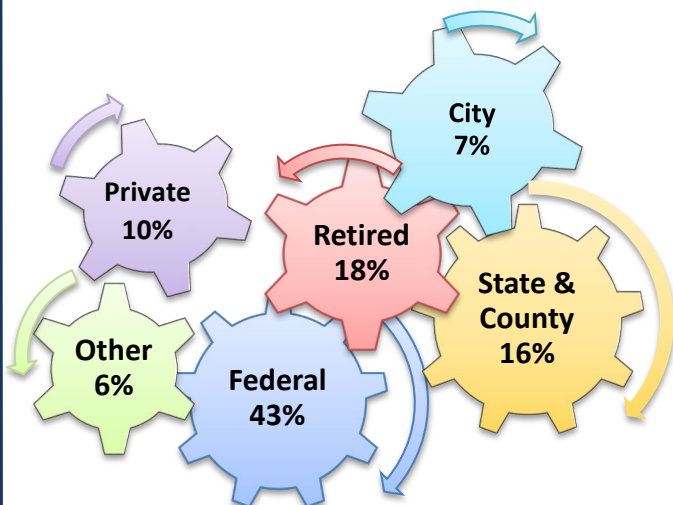


## About Our Chapter — AGA Cleveland Chapter



*We are* — the Association of Government Accountants (AGA) Cleveland Chapter. Established in 1954, our members include employees from the Defense Finance and Accounting Service (DFAS) Cleveland; the National Aeronautics and Space Administration Glenn Research Center (NASA GRC); State, county, and local government agencies of Ohio; universities and colleges; and private industry. Our Board and members are dedicated to ensuring we continue to grow.



Our members believe in and support continuing education and certifications. Around 29% maintain an active Certified Government Financial Manager (CGFM) status, over 15% have obtained their Certified Public Accountant (CPA) certification, and over 10% have obtained other certifications.

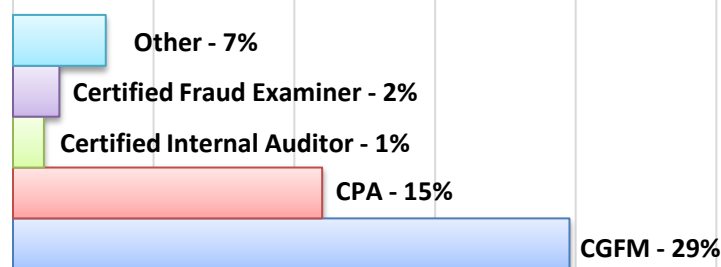
### Membership —

The AGA Cleveland Chapter ended the program year in June with 68 members. Membership includes managers, interns, accountants, financial managers, and information technology professionals.

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### 2020-2021 Member Certifications



### Chapter 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.

### Chapter Vision -

To be a premiere association for advancing government accountability in Northeastern Ohio.

*AGA is the member organization for financial professionals supporting government. We lead and encourage change that benefits our field and all citizens. Our networking events, professional certification, publications, and ongoing education help members build their skills and advance their careers.*



*We believe that the strength in our Chapter is only through members volunteering and participating.*  
Please visit us at [agacleveland.org](http://agacleveland.org)



## Chapter Awards/Recognition —

- ~ AGA Chapter Recognition Program Silver Award (2019)
- ~ Citizen Centric Reporting (CCR) Certificate of Excellence (2018)
- ~ City of Cleveland CGFM Proclamation Recognition
- ~ Ohio Board of Accountancy Eligible CPE Sponsor



Ron Gedeon

## CPE and Training Events —

While this year continued to present challenges, we found ways to carry on. Although we were unable to hold our premier event, the AGA/ASMC Annual Professional Development Training (PDT) in person, we offered it virtually, free of charge for ½ day, earning 4 CPEs. Several of our members also, attended the AGA PDT held virtually, while utilizing other forums, stated below:

- ~ Purchased Virtual AGA Webinars
- ~ Posted Opportunities on Chapter Website



Balwinder Beasley

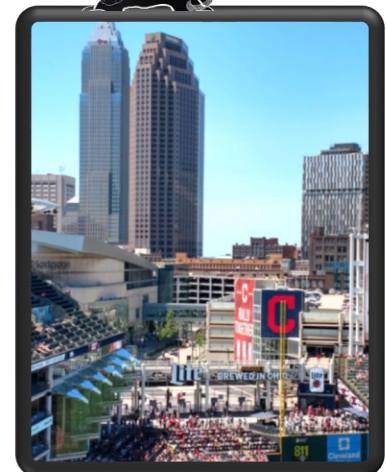
## Member Events/Community Outreach —

Majority are working in a virtual environment, but we find time to give back to our members and our community whether through events or donations:

- ~ Sponsored two luncheon speaker events:
  - Mr. Scott Ockunzzi, Ohio DOT Transportation Engineer for the Ashland Region, spoke on the "ODOT Budget & Safety, Impact of COVID, and other related topics"
  - Dr. JaNice Marshall, a certified life coach and business coach, spoke on "Uplifting Yourself and Others".
- ~ Local Charities Support – Participation:
  - Donations: St Jude, Toys for Tots, Cleveland Food Bank, Ronald McDonald House, Cleveland Animal Protective League



Jana Sjoquist



Would you like to get more involved or become a member?  
Please contact us at [membership@agacleveland.org](mailto:membership@agacleveland.org)

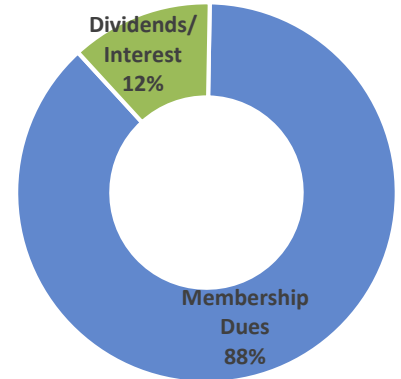


Jackie Hall-Carrillo

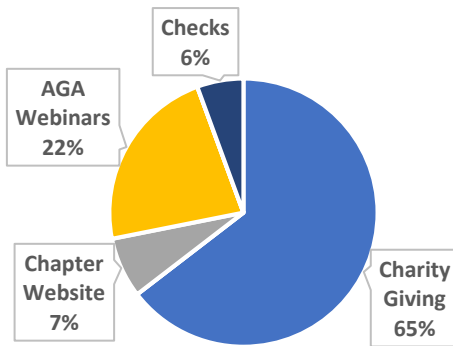
## Revenues

	PY 2021	PY 2020	PY 2019
Annual Spring PDT	\$ -	\$ -	\$ 8,295.00
Membership Dues	\$ 408.32	\$ 388.33	\$ 414.58
Dividends/Interest	\$ 56.14	\$ 225.73	\$ 140.18
	\$ 464.46	\$ 614.06	\$ 8,849.76

Along with membership dues, dividends and interest represented the majority of our revenue for the year. With the onset of COVID-19 restrictions, we were not able to hold our annual AGA/ASMC PDT in person.



## Program Year 21 Expenses



Our reduced expenses mirrored the reduced revenue. In lieu of the AGA/ASMC PDT in person event, we provided additional CPE event resources through AGA Webinars and other free events. We increased our charitable giving to assist others during the pandemic.

## Expenses

	PY 2021	PY 2020	PY 2019
Annual Spring AGA/ASMC PDT	\$ -	\$ -	\$ 5,288.42
Charity Giving	\$ 1,000.00	\$ 740.00	\$ 850.00
Annual Fall Picnic	\$ -	\$ 366.76	\$ 225.00
Chapter Website	\$ 112.99	\$ 119.88	\$ 119.88
AGA Webinars	\$ 349.00	\$ 578.00	\$ -
CGFM Study Guides	\$ -	\$ 655.18	\$ -
PO Box	\$ -	\$ -	\$ 74.00
Checks	\$ 86.65	\$ -	\$ -
Winter Social	\$ -	\$ 121.00	\$ -
<b>Total Expenses</b>	<b>\$ 1,548.64</b>	<b>\$ 2,580.82</b>	<b>\$ 6,557.30</b>

