



ASSOCIATION OF GOVERNMENT ACCOUNTANTS

RICHMOND CHAPTER POLICIES & PROCEDURES MANUAL

Approved August 14, 2020



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Chapter Bylaws can be found on our Chapter website at: <https://www.agacgfm.org/Chapters/Richmond>

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Chapter History & Presidents

1970s – In the Beginning:

The Richmond Chapter of the Association of Government Accountants (AGA) began as the Richmond Chapter of the Federal Government Accountants Association (FGAA) in the spring of 1972. John Cooley, Washington D.C. Chapter, provided strong leadership in coordinating and establishing the Richmond Chapter FGAA at the Defense General Supply Center (DGSC) in Richmond, Virginia. Initial evening dinner meetings were held at the Bellwood Officers' Club at the DGSC. On March 1, 1973, the FGAA Richmond Chapter was officially chartered, with Wayne Clements serving as President. Other members included Ann Andrews, TJ Bise, and John Adams, who each served as president after Wayne. John was a cornerstone of the chapter and remained active until he passed away in 1996. In 1975, the FGAA amended the bylaws to allow qualified state and local government employees to become full members, and the organization changed its name to the Association of Government Accountants, as we know it today. The Richmond Chapter grew to 30 members, primarily federal employees.

1980s – Building Diversity:

During the early 1980s, most of the federal members of the chapter did not renew their memberships. Early chapter leadership was lost and only through the efforts of a few chapter members, led by John Adams, did the chapter survive. John felt that an AGA presence in the Richmond area would be beneficial. The chapter had very little active membership and only held intermittent monthly meetings. In 1984, a strong and committed Regional Vice President serving in the Mid-Atlantic region, Donald Ingram, took a personal interest in the chapter. Donald convinced Ed Soniat, a member of the Virginia Peninsula Chapter who lived in the Richmond area, to take a leadership role in reviving the Richmond Chapter. With the help of Donald and the support of the National Office, Ed was able to revitalize the Richmond Chapter. Ed Soniat continued to serve on the National level for many years after.

During the mid to late 1980s, the Richmond Chapter began to attract highly visible speakers, primarily from federal and state government, as well as greater participation in regular monthly meetings. The chapter's membership growth was triggered primarily by state employees from the downtown Richmond area. The 1986-1987 program year achieved quite a bit of support from state officials as they began to become more active in chapter events and activities. The program changed to a combination of downtown luncheons and evening meetings at the DGSC Bellwood Officer's Club. The Richmond Chapter also began to co-sponsor an annual spring meeting with the Virginia Peninsula Chapter.

The chapter newsletter, which had mostly been phased out, began again in 1985 via Ed Soniat. The Richmond Chapter sponsored its first all-day seminar in January 1987, which was very successful in fulfilling the educational needs of the members. Ed Soniat served as the Regional Vice President for the Mid-Atlantic Region for the 1988-1989 program year. Chapter membership grew as the Richmond Chapter began to offer all-day seminars twice a program year. During the late 1980s, federal financial managers and local government officials joined the chapter, building a more diverse chapter base. Even



today, this diversity is reflected in the speakers from federal, state, and local governments at monthly meetings and seminars.

1990s – Professional Expansion:

In the early 1990s, chapter officers concentrated membership drives at local governments. As a result, the Richmond Chapter was recognized by the National Office for membership growth for chapters of similar size. Membership had expanded from the City of Richmond into Chesterfield and Henrico counties. In 1991, the State Board of Accountancy approved the Richmond Chapter's request to award continuing professional education credits for Certified Public Accountants. This was a major milestone demonstrating the high caliber of education and training events within the Richmond Chapter. In 1995, the joint meetings with the Virginia Peninsula Chapter became the joint Annual South-Atlantic Professional Development Trainings, which attract over 100 attendees each year.

The chapter began supporting the Certified Government Financial Manager (CGFM) program. In addition to encouraging members to apply, selected chapter members served in an advisory capacity to the National Office on various aspects of the examination.

