



AGA Atlanta Chapter
2023 – 2024 Program Year
ACE Goals & Strategic Plans

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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 follows the Chapter Executive Committee (CEC) roster are organized in line with AGA National's ACE Awards chapter affiliation requirements.

AGA Atlanta 2023 -2024 CEC Roster

CEC Role	Name	Email
Chapter President	Kristen Raley	Kristen.raley@doas.ga.gov
Chapter President-Elect	Matt Coleman	coleman@audits.ga.gov
Immediate Past President	Harry Gatanis	gatanis@audits.ga.gov
Chapter Secretary	Christi Owens	rousecs@audits.ga.gov
Chapter Treasurer	Jim Dawson	James_dawson@dekalbschoolsga.org
Chapter Treasurer-Elect	Matt Cooper	micooper@bellsouth.net
National Council of Chapters Representative	Glenda Ostrander	David233@aol.com
ACE/Accountability & Outreach	Sabur Ibrahim	ibrahims@gao.gov
Certified Government Financial Manager (CGFM)/Professional Certifications	Scott Owens	owenss@audits.ga.gov
Community Service	Kiran Batool	batoolk@audits.ga.gov
Membership	Laura Weston	weston@audits.ga.gov
Programs & Education	Jackie Neubert	neubertj@audits.ga.gov
Early Career & Students	Jim Dawson	James_dawson@dekalbschoolsga.org
Webmaster/Communications	James Shepard	shepard@audits.ga.gov
Director-At-Large (Programs & Education)	Evangeline Herrin	valennie1@yahoo.com
Director-At-Large	Frank Rogers	franknrogers@outlook.com
Director-At-Large	Lee Goodman	leegoodman@lowndes.k12.ga.us
Director-At-Large	Sonjia Sullivan	sonjials@icloud.com
Director-At-Large	Sabrina McTier	sabrina.mctier@fultoncountyga.gov
Director-At-Large	Sage Glanton	sageglanton@gmail.com
Director-At-Large	Sondra Vincent	sondra.j.vincent@irs.gov

AGA Atlanta ACE Goals

By-Laws and Procedures

ACE – Chapter Affiliation Requirement 1:

CEC reviews the chapter's bylaws annually. If necessary, updates are made and approved by members.

Individuals in Charge of Program Area:

Name: Matt Coleman
Chapter Title: Chapter President-Elect

Name: Christine Owens
Chapter Title: Chapter Secretary

Strategies:

- 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: Jim Dawson

Chapter Title: Chapter Treasurer

Name: Matt Cooper

Chapter Title: Chapter Treasurer-Elect

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.

ACE – Chapter Affiliation Requirement 6:

Use the correct Chapter and AGA associated logos in all communications.

Individuals in Charge of Program Area:

Name: Kristen Raley
Chapter Title: Chapter President

Name: Matt Coleman
Chapter Title: Chapter President Elect

Name: Sabur Ibrahim
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.
3. Ensure proper Chapter and AGA logos are used throughout the program year.

Strategies:

- Participation by chapter leadership in monthly CEC and Chapter luncheon 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 7:

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: Sabur Ibrahim

Chapter Title: Accountability and Outreach Director

Goals:

1. Complete and disseminate an annual report pertaining to the Chapter in CCR format by October 31.
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 to prepare a CCR.
- Encourage chapter members to participate as National's Citizen Centric Report reviewers.

Key Dates:

- **October 31** – Submission of CCR to Nationals and distributed to Chapter members.

Website

ACE – Chapter Affiliation Requirement 8:

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: James Shepard

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 9:

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

Individuals in Charge of Program Area:

Name: Jim Dawson

Chapter Title: Treasurer

Name: Matt Cooper

Chapter Title: Treasurer-Elect

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:

- **September 30** – Deadline for completion of Chapter Evaluation and submission to Nationals.

AGA Atlanta Strategic Plans

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, 2024.
2. Attain or exceed an overall member satisfaction rate of 80%.

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.

Membership Key Dates:

- December 2023 – Chapter Membership Satisfaction Survey
- March 31, 2024 – Membership Renewal Deadline

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: Jackie Neubert
Chapter Title: Programs & Educations Director

Name: Evangeline Herrin
Chapter Title: Director-At-Large: Programs & Educations

ACE Goals:

1. While providing CPE hours that cover a wide breadth of topics, provide networking in at least 50% of these opportunities.
2. Have a total attendance of 210 participants for educational events over the course of the program year.
3. Maintain and improve upon educational meeting survey result average of “4” from the prior program year.

