

2017 Citizen Centric Report (CCR)

to Our Members



Welcome to AGA Albuquerque



Matt Bone, CGFM, CPA, CGMA
Chapter President

Hello Members, Prospective Members, and Guests!

Welcome to AGA Albuquerque, we are proud to serve the Albuquerque-area government accounting community. Our Chapter was once again recognized for our outstanding work over the past year in promoting the Certified Government Financial Manager (CGFM) program, commitment to community service, demonstrating accountability by producing a Citizen Centric Report (CCR) and supporting the AGA mission. Members of the Chapter Executive Committee (CEC) attended the national Professional Development Training (PDT) in Boston, Massachusetts in July 2017 to receive the following:

- * CGFM Award
- * Chapter Accountability and Transparency Award
- * Community Service Award
- * Platinum Award

The CEC met early in the program year for a planning session to ensure an educational program that meets the needs of our Chapter members. We were able to provide the same high-quality training our members have grown to expect, to include a variety of training formats, to include seminars, luncheons and webinars.

The CEC business meetings were open to anyone that wanted to participate and provide input on how we could better serve you.

The past program year was a success because we saw so many of you, professionals of the Albuquerque community, at our events!

Chapter Executive Committee (CEC)

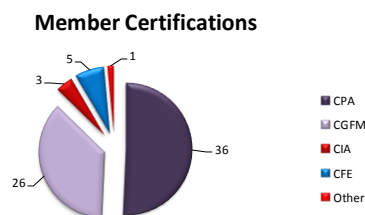
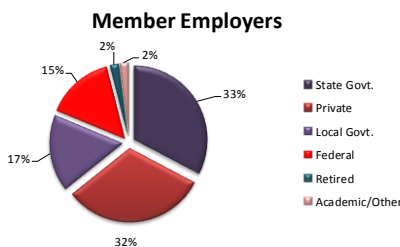
Service

Accountability

Integrity

Leadership

About Our Members



The program year ended in June with membership at 122. Our members represent every type of employer: state, city, county, federal, private, retired, and student. The majority of the membership is state government at 37%, not far behind is private at 26%. The private sector represents audit firms with a client base of the other membership types, and the chapter supports a student group of members.

More than 68% of our members maintain a certification in active status, and the majority of the members are both CPAs and CGFMs. For this reason, educational opportunities are a priority for the Albuquerque Chapter.

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Visit us at:

[AGA Albuquerque](#)



Performance Report



The Education Program Offered Over 50 Hours of CPE!



Amy Carter lunch-time speaker "Sub-Recipient Monitoring, Cooperative Audit Resolution and Allowable Costs"



Toy Drive for UNM Children's Hospital, pictured are Matt Bone, Javier Machuca, Heather Prudhomme, Marla Gorena and Donna Sandoval

The Albuquerque Chapter had a repeat performance with their exceptional education program this year. Last program year the Chapter offered more than 50 hours in continuing professional education (CPE), the 2016-2017 year offered 52 hours in CPE! The Education options covered a wide variety of topics and formats to appeal to all members.

- Four hour seminars: Succession Planning for Government Entities, GASB Updates & Financial Reporting, Data Analytics and Advanced Excel
- Luncheons: Uniform Guidance, Leadership: The Endless Journey, Severance Tax Bonds, and Time Management

- Four CGFM Test 2 Intensive review sessions offered 4 CPEs each
- Two AGA National Webinars

The CGFM Test 2 Intensive sessions were led by representatives from both the Albuquerque and New Mexico Chapters. The sessions were very successful with a class of 14 and 3 passing one or more of the CGFM exams. One member has passed all 3 exams and is now a CGFM.

The 2017 PDT offered 16 hours of CPE with a theme of "Transcending Barriers and Creating Opportunities". The menu of classes for the PDT provided technical and soft skill topics.

The Chapter also held a free networking reception in December and a CGFM celebration in March.



Community Service Events

- ◆ School supply drive for Rudolfo Anaya Elementary School
- ◆ Food Bank Drive in coordination with National AGA Challenge
- ◆ Toy drive for University of New Mexico (UNM) Children's Hospital
- ◆ Raffle for a donation to Wrinkle Writing/Blackout Theatre for Literacy

Accomplishments

- ◆ Platinum Chapter Recognition Award
- ◆ Chapter Education Award
- ◆ Chapter Community Service Award
- ◆ Chapter Accountability and Transparency Award
- ◆ State Proclamation declaring March as CGFM month
- ◆ One member obtained their CGFM Certification
- ◆ CCR Published for program year 2015-2016

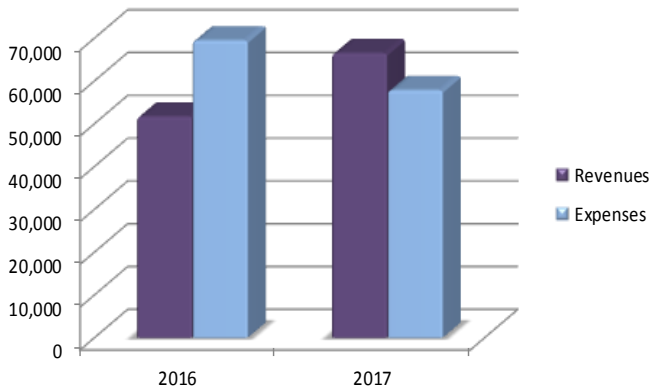
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Revenues and Expenses



