

# The Roanoke Ledger

AGA Roanoke Chapter, P.O. Box 116, Woodlawn, VA 24381  
[www.agacgfm.org/roanoke](http://www.agacgfm.org/roanoke)

## President's Message



By Curtis P. Joachim, CPA, MBA, CGFM, CGMA

Can't believe that another 30 days have gone by, they seem to go by so quickly these days, or is it just me? October was a busy month with our first in-person meeting in Roanoke, during which we presented our Chapter's 2018/2019 Citizen Centric Report (CCR). Since we didn't have a quorum of officers – we need at least three to conduct chapter business – we opted to just have the CCR training and scheduled a board meeting by conference call. This occurred on October 29<sup>th</sup>. We accomplished quite a bit during this meeting as you can tell from the attached minutes. Please be sure to support the many initiatives that are being worked on by various members of our board.

November's meeting will be via webinar and is scheduled for Thursday Nov 21st.

Ms. Andrea L. Brandon, Deputy Assistant Secretary, Budget, Finance, Grants, and Acquisition for the U.S. Department of Interior will be our speaker. Her topic will be, "Grants - A Way Forward through Risk Management and Innovation". Be sure to join us and earn 1 free CPE.

Looking ahead, we have the 2<sup>nd</sup> annual Commonwealth PDT in Williamsburg scheduled for December 12 and 13. This will be our chapter's event for December and is a joint collaboration between the Richmond, Roanoke, Shenandoah and VA Peninsula Chapters. If you haven't yet registered, be sure to do so.

Till next time remember, life is short, you only live once so make the best of every opportunity. If you don't like the circumstances, you're in, take steps to change it. The power is in your hands!

**GET THE MOST OUT OF  
YOUR AGA MEMBERSHIP  
GET INVOLVED!!!**

### CPE Credits AGA Progress

"We are in the process of becoming an official CPE provider sponsored by the National Association of State Boards of Accountancy."

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# The Roanoke Ledger

## Opportunities



This time of year has come upon us and you are invited to the 24th Annual AGA Commonwealth of Virginia PDT in Williamsburg, VA!!!!

DATE: December 12-13, 2019

LOCATION: Great Wolf Lodge

549 E Rochambeau Drive, Williamsburg, VA 23188

The agenda is packed with exciting speakers and you will earn 16 Continuing Professional Education Credits!!!

***Click Here for the Event Summary.** This includes the hotel information, pricing and other information.*

Register Below!!! (If you have not signed up for the Memberclicks system, click on the second link 1st prior to registering)

[Click Here to Register for AGA 24th Annual Commonwealth of VA PDT](#)

THEME: "The Changing Landscape of Accountability"

## CGFM Quick Facts

How do you become a CGFM?

To earn the CGFM, you must fill out an online application and meet the following requirements:

- [Ethics](#) — read and agree to abide by AGA's *Code of Ethics*
- [Education](#) — have a bachelor's degree in any subject area from an accredited U.S. college or university
- [Examinations](#) — pass three comprehensive CGFM examinations
- [Experience](#) — have at least two years of professional-level experience in government financial management

### NOVEMBER AGA MEETING

**Topic:** "Grants - A Way Forward through Risk Management and Innovation"

**When:** Thursday November 21, 2019

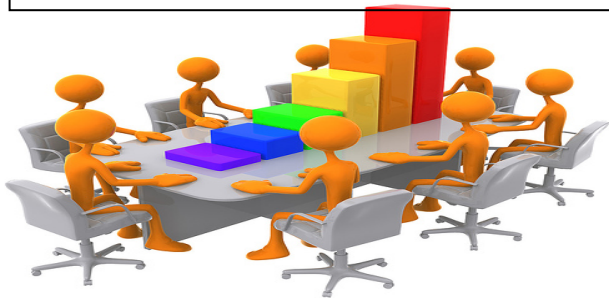
**Time:** 11:50am – 12:50pm Eastern Standard Time

**Place:** Your computer and/or your phone

**Presented by:** Andrea L. Brandon, Deputy Assistant Secretary, Budget, Finance, Grants, and Acquisition for the U.S. Department of Interior

**Cost:** Free to AGA Members; \$10 for non-members

**Share:** Feel free to share with co-workers and colleagues.



# The Roanoke Ledger

## Member Spotlight

A New Feature of the Roanoke Chapters Newsletter will be the introduction of a Chapter Member. Each month a new member will be given a list of questions and asked to answer six to enable readers to get to know him or her.