Programs & Education Strategic Plans:

- Hold 4 CPE events providing an opportunity to earn 3 CPEs at each.
- Hold annual Chapter Professional Development Training (PDT) with the opportunity of a total of 6 CPEs.
- Schedule networking and announcement sessions for 30 minutes before AGA Atlanta CPE events.
- Promote AGA Nationals Member-Only Webinar Events on chapter calendar.
- Purchase group tickets to at least one AGA Nationals webinar to offer to chapter members for free.

Tentative Calendar of Chapter Educational Events:

- **August 17, 2023** – Free to AGA Atlanta Members
- **September 21, 2023** – Quarterly Chapter Educational Event
- **October 18, 2023** – Internal Controls Webinar Presented by AGA
- **November 15, 2023** – Quarterly Chapter Educational Event
- **December 6, 2023** – Free to AGA Atlanta Members
- **January 25, 2024** – Quarterly Chapter Educational Event
- **February 7, 2024** – Free to AGA Atlanta Members
- **March 21, 2024** – Quarterly Chapter Educational Event (CGFM focus)
- **April 10, 2024** – Ethics Webinar Presented by AGA Nationals
- **May 15 & 16, 2024** – AGA Atlanta Professional Development Training
- **June 20, 2024** – Free to AGA Atlanta Members

Certified Government Financial Manager – Professional Certification

ACE – Key Performance Indicator(s):

1. Candidate Support
2. CGFM Support

Individuals in Charge of Program Area:

Name: Scott Owens
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 also identify CPE opportunities from sources outside of our Chapter and promote these opportunities through our chapter website and communications.
- Create a page on our website focused on the CGFM. This page would identify the CGFM CPE requirements, encourage CGFM renewals, publicize our new CGFMs, and provide resources for those interested in obtaining their CGFM.
- Communicate with government entities and private entities to create awareness of the value of the CGFM.
- 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. Consistently Communicate with Membership
2. Provide Updated Website

Individuals in Charge of Program Area:

Name: James Shepard

Chapter Title: Webmaster/Communications Director

ACE Goals:

1. Communicate continuously with the Chapter membership via an updated website, monthly newsletter, 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.

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: Kiran Batool
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 sponsor and organize hygiene kits for the homeless community around Atlanta in the Fall of 2023. By donating and collecting these items for hygiene kits. Contributions to be donated to local homeless shelters in need of support and assistance.
- To participate as a Chapter in the Salvation Army's Angel Tree Christmas assistance program. AGA Chapter will adopt a specific child (Angel) or senior (Silver Bell) from the Salvation Army's Angel Tree Program for the holiday season. Gifts will be bought and delivered to the Charity in early December of 2023.
- To participate in DeKalb Gives sponsored by Dekalb County Board of Education to provide Christmas gifts to students in need. Gifts will be bought and delivered to the Charity in early December of 2023.
- To organize a community service event focused on planting trees and flowers in a public area that could benefit from the addition of trees and flowers during spring of 2024. This event will be hosted during PDT and AGA will work with a local nurse and AGA member volunteers to carry out this task.
- Continue to sponsor the annual PDT NCSF fundraiser through donations of goods for raffle or through monetary support.
- 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, 2024.

Community Service Key Dates:

- **April 15, 2024:** Submit Volunteer of the Year for 100 Bonus Points (Due May 1st)
- **July 1, 2024:** Support for NCSF due to AGA Nationals

Chapter Succession Plan

Chapter Executive Committee (CEC)

ACE – Key Performance Indicator(s):

1. One quarter of CEC is comprised of members who have not previously served.
2. At least one Young Professional serves on the CEC.

Individuals in Charge of Program Area:

Name: Kristen Raley
Chapter Title: Chapter President

Name: Matt Coleman
Chapter Title: Chapter President Elect

Name: Christi Owens
Chapter Title: Chapter Secretary

ACE Goals:

1. Chapter officers proactively seek out and encourage members for CEC positions.
2. Chapter officers are elected by June 15.

CEC Strategic Plans:

- The CEC will hold at least 8 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: Jim Dawson
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 two members 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 in government finance.