2017 Professional Development Training (PDT) Financial Summary

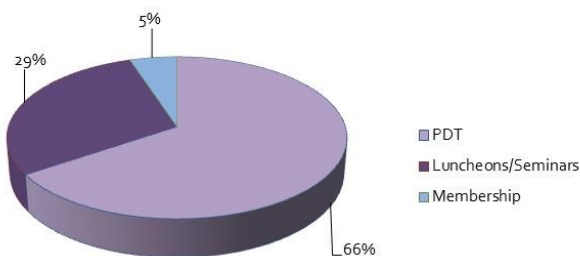


PDT Revenue to Expense Comparison 2016 and 2017

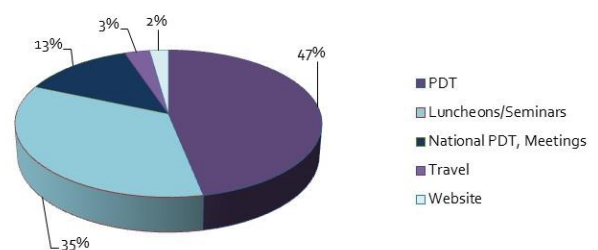
The 2017 PDT was a success, the speakers were experts in their field, the venue was fantastic, and attendance was higher than the 2016 PDT. State government agency budget constraints were still a factor in 2017, however we were able to attract more federal government attendees. In addition, the planning committee worked diligently to keep costs low and provide exceptional value in the PDT.

The Albuquerque and New Mexico Chapters provided a selection of classes to appeal to federal, state and local government. Ann Ebberts AGA CEO was the keynote speaker on the opening day. Speakers for break-out sessions included Sanjay Bhakta Deputy State Auditor, Sarita Nair, Chief of Staff at the Office of the State Auditor, Scott Bell from US Department of Treasury, Charmaine Cook Deputy State Treasurer, Ron Spilman State Controller and Cassandra Hayne SHARE (statewide accounting system) Director, Javier Almodovar FBI Special Agent and many of our sponsors from the audit firms in New Mexico.

2017 Revenue Summary



2017 Expense Summary



The major source of our expenses, as well as revenues, are educational events such as the annual PDT, seminars and luncheons that offer CPE. The Chapter Executive Committee (CEC) reviews and approves the monthly financial statements and bank reconciliations prepared by the Treasurer.

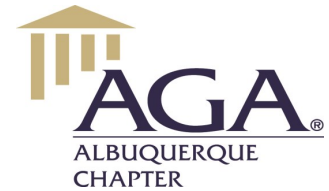


General Session at the 2017 PDT, speaker is State Auditor Tim Keller



Challenges Moving Forward

What's Next?



We submitted our Chapter Plans to the national office in April to reflect how we will concentrate our efforts in 2017-2018. A summary of the Plans are as follows:

CGFM Plan

- **CGFM Publicity** – Continue making announcements in our monthly newsletter identifying members that have recently obtained the CGFM certification.
- **CGFM Events-Speakers** - Promote CGFM certification at Chapter educational events. Make study guides and other materials available for check-out at events to those actively pursuing certification.
- **Partner with External Organization** - Meeting with the University Of New Mexico Anderson School Of Management promoting the CGFM certification. An agreement with the local Institute of Internal Auditors chapter in which both organizations have agreed to support one another in achieving our goals.

Membership Plan

- Review membership listing and contact members who did not renew their membership for the current fiscal year and encourage them to renew.
- Encourage existing members to bring new or potential members to our seminars, luncheons and the PDT.
- Provide incentives to non AGA members who attended at least one of our seminars or luncheons by offering a discount to another seminar or luncheon.



National AGA President Doug Glenn presents the Platinum Award to Krista Ganes-Chavez

Accountability Plan

- Publish the CCR on the Chapter's website
- Contact other government agencies and encourage them to produce a CCR
- Participate in the national AGA Accountability Workgroup monthly calls and collaborate with other chapters in promoting accountability.
- Participate as a CCR judge in the student challenge

Community Service Plan

The Chapter will sponsor at a minimum of 3 community service events, including School Supply Drive, Toy Drive for UNM Children's Hospital and Carrie Tingley Mud Volleyball.

The challenges we have in 2017-2018 are continuing the exceptional education program we established for the Chapter. Our experienced Education Chair left the committee and now we will need the experience of continuing Committee members to organize another unbeatable education program in content and value!

Chapter Executive Committee

President–Matt Bone, CGFM, CPA, CGMA

Immediate Past President and CGFM Chair—

Jeffrey Brown, CGFM, CPA

President Elect & Historian- Krista Ganes-Chavez

President-Elect (thru 3/2017)-Javier Machuca, CGFM, CPA

Treasurer-Victor Kraft, CPA

Secretary-Amy Carter, CPA

Education Chair-Marla Gorena, MBA

Membership-Chris Gregory, CPA

Awards Chair – Bryan Maestas, CGFM

Webmaster - Heather Prudhomme, CGFM, CGMA, CPA

Community Service Chair -Christopher Schmitz, CPA, CGMA

Accountability Chair-Donna Sandoval, CGFM

Student CEC Member-Tisha Hudetz