Please volunteer for this and let's get to know each other better.

### Stay Calm Under Construction



We'll be back next Month!

# The Roanoke Ledger

## AGA is Community Minded

### . Community Service Article

#### For November 2019 Newsletter

Every year the AGA Roanoke Chapter chooses a charity to support around the holiday season. This year we have selected the local chapter of the Ronald McDonald House Charities of Southwest Virginia. When a child is hospitalized, the Ronald McDonald House Charity provides families with a home-away-from-home and a support system to allow parents to remain closer to their sick child so that no parent has to worry about where they can afford to stay or where their next meal will come from. The Roanoke Ronald McDonald House is located three blocks from Carilion Children's Hospital and the Ronald McDonald Family Room is located on the 14<sup>th</sup> floor of the Carilion Clinic Children's Hospital. These accommodations provide snacks, meals, lodging, and a place for respite for parents or family members who do not live close to the hospital. For more information about the Ronald McDonald House Charities of Southwest Virginia, please visit their website at <https://www.rmhc-swva.org/>.

Our AGA Roanoke Chapter will be donating \$200.00 to the local chapter of Ronald McDonald House this holiday season. If any members are interested in donating additional funds, please feel free to reach out by December 12, 2019 to our Community Service Chair, Leah Kirby, at 540-387-1000 for more information on the donation process or about the charity itself. Any checks can be made out directly to "Ronald McDonald House Charity" or "RMHC" or to the AGA Roanoke Chapter with "RMHC" in the memo to designate the donation. All funds raised will be donated to the Ronald McDonald House Charities of Southwest Virginia on December 13, 2019.

### Annual Member Survey



A dashboard of the results of our 2019 AGA Roanoke Chapter Member survey can be found at this link.

<https://www.surveymonkey.com/stories/SM-C3TV33W7/>

Thank you to those who took the time to provide the feedback. We will certainly put some of the suggestions into action.

Regards,

Gillian Cadogan

Chair, Membership & Emerging Leaders

### Looking for more?

For AGA National news, visit: <http://www.agacgfm.org>

For AGA National events, visit: <https://www.agacgfm.org/Training-and-Events/Event-Calendar>

# The Roanoke Ledger

## Chapter Information

### 2018-2019 Chapter Board

Curtis Joachim, President  
 Vicki Delp, Treasurer  
 Melissa Cable, Secretary  
 Joshua Levenstein, Education/Meetings  
 Gillian Cadogan, Membership/Emerging Leaders  
 Leah Kirby, Community Service  
 Vicky Moore, Web-Master  
 Bradley Vaught, Accountability, Communications & News  
 Letter  
 Lal Harter, Nat'l Council of Chapters Representative

[Contact Information for the Chapter Board](#)

### New Members

No New members this month. Please continue to recruit.



### AGA Treasurer's Report

For the Month Ending August 31, 2019

**Beginning Balance: October 1, 2019** **\$ 3,447.36**

#### Receipts:

10-25-19 Workshop Registration 7.50

**Total Receipts \$ 7.50**

#### Disbursements:

No Disbursements

**Total Disbursements \$ -**

**Ending Balance: October 31, 2019** **\$ 3,454.86**

**Balance Reported November 12, 2019**

**Signature:**

Vicki B. Delp

**Treasurer**

**Balance check**

\$ 3,454.86

Per statement \$ 3,454.86

\$ -

## Find us online

AGA Roanoke Chapter website: <https://www.agacgfm.org/chapters/Roanoke/Home.aspx>

# The Roanoke Ledger

## Meeting Minutes

### Chapter Executive Committee (CEC) Meeting Minutes

**October 29, 2019 (via Conference Call)**

The meeting started at 12:05PM.

