

# 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

Welcome to the 2018/2019 AGA Year. I am honored and excited to serve as Chapter President of the Roanoke Chapter for another 12 months. 2017/2018 was a banner year for us, during which our Chapter earned the Platinum chapter designation – the highest designation attainable as part of AGA's Chapter Recognition Program. The objective of the Chapter Recognition Program is to support, encourage and promote AGA's mission, and to provide flexible guidelines for a well-rounded

This year, I plan to continue to build on the successes that we've had with the focus of helping members sharpen their skills and advance their careers. My goal as chapter president is to continue to assist you to use the force multiplier (AGA) to achieve your professional goals. I aim to accomplish this by providing opportunities for gaining quality CPEs year-round, including personal development. We will provide opportunities for networking events, with a focus on recruitment and retention, attracting and retaining emerging leaders and students to ensure the continued viability of our Chapter, and to provide opportunities for our members to be of service to our communities.

So, the focus is on you, our members. Your development, your opportunities, furthering your careers, your dreams, your aspirations. I've thoroughly enjoyed working with the dedicated core of directors who made up the Chapter's Executive Council (CEC) last year. This year, we've not only brought back some of those board members, but we've also added two new ones, namely, Vincent Copenhaver, our Community Service Chair, and Amber Haga, our Communications Chair. I look forward to working with Vincent and Amber as well as the rest of our Board to execute the plans and accomplish the goals that we've established for the year.

As always, we can't do it without you. We will need you to show up. Show up for the monthly meetings, the webinars, the networking events and PDTs. We've already shown that it can be done. Now we've got to take it to the next level, grow our membership. We will do this by reaching out to the Finance professionals in the neighboring cities and towns. Demonstrate the value of AGA while at the same time making those values accessible to those who wish to take advantage of them. Together we can make it happen.

We will once again get your input. Tell us what's important to you. We will use this to adjust our chapter plans. We've put together a dynamic program for the coming year. It's going to be an exciting ride. Do join us!

## Inside This Issue

President's Message	1
2018 National PDT	2
Chapter Information	3

# The Roanoke Ledger

## 2018 National PDT

The 2018 National AGA Professional Development Training (PDT) was held July 22 - 25 in Orlando, Florida.



Curtis Joachim, Roanoke Chapter President, accepting the Platinum award from Jim Arnett, AGA President, for exceeding program goals for the 2017/2018 chapter year.



Over 2,000 government financial management professionals attended the 2018 PDT.

## Join us next time!

The 2019 National AGA PDT will be held July 21 - 24, 2019 in New Orleans, Louisiana.

To learn more, visit: <https://www.agacgfm.org/PDT>

# The Roanoke Ledger

## Chapter Information

### Upcoming Chapter Events

Thursday, October 25, 2018, 6:00pm  
Chapter Meeting at Golden Corral, Christiansburg, VA

Thursday, November 29, 2018, 12:00pm - 1:00pm  
Webinar (topic TBD)

Thursday, December 6, 2018 - Friday, December 7, 2018  
Commonwealth PDT, Williamsburg, VA

### Past Chapter Events

Thursday, September 27, 2018, 11:50am - 12:50pm  
"Data @ Risk" webinar



Monthly Chapter meetings are held the last Thursday of each month at various locations and times. Please check our website and newsletters and monitor e-mail for meeting locations and times.

### Meet our 2018-2019 Chapter Board

Curtis Joachim, President and Accountability Outreach

Vicki Delp, Treasurer

Bradley Vaught, Secretary

Leah Kirby, Education/Meetings

Lal Harter, Membership/Emerging Leaders

Vincent Copenhaver, Community Service

Vicky Moore, Web-Master

Amber Haga, Communications

### South Atlantic Region

Did you know AGA chapters are divided by Section and Region? In Section IV, the Roanoke Chapter is part of the South Atlantic region that includes the Charleston, SC, North Carolina Triangle, Old Dominion University, Richmond, Roanoke and Virginia Peninsula chapters.



Certified Government Financial Manager® (CGFM®) is a professional certification awarded by AGA, demonstrating competency in governmental accounting, auditing, financial reporting, internal controls and budgeting at the federal, state and local levels.

CGFM is a respected credential that recognizes the specialized knowledge and experience needed to be an effective government financial manager.

## 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>

# **Roanoke Chapter Association of Government Accountants (AGA)**

## **Meeting Minutes**

**September 5, 2018**

### **Attendance:**

Curtis Joachim, Bradley Vaught, Vicki Delp, Vincent Copenhaver, Amber Haga and Lal Harter

#### **1. Call to Order**

The meeting was called to order at 6:05PM.

