



About the Association of Government Accountants (AGA)

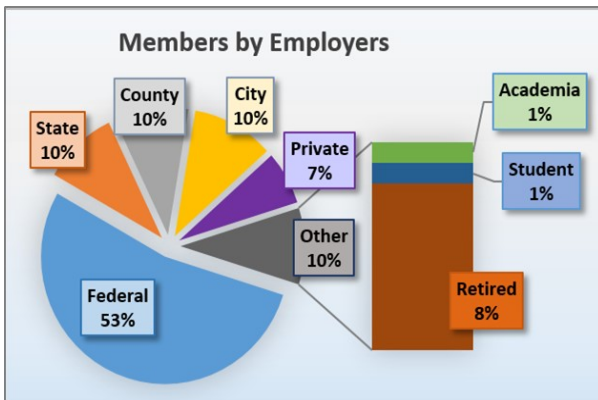
AGA is the member organization for government financial management professionals. Through training and events, professional certification, publications and ongoing education, AGA assists members in building their skills to advance their careers. AGA is committed to increasing government accountability and transparency and has been instrumental in developing accounting and auditing standards and in generating new concepts for the effective organization and administration of government financial management. Their professional certification, the Certified Government Financial Manager (CGFM) is recognized as an exemplary credential sought by both employees and employers.

About Our Chapter

Established in 1954, the AGA Cleveland Chapter members include employees from the Defense Finance and Accounting Service (DFAS) Cleveland, the National Aeronautics and Space Administration (NASA) Glenn Research Center (GRC), the State of Ohio, county and local city government agencies, universities and colleges, libraries, and private industry. Although the Chapter has been through many ups and downs, our members have remained dedicated to ensuring the Chapter continues and grows.

Membership by the Numbers

The AGA Cleveland Chapter ended the program year in June with 103 members, including 17 new members. Membership is made up of managers, interns, accountants, financial managers, and information technology professionals. Our members are well educated and encourage those around them to continue their education whether through



formal or informal venues. Almost 40 percent of our members maintain an active CGFM status, and 20 percent have obtained their Certified Public Accountant (CPA) certification.

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Mission:

The AGA Cleveland Chapter serves professionals in the government financial management community by providing quality educational opportunities, fostering professional development and certification, supporting high standards to advance government accountability, and contributing to the surrounding communities in various charity and outreach events.

Vision: To be a premiere association for advancing government accountability in Northern Ohio.



Training and Education

During the program year, the AGA Cleveland Chapter sponsored several very successful educational events and the Chapter became accredited by the Ohio Board of Accountancy to be a continuing professional education (CPE) provider:

- AGA Cleveland and the Association of Military Comptrollers (ASMC) Cleveland Chapters continued an annual tradition of hosting a joint Professional Development Training (PDT) on April 24, 2018. Over 180 people attended and received up to 8 CPEs. We were honored to have Mr. James R. Arnette, Jr. 2017-2018, AGA National President, as our guest speaker. Other prominent speakers included Brigadier General U.S. Air Force (Retired) Dave Springer, NASA GRC; Dr. Brett Baker, Assistant Inspector General, U.S. National Regulatory Commission; and Mr. Tony Milion, U.S. Veterans Affairs. We offered a variety of breakout sessions during the day to round out the program. Special thanks to Haley Proszek, our Education Chair, for leading the conference planning efforts .
- AGA and ASMC also teamed up to welcome guest speaker Ms. Audrey Davis, DFAS Deputy Director, on November 7, 2017.
- AGA hosted Mr. Tom Hach, Riverside Local School District, on December 6, 2017, for a luncheon speech on school financing.
- DFAS and NASA GRC offered AGA Webinars to members where they could earn CPEs.
- Jackie Hall-Carrillo, President, and John Kanya, VP Membership, spoke to over 100 DFAS Leaders-in-Motion on July 6, 2017, concerning enriching their careers by participating in professional organizations.



April 2018 PDT Planning Committee (from the left): John Giammo (ASMC), David Rose (ASMC), Jana Sjoquist (AGA), Jackie Hall-Carrillo (AGA), Haley Proszek (AGA), Elena Baykal (ASMC), Kari Vescio (ASMC), Lance Jones (ASCM) CW03 Matthew Pfarr (ASMC), Paul Cotton (ASMC).

Community Service and Social Events

The Chapter gave back to the community in some very big ways. We made contributions totaling \$1000 to various charities, including WAGS 4 Warriors, the Ronald McDonald House of Cleveland, the Norma Herr Women's Shelter, the Cleveland Food Bank, and the Hospice of the Western Reserve. Members staffed booths at the Cleveland Federal Executive Board's Diversity and Inclusion Fair (August 2017) and the Public Service Recognition Day Fair (May 2018).

In August 2017, AGA and ASMC hosted members and potential members at the annual summer picnic at NASA GRC. Beautiful weather, delicious food, and great company was enjoyed by all. We held a Winter Social at Bar Louie in Downtown Cleveland on Jan 25, 2018, and finished out the year with a social event at the House of Blues Foundation room immediately following the April PDT. The last event allowed PDT attendees to network and relax after the conference .

Other Accomplishments



Our chapter received several honors during the AGA PDT in Orlando, Florida. Lou Ockunzzi, a long-time Chapter Member, received the Platinum award of distinction for his leadership as Great Lakes Regional Vice President. In addition to these duties, Lou served on our Chapter Board and participated in various college fairs throughout the year. Jackie Hall-Carrillo accepted a Platinum award for our chapter's success in the AGA Chapter Recognition Program. Vicki Hagerman, Chapter Immediate Past President, served as the Great Lakes Regional Vice President Elect. Tony Harris, Chapter Outreach Coordinator, received a certificate of excellence from the AGA National Office for his exceptional work on the CCR.

