LEADERSHIP AT THE REGIONAL LEVEL

## 4. Assign Tasks

There is no reason for you to do EVERYTHING on your own. Ask for help. Talk with your team to find out what has been done in the past and then assign different tasks to the various people on your team.

## 5. Find Your Location

Contact past RVPs to find out where previous workshops have been held. If the site was centrally located and worked well for everyone, consider going right back to that particular facility again.

There are two options available as you begin to look for a meeting location. Please use the RCOW Meeting Planning Tips and Meeting Space Request forms to assist you with this process.

- A. If you know the hotel you would like to use, contact them directly to determine their availability. Be prepared to provide the meeting dates, approximate number of attendees, and the estimated meal functions that you plan to have. Request a contract that outlines your meeting space, sleeping rooms, food and beverage and audio/visual needs (must be signed by AGA)
- B. If you are unsure of the city and/or hotel in which you would like to hold your event, contact Julie Cupp at the National Office for assistance. Please complete the RCOW Meeting Space Request form and fax to 703.548.9367.

**Please remember that AGA is responsible for paying for your RCOW meeting, therefore, a National Office representative must review and sign all hotel contracts.** This is very important to remember, as AGA will not reimburse for hotel meeting expenses that are not approved by the National Office.

If at any time you need assistance, please contact Julie Cupp at [jcupp@agacgfm.org](mailto:jcupp@agacgfm.org).

## 6. Plan Your Agenda and Develop Your Materials

See the “The RCOW Agenda” section below for more details.

Contact the National Office for other sample agendas, prior year’s binders, and files from the Leadership Training Workshop, etc.

Gather your material and update or modify it as appropriate.

Pull together your onsite materials such as binders, nametags, tent cards, etc.

## 7. Coordinate the Onsite Logistics

Once the contract has been signed by AGA, the hotel will assign an event manager to assist you with the logistics for your event. You will need to provide all of your meeting information, such as specific to your event manager. Deadlines for getting this information to the hotel will be in your contract.

- A. Approximately four weeks before your meeting contact your event manager and provide him/her with your menu selections, finalized agenda, and room set-up information.

- B. In addition, be sure to send out a reminder to everyone that you have invited to attend the meeting, asking that they confirm their participation, make their travel arrangements with Avenue Travel, and to make their room reservations. Reservations can be made by individual guests that call the hotel, or via a rooming list that you will provide to the hotel’s event manager. The method of reservations and the hotel cut-off date will be outlined in the contract.

- C. Make sure to get the name and phone number of the hotel staff available to assist you during the meeting if you have questions or problems (this may or may not be your event manager).

Please also refer to the RCOW Meeting Planning Tips sheet for additional information. If you need assistance or have questions, please contact Julie Cupp at [jcupp@agacgfm.org](mailto:jcupp@agacgfm.org).

## 8. Work Out Billing Issues

Julie Cupp will complete the necessary paper work to set up direct billing with the hotel so you won’t be responsible for any out of pocket expenses. Please forward direct bill information to Julie by fax on 703.548.9367.

For all other expenses (supplies, phone calls, meals, etc.), please save your receipts. After the meeting complete the AGA Expense Form and mail the original to Julie’s attention at the National Office for reimbursement.

## 9. Provide Feedback

Please work with your SVPRS to complete the National Office feedback form so we know how your event went and how we can help follow up. Also forward a list of attendees and the agenda to Julie Cupp so the National Office can maintain an accurate history of your regional event.

## The RCOW Agenda and Binder

The following sample agenda includes a range of information that could be included on the RCOW agenda and in the binder. This sample is intended as a guideline only. Each RVP team should feel free to mix and match, add and delete so that his/her RCOW best serves chapter leaders in that region. Some RVPs choose to include all the information in the binder; some choose to include only a portion of it. Again, it’s up to you!

This is an ever-changing list. Please help keep it useful by sharing your suggestions for modifying it. Did you present a particular piece that was exceptionally helpful or not so helpful? Let us know! Need RCOW Samples or E-Files? Simply contact Rosanna Ortiz at [rortiz@agacgfm.org](mailto:rortiz@agacgfm.org) or 800.684.6931, ext. 212.

## Sample RCPOW Agenda

### Introductions

### Governance Overview

### RVP Goals and Objectives

**National Initiatives** (the SVPRS will give this brief presentation)

# SECTION IV—LEADERSHIP AT THE REGIONAL LEVEL

**Chapter Leaders' Roles and Responsibilities** (and refer to the AGA Leadership Handbook)

**Chapter Recognition Program**

**Chapter Updates**

- New and good things—highlights of accomplishments
- Identification of problems and issues

**Regional Coordinator News/Reports**

**Best Practices**

- Education, Certification, Membership, Communication, Advocacy, Chapter Administration
- The importance of a Chapter Nominating Committee

**Leadership Resources**

**Administration and Wrap-Up**

- Rosters—Who to contact with questions, Expense Report, Event Feedback
- Event Evaluation
- Chapter Attributes Form

The binder of materials can be as thick or as thin as you deem necessary. In addition to the above listed agenda items, you might want to include:

- A regional directory with contact information
- Website addresses for chapters in the region
- A copy of the Chapter Recognition Report and a sample completed version
- AGA Leadership Handbook for National, Regional and Chapter Leaders
- The Growth, Acquisition and Retention (GAR) Report
- National Office organizational chart

**RVP Reports**

In general, reports take a bad rap, but the good news about the reports you will complete as an RVP is that you will find they are actually making a difference. Your Senior Vice President for Regional Services, your National Executive Committee members, and the National Office Staff Liaison will actually read them, discuss them, distribute them, provide feedback on them, and then act on them.

AGA genuinely relies on your reports to assess how life is going out in the field. So go ahead—test us by asking a question in one of your reports and see if you don't get an answer.

Let's now review the three types of RVP Reports:

- I. Regional Goals and Objectives Report
- II. Quarterly Status Reports
- III. Final Report on Goals and Objectives

**RVPs Submit Six Reports During Their Term:**

- One Regional Goals and Objectives Report
- Four Quarterly Status Reports
- One Final Report on Goals and Objectives

Over the next few pages, we take you on a quick trip through these reports. Note that the templates contained in this Leadership Handbook are only samples. The National Office will update them and electronically distribute them to you about a month before they are due.

**I. Regional Goals and Objectives Report**

- RVPs-Elect (those taking office on July 1) take the lead developing this report, but AGA provides a head start by dedicating time during the Leadership Training Workshop to work in tandem with the RVP on this. RVPs-Elect should have this report 99 percent completed by the time the Leadership Training Workshop is over.
- You then submit quarterly reports to your SVPRS to update everyone on the status of these goals and objectives.
- The report is due early in the year—see the chart below.
- Regional Goals and Objectives, for the most part, will fall under categories that correspond to the Quarterly Status Reports, including “Communication with Chapters,” “Education/Training Events,” etc. However, RVPs should feel free to develop goals that will be of best value to their region.
- To submit the report, you will briefly describe how your regional goals and objectives actively support the National President's goals and objectives.
- Then, list your regional goals. Under each goal, list the objectives for that goal and an estimated completion date.
- You will e-mail your completed report to your SVPRS with a “cc” to the National President-Elect, your RVP-Elect and/or Elect-Designate, and the National Office.

**II. RVP Quarterly Status Reports**

- By the time these reports are due, the RVPs-Elect are full-fledged RVPs who have been formally in office for over a month.
- These reports outline the progress of the regional goals and objectives you submitted in the early spring and are due four times a year to the SVPRSs as outlined on page 26.
- The Senior Vice Presidents for Regional Services will present summaries of these reports at each NEC meeting and will provide the NEC with regional issues, concerns, accomplishments, etc. for consideration.
- You will e-mail your completed report to your SVPRS with a “cc” to the National President-Elect, your RVP-Elect and/or Elect-Designate, and the National Office.
- The National Office will distribute an updated electronic version of the report for RVPs-Elect to complete, but in general, the report will be very similar to the following:

**1. Regional Administration**

A. Long Range Planning and Regional Organization—You will cite the dates you submitted your Goals and Objectives, a summary of your Regional Chapter Officer Workshop, Chapter Attribute Inventory and Regional Officer Directory.

# SECTION IV—LEADERSHIP AT THE REGIONAL LEVEL

- B. Quarterly Reports and Final Report on Goals and Objectives—You will cite the dates you submitted your quarterly reports and Final Report on Goals and Objectives.
- 2. Communication with Chapters**
- A. Summarize how you communicated with each chapter during the quarter (meetings, e-mail, regular mail, telephone, etc.)
- B. Summarize the status of regional and chapter websites.
- C. Coordination and Communication with Regional Coordinators.
- 3. Regional and Chapter Educational Events**—Cite the date, and then describe the event, the audience and your role.
- 4. CGFM-Related Events**—Cite the date, and then provide a summary of CGFM-related activities in your region.
- 5. Membership Retention and Recruitment**—Describe how your region actively supports National and Chapter membership recruitment and retention programs.
- 6. Liaisons with Other Professional Organizations**—Cite the date and then describe initiatives with other professional associations and organizations
- 7. New Chapters and Revitalizing Existing Chapters**—Comment on initiatives to start a new chapter or to enhance or revitalize an existing chapter.
- 8. Candidates for National Leadership**—Identify candidates for National Officers and national boards and committees.
- 9. Regional Governance Structure**—Report on the implementation of the regional governance structure. (For example, what has been accomplished, any problems, comments, etc.)
- 10. Community Service**—Cite the date and then summarize the various chapter-sponsored community service events and your roles at these events.
- 11. Chapter Profiles**—Provide a brief profile (or an updated profile) of each chapter in your region.
- 12. Feedback for the NEC**—Provide any feedback for the National Executive Committee's next meeting.