#### **2. Introductions of Board Members**

Curtis Joachim – President

Vicki Delp – Treasurer

Bradley Vaught – Secretary

Vincent Copenhaver – Community Service Chair

Amber Haga – Communications Chair

Lal Harter – Membership/Young professionals and Students Chair

#### **3. 2018/2019 Meeting Schedule – Covered by Curtis Joachim, Chapter President**

September 27, 2018 6:00 pm, Webinar is scheduled, note that meeting speakers are still needed

October 25<sup>th</sup>, 2018 6:00pm, Meeting will be held in Blacksburg

November 22<sup>nd</sup>, 2018 6:00pm, Webinar is scheduled

December 6<sup>th</sup> and 7<sup>th</sup>, 2018 – Williamsburg, VA – Commonwealth PDT

To be held at the Great Wolf Lodge

Includes the Roanoke, Shenandoah, Richmond and Peninsula Chapters

A gift Basket will be provided by the Roanoke Chapter filled with Local Items

January 31, 2019 6:00pm, Webinar is scheduled

A speaker from the IRS will be obtained

February 28<sup>th</sup>, 2019 6:00pm, Meeting will be held in the Pulaski / Dublin Area

March 28<sup>th</sup>, 2019, 6:00pm, Webinar is scheduled

April 2019, PDT will be scheduled for the Roanoke Chapter

May 30<sup>th</sup>, 2019 6:00pm, Webinar is scheduled

June 2019, Award Banquet will be scheduled

Note: Above is the overall plan for the year. They will be schedule for the last Thursday of the Month. Speakers will be obtained, please provide input of suggested speakers. Possible speakers are CPAs, IRS, FBI and VA State Police.

A motion to accept the Meeting Schedule was made by Lal Harter and seconded by Vincent Copenhaver. The Motion passed.

**4. Chapter Plans – Covered by Curtis Joachim, Chapter President and each Committee Chair**

Roanoke Chapter achieved Platinum Status last year.

a) Community Service Plan – Covered by Vincent Copenhaver

Monthly Community Service Event

A possibility is “The Helping Hands”

Mr. Joachim suggested each member to volunteer in the name of AGA at a charity of their choice.

Mr. Joachim suggested a donation to a Soup Kitchen around Thanksgiving

Chapter Fundraiser will be held at the April PDT

A motion to accept the Community Service Plan was made by Lal Harter and seconded by Bradley Vaught. The motion passed.

b) Accountability Plan – Covered by Curtis Joachim

Be accountable to our citizens

Helping Local Communities and make Financial Reporting easier

CCR – Citizen Centric Report is due September 30, 2018. It is a summary of last year and road map for this year. Promoting Accountability of the local chapter to be submitted to AGA

Chapter Outreach plan – will encourage local government to publish a CCR. We will reach out to a local government.

. A CEAR Certificate could be obtained by government Agencies for excellence in financial reporting.

A motion to accept the Accountability Plan was made by Lal Harter and seconded by Vicki Delp. The motion passed.

c) Communication Plan – Covered by Amber Haga

Last year’s plan was utilized and updated.

We will hold regular meetings, webinars and in person meetings, also special awards and presentations, joint meeting with other organizations. A possibility is with the VGOFA.

A second way of communication is with the Monthly Newsletter. It will be published by the 10<sup>th</sup> of the month. Amber Haga will be the editor of the newsletter. Each Committee Chair should submit an article each month.

Meeting invites will go out by the first week of each month.

Another method of communication is the Chapter Website. Amber will get an understanding from the AGA and Vicki Moore. Ms. Moore was responsible for it last year.

The goal of the Communication Plan is to keep the members informed and the RVP.

A motion to accept the Communication Plan was made by Vicki Delp and seconded by Lal Harter. The motion passed.

d) Membership /Emerging Leaders Plan – Covered by Lal Harter

Last year’s plan was utilized and updated

Goal 1 – Membership with Emerging Leaders and Student Members

The name is now Young Professionals / Students

The goal is to get them involved and come to our meetings

Goal 2 – Retain current members and minimize attrition

Goal 3 – Make students a priority. We will meet with Student Organizations

Goal 4 – Support growing leaders by assisting on Committees

Goal 5 – Educational Opportunities – Charter sponsors CGFM certificates

A motion to accept the Membership Plan was made by Bradley Vaught and seconded by Lal Harter. The motion passed.

e) Education and Professional Development Plan – This plan will need to be reviewed

**5. Chapter Budget – Covered by Vicki Delp**

It was discussed to increase the budget in several categories over last year's budget

As of 07/27/2018 the balance in the account was \$2,883.42

The annual report was reviewed and balance of the account as of 06/30/2018 was \$3,003.42

Vicki Delp suggested getting a new PO Box in Woodlawn VA. The Blacksburg PO box would be closed. Curtis will reach out to Sam Montgomery to proceed with this.

A motion to accept the Chapter Budget was made by Vicki Delp and seconded by Vincent Copenhaver. The motion passed.

**6. Any additional items – Covered by Curtis Joachim**

Each Chair was asked if there was any additional items to discuss and all responded no.

**7. The meeting was adjourned at 7:40pm.**