In the 1994-1995 program year, the chapter expanded training and education events from two to three all-day seminars. The highlight of this year was John Adams receiving the National Chapter Service Award. This was the first award the Richmond Chapter had received from the National Office. This was also the first year the chapter earned national recognition for earning over 10,000 points in the Chapter Recognition Program.

In the 1995-1996 program year, the chapter hosted the first joint seminar with the Association of Certified Fraud Examiners (ACFE). In September 1995, the chapter achieved the highest attendance at a monthly meeting with over 60 attendees to hear a presentation on the Commonwealth of Virginia's new travel regulations. The chapter also hosted the AGA National President, Virginia Brizendine, as a guest speaker. Expanding into the student population, the chapter established the first local Governmental Accounting Award with Virginia State University. Overall, the chapter sponsored 11 educational events, with over 250 attendees earning over 780 hours for Continuing Professional Education (CPE) credits. This year, the chapter established the Chapter Awards Recognition Program to formally recognize key personnel making significant contributions to the chapter. The first award was presented to Joe Kapelewski, who recently celebrated his 30th anniversary with the AGA.

In the 1996-1997 program year, the chapter achieved an all-time high membership of 110 members with over 75% certified as Certified Government Financial Managers (CGFM). The chapter received the National Highest Overall Growth Award for membership for chapters with 50-100 members. The chapter published the first Richmond Chapter Directory. The chapter also expanded the local Governmental Accounting Award to a second university, Virginia Commonwealth University, as well as increasing the scholarship amounts. Michael Westfall was selected to serve on the National State and Local Government Committee, prompting his receipt of a chapter leadership award for Outstanding Leadership. A second chapter leadership award was presented to Betty Akins for Sustained Superior Performance. The Chapter President, Robert Dodson, was elected as the Vice President-Elect for the Mid-Atlantic Region, as well as being selected to serve on the National Awards Committee. Bob was selected to represent the Richmond Chapter at the



AGA's 47th Annual Professional Development Conference (PDC) in Phoenix, Arizona in June 1997. Ed Soniat received one of four National Chapter Service Awards at the PDC. The chapter was also honored as an All-Star Chapter for the first time for achieving the 10,000+ point level under the AGA Chapter Recognition Program for the third consecutive year.

In the 1997-1998 program year, the Richmond Chapter celebrated its 25th anniversary during the March meeting with the AGA National President, Doug Haywood, as the guest speaker. The Virginia General Assembly also honored the chapter for 25 years of service to the government financial management community. The National Executive Committee bestowed the honor of selecting the Richmond Chapter to host the National State and Local Government Leadership Conference to be held in October 2002. The chapter was honored for the second consecutive year as an All-Star Chapter for achieving the 10,000+ point level under the AGA Chapter Recognition Program. This year the chapter established a mission statement and goals and moved into the next largest chapter grouping due to membership growth totaling 139 members! This was the 2nd consecutive year the chapter received the National Highest Overall Growth award. Now offering 40 hours of CPE credits during the year, more than 2,800 CPE hours were awarded to seminar and meeting attendees. The chapter's three full-day seminars were moved to Henrico County's Dorey Park Recreation Center. The board increased visibility with participation in National committees: Long-Range Strategic Planning, Awards, State and Local Government, and Ethics. Jack Reagan was honored with the National State and Local Government Award for the Private Sector, as well as the Richmond Chapter's award for Outstanding Government Financial Manager. Bod Dodson also received the Chapter Service Award for the year, and served as Regional Vice President-Elect.

In the 1998-1999 program year, the chapter received All-Star Chapter status for achieving the 10,000+ point level for the third consecutive year (fifth year reaching that point level). For the third consecutive year, the chapter received the National Highest Overall Growth Award for membership for the chapter size grouping of 100-150 members. By the end of the year, the chapter's membership stood at 216 members. National Committee participation increased with members serving on the Long-Range Strategic Planning, National Awards (Vice Chair), State and Local Government, Ethics, and the Finance and Budget committees. Bob Dodson served as Regional Vice-President and Joe Kapelewski was nominated for Regional Vice President-Elect. Ed Mazur and Lane Ramsey both received the National State and Local Government Leadership awards. And the Richmond Chapter hosted its first ever volunteer program filing tax returns for the disadvantaged.

