

# 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 2019/2020 AGA Year. I am honored and excited to serve as Chapter President of the Roanoke Chapter for another 12 months. 2018/2019 was another banner year for us, during which our Chapter earned the Platinum level 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 chapter.

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 take advantage of all that AGA has to offer to goals.

I aim to accomplish this by providing opportunities for gaining quality CPE's 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.

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, Gillian Cadogan, Membership/Emerging Leaders, and Joshua Levinstein, our Education/CGFM/Meetings Chair. I look forward to working with Gillian and Joshua as well as the rest of our Board to execute the plans and accomplish the goals that we've established for the year. We plan to demonstrate the value of AGA while at the same time making those values accessible to those who wish to take advantage of them.

As always, we can't do it without you. We need you to participate. We need you to show up. Show up for the monthly meetings, the webinars, the networking events and PDTs. We need you to help us grow our chapter. Talk to your co-workers about AGA. Share our newsletters with them, tell them about our free webinars for CPEs, not only locally but also the ones available from AGA National. Are you part of a big office? Let us know and I'll invite ourselves over for lunch to tell your co-workers about AGA. We'll even bring free pizza! Together we can make it happen!

This year, we will once again get your input. Keep an eye out for our membership survey coming out in the next few weeks. Tell us what's important to you, what topics you would like us to cover as part of our training curriculum, when is the best time/day to hold meetings etc. 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!

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# The Roanoke Ledger

## Opportunities



# FRAUD19

Sept. 18–19 | D.C. or virtual | 14 CPEs | 11 PDU's

Focusing on internal controls and minimizing fraud, waste and abuse

## 2019 Internal Control & Fraud Prevention Training

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



### *CGFM Quick Facts*

The 2019 print and online versions of the CGFM study guides are available for purchase! The print versions include a binder for your convenience and the online versions now can be accessed offline or through an app.

*Lunch and Learn - Webinars*

*11:50AM – 12:50PM*

*Monitor email for dates and times*



# 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 better. Please volunteer for this and let's get to know each other better. This month we are pleased to introduce:

### Lal Harter



- 1) How long have you been a member of the AGA? Just under 13 years, I joined the AGA January 16, 2007.
- 2) Why did you join the AGA? I joined the AGA because my employer signed me up. At the time, Deanna Cox was Chapter president and a partner with the CPA firm Robinson, Farmer, Cox and Associates (now RFC), and as a normal course of business, all employees joined.
- 3) What do you enjoy most about volunteering? There are many reasons I volunteer, and I can't say which I enjoy the most, but some of those reasons are;
  - I enjoy serving others
  - It gives me a better appreciation for this gift I have been given
  - It gives me a sense of humility, which, paradoxically, is an important component of character
  - I believe it's good karma to pay it forward.
- 4) What is your current occupation? I'm a government financial manager. More specifically, I am a manager for Guidehouse (formerly PwC - Public sector), a Malcolm-Baldrige Award Winning top-tier global management consulting firm. I serve in their financial services sector providing solutions to federal agencies. I currently serve two federal agencies; the Department of Housing and Urban Development (HUD), where I lead a team in compiling their Annual Financial Report, and the Small Business Administration (SBA) where I develop a desk manual and procedures for their 504 loan program.
- 5) If you had to eat one meal every day for the rest of your life, what would it be? It's a toss-up; either pho or a Chipotle burrito (I'd be fine with either).
- 6) What's your favorite tip for someone in our industry? Join the AGA.

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## Who is AGA?

AGA is committed to increasing government [accountability and transparency](#). The association has been instrumental in helping develop [accounting and auditing standards](#) and in generating new concepts for effective organization and administration of government financial management.

AGA is made up of more than 14,000 members, who include elected officials, senior executives, mid-level managers, entry-level employees and students. Our members work in government financial management professions including accounting, auditing, budgeting, financial reporting, performance reporting, grants management, contract management and information systems.

**Our goal is simple:**  
— — — —  
**help you succeed.**

explore the value of AGA membership

- State and Local Government Members – 42%
- Federal Government Members – 28%
- Private-Sector Members – 18%
- Academics, Non-Profits, Students and Retirees – 12%

Our members connect to each other through [chapters](#), [leadership roles](#), networking at [national events](#) and [social media](#). Join us and gain access to many [benefits](#), including free, high-quality CPEs, discounts on national training events, and a subscription to the [\*Journal of Government Financial Management\*](#).

