

2023 - 2024 Review

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September 25, 2024

Des Moines, Iowa Chapter



About Us:

AGA is the association that connects and empowers financial related professionals who support government, from financial management to IT, human resources, cybersecurity and more, to advance good government initiatives, grow their expertise and accelerate their careers. AGA is a non-profit organization dedicated to improving the quality and effectiveness of government fiscal administration and program performance and accountability. AGA is divided into 8 geographic areas across the United States and includes chapters in Mexico City, Puerto Rico, and Pacific Rim. The Des Moines chapter was chartered in 1977 and is included in Region 3, along with chapters in Kansas, Mexico City, Missouri, Nebraska, Oklahoma, South Dakota, and Texas. Located in Iowa's capital city, membership in the Des Moines chapter is comprised primarily of State of Iowa employees. The chapter also includes members from both federal and local Governments, including cities, counties, school districts, retired members and non- governmental members.

Our Purpose

AGA is a professional association advancing accountability, transparency and leadership by promoting education, certification, innovation and collaboration across all levels of government and to stakeholders. The Des Moines Chapter serves its members by providing or sponsoring appropriate educational programs, encouraging professional development, influencing governmental financial management policies and practices, and serving as an advocate for the profession.

Vision

AGA endeavors to be the premier association for advancing governmental accountability.

Mission

For members, to provide quality professional growth and development opportunities through education programs, professional certification, peer networking, and civic activities; for employers, to develop a highly skilled workforce knowledgeable in the unique aspects of governmental accounting; for the public, to promote transparency and accountability in all aspects of government.



2024 Accomplishments:

- Provided 39 hours of quality educational programs designed to meet the continuing education requirements for Certified Government Financial Managers and Certified Public Accountants.
- The chapter “passed the envelope” and collected donations for several charities. \$271 was raised and a total of \$1,475 was paid to charities, with \$1,025 of it from prior year collections and \$450 was donated during the year.
- Added 6 new members to the chapter.
- The Chapter earned chapter recognition points to achieve the Gold Achievement in Chapter Excellence award this year. The chapter has received the Platinum, Gold, or Silver award in each of the last fifteen years.

Chapter Performance:

Meeting Plan:

The Des Moines Chapter will meet once a month in conjunction with the AGA National webinars from September through May. Each meeting will include a business meeting (no CPE offered) and program speaker (1 CPE offered). The meetings are tentatively scheduled from 11:30 AM to 1:00 PM at a location in the Des Moines metro area. **Goal partially not met. Business meetings and Lunch n’ Learns were held during 5 of the months from September through May. 4 months did not have a business meeting or lunch n’ learn.**

The Chapter will hold an annual meeting and awards program. **Goal met.**

The Des Moines Chapter Executive Committee (CEC) will meet monthly. Special committees (such as seminar, procedural, social committees) will meet as needed. Meetings will be scheduled in a manner that will allow maximum participation by all committee members. Technology will be used to the extent possible to conduct committee business and to keep committee members informed of Chapter activities in a timely manner. **Goal met.**

Education and Professional Development Plan:

- **Monthly Luncheons:** A program speaker will be scheduled for most monthly luncheon meetings, presenting a topic of interest to members. One CPE hour will be awarded for each event. We will explore options to reach outlying members. Chapter meetings will be combined with webinars. **Goal met. Five different program speakers presented during the program year.**
- **Seminars:** The Chapter intends to offer a separate seminar featuring topics of particular interest to financial management and accountability professionals in federal, state, and local governments. Tentative plans are to offer a seminar in April 2024 in conjunction with the National AGA Ethics webinar. **Goal met.**
- **Web Training Events:** The Chapter will sponsor a minimum of twelve webinars offered by the National AGA, NASACT, and others. Other webinars will be hosted as they become available, if approved by the CEC. **Goal met.**

