

The Roanoke Ledger

AGA Roanoke Chapter, P.O. Box 116, Woodlawn, VA 24381
www.agacgfm.org/roanoke

President's Message



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

AGA's 2018 – 2019 year ran from July 1st, 2018 through June 30th 2019. What a year it was for our chapter. During the year, we continued efforts to expand the educational opportunities for our members, and to help maximize the value of AGA membership. Our task was to design an education program that would enable more members to participate in educational activities being held throughout the year. Our education strategy contained three components: online training, local live-in-person meetings, and collaboration with other Chapters.

Our webinars were held during the 12:00pm lunch hour during which our members had the opportunity to earn 1 CPE. We pulled speakers from all across the country. Topics included: IT – Data at Risk, Block Chain, and Employee Classification and Disaster preparedness.

In efforts to maintain the spirit of AGA which includes member interaction and collaboration, we held in-person meetings with the webinars occurring every other month. The meetings were at 6:00pm which allows for some travel time after work. Topics covered included the Virginia Legislature Budget Process, Citizen Centric Reporting, and Generational differences.

Our in-person meetings averaged about 3-4 members, with our webinars at about 15 – 20. Webinar attendance represented between 30 – 40 percent of our membership and with personnel participating from every corner of our territory. We appreciate those of you who attended the monthly meetings and webinars and would like to see greater numbers at our in-person meetings.

During the year we also visited and spoke to Accounting and Auditing classes at three colleges about careers in government accounting and the benefits of AGA membership. As a result, we recruited 3 college students and look forward to continuing those efforts in the coming year.

We held our end of year awards dinner at the Golden Coral in Christiansburg on July 19th during which we recognized the efforts of our board members who made our year a success. From July 20th through the 24th I along with two other members attended the AGA National Professional Training in New Orleans, where our chapter was recognized as a Platinum Chapter, the highest honor bestowed to AGA chapters. We were also recognized with the Education Award for chapters of our size for our outstanding education program. A big Kudos to all who participated in chapter events during the year and to all the members of the Board who worked tirelessly to make our chapter a success. I look forward to even bigger and better things in the 2019 – 2020 AGA year!

Inside This Issue

President's Message	1
Opportunities	2
National PDT	3-4
Chapter Information	5
Board Recognition	6
Treasurer Reports	6
Meeting Minutes	7

The Roanoke Ledger

Opportunities

It's Better to Beta!

Sign up for CGFM beta testing today!

- ★ Available September and October only
- ★ Free access to CGFM online study guides
- ★ Save up to \$75 on exams

25 YEARS
CGFM

register now

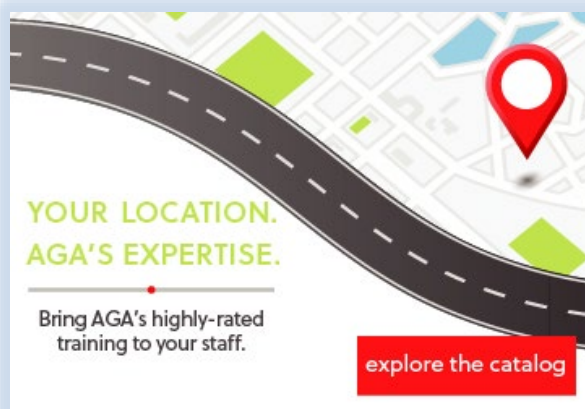
To ensure the CGFM examinations' content continues to reflect the current government financial management field, AGA periodically conducts a Job Analysis Study of the role of government financial manager. The latest Job Analysis Study was conducted in 2018 and, as a result, the CGFM examinations will follow the updated content outlines, starting on September 1, 2019.

From September 1 to October 31, CGFM examinations will be in the initial (beta) period. CGFM examinations taken during this beta period will be offered at a discounted rate. [Read more.](#)

Did you know AGA offers the convenient option of bringing training courses to your location?

[View the online catalog](#) to find courses based on category, field of study, length, or number of CPEs provided. CPEs earned in these courses can be used to fulfill CGFM CPE requirements.

To learn more, click [here](#).



Upcoming Events

Local: Thursday September 26, 2019, 11:50am – 12:50pm
Webinar (Topic to be determined)

National: Wednesday – Thursday, September 18-19, 2019
Washington, D.C. or virtual
[Internal Control and Fraud Prevention Training \(14 CPEs\)](#)

National: Webinars start September 4, 2019.
See the schedule [here](#).