In attendance:

Curtis Joachim - President  
 Leah Kirby – Community Service Chair  
 Vicky Moore - Webmaster  
 Brad Vaught – Accountability & Communications Chair  
 Joshua Levenstein – Education/Meetings Chair  
 Gillian Cadogan – Membership & Emerging Leaders Chair

There was a quorum. In the absence of the Secretary, the minutes were prepared by Gillian Cadogan.

The meeting was chaired by Curtis Joachim, President who had previously emailed a copy of the agenda to CEC members. Curtis went through the agenda

Brad motioned to approve the minutes of the August 2019 minutes which was seconded by Leah; all approved; there were no dissensions.

#### **Treasurer's Report**

In the absence of the Treasurer – Vicki Delp, Curtis presented the Treasurer's report for September 2019. Per Curtis, the report is included in the October newsletter that was emailed to members on October 10<sup>th</sup>. There is an opening balance of \$3,565.36 on account as of 9/1/2019; we disbursed \$118 for mailbox rental; resulting in an ending balance at 9/30/2019 of \$3,447.36. Leah motioned to accept the Treasurer's report, it was seconded by Vicky Moore. The report was approved with no dissensions.

#### **Community Service Report – Leah**

Leah presented several fundraising opportunities for discussion and consideration. One included having a collection or donation for Ronald McDonald House. We can consider a fundraiser between Dec 10-15<sup>th</sup>. Last year, we donated items (vs cash) to the VA.

Another opportunity in Roanoke is to volunteer time to prepare tax returns for low income families. Training begins in the December/January timeframe for TAP (Total Action for Progress) in Roanoke. Anyone interested can contact any Henderson at TAP Roanoke. Mountain CAP VITA in Wytheville and New River Community Action in Christiansburg are other programs that offer similar volunteer opportunities like TAP. Leah will work on getting more information on those. Brad stated that he can help with Mountain CAP VITA in Wytheville as he lives in that area. Per Curtis, we should get that information to all members and we will put this information in the newsletter as well.

Leah or Teffany Henderson at TAP Roanoke. Mountain CAP VITA in Wytheville and New River Community Action in Christiansburg are other programs that offer similar volunteer opportunities like TAP. Leah will work on getting more information on those. Brad stated that he can help with Mountain CAP VITA in Wytheville as he lives in that area. Per Curtis, we should get that information to all members and we will put this information in the newsletter as well.

Per Curtis, we do not usually solicit members for donations, but we have \$400 in the budget towards charity donations. We can use \$200 of that to donate to Ronald McDonald House. Gillian suggested collecting the pull tabs on soda and other cans as a fundraising effort towards Ronald McDonald House; not for this December but as an ongoing fundraising effort.

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## Meeting Minutes, Cont.

Curtis noted that we only get chapter recognition points for chapter sponsored events; we do not get points for time individual members spend volunteering on their own, unless the chapter sponsors the occasion when they are going to volunteer.

### **Accountability & Communications Report - Brad**

The Citizen Centric Report (CCR) was completed and sent on time to AGA National. A question was asked whether it should go in the newsletter or go online. Per Curtis, we can include in the next newsletter; this topic was also discussed at the last meeting held on 9/21 (only Curtis and the Secretary, Melissa Cable attended; therefore, no quorum). They also discussed how to produce a CCR, so we can consider presenting the CCR as a training event in a webinar format. Vicky noted that our CCRs are also posted on our chapter webpage, and there is a direct link under "Our Chapter" from the main page.

Brad asked the board to send information/topics/events to him to include in the newsletter. He would like to add a word search, sudoku, or a "funny" to the newsletter. He has also started highlighting an AGA member in each newsletter as a "get to know you" to the wider membership.

### **Membership & Emerging Leaders - Gillian**

Gillian discussed the membership surveys on SurveyMonkey. Surveys are due by 10/31 and, to date, 9 of 42 members, or 21%, has responded. Curtis mentioned that the response rate is about similar to last year's. Gillian will close the survey on 11/1 and will report results in the November newsletter.

