



CHAPTER GOALS 2020-2021 PROGRAM YEAR

EXECUTIVE SUMMARY

The AGA Dallas Chapter has been serving the government financial management community in North Texas for over 60 years. Our Chapter hosts biannual Professional Development Training events at The City Club in Downtown Dallas in the Fall and Spring.

Our members are from diverse professional and educational backgrounds, and support various organizations, including the Federal government; state, city and local government; academia; non-profit organizations, and private industry. We also have retired and lifetime members that are still active in our Chapter.

MEMBERSHIP

Membership Growth

Goal: Increase membership by 3%.

	Tactic	Responsibility	Due Date
1.	Host a recruitment challenge – Award for the Most Recruits	Membership Director	October - December
2.	Contact suspended members via email and phone calls.	Membership Director	August
3.	Engage local State & City Government Agencies.	Membership Director	Ongoing.

Overall Member Satisfaction

Goal: Increase membership satisfaction to 4.5.

	Tactic	Responsibility	Due Date
1.	Membership Mailing	Membership Director	Ongoing.
2.	Survey Active Members for new ideas	Membership Director	Once during program year.
3.	Host two virtual networking events for members and non-members.	Membership Director	TBD.
4.	Increased Personal Outreach from CEC to Members	Membership Director led but All CEC Members involved	Ongoing.

EDUCATION

Training Events

Goal: Provide 14 continuing professional education credits.

	Tactic	Responsibility	Due Date
1.	Participate in a group subscription to a virtual platform to support the hosting of virtual events.	NCC Representative, in coordination with CEC	Ongoing.
2.	Plan and host a minimum of two PDT events per year, either virtual or group live as circumstances dictate. <i>Note: CPE hours per event are TBD as circumstances dictate.</i>	NCC Representative and Communications Director, in coordination with CEC	Ongoing. PDTs expected to be held in Oct and May of the program year.
3.	Collaborate with neighboring Chapters to participate in joint CPE events. <i>Note: At a minimum, collaborate with the OKC and Austin chapters for participating in joint events.</i>	NCC Representative, in coordination with CEC	Ongoing. PDTs expected to be held in Oct and May of the program year.

Attendance

Goal: Achieve an average of 55 attendees in training events.

	Tactic	Responsibility	Due Date
1.	Advertise each PDT through the Chapter website, newsletter and social media platforms.	Communications Director, in coordination with NCC Representative	Ongoing. PDTs expected to be held in Oct and May of the program year.
2.	Prepare and distribute email advertisements to Chapter members and nonmembers.	Communications Director, in coordination with NCC Representative	Ongoing. PDTs expected to be held in Oct and May of the program year.
3.	Prepare and distribute targeted email advertisements to identified Groups (i.e., federal, state and local government entities).	Communications Director, in coordination with NCC Representative	Ongoing. PDTs expected to be held in Oct and May of the program year.
4.	Collaborate with neighboring chapters to invite their members to attend Dallas Chapter hosted events, especially virtual events. <i>Note: At a minimum, collaborate with the OKC and Austin chapters for attendance at each Dallas Chapter hosted event.</i>	Communications Director, in coordination with NCC Representative	Ongoing. PDTs expected to be held in Oct and May of the program year.

Satisfaction

Increase training event attendee satisfaction to 4.6.

	Tactic	Responsibility	Due Date
1.	Review and consider input from previous surveys in planning CPE sessions.	NCC Representative and Communications Director, in coordination with CEC	Ongoing. PDTs expected to be held in Oct and May of the program year.
2.	Target trusted speakers having received high satisfaction ratings in previous CPE sessions for speaking at future CPE session.	NCC Representative and Communications Director, in coordination with CEC	Ongoing. PDTs expected to be held in Oct and May of the program year.
3.	Engage event attendees during the event through raffle drawings and/or other interactive actions. <i>Note: Refer to Community Service goals. Leverage the fundraising event for a local charity as a means to engage attendees.</i>	Chapter President, in coordination with the NCC Representative, Communications Director and Membership Director	Ongoing. PDTs expected to be held in Oct and May of the program year.

