



Message from the President

Inside this Issue:	
Message from the President	1
Executive Board Information, Purpose Statement	2
2020-2021 Goals & Budget	3
Events & Reminders	4
Education Plan	5-6
How to Join AGA	7



Welcome back, everyone! It is hard to believe that we are heading into a new program year. Please check out our [Event Calendar](#) to see the great educational events we have coming up. We plan to host in-person events at ASU SkySong. Our events will conform with ASU's Coronavirus policies, [which can be read here](#). Physical distancing and limited capacity will be observed to promote safety. Currently, ASU strongly recommends that everyone wear a face covering while inside the

SkySong Building.

On September 8th, we have our first event of the year, [Communications](#), which will be produced by AGA National. This event will discuss the best practices and success stories in understanding and adapting to the evolving expectations of communications to build connectedness. On October 6th, we will have the AGA National's [Internal Controls](#) event.

We are always happy to hear from our Chapter members! We regularly check our event feedback, and we are constantly working to improve. If you are not already signed up, we encourage you to register for our Chapter's [Amazon Smile account](#). At no cost to you, 0.5% of every purchase you make on Amazon can go towards supporting the Phoenix Chapter!

If you are not a member of the AGA, or let your renewal lapse, and are interested in joining, just go to the [AGA website](#), and click join or renew. I would like to welcome our newest member, Latoya Pichon. We are happy to have you join! There are many membership benefits, such as free study materials for the CGFM exams as well as discounted CPE events. We are also always looking for interested individuals to consider joining our Chapter's Board. I can personally attest to it being an excellent professional opportunity!

The Chapter Board is also always available if you have any questions or concerns. We are excited to be able to return to limited in-person events. I am looking forward to the great learning opportunities that the new program year brings!

Sincerely,

Jordan Dale, CGFM
 President of the AGA Phoenix Chapter

AGA Phoenix Chapter Executive Board

Program Year 2021-2022

PURPOSE: Consists of chapter officers, past president, committee chairs, and other members appointed by the chapter president. Responsible for all chapter business and planning.

OFFICERS:

President	Jordan Dale, CGFM
Past President	Michelle Huckabay, CGFM, CPA
Vice President	Michael D. Baumert, CPA
Secretary	Joshua Jumper, CGFM
Treasurer	Marvin Mendieta, CGFM, CPA

ADDRESS: AGA Phoenix Chapter, PO Box 64911
Phoenix, AZ 85082-4911

EMAIL: contact@agaphoenix.org

Our Purpose

Mission Statement

AGA Phoenix Chapter serves Arizona professionals in the government financial management community by providing quality, low-cost continuing education, promoting professional development and interaction among members, and fostering a commitment to community involvement as well as a sense of responsibility for advancing government accountability.

Vision

AGA Phoenix Chapter actively creates an avenue for membership to share ideas with each other, to share knowledge and time with the community, and to promote the advancement of government standards and accountability within the profession.

We'd Love Your Input!

Please remember to send in any articles of interest, including any that you may have written on the subjects of management, accounting, or auditing. We welcome your comments and suggestions.

In addition, please send us any special announcements in relation to promotions, marriages, births, anniversaries, certifications achieved, or any other significant event for any of our chapter members. Any article submitted by the second week of the month will be included in the next month's newsletter.

Please email your news for forthcoming newsletters to:

contact@agaphoenix.org



Goals for 2021-2022 and Beyond

• Membership & Education:

- Provide 42 education credits throughout the program year. Audio conferences and live speakers.
- Reach out to new members within first month of membership.
- Reach out to all non-renewing members in May/June.
- Provide social/recruiting event in spring.
- Send out survey to members annually.
- Provide student members the option to attend three meetings for free.

• Accountability:

- Prepare chapter's Citizen Centric Report (CCR) by September 30, 2021 and post to website.
- Submit chapter's CCR to AGA's Certificate of Excellence Review Program.

• CGFM Goals:

- Continue reimbursements for chapter members who pass all three sessions of the CGFM tests. Reimbursement includes the cost of the three exams and application fee.
- Communicate and promote CGFM designation to Chapter members.
- Provide CGFM study guides to members on a first come first serve basis. Purchase two new sets this year.
- Seek State proclamation for March as CGFM month and provide recognition to CGFM members.

• Young Professionals:

- Reach out to college accounting clubs to present about jobs in governmental accounting and discuss what AGA is and how it can impact students' careers.
- Annually award up to two scholarships for students enrolled in an Accounting, Finance or Public Administration curriculum.

