



AGA Phoenix Chapter

A Report to Our Members 2020-2021

A Message From Our President

This is the eleventh year in the row the Phoenix Chapter of the Association of Government Accountants has published its Citizen Centric Report. This report embodies the AGA's initiative for governments to provide clear financial information that is accessible to the average citizen.

We would love for you to attend one of our monthly meetings or our annual Professional Development Training. We strive to provide high quality and low-cost continuing professional education for our members and the government accounting community. Please visit our website at <https://www.agacgfm.org/Chapters/Phoenix/>, where you can find information on our events, earning your CGFM certification, and much more.

We hope our report provides improved transparency and accountability of our strategic objectives and finances. We welcome any feedback and hope to see you at a future event.

Jordan Dale, CGFM

AGA Phoenix Chapter President

Our Strategic Goals

- Provide high quality, low-cost continuing professional education to the membership and the government accounting community.
- Promote the value of AGA membership in order to retain and expand membership.
- Promote the value of the Certified Government Financial Management (CGFM) program as the preferred professional designation.
- Promote government financial management to schools and colleges and become spokespersons for the advancement of government accountability through quality course offerings to students.
- Provide a web site that the membership can use to research current information relating to the Phoenix Chapter.
- Promote networking among membership at Chapter events.
- Reach out to members consistently, provide social/recruiting events, and survey members annually.
- Promote Executive Board membership in order to diversify our ideas and strengthen our focus.
- Expand AGA membership throughout the state.



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Mission

The Phoenix Chapter serves Arizona professionals in the government financial management community by providing quality, low-cost continuing education, promoting professional development and interaction among members, and fostering a commitment to community involvement as well as a sense of responsibility for advancing government accountability.

Vision

The Phoenix Chapter of the Association of Government Accountants (AGA) actively creates an avenue for membership to share ideas with each other, to share knowledge and time with the community, and to promote the advancement of government standards and accountability within the profession.

How have we progressed?

Where are we going?

2021 Accomplishments

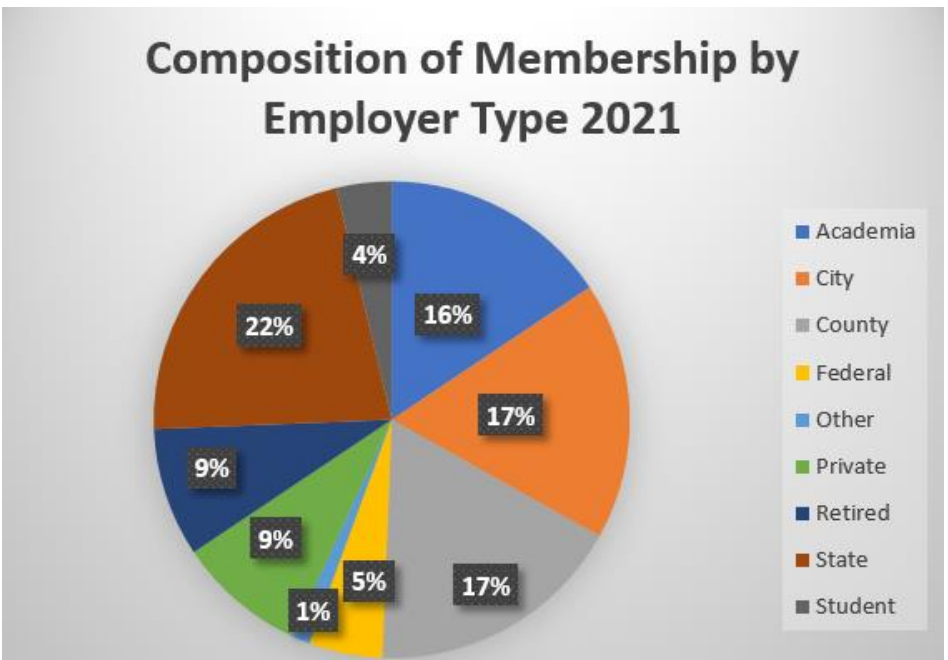
- Our Chapter held fourteen monthly educational meetings throughout the year, as well as an Ethics update and our annual Professional Development Training (PDT) for a total of 42 CPE credits. Attendees averaged 28 for monthly meetings, 48 for ethics, and 62 for the PDT.
- Due to the COVID-19 Pandemic, all program year events were held virtually to ensure health and safety for all.
- The Phoenix Chapter of AGA earned Chapter Recognition Points during the 2020-21 Program Year to be the recipient of the Silver Chapter Designation Award from AGA Nationals.
- This year our Chapter awarded two scholarship totaling \$1,500 to students identified for academic excellence and community service achievements.
- Our Chapter offered scholarships to members who passed the CGFM exam this year.
- We assisted AGA National by providing financial support to four different charities: Wounded Warrior Project, America Needs You, St. Jude Children's Research Hospital, and American Red Cross.
- We continued our sponsorship program to partner with other organizations to further our mission.

