

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

Certainly, one for the history books. Our Spring 2020 online PDT was a resounding success! If you missed it, it was quite an event. Attendance exceeded our expectations. There were 75 attendees representing all four chapters in Virginia and one member from the Raleigh, North Carolina Chapter. Attendees also included 9 individuals who were not AGA members, and we're looking forward to welcoming them as members down the road. We had five excellent speakers on topics that were relevant to our profession and times, like *"best practices for working from home, National and Virginia economic Updates in addition to a 2020 GASB update"*. During the event we raised \$385 which will be matched by AGA to support the charitable organization "Ride-A-Rescue". A big Kudos to all who attended and thanks to all the

Board who worked tirelessly to make the PDT a success.

A big thank you to the sponsors of the event, Brown & Edwards, CPAs; Wilbanks Smith & Thomas, LLC and The Joachim Group CPAs for sponsoring the event. We are looking forward to continuing to work with our sponsors to help further AGA's mission of government accountability. The IT hick-ups were few and manageable and we have noted *"lessons learned"* for future online events. So overall, it was a success. If you missed it, I hope you can make the next one.

Looking ahead, we usually have our last chapter event for the AGA year in May which is our traditional awards banquet to recognize all those who have worked hard to make our AGA year a success. However, at this point it is uncertain what form the event will take given COVID-19 restrictions. Stay tuned for details. We will then take the summer off, pausing for the National PDT in July 20-22, which will also be held online, and reconvene our board in August to hit the ground running in September for our 2020/2021 program year.

I'll wrap up with a call to service. Thanks to those who have responded to my calls requesting your assistance to serve on our Board in one capacity or the other. There's still time, and we still have some vacant positions. Serving in a leadership capacity in AGA is a great way to separate yourself from the crowd in your profession, develop or enhance your leadership skills and build relationships that lasts a lifetime. It is also a way to "give back" to the profession and help mentor the next generation of financial managers.

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Opportunities



AGA is excited to announce that PDT 2020 will be a virtual event, to be held July 20–22.

Three Reasons You Should Attend:

1. Earn up to 21 CPEs and/or 20 PDUs. Enhance your lifelong learning and gain knowledge to improve job effectiveness.
2. Stay cutting-edge. Top-notch speakers from federal, state and local government, academia, and the private sector will share key findings and offer educational experiences that augment your knowledge and enhance your skills.
3. Network and connect. Through the online platform collaborate and engage with industry experts and government financial management colleagues who face the same or similar issues and exchange ideas to bring back to your organization.

Take a look at our new 3-day agenda: [PDT 2020 Agenda](#)



2019/2020 Awards/Recognition



When: To be Determined – due to Covid 19
Time: To be Determined
Place: To be Determined
Cost: Free with membership

CGFM Quick Facts

• Submit a Work Verification Form

Fill out a [Work Verification Form](#) after you have at least two years of professional-level experience in the U.S. government financial management field. Upload the signed form in [My Path to CGFM](#). You do not have to submit this form before taking the examinations, but it must be received and approved by AGA before the designation can be granted.

See [CGFM Experience Requirement](#) for more information.



Spring PDT Recap

Thank You To Our Sponsors



- ✓ Attendees: 75
- ✓ AGA Members: 67
- ✓ Non-member : 8
- ✓ CPEs Provided: 5
- ✓ Funds raised/donated to charity: \$770

AGA is Community Minded

Ride-A-Rescue

During our Spring Online PDT, we held a Raffles to benefit Ride-A-Rescue of Montgomery County, a 501(c)(3) non-profit agency that takes in, cares for, and rehabilitates abused, neglected, and surrendered horses.

We received \$385 in donations from members & attendees which was matched by AGA National, for a total donation of \$770 to Ride-A-Rescue! Below is an excerpt from the email I received from Ride-A-Rescue:

"This is so amazing, and we are so very appreciative of this wonderful support that you all have given us!! This will be so helpful for the horses and our program! We cannot thank you enough for considering us and for showing your support! Again, thank you so much for all your help and hard work to support us! You and your organization have blessed us tremendously!"

God bless,

Reagan Miles"

Thank you all again for your help & support for Ride-A-Rescue as this year's charity!