## Reports Are Due:

- **Regional Goals and Objectives Report**—TBD
- **1st Qtrly Status Reports (covers May, June, July)**—August 13, 2004
- **2nd Qtrly Status Reports (covers Aug, Sept, Oct)**—November 5, 2004
- **3rd Qtrly Status Reports (covers Nov, Dec, Jan)**—February 11, 2005
- **4th Qtrly Status Reports (covers Feb, Mar, Apr)**—May 13, 2005
- **Final Report (covers May - April)**—May 13, 2005

- 13. Suggestion Box**—Please tell us what your good ideas are, how we can help better, how we can improve systems, etc.

## III. Final Report on Goals and Objectives

- This report provides the National President and the National President-Elect with valuable regional information and will be the basis for the status report presented to the NBD during its annual meeting.
- It is due as outlined on below.
- You will e-mail your completed report to your SVPRS with a "cc" to the National President-Elect, your RVP-Elect and/or Elect-Designate, and the National Office.
- To complete the report, simply provide the following information for each goal and objective established at the beginning of the year:
  - The timeline of when the goal was developed and when it was completed.
  - The name of the individual responsible for coordinating progress on the goal.
  - Outline any goals still in progress.
  - What is the progress toward achieving goals not yet accomplished? When will they be completed?
  - Any constraints experienced in accomplishing goals.
  - Provide any additional information regarding items or activities that might affect the AGA on a national level, a committee or task force, or the region or affected chapters within a region.
  - Provide recommendations, resolutions and requests for action.
  - Provide explanation on other matters in which you have been involved which impacts AGA. Include information relative to progress or achievements not included in the original goals and objectives.
  - Outline any suggestions that you have for the AGA leadership and for your successor.

## RVP Awards

At the end of each program year, the AGA National President-Elect recognizes RVP service with awards presented during the Professional Development Conference. The National President-Elect uses the RVP Quarterly and Final Reports to assess progress and accomplishments and in consultations with the SVPRSs, determines the RVP award recipients for the year. RVPs will be recognized as follows:

- **Platinum**—This level recognizes superior leadership and contributions. This award is presented to RVPs who perform "off the scale" and whose service consistently far exceeds responsibilities. Receiving this level award is the exception to the rule.
- **Gold Level**—This level recognizes outstanding leadership and contributions and is presented to RVPs whose service consistently exceeds responsibilities.

# SECTION IV—LEADERSHIP AT THE REGIONAL LEVEL

- **Silver Level**—This level recognizes great leadership and contributions and is presented to RVPs whose service usually exceeds responsibilities.
- **Bronze Level**—This level recognizes good leadership and contributions and is presented to RVPs whose service consistently meets responsibilities.

## Regional Vice Presidents-Elect

- Prepare Regional G&O
- Attend LTW
- Take lead on RCOW
- Be prepared to take over when RVP can't attend
- Visit Chapters
- Attend quarterly RVP phone calls when needed

## Immediate Past Regional Vice Presidents

- Work as a team member as needed
- Attend RCOW
- Provide advice and guidance
- Possibly serve on Nominating Committee

### Currently, each AGA region has a Regional Coordinator for:

- Certification
- Chapter Development and Assistance
- Community Service
- Early Careers
- Education
- Membership

## Regional Coordinators (RCs)

Currently, each region has a regional coordinator for each of six areas: Certification, Chapter Development and Assistance, Community Service, Early Careers, Education and Membership.

Regional Coordinators serve a three-year term as specialists in the above areas

and are available to assist chapters as needed in each of those areas. For instance, when a chapter membership chair is looking for new ideas and best practices for membership recruiting and retention, he/she would contact the Regional Coordinator for Membership for assistance. They report to the RVPs and participate in conference calls as needed. Shortly after they come on board, the National Coordinator will contact them to get them in the loop.

## National Coordinators

Each of the 15 regions operates with six National Coordinators—one National Coordinator for each of the six functions: Certification, Chapter Development and Assistance, Community Service, Early Careers, Education and Membership. The National Coordinator for each function is the AGA National office staff member responsible for that function. For example, the Director of Education acts as the National Coordinator for all 15 Education Regional Coordinators.

The National Coordinator's duties include:

- Transmitting the Association's goals, objectives and strategies
- Facilitating the sharing of ideas and best practices
- Providing guidance and assistance as needed

**The entire regional team meets regularly via conference calls throughout the year.**

## It's Online!

Use the Members Only section of AGA's website to run rosters for:

- RVPs
- RVPs-Elect
- Immediate Past RVPs
- Regional Coordinators
- And More!

Visit [www.agacgfm.org](http://www.agacgfm.org) (click on "Members Only")

# SECTION V—LEADERSHIP AT THE CHAPTER LEVEL

*This section builds on Sections I and II and focuses on chapter-level leadership and administering a successful AGA Chapter.*

*(Special appreciation goes out to Ray Harris and Cindy Osga for their hard work developing this section of the handbook.)*

Our Association currently boasts 90 chapters—each one run by a dedicated and enthusiastic group of leaders making things happen at the grass-roots level while continuing to ensure the success of the organization at large. This section will help our chapter superstars in their leadership roles. We will first address the chapter leadership role in general and then move on to discuss role details, committees, chapter programs, meetings, communications, and general administration (such as incorporation, insurance, etc.)

## How Much Time Does It Take?

As you can imagine, the time you will spend on AGA related activities depends on your leadership role, the team you are working with, and the particular activity. However, in early May of 2001, we informally asked chapter leaders to tell us how much time they spent on AGA related activities in one month. The box at the right provides the number of people who answered the survey and the range of hours they dedicated to that particular position.

## Preparing for Your Chapter Leadership Role

Each year (usually in the early spring), your Regional Vice President team hosts a Regional Chapter Officer Workshop dedicated to preparing you for your chapter leadership role and administering a successful AGA Chapter. You don't want to miss this invaluable event. This workshop provides you with an opportunity to meet with other chapter leaders in your regions as well as your RVP team and Senior Vice President for Regional Services. It is an excellent opportunity to learn what it takes to be a successful chapter. Expect to hear from your RVP team early in the year about this training. See page 21 for more details.

**Please Attend the Regional Chapter Officer Workshop!**

**See page 21 for more details about the Regional Chapter Officer Workshops**

## The Chapter Recognition Program

As one of your first items of business, you should get a copy of AGA's Chapter Recognition Program (CRP). The CRP is a program designed to support, encourage and promote the accomplishment of AGA's mission and to provide flexible guidelines for a well-rounded chapter. The CRP is also a noncompetitive program designed to recognize a Chapter's performance in relation to a standard or benchmark linked to AGA's mission. Each quarter, Chapters submit CRP reports to AGA's Membership Department and at the end of the program year, AGA presents Chapters with Chapter Recognition Awards.

However, you will also find that the CRP can help prepare chapter leaders and committee members for their

leadership roles and can provide them with a very good basis for drafting their respective strategic plans and annual goals. This is because the CRP follows the basic outline of AGA National's strategic plan and contains detailed objectives categorized by functions such as:

- Chapter Leadership, Planning and Participation
- Education and Professional Development
- Certification
- Membership
- Communications
- Community Service
- Awards

Some chapters have the President-Elect prepare the quarterly CRP report as a leadership learning tool.

Early each calendar year, AGA's Membership Department will distribute the updated CRP and will help chapters prepare for the upcoming program year.

## Don't Leave Home Without It!

- **The Chapter Recognition Program Manual is available online under the Members Only section of AGA website [www.agacgfm.org](http://www.agacgfm.org)**
- **Or, contact Susan Fritzen at the National Office at [sfritzen@agacgfm.org](mailto:sfritzen@agacgfm.org)**

## Working with the RVP Team

The RVP team is there to help you. Each region has a team to manage the region. The regional team consists of:

- An **experienced three-person management team** made up the Regional Vice President, Regional Vice President Elect, and the Immediate Past Regional Vice President. The RVP communicates with each chapter president and reports to the Senior Vice President for Regional Services who oversees the regional management team. The SVP for Regional Services is a member of the National Executive Committee (NEC) and reports any regional and chapter concerns and successes to the NEC.
- A **team of six functional specialists** known as regional coordinators, which are available to improve services to the chapters and members in the region.
  1. Regional Coordinator for Certification
  2. Regional Coordinator for Chapter Assistance and Development
  3. Regional Coordinator for Community Service
  4. Regional Coordinator for Early Careers
  5. Regional Coordinator for Education
  6. Regional Coordinator for Membership

The regional coordinators work with a National Office liaison that transmits goals, objectives, and strategies for the functions and provides general guidance and assistance. Most regional coordinator meetings are conducted through

# SECTION V—LEADERSHIP AT THE CHAPTER LEVEL

a conference call, which is coordinated by the National Office liaison.