## 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

Joshua Levenstein, Business Analyst at TJG

Mr. Chamroeun Siv Business Analyst at CGI



### AGA Treasurer's Report

For the Month Ending August 31, 2019

**Beginning Balance: August 1, 2019** **\$ 3,565.36**

#### Receipts:

No Receipts

**Total Receipts** **\$ -**

#### Disbursements:

No Disbursements

**Total Disbursements** **\$ -**

**Ending Balance: August 31, 2019** **\$ 3,565.36**

**Balance Reported 09/08/19**

**Signature:**

*Vicki B. Delp*

**Treasurer**

**Balance check**

**\$ 3,565.36**

Per statement

**\$ 3,565.36**

**\$ -**

## 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 - 2019-2020 Kick-off

August 15, 2019 - Minutes

- WELCOME AND CONGRATULATIONS FROM CURTIS
- IDENTIFICATION OF BOARD MEMBERS:

(was submitted timely to AGA per Curtis)

**President & Immediate Past President:** Curtis Joachim – TJG

**President Elect:** Vacant\*

**Treasurer:** Vicki Delp – Wytheville Community College

(multi (2) year term position)

**Secretary:** Melissa Cable – Salem VA Medical Center

**Accountability & Communications Chair:** Bradley Vaught – County of Pulaski, VA

(& newsletter editor)

**Membership & Emerging Leaders Chair:** Gillian Cadogan – TJG

**Community Service Chair:** Leah Kirby – TJG

**Education/Meetings Chair:** Joshua Levenstein – TJG

**Nat'l Council of Chapters Representative:** Lal Harter – Guidehouse

(new council started by AGA this year)

**Webmaster:** Vicki Moore – VA Tech

- PRESIDENT'S MESSAGE

FYI – In the absence of a president elect, Curtis will cc: the entire board on emails, etc.

\*Curtis encouraged someone from the board to consider serving as chapter president: support is available via the immediate past president and AGA National.

Reminder: AGA year and term of service runs from July1-June30.

In Jan-Feb 2020 we will begin to put together the board for our next AGA year.

- PRESENTATION OF CHAPTER PLANS:

Our primary goal/theme of this year is to provide VALUE to the current & potential membership.

**EOY (YTD) Financial Report was reviewed. (This will be included in the Chapter CCR):**

The amount reimbursed from the Williamsburg PDT was questioned/ discussed. \$653.00 was the net revenue amount received from our participation in the event (this amount included expense reimbursement). Curtis is still negotiating the revenue amount to be reimbursed to our chapter. Proceeds are split between Richmond, Shenandoah, Virginia Peninsula and Roanoke chapters. The Roanoke chapter received about 2-3% of total revenues. Curtis feels that our

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## Meeting Minutes, Cont.

share should be closer to 5% based on the contributions our chapter made: TJGCPAs sponsored the conference, provided a speaker, and members of our chapter attended the event. Curtis will be attending a meeting later this month to review the revenue split again. The distance from SW Virginia to Williamsburg was discussed, which may be a factor affecting representation from our chapter and the ability of our members to attend. Historically however, this is a very successful conference for that part of the State at that location (Williamsburg). For that reason, some feel that they are unlikely to negotiate a meeting location closer to Roanoke.

### **The Proposed Budget was discussed:**

Per Vicki the current budget is based on PY expenditures.

CHARITY DONATIONS – In the past our chapter has made several donations around the Holidays to various community organizations. A motion was approved to increase the charity donations to \$400.00.

CHAPTER MEETINGS – In anticipation of increased attendance at chapter meetings, a motion was approved to increase the chapter meeting amount to \$200.00.

PDT ATTENDEE PRICE – An increase from \$85.00 to \$95.00 per person was discussed; there was some concern that the \$95.00 price may be too expensive since much of our demographic consists of smaller, local governments. We feel however that cost reflects value and decided to give this price point a try. A motion was approved to increase the attendance price to \$95.00 for the April 2020 PDT.

RECRUITMENT – Additional “Lunch and Learns” are planned for this year. A motion was approved to increase the recruitment budget to \$200.00.

A final motion was approved to pass and accept the revised budget. (Vicki will forward a copy of the revised budget to the board once she is able to make the updates/ changes).

### **Nat’l Council of Chapters Update:**

Per Lal, the National Council of Chapters met July 21, 2019 in New Orleans, LA as part of the National PDT. The purpose of the NCC is to communicate with chapters, and to act as liaison to bring chapter concerns to the Governing Board of AGA. At the meeting, there were several group breakout roundtable discussions concerning challenges and best practices within chapters. Chapters who appear to have the most overall success (1) have large membership, and (2) were able to creatively utilize the resources on the AGA National Web Site.