2021 & 2022 Budget and Spend through 7/31			
Budget Category	'21 Spent	'22 Budget	'22 Spent
Education	\$10,157.41	\$15,109	\$0
Membership	\$1,225	\$1,250	\$0
Travel	\$0	\$1,000	\$0
Board Expenses	\$0	\$100	\$0
Scholarship	\$1,500	\$1,500	\$0
CGFM	\$0	\$1,000	\$445
Com. Service	\$250	\$500	\$0
Early Career	\$0	\$250	\$0
Audit	\$150	\$150	\$0
Misc.	\$223	\$200	\$10
Total	\$13,505.41	\$21,059.00	\$455.00

PY 2021-2022 Committee Members:

Accountability

- Kimberly Prendergast, CGFM, CPA

CGFM/Professional Certification

- Gergana Kovatcheva, CGFM, CPA
- Jordan Dale, CGFM
- Kelly Alkhoury, CGFM

Communications Committee

- Jordan Dale, CGFM (Webmaster)
- Myrna Lopez, CGFM, CPA (Newsletter)

Community Service

- Paola A. Julio De Matson

Education

- Gerald E. Snyder, CGFM-Retired
- Keith J. Orr, CGFM
- Michael D. Baumert, CPA
- Robert Hardwood, CPA

Membership

- Mary B. Adelman, CGFM, CPA

NCC Representative

- Kelly Alkhoury, CGFM

Programs

- Daniela Kunova
- Michelle Huckabay, CGFM, CPA

Young Professionals

- Getzmany Aragon
- Joshua Jumper, CGFM

Events & Reminders


Upcoming Events:

- AGA National will be offering the following webinars:
 - **Internal Control & Fraud Prevention Training 2021 on September 21-22, 2021. Virtual.**
Description: 14 CPEs. The Internal Control & Fraud Prevention Training has a rich history of providing the "latest and greatest" developments in the field. Together we can find solutions and make a difference in our workplace and in the government finance profession.
For a full description and to find out more, click [here](#).

Reminders:

- **2021 CARES Act Spending Survey**
 - The United States Congress, through the passage of the CARES Act, provided more than \$3 trillion dollars to state and local governments and the private sector to support people and organizations impacted negatively by the COVID-19 pandemic. To find out more about the results of this survey, click [here](#).
- **AGA's Recruitment Challenge – Everyone Get One!**
 - AGA's target for the 2021-2022 membership year is to recruit 2,022 new members by April 30, 2022. For more information click [here](#).





CGFM Study Resources Available:
For AGA members interested in taking the CGFM please contact our CGFM chair at cgfm@agaphoenix.org for more information. Currently there is 3 complete set of materials available for check out.
Also, successful CGFM candidates, who are members, can apply for reimbursement of the application and examination costs.
Contact our CGFM chair for step by step instructions on the CGFM process: contact@agaphoenix.org.

Education & Meeting Plan - 2021-2022 Program Year

Date	Event Type/Times	Topic	CPE Credit	Registration Deadline	Location
9/8/2021	<i>Chapter Meeting (Audio)</i> Lunch: 10:30am-11:00am Meeting: 11:00am-12:50pm Board Meeting 1:00pm-2:00pm	Communications	2	9/3/2021	ASU SkySong 1 301 Ingenuity Conference Room 1475 N. Scottsdale Rd. Scottsdale, AZ 85257
10/6/2021	<i>Chapter Meeting (Audio)</i> Lunch: 10:30am-11:00am Meeting: 11:00am-12:50pm Board Meeting 1:00pm-2:00pm	Internal Control	2	10/1/2021	ASU SkySong 1 301 Ingenuity Conference Room 1475 N. Scottsdale Rd. Scottsdale, AZ 85257
11/3/2021	<i>Chapter Meeting (Live)</i> Lunch: 11:30am-12:00pm Meeting: 12:00pm-1:50pm Board Meeting 2:00pm-3:00pm	Live Speaker TBD	2	10/29/2021	ASU SkySong 1 301 Ingenuity Conference Room 1475 N. Scottsdale Rd. Scottsdale, AZ 85257
12/8/2021	<i>Chapter Meeting (Audio)</i> Lunch: 11:30am-12:00pm Meeting: 12:00pm-1:50pm Board Meeting 2:00pm-3:00pm	Performance	2	12/3/2021	ASU SkySong 1 301 Ingenuity Conference Room 1475 N. Scottsdale Rd. Scottsdale, AZ 85257
1/12/2022	<i>Chapter Meeting (Live)</i> Lunch: 11:30am-12:00pm Meeting: 12:00pm-1:50pm Board Meeting 2:00pm-3:00pm	Live Speaker TBD	2	1/7/2022	ASU SkySong 1 301 Ingenuity Conference Room 1475 N. Scottsdale Rd. Scottsdale, AZ 85257
TBD	<i>Special Event*</i> Class: 8:30am-12:00 pm	Professional Ethics for AZ CPAs	4	TBD	TBD
2/2/2022	<i>Chapter Meeting (Audio)</i> Lunch: 11:30am-12:00pm Meeting: 12:00pm-1:50pm Board Meeting 2:00pm-3:00pm	GASB Update	2	1/28/2022	ASU SkySong 1 301 Ingenuity Conference Room 1475 N. Scottsdale Rd. Scottsdale, AZ 85257
2/25/2022	<i>Chapter Meeting (Live)</i> Lunch: 11:30am-12:00pm Meeting: 12:00pm-3:30pm	Tax & Retirement Updates: ASRS, Nationwide Deferred Comp, IRS, AZDOR	4	2/20/2022	ASU SkySong 3 130 Synergy I 1365 N. Scottsdale Rd. Scottsdale, AZ 85257