## Don't Forget

**You can run all leadership rosters online through the Members Only section of AGA's website.**

## Working with the National Office

The National Office staff is also here to help you! Glance at the Resources section to get an idea of where to turn to for help.

## Monthly Membership E-Notes and GAR

### Monthly Updates

- Each month, the AGA Membership Department distributes a membership and recruitment-related e-note update forwarding the current GAR (see below for more information), and containing suggestions, updates, reminders, etc. for all membership coordinators and chapter membership chairs.
- This monthly update will help membership chairs and coordinators stay apprised of current initiatives, will provide new ideas, and will keep the membership team connected overall.
- The AGA National Office automatically includes chapter membership chairs, membership coordinators and the entire AGA leadership listserve. However, all chapter officers are welcome to join us! If you care to be added to the list of leaders receiving this monthly e-note, simply contact Susan Fritzlen at [sfritzlen@agacgfm.org](mailto:sfritzlen@agacgfm.org) or 800.242.7211, ext. 210.

### Growth, Acquisition and Retention (GAR) Report

- The GAR is a critical statistical report containing current membership numbers for each chapter. A GAR Report will be included in that monthly membership e-note.
- The GAR Report shows a beginning membership balance and then adds or subtracts each chapter's new members, reinstates, suspends and deceased members, ending up with a current balance. The report also calculates overall growth, new member acquisition, retention goals and progress toward those goals.
- Each GAR is posted under the "Chapter Resources" portion of the Membership Only section of AGA's website at [www.agacgfm.org](http://www.agacgfm.org).

### National Officer Speaking Request

- Each AGA Chapter is welcomed and encouraged to invite the AGA National President or National President-Elect to attend a chapter event or speak at a chapter educational seminar.
- To invite him/her to your chapter's event, simply complete a "National Officer Speaking Request" and submit it to the National Office. The form is available under the "Chapter Resources" section of the Members Only portion of AGA's website at [www.agacgfm.org](http://www.agacgfm.org).
- Keep in mind that submitting your request 8-12 months ahead of schedule is not too early!

- Contact Rosanna Ortiz at [rortiz@agacgfm.org](mailto:rortiz@agacgfm.org) or 800.242.7211, ext. 131, for more information.

## Chapter Officers/Directors Rosters

July 1 is a special time at AGA. It marks the beginning of our program year. To prepare for the new year, National Office staff will be asking chapters for a list of their incoming chapter officers, directors and coordinators (such as the CGFM Coordinators). (This form is available under the "Chapter Resources" section of the Members Only portion of AGA's website at [www.agacgfm.org](http://www.agacgfm.org).)

It is critical that the RVP team knows who is serving as chapter leaders. This includes your starting roster and any updates.

Ways we use the information:

- Send chapter checks
- Keep record of chapter service
- Identify potential national leaders
- Grant proper security level in the Members Only section of the website
- Add to the AGA Leadership Listserve
- Contact appropriate officers to promote awards nominations processes

## Recognizing Chapter Excellence

AGA presents a series of awards to chapters:

- Chapter Education Awards
- Membership Recruitment Awards
- Chapter Recognition Awards
- Community Service Awards
- Chapter Newsletter Awards
- Chapter Website Awards

**Please keep the National Office and your RVP team apprised of chapter leadership changes. Contact Susan Fritzlen at [sfritzlen@agacgfm.org](mailto:sfritzlen@agacgfm.org).**

# SECTION V—LEADERSHIP AT THE CHAPTER LEVEL

## Chapter Officer and Director Roles

Each chapter's bylaws should specify eligibility for chapter office and election and installation procedures and timeframes. Usually, officers hold office for one year and may be re-elected. Directors may serve for one or two years, depending on the chapter's by-laws. When directors serve two years it is preferable that half be elected in one year and the other half elected in the subsequent year.

Chapters should have a Chapter Executive Committee (CEC) consisting of the chapter officers, the immediate past president and committee chairs, and two other standing committees: Nominating, and Bylaws and Procedures. (More information is provided about the CEC in the "Committee" section below.)

The elected officers of a chapter often include the:

- President
- President-Elect
- Immediate Past President
- Secretary
- Treasurer
- (Smaller chapters sometimes elect a single officer to serve as both the secretary and treasurer.) Also, some chapters have created vice president positions commensurate with the regional governance structure (such as vice president for membership)

The directors and other types of chapter positions include:

- Education
- Programs Director or Chair
- Membership Director or Chair
- Awards Director or Chair
- Webmaster
- Newsletter Editor
- CGFM Coordinator
- Community Service Director or Chair

Each AGA Chapter is encouraged to develop position descriptions that outline the responsibilities of chapter officers and directors. The following templates might be of use in developing a specific position description. Chapters should tailor these to best serve their interests. A chapter may want to consider developing a chapter policy and procedures manual that not only describes the duties of the various positions but how to best carry out those duties.

## Chapter President

The Chapter President leads and directs the chapter through its various programs and events. The success of chapter operations during the year depends to a great extent on the initiative and creativity demonstrated by the president.

Keeping the membership informed about the Association's activities and motivating the membership to take an active part in AGA's programs constitute an important part

of a chapter president's responsibilities.

All chapter presidents are members of the National Board of Directors (NBD) and participate in policy decisions affecting AGA.

Chapter presidents receive information about the goals of AGA through association communications and subsequently plan programs at the local level to attain these goals.

In addition to the general leadership of the chapter and the motivation of the chapter members, the president is responsible for managing committee or board activities personally or through an appointed representative, as well as championing the AGA and chapter with employers, colleges and universities, the media, etc. This includes:

- Participating in the RVP Workshops
- Attending annual meetings of the National Board of Directors. President-elects are encouraged to attend the PDC and NBD annual meeting prior to becoming chapter president.
- Adhering to the national and chapter bylaws as well as resolutions and rules regulating the administration of the chapter.
- Keeping the Regional Vice President and, through the National Office, the National President and the NEC fully informed about chapter activities.
- Calling meetings of the membership as prescribed in the chapter bylaws or as may be deemed necessary.
- Presiding at meetings of the Chapter Executive Committee.
- Chairing meetings of the membership.
- Appointing committee chairs, as prescribed in the chapter bylaws.
- Serving as an ex-officio member of all committees
- Monitoring the election of chapter officers.
- Participating in meetings with employers, the media, etc. to promote the AGA and chapter.

## Chapter President-Elect

- The chapter president-elect assists the chapter president and other board members in carry out their duties.
- The president may also assign other specific functions to the president-elect, such as the preparation of the CRP.
- In the event that the president's position becomes vacant, the president-elect discharges the responsibilities of the office of president until the expiration of the president's term or until the election of a chapter president to complete the term of the president.
- The chapter bylaws should provide guidance concerning vacancies for chapter officers and directors.

### True or False?

Chapter presidents are members of AGA's National Board of Directors (NBD)?

True.

# SECTION V—LEADERSHIP AT THE CHAPTER LEVEL

## Immediate Past President

The immediate past president is an important member of the CEC who can:

- Provide guidance to the president
- Offer continuity in chapter governance
- Serve as a special projects leader or chair of a designated task force (such as coordinate anniversary celebrations)
- Represent the chapter as an RVP, regional coordinator or on a national committee or task force
- Help identify future chapter leaders
- Function as a liaison with other associations and organizations, academia, etc.

## Chapter Treasurer

The chapter treasurer is the custodian of chapter funds and is responsible for chapter financial records and reports, including the maintenance of adequate records of all transactions involving chapter funds. Duties can include:

- Preparing the chapter's annual consolidated budget.
- Promptly depositing all receipts of the chapter in a bank account maintained in the name of the chapter.
- Making disbursements from the chapter account only on behalf of the chapter and supported by appropriate documentation. Dual signatures should be considered for large disbursements. Such thresholds should be established by the CEC.
- Establishing petty cash funds for special purposes when approved by a vote of the Chapter Executive Committee.
- Presenting all bills for chapter expenses to the Chapter Executive Committee and the Chapter Finance Committee chair.
- Upon approval by the responsible committee or by authorization of the president (according to chapter policy), paying the bills with a check drawn upon the chapter's account, except for disbursements made from the chapter's petty cash fund.
- Presenting, at least once a month, a financial report to the Chapter Executive Committee.
- Recording revenues for all chapter activities forwarded by the responsible committee and paying any expenses in connection with these functions. These collections and payments must be included in the reports of chapter receipts and disbursements.
- Preparing financial reports required by federal, state or local government jurisdictions in a timely manner, submitting these reports to the chapter president (or appointed representative) prior to transmitting them to the agency involved.
- Determining if the chapter is required to file an IRS Form 990 or Form 990EZ.

The chapter's books and records should be made available to the Chapter Executive Committee at any time and are subject to audit at least annually. Following chapter

policy, the auditor(s) may be an appointed committee or a person selected by the president or the Chapter Executive Committee, or a Certified Public Accounting firm.