In the 1999-2000 program year, the chapter received recognition for the sixth consecutive year earning over 10,000 points under the Chapter Recognition Program. Members served on the National Awards, Ethics, and Finance and Budget committees. Joe Kapelewski served as the Regional Vice President-Elect.

By the end of the decade, the Richmond Chapter membership topped 200 members and the chapter was well-represented with over 125 CGFMs. Participation in Regional and National operations increased, and the chapter even developed its own web page.

2000 – The Millennial Years:

As the Richmond Chapter entered the 21st century, the opportunities abounded! The chapter hosted the National State and Local Government Leadership Conference in October 2002, led by Conference



Committee Chair, Joe Kapelewski. Barbara Bilmyer presided over the chapter from 2001 to 2003 with a large focus on early careers. This focus brought in younger members with fresh ideas. Women led the chapter as seven of the next nine presidents served in that role that was once dominated by men. Both Dick Bunce and Joe Kapelewski served on the National Executive Committee, with Joe as the Senior Vice President (SVP) and Dick as the SVP, National Treasurer, and achieving a significant milestone by serving as the AGA's 62nd National President! The chapter diversified with representatives from federal government agencies, state government agencies, local governments, quasi-government commissions, academia, private sector, CPA firms, and retirees. Disciplines represented by membership included government accounting, public accounting, auditing, administration, education, budgeting, students, information systems, and retired members. Professional certifications of membership include CGFM, CPA, CIA, CRMA, and many others. A significant number have Master degrees or Doctorates, in addition to Bachelor's degrees.

20- Teens – New Ideas:

As we are in the midst of the “two-thousand-teens,” the Richmond Chapter is branching into the virtual age! The chapter began using Cvent to automate meeting invitations and maintain membership. In April 2014, the Richmond Chapter used Cvent to spearhead a new newsletter to encompass ideas provided by National, as well as to communicate chapter information to the members. That same year, Tim Brown renovated and revitalized the AGA Richmond website (www.agarichmond.org) to both freshen up the site as well as provide more relevant information to members. Saa'dia Talbert became president in the 2014-2015 program year and began a new campaign to pair up a current committee member with a new member to bring new ideas to the table and provide for some longevity on committees. This idea took solid ground and became a “best practice” at the Sectional Leadership Meeting held in May 2014.

At the National PDT held in Orlando in July 2014, Dick Bunce received the Robert W. King Memorial Award for distinguished service of such significance that has greatly advanced the AGA's national prestige and stature. During 2014, several Chapter Executive Committee (CEC) members were named as Regional Coordinators (RCs) with Randy Sherrod serving as Chapter Education RC, Saa'dia Walker serving as Chapter Accountability RC, and Corrine Loudon serving as Chapter Development & Assistance RC.

In May 2015, the Chapter Service Award was presented to both Thomas Bland and Corrine Loudon, who worked together on the Membership Committee and tied for the vote. Thomas was instrumental in taking on Cvent and increasing the chapter's visibility by figuring out how to expand on our capabilities within the system. In June 2015, the “Presidential Selfie” was established, with Corrine Loudon taking her own photo with each speaker instead of the standard “hand-shake in a suit” – this was well-received by much of the younger generation, and helped gain some momentum for the chapter on Facebook and Instagram. In December 2015, the Richmond Chapter joined with the Virginia Peninsula Chapter to host the 20th Annual South-Atlantic Professional Development Training at the Great Wolf Lodge in Williamsburg, Virginia. Randy Sherrod, Education Chair and Past-President has done an outstanding job leading the PDT Committee over the past few years. This was also the first year the Richmond Chapter followed National's lead with electronic check-in. Ramona Howell and the Communications Committee has done a great job leading the Chapter and keeping us up with this new age. And in January 2016, the chapter celebrated our 300th member!