Education & Meeting Plan - 2021-2022 Program Year					
Date	Event Type/Times	Topic	CPE Credit	Registration Deadline	Location
3/2/2022	Chapter Meeting (Audio) Lunch: 11:30am-12:00pm Meeting: 12:00pm-1:50pm Board Meeting 2:00pm-3:00pm	Improper Payments	2	2/25/2022	ASU SkySong 1 301 Ingenuity Conference Room 1475 N. Scottsdale Rd. Scottsdale, AZ 85257
3/23/2022	Chapter Meeting (Live) Lunch: 10:30am-11:00am Meeting: 11:00am-12:50pm Board Meeting 1:00pm-2:00pm	Live Speaker TBD	2	3/18/2022	ASU SkySong 1 301 Ingenuity Conference Room 1475 N. Scottsdale Rd. Scottsdale, AZ 85257
4/6/2022	Chapter Meeting (Audio) Lunch: 10:30am-11:00am Meeting: 11:00am-12:50pm Board Meeting 1:00pm-2:00pm	Ethics	2	4/1/2022	ASU SkySong 1 301 Ingenuity Conference Room 1475 N. Scottsdale Rd. Scottsdale, AZ 85257
4/20/2022	Chapter Meeting (Audio) Meeting: 11:00am-12:50pm	CARES Act	2	4/15/2022	ASU SkySong 1 301 Ingenuity Conference Room 1475 N. Scottsdale Rd. Scottsdale, AZ 85257
4/29/2022	Special Event*/ Professional Development Training 8:00am - 4:30pm	Professional Development Training	8	4/24/2022	Rio Salado
5/11/2022	Chapter Meeting (Audio) Lunch: 10:30am-11:00am Meeting: 11:00am-12:50pm Board Meeting 1:00pm-2:00pm	Fraud/Data Analytics	2	5/6/2022	ASU SkySong 1 301 Ingenuity Conference Room 1475 N. Scottsdale Rd. Scottsdale, AZ 85257
6/8/2022	Chapter Meeting (Audio) Lunch: 10:30am-11:00am Meeting: 11:00am-12:50pm Board Meeting 1:00pm-2:00pm	Leadership	2	6/3/2022	ASU SkySong 1 301 Ingenuity Conference Room 1475 N. Scottsdale Rd. Scottsdale, AZ 85257
		Total Program Year CPEs	40		

** These events are not monthly chapter meetings and will be at an additional cost. Details will be provided in future newsletters and/or on the Calendar of Events page on our website (<http://www.agaphoenix.org/events/>).*



Check out AGA's Free Toolkits & Guides:

- Sub-recipient vs. Contractor Checklist
- Blended and Braided Funding
- Leveraging Government Resources in Challenging Financial Times
- Risk Assessment Monitoring Toolkit
- Cooperative Audit Resolution and Oversight Initiative
- Fraud Prevention Toolkit
- Candidate Assessment Toolkit for Grant Managers
- How Federal, State and Non-Profit Collaboration Improved Efficiencies in Delinquent Debt Collection
- Citizen Centric Report: How To

<https://www.agacfm.org/Tools-Resources/Intergov/Home.aspx>

Membership Referral Program

Did you know that you can gain \$50 if you get two individuals who are not currently members to join our chapter? All you have to do is have them put your name down on the sponsor section of the membership form.

It is always nice to have new faces become members to our growing organization!

Board Members Wanted

If you are interested in volunteering for a committee and to be on the Board, please contact AGA at the following e-mail: contact@agaphoenix.org



Photo credit: squeaks2569 on Visualhunt.com

We Are Always Looking For People Interested In Joining Our Organization

NOTE: Excerpts and links below are from AGA's national website at www.agacfm.org.

What is AGA?

Briefly, AGA has been serving the government financial management profession for over 50 years. As a not-for-profit educational organization, AGA serves the professional interests of financial managers from the local, state and the federal governments, as well as public accounting firms, responsible for effectively using billions of dollars and other monetary resources everyday. Members are accountants, auditors, contract, financial and performance, budget analysts, chief financial officers, information systems managers, finance directors, inspectors

general, professors, students. Membership in AGA is like tapping into a reservoir of actual real-world knowledge and experience of government financial management experts.

Benefits of Joining

If you asked a member which of the benefits they value the most, they probably would say education and networking, which often occur at the same time and place. Here are some of our members' favorites:

- Continuing Professional Education and Networking Opportunities
- Keep Up-to-Date on Current Issues
- Keep Abreast of the Latest Technologies and Financial Systems
- Professional Guidance and Certification

How Can You Join?

Click the links below to access the Membership Application and to find out membership types and dues.



Click

<https://www.agacfm.org/Membership/Learn-About-AGA/Join-or-Renew.aspx>

to complete the online AGA Membership Application.

Did an AGA member inspire you to join? Don't forget to enter your AGA Sponsor's Name and Member ID on the application.