The Chapter Executive Committee, often at the recommendation of the chapter treasurer, usually approves the selection of the bank in which the chapter will establish its checking account. Bank resolutions and appropriate signature cards are required to establish a bank account in the name of the chapter. Unless it is inconvenient to the treasurer, the same bank should normally be used from year-to-year. When choosing the depository, the Chapter Executive Committee must also decide the number of signatures required to withdraw funds from the checking account. Most chapters stipulate that two signatures are appropriate - usually the president and the treasurer.

The treasurer is responsible for ensuring that the signature authorization forms from the approved bank are signed by the designated chapter officials and given to the chapter secretary, who will, in turn, authenticate the chapter's approval of the signatures. The secretary usually arranges for the forms to be returned to the bank.

## Chapter Secretary

- The primary duty of the secretary is to maintain the minutes of the Chapter Executive Committee meetings, obtain approval of the minutes by the CEC, and ensure the minutes are published in the chapter newsletter and/or on the chapter website.
- The secretary can be both a recording and corresponding secretary for the chapter and, as such can serve as a communications liaison between the chapter, the Regional Vice President and the national Association.
- As custodian of the official chapter files, the secretary may also be the chapter historian.
- The secretary can also issue notices of meetings; after consultation with the president, prepare the agenda of matters to be covered; keep a record of attendance; and prepare the minutes.

## Education Director or Vice President

The education director or vice president normally serves as the education chair and coordinates quality educational events for the chapter members and other government financial management professionals. Some chapters rely solely on the education director to carry out these responsibilities, while others may use a committee chaired by the education director. A chapter may also utilize a brainstorming session with chapter members and non-members to discuss potential topics and speakers. This brainstorming session may also be held with the chapter's program director or vice president and/or committee. In general, the duties of the education chair or vice president, with the assistance of the education committee, include all aspects of developing and executing chapter seminars, training, workshops and conferences.

# SECTION V—LEADERSHIP AT THE CHAPTER LEVEL

## Programs Director or Vice President

The programs director or vice president, who may chair a programs committee, develops and initiates a comprehensive set of programs for general chapter membership through monthly meetings and special activities. In general, the duties include all aspects of planning monthly meeting activities and planning events to allow informal assembly at more social type events.

Note: Some chapters combine the titles and functions of the education and program directors or vice president for education and training events, and assign socialization activities to a different director or member. As noted above, the program director or vice president and/or committee may want to participate in a brainstorming session to develop topics and speakers for the chapter's programs and educational events.

## Membership Director or Chair

The membership director or chair is responsible for attracting new members to the chapter and retaining current members. The membership director is a key contributor to a successful chapter. Typical responsibilities may include:

- Distributing membership applications.
- Notifying delinquent and suspended members of their status and encourage renewal.
- Analyze monthly membership reports and rosters for trends, errors, corrections, etc.
- Publicize chapter and national membership competition awards.
- Prepare a monthly membership column for the chapter newsletter. Announce new members in the newsletter.
- Make new members feel they belong to the chapter's AGA family.
- Coordinate membership outreach activities with the education and program directors. These directors will have a list of potential new members who attend chapter activities.
- Attend the regional training workshop to exchange ideas with other membership directors in the region.

**Don't miss the "Chapter Resources" portion of the Members Only section of AGA's website. It is chocked FULL of good recruitment ideas, best practices, helpful tips, etc!**

## Awards Director or Chair

The chapter awards director serves a critical role in the success of the chapter's award program as well as AGA's National Awards Program.

### Chapter Awards Program

The awards director generally has the responsibility of:

- soliciting nominations for the chapter awards
- organizing the awards committee meeting to select the recipients

- obtaining award plaques or certificates
- planning the award ceremony (An award ceremony may be included as part of chapter education event, a chapter program event, or an evening social event).

The chapter awards program serves as a means to reward those in the government financial community who have contributed to the chapter or its goals. It is an opportunity for the recipients to be recognized by their peers. Award categories may include:

- **Government Financial Manager of the Year:** To recognize an outstanding government financial leader who has led extraordinary initiatives in his/her employment that made a significant contribution to the government financial community.
- **Chapter Ambassador Award:** To recognize a chapter member's outstanding efforts in publicizing AGA's mission, activities and benefits.
- **Professional Development Award:** To recognize an individual's efforts in providing continuing education opportunities for government financial managers and recognizes the importance of life long learning.
- **Community Service Award:** To recognize a member's personal commitment to in community service projects sponsored by AGA and other community activities.

## National Awards Program

The National AGA awards program depends on the hard work of these enthusiastic leaders to promote the awards opportunities and to develop and submit nominations. Chapters receive credits for submitting awards nominations. (See Chapter Recognition Program for more information.)

Each year, AGA presents a series of awards designed to recognize excellence in government accountability:

**National Awards Program**—The AGA National President presents these awards each year at the Professional Development Conference and Exposition. They include the Frank Greathouse Award, Achievement of the Year Award and many others.

**Federal, State, Local and Private Sector Leadership Awards**—The AGA National President presents these awards each year at the National Leadership Conference.

Chapter Awards Directors are encouraged to contact the National Office for either a listing of prior recipients or help completing the awards forms. Simply contact Rosanna Ortiz at [rortiz@agacgfm.org](mailto:rortiz@agacgfm.org) or 800.242.7211, ext. 131.

**Download Awards Nominations Forms!**

**Visit [www.agacgfm.org/membership/awards/](http://www.agacgfm.org/membership/awards/).**

# SECTION V—LEADERSHIP AT THE CHAPTER LEVEL

## CGFM Coordinator

CGFM coordinators play an important role in promoting the CGFM program. These coordinators work closely with membership, education, early career and program directors and committees to identify potential CGFM candidates. The CGFM coordinator is usually responsible for:

- Promoting the CGFM credential to members and non-members as well as to state and local government officials for recognition and incentives.
- Supporting individuals striving to maintain the CGFM.
- Answering questions raised by current and potential CGFMs.

The CGFM designation is considered an important recruitment and retention tool for the chapter, particularly for early career members and other potential members. The coordinators share ideas with their counterparts at the regional and national level to identify ways of promoting the program; communication takes place via the CGFM Listserve and the CGFM Outreach Handbook. Some chapters have recognized the importance of this position and have elevated it to an officer position on the CEC.

## Webmaster

The Internet has become a very important communication tool. Thus, it is incumbent of all chapters to develop and maintain a functional and attractive website to communicate with its members and potential new members. The chapter webmaster helps develop the website and works closely with the CEC and other committees and members to ensure that the information on the website is accurate and conveys the information in a way that encourages members and future members to return to the website often.

## Newsletter Editor

The newsletter editor has traditionally been the key communicator with chapter members regarding upcoming events and chapter activities. Successful editors also provide their readers with interesting articles written by members and other professionals, as well as reprint articles from other chapters' newsletters, National AGA publications and professional trade journals. Like their counterpart webmasters, editors should make their newsletters functional and attractive to the reader. Some say that being the newsletter editor is "a labor of love" because a quality newsletter takes time and effort, but is rewarding if prepared correctly.

## Community Service Director or Chair

The community services director develops and promotes community service projects, which allows members to contribute skills, manpower, or funds to community-based activities. The community service director must prepare an annual community service plan as part of the Chapter Recognition Program.

Probably the most important community service project for any chapter should be the Voluntary Income Tax Assistance (VITA) program. This program prepares income tax

refunds for low-income individuals who cannot afford to have their returns prepared by a professional. Your chapter may sponsor a site or work with another community program offering the program. One chapter works with the local university providing an AGA member to each location so an "expert" is on hand to work with the students who are preparing returns. In addition the chapter provides labels and envelopes so the prepared returns make it to the correct location.

Other community service projects could include:

- Public television fund-raisers
- Food drives
- Toys for Tots
- Walk-a-thons
- Blood Drives
- Assisting a family in need
- Working a soup kitchen
- Working with Special Olympics
- Highway Clean Up

As the community service director you will want to publicize your event and go out and find the volunteers.

## Chapter Committees

Chapters are encouraged to establish as many committees as may be required for efficient chapter operations and development of quality chapter programs. Depending on your chapter's size, you may have only 4-5 committees. One of your most important responsibilities is to use your volunteers effectively, add to the core of active volunteers and recognize your volunteers throughout the year for their efforts.

Shared leadership is a key ingredient to a successful chapter and it is important that chapter officers and chairs become actively involved in fulfilling their respective responsibilities.

Chapter bylaws detail the committees authorized by the chapter; their size; and the selection process for identifying committee chairs.

Although committee chairs may be selected through election or appointment, the chapter president usually makes individual committee assignments.

