



Atlanta Chapter

**AGA Atlanta Chapter
2025 – 2026 Program Year
ACE Goals & Strategic Plans**

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Advance. Grow. Accelerate.

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Advance. Grow. Accelerate.

AGA Atlanta Chapter

AGA is the association that connects and empowers financial related professionals who support government. AGA fosters learning, certification, leadership, and collaboration for professionals and stakeholders committed to advancing government accountability. AGA fosters learning, certification, leadership, and collaboration for professionals and stakeholders committed to advancing government accountability.

Established in 1954, the AGA Atlanta Chapter is one of almost 100 chapters across the country that promotes the organization's goals by maximizing member value and providing continuing education and leadership development opportunities to members while serving their communities through volunteer activities.

We connect and empower professionals to help them:

- **Advance** sound financial practices, accountability, transparency, and excellence in government.
- **Grow**, learn, excel, and engage through a network of likeminded professionals and leaders.
- **Accelerate** professional careers through learning opportunities and the opportunity to earn a unique credential - the Certified Government Financial Manager, the only credential developed solely with the government financial professional in mind.

AGA Atlanta Chapter serves the governmental financial community throughout the state of Georgia.

Achievements in Chapter Excellence (ACE) Awards

The objective of the Achievements in Chapter Excellence (ACE) Awards is to support, encourage and promote AGA's mission, and to provide flexible guidelines to help the development of a well-rounded chapter.

The ACE year begins on July 1 and concludes on June 30.

The AGA Atlanta ACE goals that follow the Chapter Executive Committee (CEC) roster are organized in line with AGA National's ACE Awards chapter affiliation requirements.

AGA Atlanta 2025 - 2026 CEC Roster

CEC Role	Name	Email
Chapter President	Matt Coleman	coleman@audits.ga.gov
Chapter President-Elect		
Immediate Past President	Kristen Raley	kristenraley@outlook.com
Chapter Secretary	Kristen Raley	kristenraley@outlook.com
Chapter Treasurer	Harry Gatanis	gatanis@audits.ga.gov
Chapter Treasurer	Matt Cooper	micooper@bellsouth.net
National Council of Chapters Representative	Glenda Ostrander	david233@aol.com
ACE Director	Mary Yurewitch	yurewitcm@audits.ga.gov
Certified Government Financial Manager (CGFM) Director	Sage Glanton	sageglanton@gmail.com
Community Service Director		
Membership Director	Laura Weston	weston@audits.ga.gov
Programs & Education Director	Taylor Seymour	seymourt@audits.ga.gov
Early Career & Students Director	Mandy Wissing	mandy.wissing@cobbk12.org
Webmaster/Communications	Kristen Raley	kristenraley@outlook.com
Director-At-Large		

AGA Atlanta ACE Goals

Bylaws and Procedures

ACE – Chapter Affiliation Requirement 1:

The Bylaws and Procedures Committee reviews the chapter's bylaws annually. If necessary, updates are made and approved by members.

Individuals in Charge of Program Area:

Name:

Chapter Title: Chapter President-Elect

Name: Kristen Raley

Chapter Title: Chapter Secretary

Strategies:

- Coordinates with members of the Bylaws and Procedures Committee to review bylaws and make any necessary updates or changes.
- Present any updates or changes to CEC for vote.

Annual Chapter Filings

ACE – Chapter Affiliation Requirement 2:

File IRS Form 990N or e-postcard by the appropriate deadline.

ACE – Chapter Affiliation Requirement 3:

CEC reviews the required state filings annually. Either complete necessary action or determine that no action is necessary and record this information in meeting minutes.

Individuals in Charge of Program Area:

Name: Matt Cooper
Chapter Title: Chapter Treasurer

Name: Harry Gatanis
Chapter Title: Chapter Treasurer

Strategies:

- Begin preparation of the federal tax return to the Internal Revenue Service by October 1st.
- Begin preparation of state filings to the Secretary of State by March 1st.

Key Dates:

- **November 15** – Submission of 990N due to Internal Revenue Service.
- **April 1** – State filings due to Georgia Secretary of State.