In December 2017, the chapter made a monumental move by expanding the annual Professional Development Training throughout the Commonwealth. The Richmond, Virginia Peninsula, and



Shenandoah chapters came together to celebrate the 22nd Annual Commonwealth Professional Development Training.

For the first time in history, three Richmond chapter CEC members became the Regional Vice President (RVP) team for the 2018-2019 program year: Corrine Louden, Immediate Past RVP; Saa'dia Walker, RVP; and Randy Sherrod, RVP-Elect.

To top off the decade, Danielle Roache was instrumental in expanding social media to four platforms: LinkedIn, Facebook, Twitter, and Instagram.



Chapter Presidents:

2020-2021	Danita Barnes	1995-1996	Robert L. Dodson
2019-2020	Danielle Roache	1994-1995	Betty G. Akins
2018-2019	Winston Lucombe	1993-1994	Michael Westfall
2017-2018	Thomas Bland	1992-1993	Clarence E. Weeks
2016-2017	Randy Sherrod	1991-1992	Ronald M. Grignol
2015-2016	Corrine Louden	1990-1991	Carolyn M. Barnard
2014-2015	Saa'dia Talbert	1989-1990	Charles A. Cheek
2013-2014	Randy Sherrod	1988-1989	Lawrence E. Davis
2012-2013	Algappan Subramanian	1987-1988	Janet L. Manchey
2011-2012	Alfred Washington	1986-1987	Edwin J. Soniat
2010-2011	Fred Hoover	1985-1986	Carol Creed
2009-2010	Karen Conrad	1984-1985	George Hanna
2008-2009	Vickie Bridgeman	1983-1984	Wallace Hutchinson
2007-2008	Joy Yeh	1982-1983	T.J. Bise
2006-2007	Jennifer Cavedo	1981-1982	Mary F. Forrest
2005-2006	Nancy Sanders	1980-1981	Ronald K. Layne
2004-2005	Bill Cole	1979-1980	Robert L. Aylor
2003-2004	Melinda Barbish	1978-1979	James L. Coen
2002-2003	Barbara Bilmyer	1977-1978	Robert L. Seward, III
2001-2002	Barbara Bilmyer	1976-1977	John Adams
2000-2001	Ken Gunn	1975-1976	T.J. Bise
1999-2000	Richard O. Bunce	1974-1975	Ann Andrews
1998-1999	Nauri Ahmed	1973-1974	Wayne E. Clements
1997-1998	Joseph A. Kapelewski		
1996-1997	Robert L. Dodson		



Chapter Executive Committee (CEC) Position Descriptions

- **President:** Leads and directs the chapter through various programs and events.
 - Encourage and partner with all positions to complete tasks effectively and in a timely manner.
 - Submit the following plans to RVP, SVPRS, and the National Office by **July 1st** - be sure to copy the Secretary for record-keeping purposes:
 - CEC Meetings
 - Education & Professional Development (Programs & Education)
 - CGFM
 - Community Service
 - Membership
 - Young Professionals
 - Accountability
 - Other plans (Sponsorships, Communications, and Award committees)
 - Schedule and conduct meetings of the CEC and membership as needed. The National Office recommends the use of Robert's Rules of Order for using parliamentary procedure to conduct an organized CEC meeting.
 - Serve as liaison between other local chapters, the National Council of Chapters representative, and the National Office.
 - Attend annual National Board of Director meetings, primarily held during the National PDT each summer.
 - Develop a strategic, multi-year written plan to accomplish the chapter mission – submit to the National Office, and ensure compliance during the year.
- **President-Elect:** Assists the President to prepare for the following program year.
 - Serve as the Chair of the Nominating Committee.
 - Participate in the Sectional Leadership Meeting, held each May.
 - Serve in the capacity of the President during his/her absence.
- **Past President:** Provides guidance to the President.
- **Secretary:** Official custodian of chapter records.
 - Submit official CEC roster to the National Office upon CEC approval by **April 30th** of each year. Ensure mid-year revisions are promptly submitted to the National Office.
 - Ensure meetings are properly documented via meeting minutes, to include recording and attendance.
 - Prompt distribution of CEC meeting minutes to officers and members.
 - Update and maintain CEC roster as necessary, coordinating any changes with the National Office.
 - Provide documentation to the National Office upon request.