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- **Other Educational Opportunities:** The Chapter will also inform members and non- members of continuing education opportunities available through National AGA, other AGA chapters, and other professional organizations. **Goal met.**
 - **Notifications:** The Chapter will request that AGA seminars and other educational events be included on the agendas and mentioned during any meetings held by the State financial managers. Other avenues of publication will be pursued. **Goal met.**

CGFM Plan:

Goal 1 – Support current CGFMs

The Chapter will assist current CGFMs in meeting 80 hours of CPE every two years by:

- Offering approximately 40 hours of CPE at Chapter sponsored events.
- Identifying CPE opportunities that can be applicable towards CGFM CPE requirements from sources outside of our Chapter, including local seminars, internet courses, self- study, other AGA chapter events, etc., and promoting those on our website and in the newsletter.
- Publishing CGFM CPE requirements on the website and in the newsletter.

Goal met. 39 hours of CPE sponsored & over 50 hours of CPE advertised.

The Chapter will recognize new and current CGFMs on the website, in the newsletter and at monthly meetings. **Goal met.**

The Chapter will encourage CGFM renewals through personal contact, letters/e-mails, the website and the newsletter. **Goal met.**

Goal 2 – Market CGFM service mark locally

The Chapter will look for opportunities to promote the CGFM designation to government employers, professional organizations, universities and colleges, and the general public in our area. The Chapter CGFM Chair will reach out to the Area 3 Director or to National for ideas and suggestions that may help accomplish this goal. **Goal met.**

The Chapter will recognize March as CGFM month in the State of Iowa (the Governor's CGFM Month proclamation was obtained in 2007 for 2007 and future years). The Chapter will maintain the relationship with the City of Des Moines recognizing March as CGFM month. The Chapter will also seek similar local and county CGFM proclamations. **Goal partially met. The Chapter submitted for proclamations from the City of Des Moines and Polk County, but never heard back on either one.**

The Chapter will strive to use the CGFM logo in all of our publications. **Goal met.**

Goal 3 – Assist potential new CGFMs in attaining certification

The Chapter will survey the needs of current and potential CGFM candidates and offer support as needed to individuals studying for CGFM exams, such as organizing a study group or bringing a CGFM study course to Des Moines. **Goal met – surveyed the needs and interest was low, so no further action was taken.**

The Chapter will continue offering a minimum of 2 study guides for each of the three exam parts through the State Library and one electronic study guide owned by the chapter. The Chapter will promote this benefit on the website and in the newsletter. **Goal met.**

The Chapter will provide scholarships for members who obtain CGFM certification. The CEC will communicate information about this benefit to potential new CGFMs on the website, in the newsletter and at Chapter events. **Goal met.**

Community Service Plan:

The Chapter strives to participate in one community service participatory event and will select six charities recognized by the IRS to support, through either monetary donations or donations of goods. The Chapter will match up to \$100 of monetary donations per charity. Additionally, the Chapter will request a match from the National Community Service Fund. **Goal partially met. Only 3 charities were supported in the program year, Chapter and National match was completed.**

Membership Plan:

The Chapter Membership Chair will check membership lists and contact suspended members to encourage them to renew. **Goal met.**

The Chapter will provide incentives to encourage current members to recruit new members. Incentives may include, but are not limited to: free registration to one or more Des Moines AGA Chapter event(s) offered in the subsequent year to the member who recruited the most new members in the current chapter year; free registration to webinars offered in the subsequent year to the member who accompanied the most prospective new members to “lunch ‘n’ learns”/webinars in the current chapter year, etc. **Goal met.**

Encourage membership by offering a reduced registration fee for seminars and webinars to AGA members as compared to non-members. **Goal met.**

Invite non-members who attend seminars and webinars to monthly meetings and to join AGA. **Goal met.**