## Types of Committees

According to the bylaws, each chapter should have three standing committees:

- Chapter Executive Committee
- Nominating Committee
- Bylaws and Procedures Committee

In addition, other committee interests in a typical chapter might include:

- Audit Committee
- Awards Committee

# SECTION V—LEADERSHIP AT THE CHAPTER LEVEL

- Budget and Finance Committee
- CGFM Committee
- Communications Committee
- Community Service Committee
- Education Committee
- Membership Committee
- Meetings Committee
- Newsletter/Website Committee
- Programs Committee

## Selection and Roles of Committee Chairs

Your committee chairs are a key part of your leadership team, since committees will carry out most of your chapter's goals. While it is always recommended that you look for individuals who can be relied upon, don't forget to consider newly involved chapter members who display a great deal of enthusiasm and who have successfully taken on responsibility. This is an opportunity for future leaders to be identified. The following qualities are very important for a committee chair:

**Leadership.** Can this person organize and delegate workloads, give positive direction and set reasonable goals and objectives for the committee?

**Enthusiasm.** Does this person have the ability to motivate and generate enthusiasm in others for their committees' goals?

**Coach/Trainer.** Can this person provide support and training for committee members?

**Content Expertise.** Does this person have experience or knowledge in the topic area of this committee?

**Respect of Peers.** Is this person recognized as a leader, either professionally or as volunteer? Will others willingly following him/her?

The following few pages provide guidance and ideas on various committees, their scope and objectives.

## Standing Committees

### Chapter Executive Committee (CEC)

This committee consists of the chapter officers, the immediate past president and board of directors. Some chapters include committee chairs on the CEC, as well as vice presidents for specific functions to highlight the importance of the activity (e.g., certification, membership, education, community service, etc.).

- The chapter president serves as the presiding officer.
- The Chapter Executive Committee is responsible for all business of the chapter and may present recommendations to the chapter for action.
- The Chapter Executive Committee has primary authority over any chapter committee.

### Nominating Committee

Chaired by the president-elect, this standing committee is responsible for recommending names for National leaders and for recommending names for chapter elective offices in accordance with provisions stated in the chapter bylaws.

- To issue its report to the membership, the president should appoint a nominating committee as early in the year as possible.
- In preparing a slate of candidates, the committee should consider a cross-section of the chapter membership and ascertain, in advance, that those nominated would be willing to devote the necessary amount of time to chapter activities.
- Once determined, the committee should promptly report the nominations to the chapter secretary who is responsible for the preparation and tabulation of ballots.
- Committee members should also always be on the look out for potential chapter officers. Encourage new members to become involved with the chapter so they feel a part of the AGA family and are more likely to serve.

### Bylaws Committee

This standing committee ensures chapter bylaws are consistent with AGA National bylaws.

## Other Possible Committees

### Audit Committee

This committee is responsible for conducting periodic audits of the chapter's financial operations.

The results of these audits are to be contained in at least one written report, submitted annually to the Chapter Executive Committee within 30 days after the close of the fiscal year.

It is also a good idea to report to the membership on the chapter's finances annually as well.

A copy of the final report should be furnished to the National Office.

### Awards Committee

This committee is responsible for the chapter's awards program, as well as for submitting nominations for the National Awards Program.

The committee should familiarize itself with members' contributions to financial management at all levels of government so it can best identify those, which merit recognition.

The Chapter Executive Committee approves recommendations of the awards committee.

Also see the Awards Director information on page 31.

### Budget and Finance Committee

This committee administers the financial affairs of the chapter, including, but not limited to:

- developing budget recommendations for the fiscal year to the Chapter Executive Committee prior to its annual meeting

# SECTION V—LEADERSHIP AT THE CHAPTER LEVEL

- selecting and overseeing chapter investments
- administering the chapter's memorial funds
- selecting a depository for chapter funds
- developing a long-range strategic financial plan for the chapter executive committee's consideration

## CGFM Committee

This committee is responsible for developing, promoting, and supporting members and nonmembers in their earning the CGFM designation. In fulfilling its responsibilities, it should:

- Work with the education, early career, and membership committees to identify and support potential CGFM candidates.
- Offer to support study groups that will help CGFM candidates prepare for the exam.
- Work with members who will seek support from senior level government financial officials to gain recognition of the CGFM designation at the state and local government level for job placement and promotion.
- Coordinate with the National Office to support retention and renewal of CGFM holders.
- Place CGFM articles in the chapter newsletters celebrating chapter members' earning their CGFM, preparing for the exam, earning scholarships to pay for the exams and making presentations at AGA chapter meetings.

## Communications Committee

This committee is responsible for enhancing the image of the chapter and that of the governmental accountability professional. This includes promoting a better understanding of financial management functions and practices through recognized media channels and maintaining a timely liaison with other professional organizations to recognize the work of the chapter's committees.

- This committee develops policies and establishes standards governing all chapter publications for approval by the chapter's Executive Committee, including basic publication formats, costs and distribution media.
- The committee is responsible for publishing a monthly or bimonthly newsletter to keep chapter members informed on upcoming meetings and chapter activities.
- The committee also provides technical guidance to the newsletter editor to ensure adequate coverage of financial management subjects and the various government departments to include in the chapter publication. The newsletter competition at the national level, as well as the Chapter Recognition Program, provides further guidance in this area.
- This committee is responsible for conducting or overseeing member studies of financial management matters of general interest to the chapter members and publishing the results of these studies after approval by the Chapter Executive Committee.
- The committee cooperates with other research organizations and participates in combined endeavors to improve

financial management within the financial management profession.

- This committee is responsible for promoting the chapter activities program to the membership and preparing reports for the national association, showing credits earned in accordance with guidelines contained in the Chapter Recognition Program rules. (The Chapter Recognition Program Manual is available from National Office. Some chapter presidents assign the CRP reporting to the president-elect.)

## Community Service

This committee converts the chapter's desire to perform public service into tangible programs by:

- surveying the membership to determine areas of public service interest.
- researching existing projects and programs within the community, which could benefit from member expertise.
- investigating new areas of unmet need, which could become a chapter-sponsored public service project or program.
- recommending a program of public service for chapter approval; and
- coordinating and overseeing approved public service endeavors.

The National Office can provide chapters with a Community Services Handbook filled with many ideas for public service activities.

## Education Committee

This committee has the responsibility, within the chapter's geographical area, for developing, promoting and improving the understanding of public sector financial management at the federal, state, territorial and local government levels by:

- members of the association;
- non-AGA members from the public and private sectors who work in or are interested in financial management within the various levels of government;
- area financial management educators and students.
- In fulfilling its responsibilities, the committee should work closely with the Chapter Programs Committee, the National Office, educational institutions within their area and other professional organizations who have an educational mission.
- The committee may also arrange seminars on financial management and invite the participation of members of other professional organizations and local business representatives.
- To ensure the best possible attendance, seminars must receive advance publicity. Appropriate continuing professional education credits should be arranged.
- When group leaders are carefully selected and well briefed in their respective seminar subjects, the program will be a success.

# SECTION V—LEADERSHIP AT THE CHAPTER LEVEL

## Membership Committee

This committee is responsible for attracting members to the chapter and maintaining the active interest of current members. Through implementation of a well-conceived membership recruitment and retention plan, the committee:

- Analyzes the chapter's membership mix to determine areas in public sector financial management that are not represented and defines a recruitment process to attract professionals within these targeted groups to AGA.
  - This might include special initiatives targeted to recruiting and retaining early career members
- Reviews registration rosters from recent chapter events to identify nonmember participants and follow-up with these potential membership leads.
- Queries the membership on how to better respond to their needs and forwards the recommendations to the Chapter Executive Committee for use in developing new programs and services to members.
- Reviews and appropriately revises letters used for recruiting and welcoming new members, as well as reactivating suspended members.
- Maintains an up-to-date record of the names and addresses of all chapter members and makes current listings of all active chapter members available to chapter chairs responsible for mailing chapter materials and announcements to the membership.

## Meetings Committee

This committee is responsible for improving and maintaining good attendance at meetings.

So that meetings can be successful, optimum attendance is essential. The committee might arrange reminder calls to chapter members in advance of scheduled meetings and should call members who do not attend meetings regularly to ascertain the reason and encourage them to attend the next meeting.

The meetings committee may also be responsible for arranging chapter meetings, including meeting locations. In fulfilling this responsibility, the committee should, at a minimum:

- Canvass the membership as to the preferred meeting times and places.
- Work closely with the education and program committee(s) to ensure that their logistical needs are met.
- Make provisions for beverage service, menus and table arrangements for each meeting.
- Notify the management of the meeting place of the number of expected meeting attendees.
- Ensure that facilities and audio-visual equipment required by the speaker are available.
- Arrange the head table in the manner specified by the chapter president.

## Program Committee

This committee has the responsibility of developing and initiating a comprehensive program in the field of public sector financial management for the general chapter membership.

- Some chapters establish subcommittees to assist the program committee.
- The efforts of the program committee have a marked impact on the success of the chapter in achieving its goals.
- Ideally chaired by one of the chapter's more seasoned members, the committee should prepare an annual program plan for approval by the Chapter Executive Committee.
- In implementing the chapter programs, this committee is generally assigned responsibility for securing guest speakers/panel members for meetings, as well as obtaining the necessary program materials for technical meetings. More specifically, these tasks include, but are not limited to, the following:
  - Coordinating meetings, including arranging for speakers and required audio-visual needs.
  - Arranging adequate accommodations for speakers and guests, taking times and points of arrival/departure into consideration; securing biographical data from speakers and forwarding it to the publicity committee chair, chapter secretary and chapter editor in ample time for preparation of publicity releases and chapter meeting notices; and following the meeting, sending a letter of appreciation to each speaker.