- **Treasurer:** Custodian of chapter funds, responsible for chapter financial records and reports.
 - Prepare an annual budget.
 - Prompt deposits of receipts into the chapter's bank account.
 - Prompt disbursement of funds on behalf of the chapter, supported by appropriate documentation.
 - Preparing a monthly financial report to the CEC.
 - Record and maintain financial records in accordance with best practices and accounting standards.
 - Prepare financial reports as required by local, state, or federal government jurisdictions.
 - Filing an informational return with the IRS (990 or 990-N Postcard, depending on gross revenues) by **November 15th**.

- **Assistant Treasurer (non-voting):** Assists the Treasurer as needed.
 - Collect past due amounts from members.
 - Provide secondary monitoring over chapter funds, records, and reports.
 - Ensure PCI compliance.

- **Nominating Committee:** Ensures a fair and consistent nomination process for the CEC officers and committees.
 - This committee is comprised of the President (Chair), Past-President, and Past- President.
 - Prepare a slate of candidates for the CEC, being sure to consider a cross-section of the chapter membership, and verifying that those nominated would be willing to devote the amount of time necessary to fulfill their responsibilities.

- **Young Professionals Committee:** Promotes the chapter to young adults and early career members and potential members.
 - Coordinates social networking events with the Membership Committee.
 - Research the establishment of new student chapter opportunities with local higher education institutions.
 - Connect with current Young Professional members and seek out assistance and ideas to attract and retain other young professionals.



- **Sponsorships Committee:** Seek out willing entities to assist with chapter expenses and sponsor events throughout the year.
 - 9-12 months in advance, reach out to past speakers and vendors via phone or email with a prepared sponsorship letter/brochure to request assistance with planning and funding upcoming events. Define chapter mission and purpose, and offer various sponsorship levels along with pricing and benefits (complimentary registration, advertising space in newsletter and/or website, location of booth, verbal acknowledgments, etc.)

- **Programs & Education Committee:** Coordinates high-quality educational events for members and other government professionals.
 - Plan and execute chapter trainings, seminars, workshops and conferences, distributing workload amongst other committees as necessary.
 - Book locations 9-12 months in advance for one-hour events in a state or local government building, ensuring the room set up is arranged ahead of time, and allowances for food.
 - Contract with local hotels 9-12 months in advance for half or full day seminars, to include: method of payment and deposit amounts; cancellation in the event of inclement weather meeting room space cost, use time, room number/name; catering cost, food minimum, meal plan breakdown, snacks/coffee breakdown, times offered; equipment needs and set-up requirements; accommodations for overnight conference to include check in/out time, government rate, type of room, block of dates, maximum number of rooms, cut-off date, additional fees, possibility of complimentary rooms or meeting space, how attendees can make reservations individually or grouped by company
 - Book speakers 2-3 months in advance via email, reminding speakers that registration, meals, and CPE (plus one for speaking) are provided at no cost.
 - Ensure equipment is on-site (laptop, projector, screen, hand-held wireless mic or hands-free mic)
 - Arrive at least a half hour prior to event start time to ensure everything is in place

- **Communications Committee:** Provides information and events to members promptly via various methods and platforms.
 - Appoint a photographer to capture highlights from each event – utilize photographs in newsletter, on website, and in social media.
 - Monitor and maintain the chapter email account: agarichmondinfo@gmail.com
 - Maintain the chapter website hosted by the National Office, posting events for the program year, the Citizen-Centric Report, and advertising sponsors.
 - Maintain social media sites (Twitter, Facebook), posting events to encourage attendance and highlight past events.
 - Develop and distribute a monthly chapter newsletter to chapter contacts to include a president’s message, past events, upcoming events, sponsors, CEC contact info, and CEC minutes.