CGFM

Candidate Support

Goal: Provide support to members seeking to become CGFMs.

	Tactic	Responsibility	Due Date
1.	One on One outreach will ask if members are interested in CGFM and how we could support them	Director of Membership, in coordination with CEC	Ongoing
2.	Implement at least one CGFM scholarship opportunity	CEC	Ongoing
3.			

CGFM Support

Goal: Retain 90% of CGFMs.

	Tactic	Responsibility	Due Date
1.	Recognition Event for CGFM members	Director of Membership	Ongoing
2.	Feature a few CGFM Members in newsletter	Director of Membership	Ongoing
3.	Follow up with any CGFM who leaves to identify what we could do to retain them	Director of Membership	Ongoing

COMMUNICATIONS

Goal: Maintain and execute a communications strategy, including a website, email and social media outreach.

	Tactic	Responsibility	Due Date
1.	Issue the AGA Dallas Chapter newsletter monthly (September through June)	Communications Director	Monthly
2.	Review and update the AGA Dallas Chapter website monthly	Communications Director	Monthly
3.	Setup and launch AGA Dallas Chapter Facebook account	Communications Director	9/30/2020
4.	Post to AGA Dallas Chapter social media accounts at least once a week	Communications Director	Weekly

COMMUNITY SERVICE

Goal: Hold at least 1 community service event.

	Tactic	Responsibility	Due Date
1.	Advertise each virtual professional development event (PDT) as a joint fundraising event for a local charity. <i>Note: If PDT is held as group-live, tactics remain, but will be modified accordingly.</i>	Communications Director, in coordination with NCC Representative	Ongoing. PDTs expected to be held in Oct and May of the program year.
2.	In coordination with each virtual PDT, identify the portion of net proceeds that can be donated to local charitable organizations. Communicate the calculation to the CEC for approval.	Treasurer, in coordination with NCC Representative	One week prior to the event – calculate estimated donation amount to be communicated during the event. Two weeks after the event – calculate final amount to be donated.
3.	During the event, communicate the identified charitable organizations, the estimated donation, and the impact to our community.	President, with input from Treasurer	Ongoing. PDTs expected to be held in Oct and May of the program year.
4.	Upon CEC approval, make the donation to the identified charities. Submit requests to AGA National for matching donations through the National Community Service Fund.	Treasurer, in coordination with NCC Representative	One month after the event.

STRATEGIC VISION

Leadership

Goal: Recruit at least 1 member that had not previously served in the Chapter Executive Committee to serve in a leadership position.

	Tactic	Responsibility	Due Date
1.	Prepare and distribute membership surveys that include specific questions to identify future CEC members.	Communications Director and Membership Director, in coordination with CEC	Annually, in January.
2.	Prepare and distribute targeted outreach to potential CEC members, identifying areas to serve and a call to action to serve.	President and Membership Director, in coordination with CEC	Ongoing, with specific focus in February, after receipt of member surveys.
3.	Develop and maintain a leadership development roster to track and follow up with potential future leaders.	President and Membership Director, in coordination with CEC	Ongoing, with updates based on targeted outreach to potential CEC members.

Students

Goal: Retain or recruit at least 1 student member.

	Tactic	Responsibility	Due Date
1.	Maintain a student roster to document names and contact information for students.	Membership Director, in coordination with CEC members	Ongoing, as CEC members identify students.
2.	Distribute targeted emails to names on the student roster inviting them to attend each PDT. <i>Note: CEC will determine in advance if students will attend for free or at a reduced rate.</i>	Communications Director, in coordination with NCC Representative and Membership Director	Ongoing. PDTs expected to be held in Oct and May of the program year.
3.	In coordination with roles on National Boards and Committees, offer to speak to university courses on the merits of AGA and careers in government accountability. <i>Note: Extend a minimum of two offers during the program year.</i>	Communications Director and NCC Representative, in coordination with CEC members	Ongoing.
4.	In coordination with each virtual or group live PDT, identify a local university professor (in a field related to government accountability) and request him/her to serve as a speaker. <i>Note: Extend a minimum of two requests during the program year.</i>	NCC Representative, in coordination with CEC members	At least one month prior to the event.