## Chapter Bylaws

**AGA National would like to have a copy of each AGA chapter bylaws on file. This is particularly important if your chapter is included under AGA's tax exemption status.**

**Contact Rosanna Ortiz at [rortiz@agacgfm.org](mailto:rortiz@agacgfm.org) or 800.242.7211, ext. 212, for more details or for a copy of the bylaws template.**

## Developing Chapter Programs

While the national organization tends to focus on industry-wide issues and programs to support all chapters, the jurisdiction of a chapter is in its local area. Chapters deliver programs close to home to their members and on topics that reflect the needs and interests of their particular members. They can respond quickly to localized concerns or problems.

Chapter programs are among the most important factors leading to the success of a chapter. Interesting and dynamic programs and activities will attract new members, aid in membership retention and ensure the wide participation of the general membership.

# SECTION V—LEADERSHIP AT THE CHAPTER LEVEL

AGA bylaws offer the following AGA objectives:

- To instruct, train and inform government accountability professionals in the fields of accounting, auditing, budgeting and financial management. This continuing education process will provide for the professional development of government accountability professionals so that they may better serve the public.
- To encourage and provide educational events for the interchange of ideas among accountability professionals in government service and among government and non-governmental financial managers.
- To contribute to the advancement of financial management principles and standards and through educational events, promote appropriate utilization of financial management methods and techniques to improve management control and accountability to the public.
- To bring together accountability professionals in the government and the community for education and other constructive endeavors.
- To promote the observance of professional standards and ethics in the accomplishment of government accountability activities.
- To recognize the unique skills and knowledge required of professionals who specialize in government financial management by sponsoring a professional certification program.

As you can see, these objectives are far-reaching. In devising local plans, the Chapter Executive Committee should recognize the role the national Association committees play in establishing national objectives directed toward the improvement of financial management in government.

Each chapter, to the greatest extent possible, should plan to provide support for the national programs. However, the impetus for new programs need not necessarily stem from the national committees. Suggestions for projects to improve financial management or otherwise meet the Association's objectives often emanate from the chapters.

In implementing the objectives concerning professional development, the primary concern of the chapter leadership should be to determine the needs of the chapter membership. The Chapter Executive Committee (possibly through a program committee) should contact the Regional Vice President, obtain local ideas and plan chapter goals at the beginning of each year and share them with the membership. The goals may consist of a general program or a "shopping list" of projects. By bringing the stated goals to the active chapter members' attention, members are given the opportunity to suggest revisions and subsequently commit themselves to an agreed upon program. When specific projects are accepted, committee chairs should be appointed to undertake the various projects.

AGA is an organization whose members are involved in a wide variety of governmental operations. Thus, chapter meeting programs are most valuable when members can apply chapter programs to their respective field of endeavor or improve their technical knowledge. Ideally, the overall

program schedule should include a variety of technical projects, although public service programs should be included during the year.

Since AGA is a voluntary organization, it is important to stimulate interest in the chapter by developing meaningful projects, which will involve as many members as possible. One approach to encourage member involvement in the various chapters' committees is to send each member a list of projects/committees and ask the member to designate the committee(s) to which they prefer to contribute their talents. To further ensure continued interest in chapter activities, each project should be completed, where feasible, in a relatively short period of time. This, too, encourages individual member involvement.

## Chapter Meetings

Some chapters have discovered evening meetings work best; some have luncheon meetings and others have tried breakfast meetings. Some chapters are social, some are not. Some simply want good CPE.

A chapter meeting is a valuable means of bringing members together regularly. Beyond the benefits derived from the program or chapter activity, individual members are enriched by the new contacts and friendships, which come from sharing common interests, backgrounds and experiences, as well as learning from other member experiences in the government accountability community. Topics, speakers, and location are key to a successful chapter meeting, not to mention price. Many chapters have noted an increase in meeting attendance with a good CPE program.

In planning the year's chapter meetings calendar, care should be taken to tailor each to a specific purpose. If they are to be meaningful technical programs, they should not include chapter business matters requiring discussion. To do otherwise would create an agenda, which will become too full—particularly if the meeting also includes a lunch or dinner.

Other important factors in making meetings successful include:

- Planning programs well in advance.
- Adhering to a definite time schedule.
- Directing technical programs toward the majority of the membership.
- Being innovative and provoking thought.
- Involve the membership—in discussion, in program evaluations and recommendations.
- Making new members feel a welcome, integral part of the chapter. Assigning a CEC member to greet a new member at a chapter meeting or educational event will pay dividends for the chapter.
- Sharing member successes—promotions, awards and honors.
- Establishing a telephone reminder system wherein each member is called and encouraged to attend the upcoming meeting.

# SECTION V—LEADERSHIP AT THE CHAPTER LEVEL

- Meeting at the most convenient time and place. Chapter members should participate in the decision-making process, expressing their preference of meeting date, location and cost. Such involvement could directly impact retention - the greater the appeal, the more likely members will attend!

Use the chapter meeting to make the most of the time together. This is the time to communicate to the membership or potential membership. Those in attendance need to hear more than a chapter officer announcing the speaker. Do not assume everyone in attendance has read the chapter news or visited the National AGA website to know the latest. Take a few moments to share such items as chapter news, regional news, national AGA news, announce the next monthly program meeting with speaker and topic, announce the upcoming chapter educational event (the sooner the better), take the opportunity to introduce new members, announce any member achievements or news, announce the chapter community service events and solicit for volunteers.

## Chapter Communications

### Chapter Newsletters

Because it reaches the total membership every month, the chapter newsletter is a very important chapter program.

Effective newsletters are attractively designed and contain informative and educational materials that appeal to the general membership. It should be well-organized and succinctly present significant news about members and chapter activities. Periodic short articles of a technical nature can be a positive addition to the newsletter's content. Reviewing the requirements contained in the Chapter Recognition Program would be helpful here as well.

If newsletters are used to announce details of an upcoming meeting, it is imperative that they be mailed in time to reach each member well in advance of the meeting - timeliness is everything!

Newsletters frequently reflect the chapter's personality. A professionally produced newsletter underscores the quality of your chapter's program and its commitment to excellence. It is well worth the thought, production time and cost to publish (i.e. printed and/or electronic) an effective newsletter. As an image enhancer, it forms the initial impression new members have of the chapter as a whole and becomes the ongoing conduit between the chapter leadership and all members.

The National Office has developed a Chapter Communicators website and a Newsletter Editors Handbook to help develop a chapter newsletter.

## Don't Miss Out!

Sign up to access AGA's Chapter Communicators website. Visit [www.agacgfm.org/membership/communicators/Welcome.aspx?ReturnURL=default.aspx](http://www.agacgfm.org/membership/communicators/Welcome.aspx?ReturnURL=default.aspx) for:

- AGA logos
- Letterhead
- Brochures
- Namebadges
- And More!

## Chapter Corporate Identity Website

Personalized logos are available for each chapter on the Chapter Corporate Identity Website found at [www.agacgfm.org/membership/identity](http://www.agacgfm.org/membership/identity). Here you can also download letterhead, brochures, name badges, banners and a variety of other items your chapter will find useful. Everything that you can download on this site has been designed to conform to the AGA corporate identity. By working together, we can build the AGA brand. If you have questions about the site or need technical assistance, please contact Marie Force, director of communications, at [mforce@agacgfm.org](mailto:mforce@agacgfm.org).

## Chapter Websites

The chapter website, when maintained current, can provide an effective tool for communicating with chapter members. Depending on chapter resources, both financial and human, will determine what type of website you are able to handle. Some basic items to you may want to include on your website:

- chapter officers and directors (name, title, e-mail address, telephone number)
- chapter by-laws
- chapter newsletters
- monthly meeting announcement
- chapter educational event announcement with registration form
- link to national website
- (You may also want to allow members to register for chapter meetings and educational events through the website.)

The important thing is that the website contain current information about the chapter.

## Chapter Administration

As a chapter leader, it is essential that you have accurate and current information about the federal and state legal and tax issues facing your chapter. An awareness and understanding of these issues can prevent problems and costly errors.

Except where noted, for help with any of the following subjects, please contact AGA's Finance and Administration Department, Cristina Barbudo at [cbarbudo@agacgfm.org](mailto:cbarbudo@agacgfm.org) or 800.242.7211, ext. 101.

# SECTION V—LEADERSHIP AT THE CHAPTER LEVEL

## Chapter Bylaws

While your chapter's articles of incorporation were drafted in general terms to permit maximum flexibility, your bylaws are the legal guidelines that specify the rules of operation for your chapter. As a chapter leader, you have a fiduciary responsibility to ensure that your chapter operates in accordance with your bylaws, which are your governing documents. Additionally, you are responsible for ensuring that your chapter's bylaws have been drafted and remain (if changes are made) in compliance with both the AGA National Bylaws and your state laws.