We reached out to 10 professors, accounting departments and accounting societies at 8 different colleges to host presentations on the AGA and to bring awareness to the CGFM certification. One college has declined, 2 have confirmed dates and we've left messages for the remaining professors/societies. We are currently scheduled to visit the VT Accounting Society on 12/4 and Roanoke College accounting class on 1/21/2020. We also contacted the same group of professors and accounting societies and sent the link to the AGA scholarship application for the 2020 National Leadership Training in Washington, D.C.

We have also reached out to 4 firms in the Roanoke area (KPMG, Cherry Bekaert, Brown & Edwards; and Robinson Farmer Cox) to similarly bring awareness of the AGA and CGFM certification to staff members.

Curtis had a call with the National AGA last week where they discussed encouraging professors to join the AGA. We can ask the professors if we can sign them up for a free membership in our chapter. One other opportunity we can sell to professors is to allow them to write/publish in the AGA journal; we can also suggest that professors give students extra credit for signing up with the AGA. Curtis mentioned that he does a lot of presentations with not much success. The AGA has revamped their presentation to present more information to students about how they can go about getting a job or career in government accounting. We will see how well that works.

Curtis stated that he will be presenting at Appalachian State on 11/20 behalf of National AGA. Reaching out to CPA firms to grow membership through these firms since there has not been much success with local governments. Brad mentioned he would reach out to one of his contacts from a local firm.

### **Meetings/Education – Josh**

We have engaged a speaker, Ms. Andrea Brandon from the DOI, for the 11/21 webinar. She typically speaks on grants but has not yet provided a topic, however, Josh will send out the invitation to members as soon as that detail comes in. Curtis mentioned that either the Ohio or Philadelphia chapter has asked about our webinar series and calendar which they saw on our AGA website. Webinars are open to any AGA member free of charge. From a chapter recognition points perspective, we will receive points for registering the chapter with the Virginia state board of accountancy (VBOA) and National Association of State Boards of Accountancy (NASBA). Curtis has asked that we research what needs to be done to allow our chapter to register with the VBOA and NASBA.

The December PDT training is on the calendar and will be held in December at Great Wolf Lodge in Williamsburg. TJG is a sponsor and some members of that firm will attend. Tickets to the park are free. There will be a tax webinar in January 2020; in February, an in-person meeting is planned. Curtis requested comments on a suggestion to do away with these meetings which are held at different locations in the area and instead, having these meetings via webinar/conference call in an effort to increase attendance. Members will still get CPE credits.



# The Roanoke Ledger

## Meeting Minutes, Cont.

The Spring PDT is tentatively scheduled for April 23<sup>rd</sup>. Brad has identified a speaker and Curtis working on obtaining other speakers. Board members were asked with helping to identify speakers. This date will be confirmed if there are no concerns by CEC members by end of week.

### Website- Vicky

To have a more personal appeal to the website, Vicky would like to solicit a paragraph from members on “Why I am a CGFM” and why they earned the certification. Vicky suggested that Brad can make a request in the newsletter so that members can respond to her. Vicky also suggested recognizing in the newsletter those employers who support the certification in a positive way, such as increased income, better job opportunities, etc. It was stated that Melissa also brought up this subject in the last meeting.

Privacy – Curtis mentioned that we get chapter recognition points for having a privacy statement on our website. Per Vicky, we do have one but it is very basic and links to the National privacy statements. Curtis suggested that this was sufficient and acceptable.

Brad was nominated for Who’s Who in Government Finance. The organization wants a link to any professional organizations to which he belongs so he will send Vicky an email with the organization’s requirements.

We have a link to “Chapter News” on our website so we can put a blurb there about Brad. Brad stated that “Who’s Who” will be doing a write up. We also post newsletters on our website under a “Chapter Newsletter” link. According to Vicky, whereas newsletters can remain on the website indefinitely, news items posted under Chapter News will expire after a certain number of days.

In those months where we have webinars and CEC meetings, Curtis suggested having a separate CEC meeting. We will see how it works for November and December. For November, we will have our regular webinar with a brief 10-minute CEC meeting.

Brad needs to pick someone to highlight in the November newsletter. Curtis suggested he select someone from our Chapter roster who isn’t a board member.

There being no further business, the meeting ended at 12:53PM.