Membership Demographics

	2020	2021	% Change
Total Membership	165	160	-3.0%
CGFM Certifications	82	82	0.0%
CPA Licenses	32	32	0.0%
Bachelor Degrees	79	70	-11.4%
Master Degrees	61	66	8.2%

- *Our membership increased slightly due to strong recruiting efforts and networking.*

Composition of Membership by Employer Type 2021



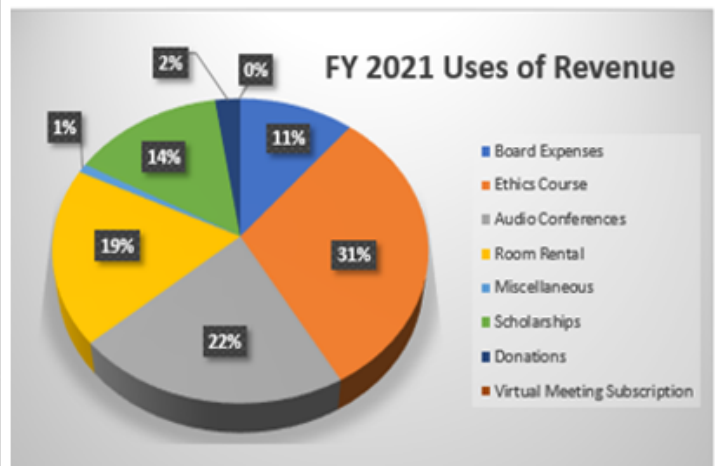
- *We offered monthly education meetings virtually to encourage participation from non-traditional attendees.*
- *The Chapter provides an Ethics class annually as a benefit to our members, to meet their CPA Ethics requirements.*

Our Finances

Revenues and Expenses

What are the costs for **servicing our members** and how are those costs paid?

PHOENIX CHAPTER SCHEDULE OF SOURCES AND USES		
	FY 2020	FY 2021
SOURCES		
Event Registration	20,560	19,774
Chapter Dues	792	804
Sponsors	750	1,300
Miscellaneous	4	48
Total	22,105	21,926
USES		
CGFM	1,332	-
Meetings - Catering	4,459	-
Board Expenses	1,135	1,225
Ethics Course	3,248	5,800
Audio Conferences	2,270	2,483
Room Rental	1,975	1,725
PDC Materials	386	-
Miscellaneous	102	373
Scholarships	1,500	1,500
Donations	250	250
Travel	701	-
Website	24	-
Virtual Meeting Subscription	-	150
Total	17,382	13,505
SOURCES OVER USES	4,723	8,421



Independent Audit

An Independent audit of the Chapter's finances was conducted, resulting in a clean opinion. Complete financial information can be found at www.agaphoenix.org.

What's Next?

Key Initiatives

We want to hear from you.

If you would like any additional information on our Chapter or are interested in volunteering for a committee or serving on our Executive Board, please contact any of our Board members. You can find a listing of our Board members on the "Chapter Leadership" page on our website. We look forward to hearing from you.

AGA – Phoenix Chapter

PO Box 64911

Phoenix, AZ 85082-4911

www.agaphoenix.org



To reach any of our officers, please send an email to contact@agaphoenix.org.

Our 2020-21 officers included:

- Jordan P. Dale, CGFM - President, Webmaster, and CGFM/Professional Certification Co-Chair
- Michael D Baumert, CPA - Vice President, Education Committee Co-Chair
- Marvin Mendieta, CPA, CGFM -Treasurer and CGFM Co-Chair
- Joshua Jumper, CPA, CGFM – Secretary, Young Professional Committee Chair
- Mary Adelman, CGFM - Membership Chair
- Kelly Alkhoury, CGFM –NCC Representative, CGFM/Professional Certification Co-Chair
- Gergana A. Kovatcheva, CGFM – CGFM/Professional Certification Co-Chair
- Keith Orr, CGFM, Jerry Snyder, CGFM-Ret, Robert Harwood - Education Committee
- Daniela D. Kunova, Michelle Huckabay, CPA, CGFM – Programs Committee Co-Chair
- Kim Prendergast, CGFM, Accountability Chair
- Myrna Lopez, CGFM, Communications

Challenges-FY 21 Targets

- The ongoing COVID-19 pandemic has required our chapter to look for ways to deliver high quality CPE training in a virtual environment.
- Aim to return to in-person educational events in January 2022 based on health and safety protocols at that time.
- Produce timely and effective communication and information to our members. Another goal is to produce the Chapter's Citizen Centric Report and have it posted to our website by October 2021.
- Increase exposure of the Chapter via advertising annual scholarship opportunities at Colleges and Universities.
- Return to having community service events to assist the needs of our community. Paola A. Julio De Matson is our Community Services Chair.
- We are striving to retain and increase membership. Our Chapter's goal is to retain 95% of our current members, and increase new membership by 5%.