The Prototype Chapter Bylaws, which are based on the AGA National Bylaws, provide both a sample and parameters for your chapter to follow in drafting or amending your bylaws. A copy of the Prototype Chapter Bylaws is available from Rosanna Ortiz at [rortiz@agacgfm.org](mailto:rortiz@agacgfm.org) or 800.242.7211, ext. 212.

Be sure each chapter member is aware of the chapter bylaws. It is a good idea to post them to the chapter website so anyone can have access to the document.

**A copy of the Model Chapter Bylaws is available on the web under the Members Only section of the website (click on "Member Resources") at [www.agacgfm.org](http://www.agacgfm.org).**

## 501(C)(3) Status

To be tax-exempt as an organization described in Internal Revenue Code Section 501(c)(3), an organization must be organized and operated exclusively for one or more of the purposes set forth in IRC Section 501(c)(3) and none of the earnings of the organization may inure to any private shareholder or individual. In addition, it may not attempt to influence legislation as a substantial part of its activities and it may not participate at all in campaign activity for or against political candidates.

As an exempt organization you may still need to file with the Internal Revenue Service. The chapter should be aware of the requirements for filing Form 990 or Form 990EZ, Return of Organization Exempt from Income Tax.

Organizations are required to file an annual information return as follows:

- Form 990 for organizations with annual receipts of more than \$100,000 or total assets worth more than \$250,000.
- Form 990 EZ for organizations with annual receipts of less than \$100,000 but at least \$25,000 and total assets less than \$250,000.

## Chapter Incorporation

If your chapter is not incorporated, incorporating is a relatively simple procedure that involves filing articles of incorporation or a certificate of incorporation with the secretary of state of your jurisdiction along with the applicable fee.

In addition to articles of incorporation, some states may require bylaws or other documents. Both the articles of incorporation and bylaws must comply with the most recent documents of the Institute. Your state also may require annual submissions of additional paperwork, such

as annual reports, minutes from your annual meetings, or payment of an annual fee in order to retain the incorporation status.

## Employer Identification Number

Your chapter must obtain a Federal Employer Identification Number (EIN) by filing IRS Form SS-4. Your EIN is the chapter's federal identification number that is used on most documentation. The chapter's EIN is not the same as that of AGA National.

Neither the EIN nor any other number is a "tax-exempt" number for federal income tax purposes. Your chapter is still responsible for the filing of all reports with governmental authorities, including the fees or taxes associated with these reports.

The National Organization does not include the income or expenses of its chapters on its annual information report, which is filed with the Internal Revenue Service.

## Insurance

Your chapter may want to consider securing liability of officers and indemnification insurance coverage. Contact your insurance agent to assess the sufficiency of your current coverage.

## Records Retention

Throughout each year, chapter officers often accumulate a considerable amount of correspondence and other material. Prior to the conclusion of the chapter year, each outgoing and incoming officer should jointly review the files, retaining materials of future or permanent value. Ideally, the Chapter Executive Committee should approve a retention schedule for financial and similar records of a semi-permanent nature. In general, the records that should be maintained on a long-term basis include:

- Membership records
- Chapter minutes
- Chapter policy book
- Chapter financial records
- List of chapter officers
- Chapter recognition reports
- Education program materials (see NASBA requirements for more details)
- Annual chapter history

## Building On Your Chapter Leadership Role

Please consider expanding your AGA service by serving on a National board or committee, as an RVP-Elect, Senior Vice President for Regional Services, etc. Contact Rosanna Ortiz at [rortiz@agacgfm.org](mailto:rortiz@agacgfm.org) to learn more.

# SECTION VI—LEADERSHIP TOOLS AND RESOURCES

## How Can We Help You?

The following pages are filled with ideas, suggestions, examples, contacts, and tools that will help AGA leaders get the job done. Remember, AGA stands prepared to help you in any way it can. Feel free to contact the National Office to let us know how we can help.

**AGA's Website** [www.agacgfm.org](http://www.agacgfm.org)

- AGA's website is a wealth of information, reminders, and details
- An entire section is dedicated to "best practices" in all function areas, including membership, education, etc.
- Don't forget to check out the Chapter Communicators Website. This comprehensive resource allows chapter newsletter editors to download all AGA logos and stationery templates. Take advantage of this great resource!
- Check out AGA's Academy for Government Accountability website—a one-stop resource for all CPE needs—on-line CPE, information about the CGFM Examinations and GFM courses, etc.

## Do You Have an Idea to Add to This List?

Please let us know if you have additions to this "resources" list. Leaders can easily post ideas to the Leadership Listserve at: [agaleadership@mh.databack.com](mailto:agaleadership@mh.databack.com).

## Bookmark AGA's Website and Visit Often!

[www.agacgfm.org](http://www.agacgfm.org)

## Members Only Section of AGA's Website

Use the speed and convenience of the Internet to access information and resources!

Access Chapter Recognition Program and Forms, order bulk membership and CGFM materials online, update your membership record, learn more about AGA's membership recruitment campaign, run labels for your chapter's upcoming event or recruitment drive, search for members, run your chapter's list of suspended members, access Standard Reports such as the Growth, Acquisition and Retention (GAR) Report and the Membership Analysis Report, run specialized reports and export data, submit information for TOPICS online and more!

To access this vital resource, visit AGA's website at [www.agacgfm.org](http://www.agacgfm.org), click on "Members Only" at the top, then log in. Use your AGA membership number to log in and your first initial/last name as your password.

## Manuals and Documents

The following are resources that, along with this manual, will help round out your leadership training.

- **AGA National Bylaws**
- **Long-Range Strategic Plan:** Get a broad view of where AGA is going over the next few years.

- **National President's Theme and Goals:** Learn what the current National President is focusing on during his/her term.
- **Current Operating Plan:** Discover how AGA will be implementing the long-range strategic plan for the current fiscal year.
- **Policies and Procedures Manual:** Chapter 14 of AGA's Policies and Procedures Manual is especially helpful to AGA leaders. Need to know which portion of your AGA-related trip you can get reimbursed for? Read the "Travel Guidelines," for more information.
- **Navigating the Maze:** This six-page reader provides the "big picture" that AGA operates in. It defines common industry terms and acronyms, describes the "big players," and provides a brief overview of AGA's history and structure.
- **AGA Leadership Handbook:** A "must have" for all AGA leaders, whether you are the National President or a chapter awards program chair.
- **The Journal of Government Financial Management and TOPICS:** Teach others what you know—submit an article for publication and get yourself published. Contact Marie Force in AGA's Communications Department at [mforce@agacgfm.org](mailto:mforce@agacgfm.org) or 401.682.2752 for a copy of an article or for details on article submission.
- **Past Regional Reports:** Understanding a region's history will help leaders build their region's future and will facilitate a smooth transition. Contact Rosanna Ortiz at [ortiz@agacgfm.org](mailto:ortiz@agacgfm.org) or 800.242.7211, ext. 212, for a copy of your region's past reports.

## Would You Like An E-Version of this Handbook?

Simply contact the AGA National Office at 800.242.7211. This manual resides on the "public" drive in the "Leadership Handbook" folder.

## Your Leaders are Resources!

### AGA's National President

- AGA Chapters are encouraged to invite the National President to speak at chapter and regional events
- If you are interested in hosting the National President, please ask them to complete the National Officer Speaking Request form
- Contact Rosanna Ortiz at [ortiz@agacgfm.org](mailto:ortiz@agacgfm.org) or 800.242.7211, ext. 131, for more information

### Senior Vice Presidents for Regional Services

- Under AGA's regional governance plan, these four individuals—one from Sections I, II, III and IV—provide essential leadership of the regional team and ensures that the National Executive Committee is kept abreast of accomplishments, challenges and updates

# SECTION VI—LEADERSHIP TOOLS AND RESOURCES

- Since they serve on the National Executive Committee, you can run an NEC roster from the Members Only portion of AGA's website at [www.agacgfm.org](http://www.agacgfm.org) or contact Rosanna Ortiz at [ortiz@agacgfm.org](mailto:ortiz@agacgfm.org) or 800.242.7211, ext. 131, for more information.

## The RVP and RVP-Elect

- These star performers are here to help chapter leaders succeed! Contact them if you have a question or problem.
- Your RVPs and RVPs-Elect will keep you updated on AGA priorities, remind you of important deadlines, distribute regional newsletters, help you develop and promote your educational events, and help you identify problems and develop solutions.
- Visit the Members Only section of AGA's website at [www.agacgfm.org](http://www.agacgfm.org) for a roster of RVPs and RVPs-Elects or contact Rosanna Ortiz at [ortiz@agacgfm.org](mailto:ortiz@agacgfm.org) or 800.242.7211, ext. 131, for more information.

## The RVP-Elect Designate

- Remember, six months out of the program year (from January to July), the regional team includes the RVPs-Elect Designate.
- RVPs teams should keep their RVP-Elect Designate in the loop and apprised of issues. More importantly—ask for their help and keep them involved.
- Think about asking them to monitor the AGA website and distribute regular updates. Or, think about asking them to help you locate a site for your Regional Chapter Officer Workshop.
- Use the Members Only section of AGA's website to run these rosters or contact Rosanna Ortiz at [ortiz@agacgfm.org](mailto:ortiz@agacgfm.org) or 800.242.7211, ext. 131, for more information.