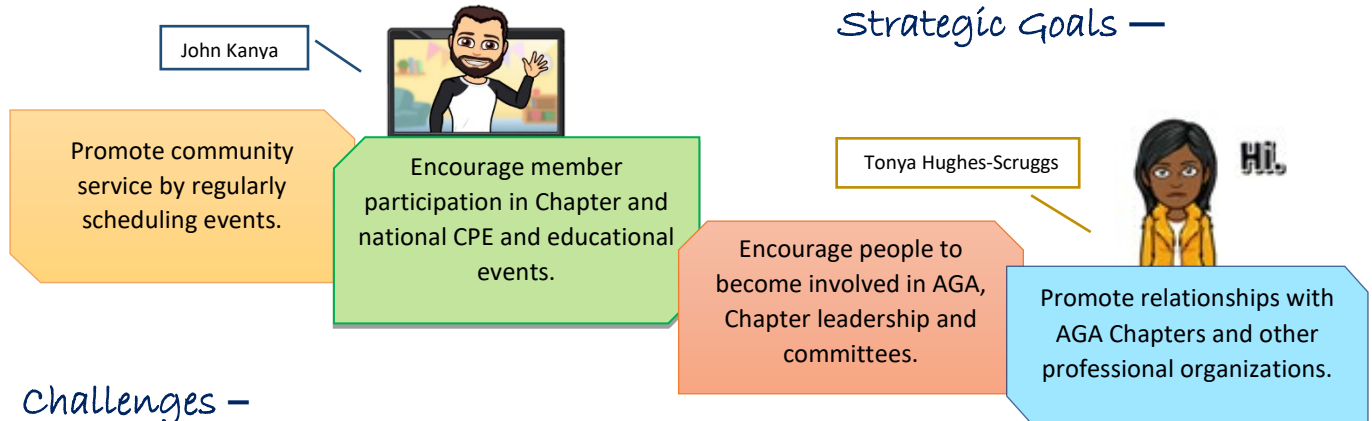


Michael Hoffman

**Program Year Comparison:** As described in the Revenues and Expenses, COVID-19 impacted our Chapter. Without the annual combined AGA/ASMC PDT in person, we lost an opportunity to recruit, retain membership and network with everyone in attendance. Continued our community outreach efforts and developed training events to hold in the virtual format.



Our Chapter continuously seeks ways to serve our members and the community. Our Strategic Goals and plans are based on overcoming the Challenges. This past year has been especially stressful and challenging as we find new ways to provide a high level of benefits in our new “virtual” world.



## Challenges —

- ~ Increasing and retaining membership and participation in the Chapter leadership and committees.
- ~ Providing training events and opportunities that members find interesting and relevant.
- ~ Expanding public knowledge on the benefits and value of AGA and the CGFM to increase our membership.
- ~ Growing the **CGFM** in our Chapter and supporting other certifications

Chapter Leaders 2020-2021

President	• John Kanya
Past President	• Jana Sjoquist
President- Elect	• Tonya Hughes-Scruggs
Secretary	• Michael Hoffman
Treasurer	• Jackie Hall-Carrillo
Treasurer-Elect	• Jene Philippy
Directors	<ul style="list-style-type: none"> <li>• Professional Certification: Ron Gedeon</li> <li>• Education: Balwinder Beasley</li> <li>• Membership: Vacant</li> <li>• Community Service: Vacant</li> <li>• Communications: Hoffman/Sjoquist</li> <li>• CCR/Outreach: Shared</li> </ul>

Incoming Chapter Leaders 2021-2022

President	• Tonya Hughes-Scruggs
Past President	• John Kanya
President-Elect	• Vacant
Secretary	• Michael Hoffman
Treasurer	• Jackie Hall-Carrillo
Treasurer-Elect	• Jene Philippy
Directors	<ul style="list-style-type: none"> <li>• Professional Certification: Ron Gedeon</li> <li>• Education: Balwinder Beasley</li> <li>• CCR: Shared</li> <li>• Outreach: Lou Ockunzzi</li> <li>• Communications: Hoffman/Sjoquist</li> <li>• Membership: Shared</li> <li>• Community Service: Ashley Johnson</li> <li>• NCC Rep: Jana Sjoquist</li> </ul>



*We want to hear from you!*

Do you like this report? Would you like to see other information? Please let us know. Contact us at [accountability@agacleveland.org](mailto:accountability@agacleveland.org).