A lot of time was spent at the meeting discussing AGA recruitment and the value of AGA membership.

AGA is also considering changing its name since it is getting a lot of interest from groups involved in governmental accountability (IT, Auditing, Policy, Budget) who are not actually accountants. Feedback is welcome on this issue.

The next meetings are Nov 7 – virtual; Feb 4 – virtual. Lal can share any concerns with the NCC that you may have, or any feedback you wish to provide.

### **Meetings/Education/CGFM plan:**

Our primary goals here are to (1) provide education/ events to meet CPE requirements and (2) help individuals attain the skills needed to pass the CGFM exam. There will be an increased emphasis on the CGFM examination as well as helping current membership develop and maintain additional skills for their profession. To this end, monthly meetings with speakers, additional seminars, and webinars are planned. We also want to (3) provide awareness and marketing of educational events. Completing all the above will ensure that we meet our chapter recognition points in this area. A rotating schedule of in person meetings vs. webinars was adopted last year which has worked well, especially in getting increased attendance (via webinars). With that in mind we are proposing a similar plan this year as follows:

**September** Webinar – IT Security; **October** in-person meeting – CCR; **November** Webinar – Grants; **December** PDT Williamsburg; **January** Webinar Tax; **February** in-person meeting – Disaster Preparedness; **March** Webinar – CGFM; **April** In-person meeting PDT; **May** End of Year Celebration; **June** – Off; **July** – PDT – Dallas, Tx – Off; **August** – Planning Meeting for 2020 - 2021



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## Meeting Minutes, Cont.

With this plan in force it will be easier now to plan and find speakers.

A motion was approved to pass and accept this education plan.

### **Membership & Emerging Leaders plan:**

Congratulations to Joshua who is recognized as an emerging leader!

We would like to focus on young professionals, membership retention and growth.

We have done a good job in the past with our visits to local colleges: Virginia Tech, Roanoke College, Hollins University and Virginia Western Community College. We want to continue this path and even expand. Furthermore, a listing of ideas is available in the suggested/ recommended activities chart in the plan copy that was submitted. Generating ideas is not always easy and we would like to have as many ideas as possible.

A request to add New River Community College and Wytheville Community College to the reach outs was approved. We would also like to provide some "Lunch and Learn" events with major employers as we are able.

A motion was approved to pass and accept this membership/education plan.

### **Community Service plan:**

A non-technical event was added to the plan: this is essentially a volunteer, community service, non-accounting event. Leah asked for input and feedback on this. It was noted that our chapter dispersion is a challenge to overcome when planning community service and volunteer events. Some members did express interest in assisting with VITA: Volunteer Income Tax Assistance. It was noted that for personal volunteer hours to count toward AGA chapter recognition you must designate the volunteer visit as an AGA sponsored event. You should also notify Leah or Curtis that hours are being dedicated/ donated to AGA.

A motion was approved to pass and accept this community service plan.

### **Accountability plan:**

A large part of accountability is compiling the CCR (Citizen-Centric Report) for the Roanoke chapter. We would also like to compile CCRs for other agencies as we are able. A request/ inquiry was made to help Pulaski County with their CCR; we have also helped Christiansburg with their CCR in the past. Our chapter will receive the maximum points from AGA for getting this done in the 1<sup>st</sup> quarter of the AGA year. We are fortunate to have in our chapter (and on our board) members at the local government level who can assist with compiling the CCRs.

A motion was approved to pass and accept this accountability plan.

### **Communication plan:**

Brad will be compiling the newsletter – he wanted to be certain that everyone has his phone number and email for necessary correspondence:

[bwvaught@pulaskicounty.org](mailto:bwvaught@pulaskicounty.org); 540-980-7748. **Brad will need the following items monthly: meeting minutes, treasurer's report and volunteer hours.** He will also be assisting Vicki with maintenance of the web site. Our most important goal for efficient communication is for us to consistently meet our deadlines. **Newsletter articles should be submitted no later than the 10<sup>th</sup> of the month.** Any member news is welcome; highlighting specific members would also be a great idea.

A motion was approved to pass and accept this communication plan.

- OTHER BUSINESS

Brad will be auditing the financial records from last year on Monday, August 19, 2019.

Again, our overall goal is to provide value to our members, including growth and reaching out.