Regional: Tuesday, October 22, 2019, 8am – 4:25pm
Four Points by Sheraton Richmond Airport, Richmond, VA
[October Fraud and Technology Seminar \(7 CPEs\)](#)

The Roanoke chapter holds monthly chapter meetings either by webinar or in-person. Please check our website, newsletters and monitor e-mail for meeting locations and times.

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

National PDT

- Congratulations to our Chapter for receiving the Platinum-Level Chapter Recognition Award!
- The Roanoke Chapter was also awarded AGA's 2019 Chapter Education Award for its educational program. We provided the opportunity for members to obtain 31 CPEs during the AGA year.

Mission:

POSSIBLE

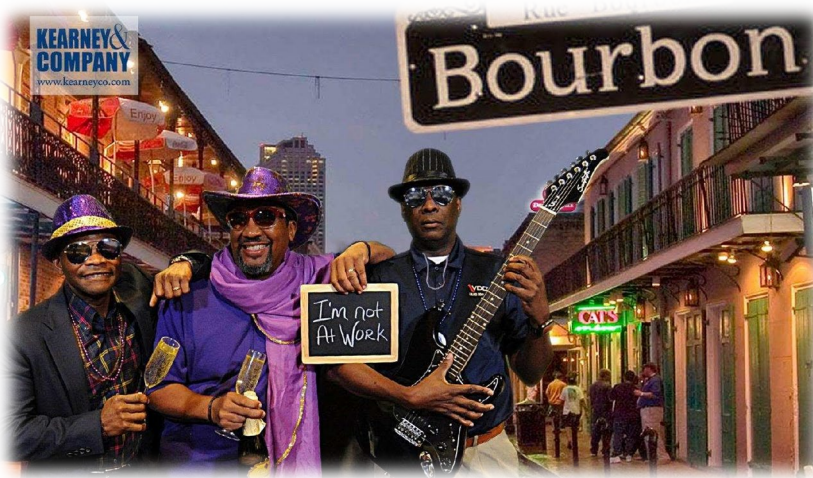
2019 Chapter Retention Program

- Our chapter was one of nine Chapters that met AGA's goal of 60% or higher for member retention.



The Roanoke Ledger

National PDT, Cont.



[Click here](#) to see more pictures from the 2019 National PDT.

Three reasons you should attend next year:

1. Earn up to 25 CPEs. Enhance your lifelong learning and gain the knowledge and understanding to better improve your job effectiveness.
2. Stay cutting-edge. Top-notch speakers from federal, state, local, academia and the private sector will share key findings and educational experiences to augment your knowledge and enhance your skills.
3. Network and connect. Collaborate and engage with industry experts and government financial management colleagues facing the same or similar issues and exchange ideas to bring back to your organization.



The Roanoke Ledger

Chapter Information

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



[Contact Information for the Chapter Board](#)



The Roanoke Chapter received a Certificate of Excellence for our 2017-2018 Citizen Centric Report! AGA applauded our commitment to good government and responsible fiscal action reflected in our report.

AGA Treasurer's Report For the Month Ending June 30, 2019			
Beginning Balance: June 1, 2019			\$ 4,756.34
Receipts:			
	No Deposits	\$	-
		Total Receipts	\$ -
Disbursements:			
	Check # 1117 Curtis Joachim (Reimbursement for PDT Registration)	\$	(875.00)
		Total Disbursements	\$ (875.00)
Ending Balance: June 30, 2019			\$ 3,881.34
Balance reported as of July 23, 2019			
Signature: <u>Vicki B. Delp</u>		Balance check	
	Treasurer		
		Per statement	\$ 3,881.34
			\$ -

For additional Treasurer Reports for the summer months, see page 7.

Find us online

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

The Roanoke Ledger

Board Recognition

Chapter Board Recognition

Special thanks to all our board members for serving the Roanoke Chapter for the 2018-2019 AGA year!
Here are photos from our end-of-year awards banquet recognizing those who were able to attend.



Volunteer of the Year Award



The Roanoke Chapter's very own Vicki Delp was recognized by AGA National President John Lynskey with AGA's Volunteer of the Year Award.