National AGA President Jim Arnette receiving a Certificate of Appreciation from Lou Ockunzzi, Chapter Regional VP.

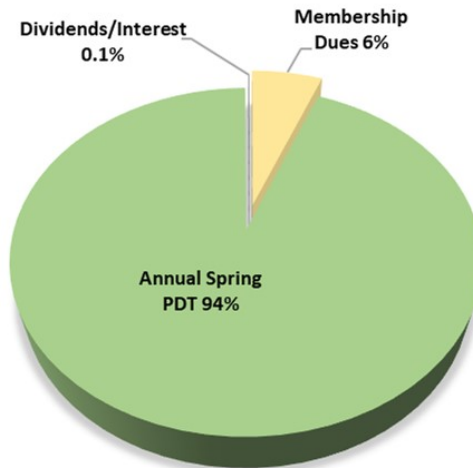
Chapter Finances

Revenues and Expenses

What are the costs for servicing our members and how are those costs paid?

The treasurer is elected annually and handles monetary transactions as well as prepares an annual budget. A bank account with Century Federal Credit Union is maintained to account for the resources used to pay for the service incurred throughout the program year. Included are the annual member picnic, holiday party, charitable contributions, administrative expenses, and Chapter website hosting.

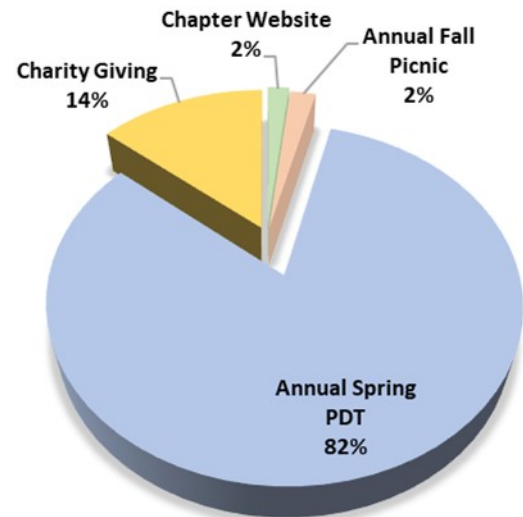
Chapter Revenues



Revenues	
Membership Dues	\$ 553.00
Annual Spring PDT	\$ 8,795.50
Dividends/Interest	\$ 9.91
Total Revenue	\$ 9,358.41

Chapter Expenditures

Expenditures	
Chapter Website	\$ 128.22
Annual Fall Picnic	\$ 154.25
Annual Spring PDT	\$ 5,968.41
Charity Giving	\$ 1,000.00
Total Expenses	\$ 7,250.88



Program Year Comparison:

From the prior year to current, we have continued to grow the annual Spring PDT - allowing more attendees the opportunity to learn, earn CPEs, and network with others.

We have also increased our charitable contributions to demonstrate our commitment to give back to the our surrounding community.

	2018 Actual (Jul 2107-Jun 2018)	2018	2017 Actual (Jul 2016-Jun 2017)	2017
Total Revenue	\$ 9,358.41	100%	\$ 8,913.25	100%
Membership Dues	\$ 553.00	6%	\$ 553.34	6%
Annual Spring PDT	\$ 8,795.50	94%	\$ 8,350.00	94%
Dividends/Interest	\$ 9.91	0.1%	\$ 9.91	0.1%
Total Expenses	\$ 7,250.88	100%	\$ 5,408.25	100%
Chapter Website	\$ 128.22	2%	\$ 128.22	2%
Annual Fall Picnic	\$ 154.25	2%	\$ -	0%
Annual Spring PDT	\$ 5,968.41	82%	\$ 4,683.55	87%
Winter Social	\$ -	0%	\$ 296.48	5%
Charity Giving	\$ 1,000.00	14%	\$ 300.00	6%

Chapter Future

Key Initiatives and Challenges Moving Forward



AGA Chapter Board Members:

- Sharon Buggele, Community Service Chair
- Vicki Hagerman, Chapter Immediate Past President
- Jana Sjoquist, Chapter President Elect
- Jackie Hall-Carrillo, Chapter President
- Haley Proszek, Education Chair

Strategic Goals

- Get more people involved in Chapter leadership and committees to prepare future Chapter leaders.
- Continue to attend and encourage participation in regional, sectional, and national events.
- Hold more educational events throughout the year to offer more CPE opportunities to our members.
- Request state and local proclamation for CGFM month.
- Build relationships with other AGA Chapters.
- Promote community service by scheduling quarterly service events.

Challenges

- Increasing and retaining membership and participation
 For our Chapter to grow and maintain membership, we must provide members with opportunities to obtain CPE credits, invite engaging speakers to professional events, and continue advertising the many networking benefits AGA has to offer.
- Growing the CGFM certifications in our Chapter
 Our Chapter must embrace the opportunity to increase interest and support professionals who are studying for the CGFM in an increasingly competitive environment of Certified Public Accountants, Certified Management Accountants, Certified Defense Financial Managers, and other recognized certifications. Expanding public knowledge on the benefits and value of the CGFM will provide professionals with information on how a CGFM certification benefits them .

Chapter Leaders 2017-2018

President: Jackie Hall-Carrillo
 President Elect: Jana Sjoquist
 Immediate Past President:
 Vicki Hagerman
 Treasurer: James Gant
 Secretary: Michael Hoffman

Chapter Leaders 2018-2019

President: Jana Sjoquist
 President Elect: Janson Stitt
 Immediate Past President:
 Jackie Hall-Carrillo
 Treasurer: Michael Hoffman
 Secretary: Steve Morgunov

We want to hear from you!

Do you like this report?
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www.agacleveland.org