Encourage membership by emphasizing the CPE offered at the luncheon meetings and the opportunity to network with other governmental auditing/accounting/finance individuals. Also, emphasize the ability to earn three hours of CPE at one time, at a low cost, by participating in the webinar that usually follows the Chapter luncheon meeting. **Goal partially met – encouraged membership by emphasizing the ability to earn CPE at a low cost or even for free through both the Chapter and National AGA by being a member. Hosted 5 free lunch n’ learns during the year and advertised National’s Free Member Only webinars.**

Recognize new members in the Chapter newsletters and at Chapter meetings. **Goal met.**

Recognize members at the awards ceremony with a certificate of recognition for each 5, 10, 15, etc. years of membership. **Goal met.**

Provide timely information to members using updated Chapter website. **Goal met.**

The Chapter Membership Chair will provide the Communications Chair the members that have the most membership recognition points. Names of the top three members will be published on the Chapter website and in the newsletter. **Goal met.**

Apply for the National Recruitment Scholarship dollars, when offered, and develop plans for use of the funds by AGA’s deadline. **Goal not met.**

Young Professionals Plan:

The Chapter will encourage members to speak to students in accounting classes/clubs at colleges in Iowa, telling them about working in the governmental accounting field, CGFM certification, and AGA in general. The Chapter will also provide the National AGA brochures about governmental accounting to the colleges/students during individual department recruiting efforts. **Goal met. Two Universities were visited during the program year.**

The Chapter will help to promote the free e-memberships to full-time college students and college professors to help get AGA further marketed. **Goal met.**

Chapter members will be informed of National AGA scholarship opportunities. **Goal met.**

The Chapter may promote the “*Government Finance Case Challenge*” to area colleges and universities. **Goal met.**

Accountability Plan:

The Chapter Accountability Chair will enlist committee members to help prepare and publish the Chapter’s annual Citizen-Centric Report (CCR). **Goal met.**

The Chapter will establish an outreach committee to promote the Citizen-Centric Report to other governments and to assist with preparation and publication as needed. **Goal not met.**

The Chapter will consider partnering with college students to prepare the Chapter CCR or agency CCR for college credit or extra credit. **Goal not met.**

The Accountability Chair will coordinate with the Education Chair to use speakers and training materials focusing on government accountability and performance best practices for Chapter events. **Goal met. 39 hours of CPE sponsored.**

Communication Plan:

The Chapter Website Chair will post information pertinent to the good of the Chapter and its members on the Chapter website; the Chapter website will be updated as needed. **Goal met.**

The Chapter will issue six newsletters throughout the year. **Goal met.**

Other Opportunities:

Invite junior/senior accounting majors, and their professors, to our webinars at discounted/reduced rates. Invite the same to our monthly luncheon meetings. To encourage participation, the Chapter may offer free webinars and/or lunches to these individuals. **Goal met.**

Reach out to other target markets that we are missing right now such as city, county, and school employees. **Goal met.**

Update the Chapter procedures and by-laws, as needed, and develop a strategic plan. **Goal met.**

Consider incentives for participating on the CEC. **Goal met.**

Our Finances:

What are the costs for services and how are those costs financed?

Conference registration and monthly webinar fees are the primary source of revenue for the Chapter. The fee structure for conferences is determined based on estimated expenses and the number of CPE hours offered and is tiered by member status. Fees for webinars are established based on the Chapter's costs to provide the training opportunity. The Chapter uses these revenues to provide education programs and leadership opportunities and to maintain Chapter operations. Revenues are collected predominately in the spring of each year and are used to fund activities in the subsequent program year. Other Chapter expenses include registration and travel costs for the Chapter President to attend the National AGA Professional Development Training (PDT), community service projects (direct charitable contributions), and CGFM scholarships, CEC member incentives and other member incentives.

