



Message from the President

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Hello everyone! I am glad to be back in the full swing of the program year. Please check out our [Event Calendar](#) to see the great educational events we have coming up. Based on the current COVID data and AGA National’s policies, our events will be **online only** until further notice.

On September 8th, we had our first event of the year, Communications, which will be produced by AGA National. On October 6th, we will have the

AGA National’s [Internal Controls](#) event. On November 3rd, we will have our locally produced event called [Effective Interview and Communication Techniques](#). AGA Phoenix member Charles Hester will be the presenter.

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 actively monitoring COVID data and will update members of any changes on whether events are in-person, online only, or hybrid. I am looking forward to the great learning opportunities that this 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 8/31			
Budget Category	'21 Spent	'22 Budget	'22 Spent
Education	\$10,157.41	\$15,109	\$2,529.00
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	\$22
Total	\$13,505.41	\$21,059.00	\$2,996.00

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:
 - **Technology and Transformation Summit on November 18, 2021. Virtual.**
Description: 8 CPEs. This event will bring more than 1,600 government leaders and industry experts together to discuss how IT innovation, workforce as an enabler, security and cloud are transforming mission delivery. Digital transformation is now, more than ever, a major focus for federal, state and local governments in performing their missions more efficiently and effectively. 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 cgm@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	Chapter Meeting (Audio) Meeting: 11:00am-12:50pm Board Meeting 1:00pm-2:00pm	Communications	2	9/3/2021	Virtual
10/6/2021	Chapter Meeting (Audio) Meeting: 11:00am-12:50pm Board Meeting 1:00pm-2:00pm	Internal Control	2	10/1/2021	Virtual
11/3/2021	Chapter Meeting (Live) Meeting: 12:00pm-1:50pm Board Meeting 2:00pm-3:00pm	Effective Interview and Communication Techniques	2	10/29/2021	Virtual
12/15/2021	Chapter Meeting (Audio) Meeting: 12:00pm-1:50pm Board Meeting 2:00pm-3:00pm	Performance Management	2	12/3/2021	Virtual
1/12/2022	Chapter Meeting (Live) 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
1/28/2022	Special Event* Class: 8:30am-12:00 pm	Professional Ethics for AZ CPAs	4	1/23/2022	Virtual
2/2/2022	Chapter Meeting (Audio) Meeting: 12:00pm-1:50pm Board Meeting 2:00pm-3:00pm	GASB Update	2	1/28/2022	Virtual
2/25/2022	Chapter Meeting (Live) 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) Meeting: 12:00pm-1:50pm Board Meeting 2:00pm-3:00pm	Improper Payments	2	2/25/2022	Virtual
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) Meeting: 11:00am-12:50pm Board Meeting 1:00pm-2:00pm	Ethics	2	4/1/2022	Virtual
4/20/2022	Chapter Meeting (Audio) Meeting: 11:00am-12:50pm	CARES Act	2	4/15/2022	Virtual
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) Meeting: 11:00am-12:50pm Board Meeting 1:00pm-2:00pm	Fraud/Data Analytics	2	5/6/2022	Virtual
6/8/2022	Chapter Meeting (Audio) Meeting: 11:00am-12:50pm Board Meeting 1:00pm-2:00pm	Leadership	2	6/3/2022	Virtual
		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/>).

Announcements - Job Postings

Performance Audit Supervisor— AZ Department of Transportation **(\$65,000.00-\$85,000.00, Anticipated Salary \$78,705.15)**

Our Performance Audit Supervisor position is primarily responsible for supervising a team of staff performing audits; provides leadership and strategic direction to the unit, providing day to day direction for audits, participating in hiring decisions, maintaining and improving the quality of audits, clearly communicating audit results and maintaining effective relationships with management throughout ADOT.

Experience and Education:

The ideal candidate will have a Bachelor's Degree in Accounting, Finance, Business Administration or other field meeting the KSAs. Minimum of two years of professional, complex, and diverse audit experience, minimum of three years supervisory experience, and CPA, CIA or other professional designation is preferred

Refer to the State of Arizona's website for additional details.

Apply online at: <https://www.azstatejobs.gov/jobs/performance-audit-supervisor-phoenix-arizona-united-states>

Contracting and Procurement Manager— Maricopa Association of Governments **(\$56,273.00 – \$97,716.00)**

The individual will be responsible for a full range of procurement functions including solicitation, analysis, evaluation, and negotiation of contracts. The individual will also be responsible for researching, interpreting, and implementing requirements associated with Code of Federal Regulations (CFRs) that govern Metropolitan Transportation Planning and Programming.

Experience and Education:

Bachelor's Degree in Law, Business, Public Administration, or related field is required. Minimum of three years progressively responsible, professional-level, related experience. Must be able to set priorities, analyze problems, and formulate clear, effective solutions.

Refer to the Maricopa Association of Government's website for additional details.

Apply online at: <https://www.azmag.gov/Jobs-RFPs-RFQs/Jobs-at-MAG?category=Fiscal+Services>

Would you like to post your organization's job postings on our website?

Please email AGA Phoenix Webmaster, contact@agaphoenix.org





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.agacgfm.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

We Are Always Looking For People Interested In Joining Our Organization

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