## The Immediate Past RVP

- Don't lose touch with the individual who just left the RVP office. They are vital for a smooth transition and are a wealth of information.
- Feel free to contact them to invite them to your regional chapter officer workshop, ask for their opinions, find out how they did something in the past, or to get a feel for a certain chapter in your region.
- Use the Members Only section of AGA's website to run these rosters or contact Rosanna Ortiz at [ortiz@agacgfm.org](mailto:ortiz@agacgfm.org) or 800.242.7211, ext. 131, for more information.

## Regional Coordinators

- Chapters can contact our Regional Coordinators for ideas, suggestions, solutions and best practices, in the areas of Certification, Chapter Development and Assistance, Community Service, Early Careers, Education and Membership.
- Use the Members Only section of AGA's website to run these rosters or contact Rosanna Ortiz at [ortiz@agacgfm.org](mailto:ortiz@agacgfm.org) or 800.242.7211, ext. 131, for more information.

## National Coordinators

- These are your special contacts with the specific knowledge in the six program areas: Certification, Chapter Development and Assistance, Community Service, Early Careers, Education and Membership.
- The National Coordinators are listed on each of the Regional Coordinator rosters.
- Use the Members Only section of AGA's website to run these rosters or contact Rosanna Ortiz at [ortiz@agacgfm.org](mailto:ortiz@agacgfm.org) or 800.242.7211, ext. 131, for more information.

## AGA National Office Staff

- AGA's National Office staff is here to support AGA's national, regional and chapter leaders. Each issue of Topics includes a current list of National Office staff
- Or, visit the AGA website at [www.agacgfm.org/about/natloffice](http://www.agacgfm.org/about/natloffice) for the roster. Better yet, run the roster yourself and get familiar with the Members Only portion of AGA's website at [www.agacgfm.org](http://www.agacgfm.org).

## Contact AGA's Membership Department for:

- Recruitment and retention ideas such as a PowerPoint presentation (complete with speaker notes) on the benefits of AGA membership.
- Membership demographics and trends.
- Bulk membership materials (membership application and/or "Value of AGA Membership").
- AGA merchandise.
- Various membership-related reference documents such as the Chapter Recognition Program Manual, Community Service Guidebook, Membership Chair Handbook, Model Chapter Bylaws, New Chapter Organization Manual and the Affiliate Chapter Formation Manual.
- Contact Susan Fritzlen at [sfritzlen@agacgfm.org](mailto:sfritzlen@agacgfm.org) or 800.242.7211, ext. 210, for more information.

## Contact the Office of the Executive Director for:

- Information about AGA's Awards Programs. Help someone else get recognized for his or her contributions or nominate yourself! Rosanna Ortiz at [ortiz@agacgfm.org](mailto:ortiz@agacgfm.org) or 800.242.7211, ext. 131, is your contact.
- Scheduling a visit by the National President, contact Rosanna Ortiz at [ortiz@agacgfm.org](mailto:ortiz@agacgfm.org) or 800.242.7211, ext. 131.
- Governance-related resources (National Office Position Descriptions, minutes from past NEC and NBD meetings, National bylaws, etc.).
- Details about AGA's Certificate of Excellence in Accountability Reporting (CEAR) Program or Certificate of Excellence in SEA Reporting Program.
- Letters of reference attesting to your leadership in AGA, history of service, special accomplishments and contributions to the financial management profession.

# SECTION VI—LEADERSHIP TOOLS AND RESOURCES

- Contact Lisa Thatcher at [lthatcher@agacgfm.org](mailto:lthatcher@agacgfm.org) or 800.242.7211, ext. 212, for more information about the above three bullets.

## Contact the CGFM Department for:

- Chapter Coordinator's Outreach Book.
- Ideas for promoting the CGFM program and increasing the number of CGFMs in your chapter.
- More information about AGA's CGFM mentoring program.
- Information and support on obtaining state and local government recognition of the CGFM Program. Contact Katya Silver at [ksilver@agacgfm.org](mailto:ksilver@agacgfm.org).
- Bulk CGFM materials.
- A CGFM PowerPoint presentation (complete with speakers notes).
- Joining the CGFM Listserve.
- The GFM Course schedule and ideas about promoting the GFM courses.
- Contact Katya Silver at [ksilver@agacgfm.org](mailto:ksilver@agacgfm.org) or 800.242.7211, ext. 313, for more information.

## Contact the Office of Finance and Administration for:

- More information on the IRS group ruling.
- Chapter dues checks.
- Questions about your status as a nonprofit organization.
- AGA's financial statements.
- Contact Cristina Barbudo at [cbarbudo@agacgfm.org](mailto:cbarbudo@agacgfm.org) or 800.242.7211, ext. 101, for more details.

## Contact the Communications Department for:

- Press releases about a recent accomplishment.
- Help creating effective newsletters.
- AGA logos and stationery, newsletter and other templates.
- Contact Jenn Curtin at [jcurtin@agacgfm.org](mailto:jcurtin@agacgfm.org) or 864.246.6550, or Marie Force at [mforce@agacgfm.org](mailto:mforce@agacgfm.org) or 401.682.2752 for more information.

## Contact the Education Department for:

- All our available educational opportunities and questions about CPE policy.
- Latest information on AGA's Audio Conferences and CPE opportunities.
- Rutgers Scholarship Program.
- Contact Lin Latham at [llatham@agacgfm.org](mailto:llatham@agacgfm.org) or 800.242.7211, ext. 209, for more information.

## Contact the Conferences Department for:

- A schedule of upcoming conferences and questions about registration
- Contact Julie Cupp at [jcupp@agacgfm.org](mailto:jcupp@agacgfm.org) or 800.242.7211, ext. 207, for more information

## Other Resources

### Regional Websites

Several RVPs maintain regional websites chocked full of great information. Check them out:

- North Central Region  
[www.adpc.purdue.edu/NCREGAGA/NorthCentral.html](http://www.adpc.purdue.edu/NCREGAGA/NorthCentral.html)
- Mid-Atlantic Region  
[www.geocities.com/agamidatlantic](http://www.geocities.com/agamidatlantic)
- Texas-Oklahoma Region  
[www.geocities.com/theturk76017/agamain.html](http://www.geocities.com/theturk76017/agamain.html)

### AGA Today

This is a free bi-weekly e-mail newsletter that will keep you regularly plugged in to what's happening at AGA in and the government accountability community. Sign up at [www.agacgfm.org/publications/agatoday/](http://www.agacgfm.org/publications/agatoday/).

### Leadership Rosters

Hundreds of current and past AGA leaders who have done all this before! Potential speakers, good contacts and professionals who have been through the AGA leadership cycle before. Run these rosters by visiting the Members Only section of AGA's website at [www.agacgfm.org](http://www.agacgfm.org) or contact Rosanna Ortiz at [rortiz@agacgfm.org](mailto:rortiz@agacgfm.org).

### Growth Acquisition and Retention (GAR) Report

The GAR provides a monthly update on AGA's membership numbers by chapter. Use it to motivate your fellow chapter officers, develop your goals, and monitor your chapter's progress.

Run the latest report via the Members Only section of AGA's website at [www.agacgfm.org](http://www.agacgfm.org).

Also, the National Office regularly distributes these reports to AGA leaders. Direct any questions about the report to Susan Fritzlen at [sfritzlen@agacgfm.org](mailto:sfritzlen@agacgfm.org) or 800.242.7211, ext. 210.

### AGA Communicator's Listserve

AGA's Communications Department regularly contacts each chapter newsletter editor to keep them apprised of important AGA and government accountability community issues.

Sign up for this invaluable resource by going to [www.agacgfm.org/membership/communicators/Welcome.aspx?ReturnURL=default.aspx](http://www.agacgfm.org/membership/communicators/Welcome.aspx?ReturnURL=default.aspx).

### Leadership Listserve

Tell Others About It! Did you come up with a great way to promote the CGFM? Did you just complete a successful seminar with another organization that others might not know about? Then spread the word - put it on the Listserve! Or, do you have a question? What better way to find out what others have done about promoting the CGFM program, finding speakers, developing newsletters, building a scholarship program and recruiting new members than to ask?

## SECTION VI—LEADERSHIP TOOLS AND RESOURCES

Use the Leadership Listserve to reach:

- National Executive Committee Members; Regional Vice Presidents (RVPs); RVP-Elects; Immediate Past Regional Vice Presidents; Board, Committee and Task Force Chairs; Chapter Presidents; Other leaders (such as past board chairs who have requested to stay on the Listserve); National Office Staff.

To use the Listserve 24 hours a day, seven days a week, simply send a message to [agaleadership@mh.databack.com](mailto:agaleadership@mh.databack.com) and you will reach the above six groups with the click of a button. That's it! To subscribe or unsubscribe, contact the Leadership Listserve Administrator, Jenn Curtin, at [jcurtin@agacgfm.org](mailto:jcurtin@agacgfm.org) or 864.246.6550. We ask that you only use the listserv for AGA business.

**THANK YOU FOR YOUR AGA LEADERSHIP!**



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