Chapter Governance

ACE – Chapter Affiliation Requirement 4:

Elect and submit Chapter Officers for the program year by August 1.

ACE – Chapter Affiliation Requirement 5:

Submit Chapter Strategic Plans and ACE Goals by September 1.

Individuals in Charge of Program Area:

Name: Matt Coleman
Chapter Title: Chapter President

Name: Mary Yurewitch
Chapter Title: ACE Director

Goals:

1. Develop and implement a three-year strategic plan that aligns with the Chapter's Strategic Plan Framework.
2. Produce and maintain policies and procedures to assist the CEC and other committee members in their positions.

Strategies:

- Participation by chapter leadership in monthly CEC and Chapter Educational meetings.
- Communication among leadership regarding effective policies and necessary policy changes.
- Continuously and proactively discuss the importance of utilizing proper logos on all forms of communication.

Key Dates:

- **August 1** – Submission of CEC Roster to Nationals (Bonus points if submitted by June 15).
- **September 1** – Submission of Chapter Goals and Strategic Plans to Nationals (Bonus points if submitted by August 1).

Citizen Centric Reporting

ACE – Chapter Affiliation Requirement 6:

The chapter prepares and disseminates an annual report to its members in Citizen Centric Reporting (CCR) format. If chapter CCR is not submitted for judging, email a copy of the chapter's report to chapters@agacgfm.org.

Individuals in Charge of Program Area:

Name: Mary Yurewitch

Chapter Title: ACE Director

Name: Kristen Raley

Chapter Title: Webmaster/Communications Director

Goals:

1. Complete and disseminate an annual report pertaining to the Chapter in CCR format by November 15, 2025.
2. Assist in preparation of a CCR for a government entity.

Strategies:

- Develop an annual Chapter CCR and submit it to AGA's National Office.
- Post the Chapter CCR to our website and other social media.
- Work with government entities and other AGA Chapters to prepare a CCR.
- Encourage chapter members to participate as National's Citizen Centric Report reviewers.

Key Dates:

- **November 15** – Submission of CCR to Nationals.
- **February 1** – Issue Chapter Citizen-Centric Report.

Website

ACE – Chapter Affiliation Requirement 7:

Chapter maintains an updated website. Minimum requirements include an accurate roster of chapter leaders and committees as well as an accurate calendar of upcoming events.

Individuals in Charge of Program Area:

Name: Kristen Raley

Chapter Title: Webmaster/Communications Director

Strategies:

- To maintain a monthly update frequency for Chapter website. Solicit content from CEC members on a regular basis and provide feedback to members regarding items posted or updated.
- To eliminate manual Chapter meeting administration by exploring Conferences.io. Provide opportunities for virtual networking prior to/after presentations, attendee engagement, attendee tracking, polling, and CPE certificate generation and delivery.

Annual Chapter Evaluation

ACE – Chapter Affiliation Requirement 8:

Chapter should have an annual evaluation or audit to ensure accurate accounting practices and internal controls.

Individuals in Charge of Program Area:

Name: Matt Cooper
Chapter Title: Chapter Treasurer

Name: Harry Gatanis
Chapter Title: Chapter Treasurer

Goals:

1. Provide the Chapter with timely and accurate financial statements.
2. Ensure the internal control structure complies with National's standards.

Strategies:

- Follow practices documented within the "Resources and Guidelines for Chapter Treasurers" by AGA National.
- Provide the Chapter's financials to an independent reviewer annually for evaluation and answer any questions from the independent reviewer.

Key Dates:

- **Upon completion** – Submission of Chapter Evaluation to Nationals.

AGA Atlanta Strategic Plans

Chapter Membership

ACE – Key Performance Indicator(s):

1. Membership Growth
2. Overall Member Satisfaction

Individuals in Charge of Program Area:

Name: Laura Weston
Chapter Title: Membership Director

ACE Goals:

1. Achieve a 10% or greater annual membership growth by April 30, 2026.
2. Attain or exceed an overall member satisfaction rate of 80%.
3. Submit an award nomination for NLT and/or PDT, including volunteer of the year.