Revenues by Source

	2024	2023
Conference Revenues	\$ 6,368	\$ 12,340
Monthly Webinars	\$ 3,123	\$ 4,724
Membership Dues and Fees	\$ 538	\$ 275
Charitable and Other Activities	\$ 271	\$ 556
Total Chapter Receipts	\$ 10,301	\$ 17,895

Expenses by Function

	2024	2023
Annual Conference	\$ 5,601	\$ 10,777
Monthly Webinars	\$ 3,600	\$ 4,377
Charitable Activities	\$ 1,484	\$ 539
Regional and National Conferences	\$ 1,862	\$ 244
Chapter Operations	\$ 662	\$ 538
Total Chapter Expenses	\$13,209	\$ 16,475

Financial Review

A financial review of the Chapter's finances was completed, and the financial records appear to be reasonable and properly supported.

What's Next:

Meeting Plan:

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The Chapter will hold an annual meeting and awards program.

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Education and Professional Development Plan:

- **Monthly Luncheons:** A program speaker will be scheduled for most monthly luncheon meetings, presenting a topic of interest to members. One CPE hour will be awarded for each event. We will explore options to reach outlying members. Chapter meetings will be combined with webinars.
- **Seminars:** The Chapter intends to offer a separate seminar featuring topics of particular interest to financial management and accountability professionals in federal, state, and local governments. Tentative plans are to offer a seminar in April 2025 in conjunction with the National AGA Ethics webinar.
- **Web Training Events:** The Chapter will sponsor a minimum of eleven webinars offered by the National AGA, NASACT, and others. Other webinars will be hosted as they become available, if approved by the CEC.
- **Other Educational Opportunities:** The Chapter will also inform members and non-members of continuing education opportunities available through National AGA, other AGA chapters, and other professional organizations.
- **Notifications:** The Chapter will post all educational events to the Chapter Website and also request that AGA seminars and other avenues of publication will be pursued

CGFM Plan:

Goal 1 – Support current CGFMs

The Chapter will assist current CGFMs in meeting 80 hours of CPE every two years by:

- Offering a minimum of 30 hours of CPE at Chapter sponsored events this year.
- Identifying CPE opportunities that can be applicable towards CGFM CPE requirements from sources outside of our Chapter, including local seminars, internet courses, self-study, other AGA chapter events, etc., and promoting those on our website and in the newsletter.
- Publishing CGFM CPE requirements on the website and in the newsletter.

The Chapter will recognize new and current CGFMs on the website, in the newsletter and at the annual spring seminar.

The Chapter will encourage CGFM renewals through personal contact, letters/e-mails, the website and the newsletter.

Goal 2 – Market CGFM service mark locally

The Chapter will look for opportunities to promote the CGFM designation to government employers, professional organizations, universities and colleges, and the general public in our area. The Chapter CGFM Chair will reach out to the Area 3 Director or to National for ideas and suggestions that may help accomplish this goal.

The Chapter will recognize March as CGFM month in the State of Iowa (the Governor's CGFM Month proclamation was obtained in 2007 for 2007 and future years). The Chapter will also seek similar local and county CGFM proclamations.

The Chapter will strive to use the CGFM logo in all of our publications.

Goal 3 – Assist potential new CGFMs in attaining certification.

The Chapter will survey the needs of current and potential CGFM candidates and offer support as needed to individuals studying for CGFM exams, such as notifying potential candidates of virtual study groups.

The Chapter will continue offering a minimum of 2 study guides for each of the three exam parts through the State Library. The Chapter will promote this benefit on the website and in the newsletter.

The Chapter will provide scholarships for members who obtain CGFM certification. The CEC will communicate information about this benefit to potential new CGFMs on the website, in the newsletter and at Chapter events.

Community Service Plan:

The Chapter strives to participate in one community service participatory event and will select six charities recognized by the IRS to support, through either monetary donations or donations of goods. The Chapter will match up to \$100 of monetary donations per charity. Additionally, the Chapter will request a match from the National Community Service Fund.