Vicki has served as Roanoke Chapter Treasurer from 2017-2019. Besides preparing the chapter's monthly and yearly Treasurer's reports and managing our finances, Vicki is always willing to step in and help. She secured the venue and hauled refreshments and décor for our yearly Spring PDTs, helped to organize meetings, and she volunteers to fill in anywhere she may be needed. She always has a positive attitude and giving spirit. Vicki is a wonderful asset to our chapter, and we are grateful for her contributions and continued dedication to AGA!

The Roanoke Ledger

Treasurer Reports

AGA Treasurer's Report For the Month Ending May 31, 2019

Beginning Balance: May 1, 2019 \$ 5,686.88

Receipts:

5/1/2019	PDT Registration	\$	85.00
5/1/2019	Deposit (PDT Charity Raffle)	\$	100.00
Total Receipts			\$ 185.00

Disbursements:

4/25/2019	CK#1113	Vincent Copenhaver (PDT Reimbursement)	\$	(125.00)
5/1/2019	CK#1114	Seasons & Occasion (PDT Catering)	\$	(639.54)
5/1/2019	CK#1115	Roanoke Higher Ed. Ctr. (PDT Room Rent)	\$	(251.00)
5/30/2019	CK#1116	Helping Hands (PDT Charity Donation)	\$	(100.00)
Total Disbursements			\$	(1,115.54)

Ending Balance: May 31, 2019 \$ 4,756.34

Signature: Vicki B. Delp

Balance Check: \$ 4,756.34
Per Statement: \$ 4,856.34
CK#1116 (Not Cleared) \$ (100.00)

AGA Treasurer's Report For the Month Ending April 30, 2019

Beginning Balance: April 1, 2019 \$ 3,305.85

Receipts:

04/04 to 04/30/19	PDT Registrations	\$	1,505.47
4/24/2019	PDT Sponsorship	\$	435.00
4/12/2019	PDT Sponsorship	\$	339.55
4/26/2019	Chapter Dues	\$	165.00
			\$ 2,445.02

Disbursements:

4/23/2019 (Debit Card)	Wal-Mart (PDT Refreshments)	\$	49.25
4/24/2019 (Debit Card)	Dollar Tree (PDT Serving Supplies)	\$	14.74
4/25/2019 - CK # 1113	Vincent Copenhaver (Reimbursement for Raffle Items)	\$	125.00
			\$ 188.99

Ending Balance: April 30, 2019 \$ 5,561.88

Balance reported as of 05/10/19

Signature: Vicki B. Delp
Treasurer

Balance check \$ 5,561.88
Per statement \$ 5,686.88
Check # 1113 (Not Cleared) \$ (125.00)

The Roanoke Ledger

Meeting Minutes

Roanoke Chapter Association of Government Accountants (AGA)

Meeting Minutes

May 30, 2019

Attendance: Curtis Joachim, Leah Kirby, Louise Burnette, Bradley Vaught, Joshua Levenstein, Vincent Copenhaver, Sarah Beamer, Katie, Kevin Berry, Jeet Heda, Angie Hill, Judy Gallimore and Linda Wood

1. Call to Order – by Curtis Joachim, Chapter President

- The meeting was called to order at 11:50AM.

2. Minutes – by Curtis Joachim, Chapter President

- No meeting minutes for April due to the PDT in Roanoke, VA

3. Treasurer Report – by Curtis Joachim, Chapter President

- No report was given
- It was noted that the PDT was a success for the Roanoke Chapter

4. Community Service – by Curtis Joachim, Chapter President

- The raffle at the PDT this April was for Helping Hands. The PDT raised \$100.00 and the National AGA will match \$100.00. Therefore, \$200.00 will be presented to the Helping Hands of Franklin County.

5. Membership / Emerging Leader – by Curtis Joachim, Chapter President

- Visits were made to both Hollins College and Roanoke College. We were able to recruit 3 students to join AGA as student members and one attended the PDT in April.

6. Meetings / Upcoming - by Curtis Joachim, Chapter President

- The next meeting will be an Awards / Dinner meeting at a location in Blacksburg. This will take place on June 28th. The location will be announced soon.
- The National PDT is in New Orleans on July 19th through 24th.

7. New Board Members - by Curtis Joachim, Chapter President

- Currently we continue to have open board positions needed for next year

8. Lead - by Curtis Joachim, Chapter President

- May 2nd through 4th in Hanover, MD
- This year's attendance was Curtis and Lal.

9. CPE – Mr. John Johnson, Audit Director, DHS OIG

- The presentation was on Disaster Preparedness for the Financial Manager.

10. The meeting was adjourned at 12:52PM.