- **Community Service Committee:** Develops, promotes, and finds volunteers for community service projects, which allow members to contribute skills, labor, or funds to community-based activities.
 - 9-12 months in advance, select a charity for the chapter to sponsor during training events.
 - Coordinate an on-site raffle at each half or full-day training event (ticket prices \$1 for 1, \$5 for 7, and \$10 for 15) for a 50/25/25 split (50% to charity, 25% to winner #1, 25% to winner #2). National AGA Office offers a matching program – (note: be sure to check on rules for

- that program year).
 - For two-day conferences, coordinate with the Awards Committee and conduct an on-site raffle for gift baskets. Request community company participation in sponsoring gift baskets and prizes.
 - Plan and coordinate community service volunteer events.
- **Awards Committee:** Coordinates participation in local chapter awards and the National Awards Program.
 - Coordinate speaker gifts for chapter training events (\$20/\$25 gift cards)
 - Coordinate door prizes for chapter training events (i.e., small gift baskets or gift cards, may use pre-numbered registration to select winners, chosen at random by speakers)
 - Publicize chapter and National membership competition awards.
 - Solicit nominations for chapter and National awards.
 - Create an awards program for chapter members and officers to include planning the award ceremony and obtaining the awards for distribution to recipients.
- **Membership Committee:** Attracts new members to the chapter and encourages continuity of membership amongst current members.
 - Contact members at renewal time and get half or more of the April 1st Not Yet Renewed individuals to renew by **May 31st**
 - Maintain a current record of members and potential members, making updates as required.
 - Notify delinquent and suspended members of their status and encourage renewal.
 - Analyze monthly membership reports and rosters for trends, errors, corrections, etc.
 - Welcome and integrate new members into the chapter's activities and education sessions.
 - Coordinate membership outreach activities and membership incentive programs with the Young Professionals and other committees.
 - Oversee the Event-system Sub-Committee, which manages membership, registration, and event database. Announce events no later than three weeks prior to each event.
 - Ensure on-site registration table is manned by 2-3 CEC members to welcome guests, hand out name badges, and assist with signing in.
 - Distribute CPE certificates no later than 30 days upon completion of event.
 - Distribute an Annual Membership Satisfaction Survey to members, sharing results with the CEC, RVP, SVPRS, and the National Office.
- **CGFM Committee:** Promotes the CGFM program.
 - Promote the CGFM credential to members and nonmembers, and to state and local government officials for recognition and incentives.
 - Provide opportunities (study guides/groups, etc.) for individuals striving to obtain the CGFM.
 - Obtain CGFM recognition from state and local governments and other avenues for CGFM Month in March.
 - Maintain, issue, and monitor member usage of chapter-owned CGFM study materials, in line with chapter policy as stated in the "CGFM Study Guide Loan Program" further in this manual.
- **Accountability Committee:** Ensures fiscal and moral responsibility of the chapter.
 - Submit the Citizen-Centric Report (CCR) to the National Office, SVPRS, RVP, and CEC by **September 30th**, to include education, CGFM, membership, community service and young



- professional activities, number and hours during the program year.
- Submit the completed CCR to the AGA Certificate of Excellence review program.
 - Conduct an annual audit/review of chapter finances and submit to the CEC and then to the National Office by **September 30th**.
 - Work with other governmental entities to produce a CCR for distributions to the public.
 - Promote the CCR with a presentation at a chapter event.
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- **By-Laws and Procedures Committee:** Responsible for maintaining and updating the Chapter's By-Laws and the Policies and Procedures Manual.
 - Reviews and maintains Chapter By-Laws as necessary, ensuring consistency with AGA National By-Laws (at least on an annual basis).
 - Recommends changes to the By-Laws to the CEC.
 - Reviews and maintains the Policies and Procedures Manual annually.
 - Recommends changes to the Policies and Procedures Manual to the CEC.
 - Changes or updates to the By-Laws and Policies and Procedures Manual are submitted to the CEC for review and presented at the next chapter meeting for adoption and submission to the National Office.