Membership Plan:

- The Chapter Membership Chair will check membership lists and contact suspended members to encourage them to renew.
- The Chapter will provide incentives to encourage current members to recruit new members. Incentives may include, but are not limited to: free registration to one or more Des Moines AGA Chapter event(s) offered in the subsequent year to the member who recruited the most new members in the current chapter year; free registration to webinars offered in the subsequent year to the member who accompanied the most prospective new members to "lunch 'n' learns"/webinars in the current chapter year, etc.
- Encourage membership by offering a reduced registration fee for seminars and webinars to AGA members as compared to non-members.
- Invite non-members who attend our seminars and webinars to our monthly meetings and to join

AGA.

- Encourage membership by emphasizing the CPE offered at the luncheon meetings and the opportunity to network with other governmental auditing/accounting/finance individuals. Also, emphasize the ability to earn three hours of CPE at one time, at a low cost, by participating in the webinar that usually follows the Chapter luncheon meeting.
- Recognize new members in the Chapter newsletters and at Chapter meetings.
- Recognize members at the awards ceremony for each 5, 10, 15, etc. years of membership.
- Provide timely information to members using updated Chapter website.
- The Chapter Membership Chair will provide the Communications Chair the members that have the most membership recognition points. Names of the top three members will be published on the Chapter website and in the newsletter.
- Apply for the National Recruitment Scholarship dollars, when offered, and develop plans for use of the funds by AGA's deadline.

Early Careers Plan:

The Chapter will encourage members to speak to students at colleges in Iowa, including but not limited to students in accounting. The Chapter will talk to them about working in public service, CGFM certification, and AGA in general. The Chapter will also provide the National AGA brochures about governmental careers to the colleges/students during individual department recruiting efforts.

The Chapter will help to promote the free e-memberships to full-time college students and college professors to help get AGA further marketed, as well as encourage college instructors to include AGA membership or events in curriculum.

Chapter members will be informed of National AGA scholarship opportunities.

The Chapter will share state government accounting and management internship opportunities with local and regional higher education institutions.

The Chapter may promote the "Government Finance Case Challenge" and CGFM certification to area colleges and universities. Chapter members will speak to college faculty about opportunities to integrate the case challenge or CGFM curriculum into college credit class, with testing at the end of the semester.

The Chapter will encourage students to attend local events including webinars, luncheon meetings, and the April conference, and may work with area higher education institutions to host an event such as a webinar or the April conference.

The Chapter will explore new ways to support students from middle school to university level, young professionals in government, including a potential job shadowing program.

Accountability Plan:

The Chapter Accountability Chair will enlist committee members to help prepare and publish the Chapter's annual Citizen-Centric Report (CCR).

The Accountability Chair will coordinate with the Education Chair to use speakers and training materials focusing on government accountability and performance best practices for Chapter

events.

Communication Plan:

The Chapter Website Chair will post information pertinent to the good of the Chapter and its members on the Chapter website; the Chapter website will be updated as needed.

The Chapter will issue six newsletters throughout the year.

Other Opportunities:

- Reach out to other target markets that we are missing right now such as city, county, and school employees.
- Coordinate AGA training with State of Iowa, Performance & Development Solutions (PDS) classes.
- Ask college instructors to include AGA membership or events in curriculum.
- Educate and promote the Citizen-Centric Report (CCR) and the Certificate of Excellence in Accountability Reporting (CEAR) Program.
- Update the Chapter procedures and by-laws, as needed, and develop a strategic plan.
- Consider incentives for participating on the CEC.
- Explore opportunities to work with Workforce Development to attach more people to the Government sector.

Demographics:

Chapter Status:	Gold
Active Members June 30:	64
Members with CGFM Certification:	28
CPE Hours Offered:	39
Attendees at Annual Conference:	32 members, 31 non-members

2024-2025 Chapter President: Kaylynn Short aga.dsmiowa@gmail.com

We want to hear from you. Do you like this report? Would you like to see other information? Please send your suggestions to aga.dsmiowa@gmail.com. For more information on our services, visit our website at www.agacgfm.org/Chapters/DesMoines/.

