



NEW MEXICO CHAPTER

2017 Citizen Centric Report (CCR) To Our Members

Welcome to AGA New Mexico

The New Mexico Chapter ended another successful program year in May 2017. The Chapter had a goal of 19,501 points to receive a Platinum Award, the highest level for areas including leadership, education, certification, community service, communications, membership and awards. Thanks to all New Mexico Chapter members for helping to obtain and surpass our target!

During the program year we produced a 2016 Citizen Centric Report (CCR), offered 53 hours of continuing professional education (CPE)

through our luncheons, webinars and annual Professional Development Training (PDT), which is held jointly with the Albuquerque Chapter. We also held several fund-raising events for local charities and schools. The Chapter continues to use our website, emails and social media such as Facebook to reach out to our membership. We also have members that serve on AGA National boards and committees. The New Mexico Chapter is very fortunate to have such a great team.

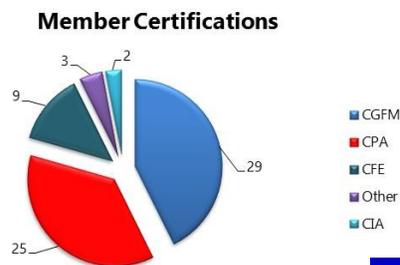
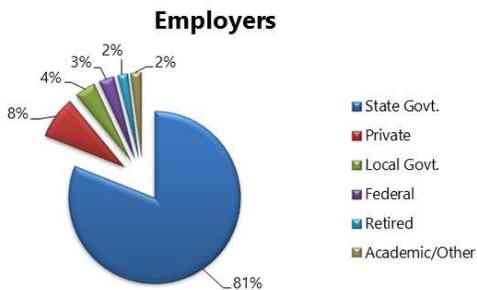
Chapter Executive Committee (CEC)



*Vince Lithgow, MBA, CGFM—
Chapter President*

Member Demographics

The New Mexico Chapter is based in Santa Fe, the state capitol, and the largest employer group is State Government. The other large employer group is Private which accounts to the CPA firms that audit the government agencies in the State. Approximately 28% of our membership have an active certification, and of this group 45% hold the AGA certification of CGFM. The second largest group of certification types is CPA, and most of the CPAs are also active CGFMs.



Visit us at:

[AGA New Mexico](#)

Performance Report



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Over 50 Continuing Professional Education (CPE)



Ann Ebberts helping us fill the PDT goodie bags

The New Mexico Chapter offered 53 CPE in 2016-2017 program year. The 2017 Professional Development Training (PDT) offered 16 CPE, and attendance increased from the prior year. The theme of "Transcending Barriers and Creating Opportunities" offered topics in both technical and soft skills; and provided break-out sessions that pertained to federal, state and local government. Attendees enjoyed the venue, the food, the networking and of course the speakers. Ann Ebberts, AGA CEO, joined us in prepping the goodie bags and was the keynote speaker on the first day. Ann also presented a break-out session "What Keeps CFOs Up at Night". The CGFM Test 2 Intensive sessions offered 16 CPE and were led by representatives from both the Albuquerque and New Mexico Chapters. The other 21 CPE were offered in the form of guest speakers at luncheons and national AGA audio conferences. Our success is because our members continue to support the AGA and the value that membership offers. If you have suggestions for us of how to improve we welcome it, your opinion counts!



Vince Lithgow, Miranda Ntoko (FMY), State Auditor Tim Keller, Shannon Sanders (FMY), Wanda Gonzales, and Sanjay Bhakta (FMY)



Juan Carlos Trujillo receives his scholarship from Vince Lithgow and Sandra Steckler

Community Service Events

- ◆ Adelante School Supply Drive
- ◆ Blessings for Burque, donations for homeless
- ◆ Food Depot, donation of 91 lbs of assorted food, part of National AGA Challenge
- ◆ City of Santa Fe "Shop with a Cop" donated \$500 and stuffed toys
- ◆ Santa Fe Youth Shelter, donated \$200 and food items
- ◆ Donation of gift for National PDT



Santa Fe Fraternal Order of Police President Billy Perdue talks about "Shop with a Cop"

Accomplishments

- ◆ Platinum Chapter Recognition Award
- ◆ State Proclamation declaring March as CGFM month
- ◆ 53 CPE offered to members
- ◆ CCR Published for program year 2015-2016
- ◆ Three Undergraduate Scholarships \$250
- ◆ One Graduate Scholarship \$500
- ◆ Recognized 3 members as Outstanding Financial Managers of the Year (FMY)