Membership Strategic Plans:

- Encourage members to invite non-members to join our chapter and chapter educational events through promotion of a Chapter Membership Incentive Program.
- Participate in membership recruitment events to invite non-members to participate in our chapter and chapter educational events.
- Prepare and distribute a Chapter Membership Satisfaction Survey to identify the needs of our members and areas for improvement.
- Communicate with members to encourage membership renewal and provide additional communication for members who missed the renewal deadline to renew their membership.
- Welcome new members and non-member participants through email communication to inform them of upcoming events and encourage participation within our chapter.
- Submit an award nomination at NLT, PDT, or Volunteer of the Year. The "Volunteer of the Year" plan is a special recognition program aimed at honoring and appreciating the exceptional contributions and dedication of volunteers in our AGA Atlanta Chapter. AGA Atlanta will nominate "Volunteer of the year" by April 15, 2026.

Membership Key Dates:

- **December 2025** – Chapter Membership Satisfaction Survey
- **March 31, 2026** – Membership renewal deadline
- **April 15, 2026** – Submit an award nomination for NLT and/or PDT

Programs & Education

ACE – Key Performance Indicator(s):

1. Training and Events
2. Educational Meeting Attendance
3. Educational Meeting Satisfaction

Individuals in Charge of Program Area:

Name: Taylor Seymour
Chapter Title: Programs & Educations Director

ACE Goals:

1. Provide CPE opportunities in multiple formats (i.e. in-person and virtual).
2. Co-host an educational event with another AGA Chapter.
3. While providing CPE hours that cover a wide breadth of topics, provide networking in at least 50% of these opportunities.
4. Exceed the 2024 – 2025 program year average attendance for educational events by 10% or more.
5. Maintain and improve upon educational meeting survey result average of “4” from the prior program year.

Programs & Education Strategic Plans:

- Hold CPE events providing an opportunity to earn at least 15 CPE over the course of the year, including the annual Chapter Professional Development Training (PDT).
- Advertise and offer CPE events outside of current membership base.
- Promote AGA Nationals Member-Only Webinar Events on chapter calendar.

Tentative Calendar of Chapter Educational Events:

- **September 2025**
- **October 2025** GAO Audit Planning and Processes
- **November 2025** Annual Fraud Prevention Training
- **December 2025**
- **January 2026**
- **February 2026**
- **March 2026** Artificial Intelligence & Data Analytics
- **April 2026**
- **May 2026** Annual Professional Development Training
- **June 2026**

Certified Government Financial Manager

ACE – Key Performance Indicator(s):

1. Candidate Support
2. CGFM Support

Individuals in Charge of Program Area:

Name: Sage Glanton
Chapter Title: CGFM Director

ACE Goals:

1. The chapter holds an information session for the CGFM, provides CGFM exam preparation materials or exam reimbursement, and organizes a CGFM study group or sponsors a CGFM course.
2. Chapter promotes the value of CGFM through recognition of the Chapter's CGFMs via formal chapter communications, events, and the government financial management community (outside of the chapter).
3. Chapter obtains a CGFM Month proclamation.

CGFM Strategic Plans:

- Provide and promote AGA Atlanta and National events that support the CGFM CPE requirements and identify CPE opportunities from sources outside of our Chapter and promote these opportunities through our chapter website and communications.
- Communicate with government entities and private entities to create awareness of the value of the CGFM and promote official recognition of CGFM by employers.
- Obtain endorsements from elected officials and government accountability leaders to promote the CGFM, including obtaining a CGFM Month proclamation from the Governor in March.
- Provide chapter members with CGFM study materials and study groups to help prepare them for the CGFM exams throughout the year.
- Provide scholarship opportunities to cover the cost of the CGFM Application and/or CGFM Exams.

Communications

ACE – Key Performance Indicator(s):

1. Communicates with Membership
2. Provide Updated Website

Individuals in Charge of Program Area:

Name: Kristen Raley
Chapter Title: Webmaster/Communications Director

ACE Goals:

1. Communicate continuously with the Chapter membership via an updated website, monthly newsletter, email notifications, and social media postings.