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

Candy Brown



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>

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Chapter Information

AGA Treasurer's Report For the Month Ending April 2020

Beginning Balance: April 1, 2020

\$ 4,056.34

Receipts:

4/3/2020	Registration Fees - PDT-Square	\$ 145.05
4/7/2020	Registration Fees - PDT-Square	\$ 33.68
4/8/2020	Registration Fees - PDT-Square	\$ 67.36
4/9/2020	Registration Fees - PDT-Square	\$ 203.61
4/14/2020	Registration Fees - PDT-Square	\$ 115.61
4/14/2020	Registration Fees - PDT- Check	\$ 35.00
4/14/2020	Registration Fees - PDT- Check	\$ 105.00
4/14/2020	Registration Fees - PDT- Check	\$ 35.00
4/16/2020	Registration Fees - PDT-Square	\$ 163.86
4/17/2020	Registration Fees - PDT-Square	\$ 758.27
4/20/2020	Registration Fees - PDT-Square	\$ 216.65
4/20/2020	Registration Fees - PDT-Square	\$ 283.95
4/20/2020	Registration Fees - PDT- Check	\$ 35.00
4/20/2020	Registration Fees - PDT- Check	\$ 35.00
4/21/2020	Registration Fees - PDT-Square	\$ 231.83
4/22/2020	Registration Fees - PDT-Square	\$ 227.28
4/23/2020	Registration Fees - PDT-Square	\$ 67.36
4/23/2020	Registration Fees - PDT- Check	\$ 35.00
4/24/2020	AGA-Membership Dues	\$ 198.33
4/27/2020	Registration Fees - PDT- Check	\$ 35.00
4/27/2020	Registration Fees - PDT- Check	\$ 35.00
4/28/2020	Registration Fees - PDT-Square	\$ 33.68

Total Receipts

\$ 3,096.52

Disbursements:

4/30/2020	CK# 1201 - The Joachim Group-Reimbursement (PDT Raffle Door Prizes & Speaker Gifts)	\$ 200.00
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Total Disbursements

\$ 200.00

Ending Balance: 04/30/20

\$ 6,952.86

Signature:

Vicki B. Delp

Treasurer

Meeting Minutes



POST SPRING 2020 PDT MEETING MINUTES

April 30, 2020 12:00pm

- President – Thank you
- Treasurer recap
 - No. Registrations – 75
 - No. Member - 67
 - No. Non-member - 8
 - Revenue Expense Summary – Current NET is \$2,898.19. We are still awaiting 1 outstanding check payment, and we have expenditure reimbursements of \$200.00 which still need to be paid.
 - Outstanding Collections – There is 1 check we are still waiting for.
 - We will be reaching out to the 8 non-AGA members providing them information related to membership.
- Community Service Chair Recap
 - Raffle Summary – Went very well; people liked the online platform.
 - Funds raised - \$770.00 TOTAL including match from AGA.
 - Status of drawings – Each winner has been notified; the gift cards have been distributed.
 - Thank you notes and gift cards for each speaker have been distributed.
 - There were \$100.00 in expenditures for both the raffle prizes and the speaker expenditures (\$200.00 total).
 - 19 people donated to the raffle fund raiser.
- Education
 - Evaluations – people seemed to like the on-line platform.
 - CPEs – these will be distributed no later than May 8 giving participants time to submit the evaluation forms.
 - Presentations – Copies will be uploaded no later than May 8.

Meeting Minutes - continued

- Lessons Learned
 - UNRELIABLE INTERNET ACCESS – The organizer should be managing the presentation files (and not the presenter) to avoid technical problems. Possibly use the phone instead of the computer as the voice audio has no delay.
 - ANNOUNCEMENTS SHOULD BE REPEATED – We should repeat the announcements intermittently throughout the conference and not just at the opening.
 - POSITIONING OF LETTERS – We should insert the letters ourselves after the speakers have submitted their presentations in order to achieve consistency.
 - PROGRAM DISTRIBUTION – Getting the program out sooner before the start of the conference would help. Some items, such as sponsors, can be updated later.
 - ON-LINE RAFFLE - We seemed to be able to raise more funds on-line due to the convenience. This is something we should consider repeating. We should also set a higher goal for next time since we had such a positive response.
 - SPEAKER PRACTICE – The “run thru” for the speakers before the conference was very helpful to avoid major glitches with technology during the presentation.
 - LUNCH BREAK – Some participants requested a lunch break, but we do not feel this is necessary unless we conduct a full day session.
 - STATE & LOCAL TOPCIS – We feel that these topics (which was the focus of our conference) are well suited to our audience currently.
 - LOWER PRICE – We feel that the “on-line” lower price contributed to the large turnout and participation.
 - AGA TO INVEST IN PLATFORM? – We felt that the on-line format worked so well that it would be worthwhile for AGA National to consider investing in a similar presentation platform for all the chapters to use. This is something that can be explored next year with AGA National.
 - REGISTRATION FEATURE – “Go to Webinar” has a built-in registration feature which we may want to consider using in the future if the price is reasonable/low/free.
- May end of year Celebration – This is on hold for now due to Corona Virus.
- Josh to distribute summary evaluation results to the board members.
- We are working to complete the Board for the 2020 – 2021 year.

FUNNY MOMENT AND FUN NUMBERS!!!



"Be 'creative'? I'm an accountant, not a novelist."