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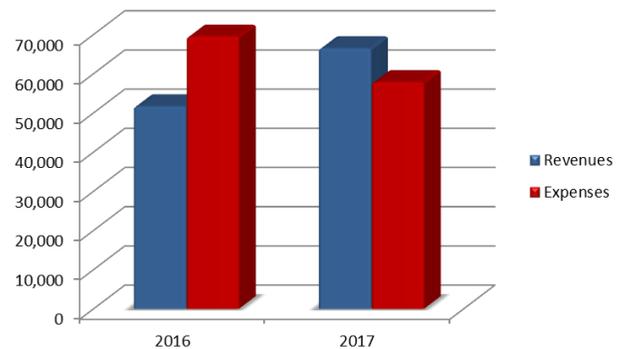
2017 Professional Development Training (PDT) Financial Summary

The 2017 PDT was a success, the speakers were experts in their field, the venue was fantastic, and attendance was higher than the 2016 PDT. State government agency budget constraints were still a factor in 2017, however we were able to attract more federal government attendees. In addition, the planning committee worked diligently to keep costs low and provide exceptional value in the PDT.

The Albuquerque and New Mexico Chapters provided a selection of classes to appeal to federal, state and local government. Ann Ebberts AGA CEO was the keynote speaker on the opening day. Speakers for break-out sessions included Sanjay Bhakta Deputy State Auditor, Sarita Nair, Chief of Staff at the Office of the State Auditor, Scott Bell from US Department of Treasury, Charmaine Cook Deputy State Treasurer, Ron Spilman State Controller and Cassandra Hayne SHARE (statewide accounting system) Director, Javier Almodovar FBI Special Agent and many of our sponsors from the accounting firms in New Mexico.



State Auditor Tim Keller speaks during a general session at the 2017 PDT



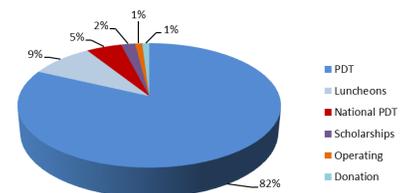
PDT Revenue to Expense Comparison 2016 and 2017



Matt Bone, Albuquerque Chapter President and Vince Lithgow New Mexico Chapter President at the PDT

2017 Expense Summary

The pie chart is a break-down of expense categories for the program year 2016-2017. The majority of expenses, 82%, for the year are related to the PDT. The luncheons account for 9% of expenses, the Chapter provides one hour of CPE at luncheons with a guest speaker. The Chapter was able to send six representatives to the National PDT in Anaheim, California for 24 hours of CPE; two members of the Executive Committee presented at break-out sessions; the National PDT accounted for 5% of total expenses. The remainder of expenses are scholarships, operating expenses and donations.



Challenges Moving Forward

What's Next?

We submitted our Chapter Plans to the national office in June to reflect how we will concentrate our efforts in 2017-2018. A summary of the goals in each plan are as follows:

CGFM Plan

- * Recruit seven (7) members to apply for the "You Pass We Pay Program".
- * Coordinate with Albuquerque Chapter to offer a CGFM Summer Series of classes.
- * Obtain signed proclamation from the Executive proclaiming March as CGFM Month.

Education and Professional Development Plan

- * Provide a minimum of six (6) audio conferences. The audio conferences will be free, open to members and non-members.
- * Monthly lunch meetings with a guest speaker that offer one hour of CPE.
- * Provide 16 hours of CPE at a joint PDT with Albuquerque Chapter in the Spring of 2018.

Membership Plan

- * Notify delinquent and suspended members of their status and encourage renewal.
- * Publicize chapter and national membership awards.
- * Prepare a monthly membership column for the chapter newsletter and website.



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Community Service Event

- * Annual Back to School Fundraiser
- * Breast Cancer Awareness Walk
- * Post/Sponsor Veteran's Day Flags at the Santa Fe National Cemetery
- * Annual Thanksgiving Food Drive

Accountability Plan

- * Complete and submit a Citizen Centric Report (CCR) by the required national AGA deadline of September 30.
- * Contact other government agencies and encourage them to produce a CCR.
- * Serve as the chair of the national AGA Accountability Workgroup.
- * Participate as a CCR judge in the student challenge and government challenge.

Challenges we face in the coming year are a decrease in membership by our largest employer group, state government. State Government Agencies continue to have budget constraints. The Chapter will focus on luncheons and the PDT that attract members and non-members. The CEC will emphasize the value of AGA membership and the benefits that offer education and networking with peers.

Chapter Executive Committee (CEC)

President— Vince Lithgow, CGFM

Vice President—Zella Cox

President-Elect & Communications—Wanda Gonzales

CGFM Chair-Vice-President-Luis Eres, CGFM

Treasurer—Blanca Sena

Education Chair-Bryan Maestas, CGFM

Accountability Chair—Donna Sandoval, CGFM

Webmaster—Elena Tercero, CPA, CGMA, CGFM

Membership Chair-Miranda Mascarenas

Research/Historian—Sandra Steckler

Community Service Chair -Margaret Sena

Secretary—Wendy Loomis

Newsletter Chair—Michael Chmura

Early Career Chair — Chris Garcia



Wanda Gonzales accepts Platinum Award from National AGA President Doug Glenn