Communications Strategic Plans:

- Solicit content from CEC members on a regular basis and provide feedback to members regarding items posted or updated.
- Use a communications tool to create email notifications and social media posts to promote chapter and national events.
- Issue a monthly chapter newsletter.
- Collaborate with other AGA Chapters to share and promote events to AGA Atlanta members outside of the AGA Atlanta Chapter.
- Communicate AGA Atlanta events to other AGA Chapters and participants outside of Chapter membership through social media platforms and email.
- Participates in the AGA Nationals Communications Award Program.

Community Service

ACE – Key Performance Indicator(s):

1. Provide Service Projects for Chapter
2. Support the Annual PDT NCSF Fundraiser

Individuals in Charge of Program Area:

Name:

Chapter Title: Community Service Director

ACE Goals:

1. Provide at least 2 community service events for chapter participation concurrent to, and independent of, chapter events.
2. Sponsor the annual PDT NCSF fundraiser through donations of goods for raffle or through monetary support.

Community Service Strategic Plans:

- To participate in DeKalb Gives sponsored by Dekalb County Board of Education to provide Christmas gifts to students in need in December 2025.
- Support the Atlanta Habitat for Humanity's Financial Literacy Program.
- Partner with other local organizations to organize a joint community service effort.
- Support Meals on Wheels Atlanta through monetary donation and submission of handwritten letters to be included in meal deliveries.
- Support local schools by volunteering to read during Read Across America Week.
- Continue to sponsor the annual PDT NCSF fundraiser through donations of goods for raffle or through monetary support.

Community Service Key Dates:

- **July 1, 2026:** Support for NCSF due to AGA Nationals

Chapter Succession Plan

Chapter Executive Committee (CEC)

Individuals in Charge of Program Area:

Name: Matt Coleman
Chapter Title: Chapter President

Name: Mandy Wissing
Chapter Title: Early Career & Student Director

Name: Laura Weston
Chapter Title: Membership Director

ACE Goals:

1. Chapter officers proactively seek out and encourage members for CEC positions year-round.
2. At least, one quarter (25%) of the CEC is comprised of new Chapter leaders, and one Young Professional serves.
3. Chapter officers are elected by June 15th.

CEC Strategic Plans:

- The CEC will hold at least 10 monthly meetings. These meetings will focus on implementing goals and plans for the year. The CEC will meet at least two days prior to scheduled Chapter events to discuss the agenda and scheduled presentations.
- Minutes of the CEC meetings will be documented by the Chapter Secretary and distributed to the CEC members after each meeting. A copy of the minutes will also be provided to Chapter members through the Chapter's website.
- The CEC will hold at least one monthly meeting dedicated to developing the Chapter's goals and plans for the year as well as recognizing those who made the past program year successful.
- The CEC will recruit new members to the CEC at least two months prior to elections in June and focus on recruiting Young Professionals and Chapter Members with expertise in areas that will ensure the CEC represents the diverse backgrounds of our chapter members.

Early Career & Students

ACE – Key Performance Indicator(s):

1. Participate with Local College and Universities
2. Support AGA Electronic Professor Members
3. Support Young Professional Community

Individuals in Charge of Program Area:

Name: Mandy Wissing
Chapter Title: Early Career & Student Director

ACE Goals:

1. Participate in college/university fairs and speak to students about careers in government.
2. Develop and maintain relationships with college/university professors and sign them up for the AGA Electronic Professor Membership (or dues paying member).
3. At least one Young Professional serves on the CEC for the program year.

Early Careers/Students Strategic Plans:

- Provide membership scholarships for one member of the Young Professional Community.
- Continue our chapter mentorship program that provides participants with resume assistance, interview coaching, and job search assistance.
- Expand our membership presence with early career professionals through focused membership drives.
- Create relationships with local college professors and provide presentations for students focused on careers in government accounting and the value of AGA membership and the CGFM.
- Provide educational scholarship opportunities for students with career goals focused on government service.