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Training Event Registration Policy

Refund Policy:

The Richmond Chapter of the Association of Government Accountants (AGA) shall establish and maintain a refund process for registrations to prevent and mitigate any occurrence requiring a refund due to unforeseen circumstances or a member's inability to attend. The Richmond Chapter of AGA reserves the right to refuse/cancel registrations. If the Richmond Chapter of AGA refuses a registration, registrants will be offered a refund, if reasonable.

Event Procedures:

1. Each invitee will register through an email invite or registration system. Payments are accepted via credit card or by check. Checks can be mailed to the contact within the invite. Once a check is received in the mail, the contact will notify the invitee that the payment was received. The contact will update the system accordingly to reflect the receipt of the payment.

A. Canceling Registration:

- Unless specifically stated on the registration invite or email, the deadline to request a refund for an individual registration is *two business days* before the seminar or event.
- Cancellations can be made through Event registration site, or the AGA email address (agarichmondinfo@gmail.com).
- All refund requests must be made by the attendee or credit card holder. (Note: Credit Card holder could be the agency contact that pays for a group of employees for the AGA Richmond Chapter events.)
- Refunds will either be credited back to the card used or sent via check, depending on how the payment was initially remitted.

B. Outstanding Balances

- If an invitee has any outstanding balance due to the Richmond Chapter of AGA, the invitee will not be able to register for events until the balance is fulfilled.
- Invitees will receive emails from the Event registration site for collection purposes until the balance owed is fulfilled.

C. Inclement Weather

- In case there is an instance where inclement weather affects the event, the AGA Richmond Chapter asks registrants to follow the mandate put in place from the Department of Human Resource Management on emergency closings for state government in the Richmond metro area.
- The AGA Richmond Chapter will reschedule the event so no re-registration is needed, however, if the event is not rescheduled, refunds will be provided. The Richmond Chapter of AGA will notify the registrants of the rescheduled event as soon as possible. Registrants are responsible for ensuring information is up to date during registration.



CGFM Study Guide Loan Program

Background

One of AGA Richmond's goals is to promote and retain Certified Government Financial Managers (CGFM). In furtherance of this goal, the Chapter has purchased study guides from the National Office to help members prepare for the Certified Government Financial Manager (CGFM) examinations. The chapter CGFM Chair will loan these study guides, and donated materials, to members desiring to take the examinations, pursuant to and in conformance with this policy.

Study Guide Loan Policy

CGFM Study Guides may be loaned only in conformance with the following requirements:

- Loans will be made only to current AGA members.
- Loans will be made only to requestors that have an active eligibility letter from the AGA Office of Professional Certification.
- A borrower may only have one study guide checked out at any time.
- All study guides will be loaned on a first come, first served basis, providing all of the above requirements are met.
- Each study guide may be borrowed for a period of no more than one month.
- A borrower may request a renewal of their current study guide loan for an additional one-month period. Renewal requests may be granted at the discretion of the chapter CGFM Chair.
- All borrowed study guides must be returned in the same condition they were loaned. If there is damage to a study guide, the borrower is responsible for payment for the damages, as determined by the chapter CGFM Chair. Damage is defined as significant changes such as torn or missing pages, liquid or other exposure that renders pages or sections of the book unreadable, broken or missing binders, etc. Damage does not include normal wear and tear from regular use.
- Each loan will be supported by a signed agreement that incorporates all necessary requirements and notifications.
- If a study guide is not returned by the designated date, the chapter CGFM Chair will notify the borrower that the study guide is overdue and they need to return it within a specified period of time (less than a week). Within the notification, the borrower will also be made aware that they will be charged for the cost of a new study guide if they do not return the borrowed version within the specified period of time.
- If the borrower does not return the study guide within the acceptable period of time, the chapter CGFM Chair, after consultation with the chapter President will charge the borrower for the cost of the study guide.
- The chapter CGFM Chair may, within the available Certification budget, purchase replacement study guides, as necessary.
- The chapter President and/or chapter CGFM Chair may add additional requirements that are necessary to manage this program.