



Chapter Leadership Handbook 2022—2023

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Introduction

Thank you for serving in the premier association for government financial management professionals. The tremendous strides we have taken as an organization are a direct result of the commitment of our volunteer leaders; and we are grateful for your time, energy, insights, skills and knowledge.

Whether you are embarking on your first AGA leadership term, finishing up one of several terms, or just considering an AGA leadership role — welcome! This handbook provides you with much of the information you need to succeed as an AGA leader, and enjoy an exciting and productive term. It is organized to (1) provide you with an overview of AGA; (2) give you a good idea of what is expected of you as a leader; (3) let you know what you can expect when you start your term; and (4) show you how you can get the job done. This handbook should be used in conjunction with other resources, such as the National Officer [position descriptions](#), AGA [bylaws](#) and [strategic goals](#), which can be found on AGA's website (www.agacgfm.org). We strongly suggest you take the time to explore the website and see all the resources available for your use.

Finally, please feel free to copy any portion of this manual or pass it along! If you find it helpful and you think it can be beneficial to someone else, please share the information.

AGA leaders are innovative, energetic professionals who are ready to be catalysts for change and willing to take risks. Furthermore, our leaders are creating our future, defining how we serve financial professionals, and ensuring our success as the premier association for advancing government accountability for all levels (federal, state and local) of government. In fact, we are the *only* organization that serves all levels of government in financial management. We are exceptionally proud of our leadership team and look forward to working with you as we serve the government accountability professionals that serve our country.

National Calendars

AGA National operates under three different calendar years:

- The **ACE Awards** calendar of June 1 – May 31
- The **program** calendar of July 1 – June 30
 - This calendar encompasses the activities of officers, boards, committees and task forces.
 - All leadership terms formally begin on July 1 of each year.
- The **fiscal** and **membership** calendar of April 1 – March 31

Calendar Summary:

April 1 – March 31: National fiscal year, membership year

June 1 – May 31: chapter activities year

July 1 – June 30: program year, delineates officer terms

Section I – AGA Governance Overview

This section contains information about AGA’s governance structure and functions. Questions should be directed to AGA’s [Governance Manager](#).

AGA’s Mission & Activities

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.

AGA Overview

Our members work in government financial management across sectors and worldwide, working to increase government financial performance and accountability. They educate themselves via training events to ensure they are always up to date on the most relevant news and information and boost their credentials via certification.

- Serve as the catalyst for innovation and thought leadership in government financial management
 - Invest in leading and emerging issues
 - Provide valued input on standards and to policymakers
- Educate and empower professionals to advance government accountability
 - Expand participation and reach of educational events through multiple delivery channels
 - Offer timely and relevant events, courses and tools
 - Promote careers in government financial management
- Advance Certified Government Financial Manager® (CGFM®) as the certification for government accountability professionals
 - Promote the relevance and value of the CGFM to individuals, employers and educators
 - Increase the number of CGFMs
 - Continuously update certification processes and materials for relevancy
- Facilitate collaboration among multiple disciplines, sectors, and levels of government
 - Provide forums for dialogue and information sharing
 - Engage with government leaders and professional organizations to build partnerships and trust
 - Develop and promote tools to address intergovernmental challenges
- Maximize member value
 - Empower chapters and support their activities
 - Expand opportunities for leadership development
 - Increase the number and diversity of members
 - Create experiences that increase member engagement
 - Engage and mentor young professionals
- Enhance the public’s perception of government financial management
 - Utilize multiple forms of media to highlight significant achievements of government financial managers
 - Promote citizen-friendly reporting of governments’ finances, accomplishments and challenges
 - Communicate the value of public service
 - Highlight the importance of financial management in decision making

Since 1950, AGA has addressed the issues and challenges facing government financial managers. Our organization has been instrumental in developing accounting and auditing standards and in generating new concepts for the effective organization and administration of financial management functions, including the passage of the Inspector General Act of 1978 and the Chief Financial Officers Act of 1990.

AGA conducts independent research and analysis of all aspects of government financial management. These research series reports assess current and/or best practices and make recommendations for future improvements in federal, state and local governmental accounting, auditing and financial management. Generally, the reports deal with auditing and accounting, financial management, technology and other management issues.

As a national organization, AGA operates within a national/chapter structure. It is through this successful relationship that we have become *the* premier association for financial government accountability professionals. The success of this partnership relies upon the strengths of both the national and chapter leadership teams combined with a willingness to collaborate and cooperate in areas of mutual interest.

Organizational Structure

Overview

[View AGA's Organizational Chart](#). AGA operates under a national-chapter partnership with its chapters. For the purpose of representation on the National Governing Board, chapters are grouped into [eight geographic areas](#).

National Council of Chapters (NCC)

The National Council of Chapters (NCC) serves as an integral and essential advisory group to AGA's National Governing Board (NGB). The NCC is vital for the representation and furtherance of the interests of AGA chapters and members. The NCC facilitates communication, support and collaboration among chapters and between chapters and the Board. Members of the Council serve as a critical resource both to the NGB and to their chapters to support the best interests of AGA and the profession.

Composition

The NCC shall be comprised of one representative from each active chapter. This representative is to be appointed by a vote of the chapter's Executive Committee/Board. In making selections, chapters will be encouraged to select a member that has served as a recent chapter officer, such as the immediate past chapter president. This Council representative should also serve on their chapter's Executive Committee to keep current with the chapter's needs and communicate NCC ideas and updates to their chapter leaders. Representatives who are involved in leadership activities, regularly attend chapter events, and able to network and mentor are also encouraged.

NCC members (except the NCC chair) will serve a one-year term and may be reappointed for two terms. After a person's third term as a Council representative, they cannot be reappointed by a chapter until a period of at least two years has passed (unless an exception is made by a majority vote of the LDC).

The NCC will be chaired by the National President-Elect, who will serve a one-year term.

Responsibilities

- Provide input to the NGB on strategic issues, current topics and governance decisions
- Serve as a forum for the NGB to gauge the pulse of the membership on new initiatives and assess programmatic impacts
- Communicate chapter challenges, issues and concerns to NGB and national office while providing suggestions for action
- Facilitate connections and communication among chapters
- Share information about chapter successes
- Communicate AGA programs and initiatives to chapters and secure chapter involvement

- Promote chapter health and growth
- Attend and actively participate in annual leadership training and other NCC meetings
- Serve as a resource to, and provide support for, chapter board members
- Provide mentoring for new chapters and chapters being revitalized

Meetings

The NCC meets four times per year, two meetings in person and two held virtually per the calendar below. NCC representatives will attend the leadership training meeting their chapter participates in, as they will be oriented to their role in a separate training session at this meeting.

April/May

In-person Orientation for all NCC reps (at annual leadership training meetings)

October

Virtual meeting

July

In-person meeting (at PDT)

January

Virtual meeting

Chapters will appoint their representatives to the NCC in January for the year ahead, and those representatives may self-nominate for the eight NGB Director (for Chapters) positions. The Leadership Development Committee will recommend for NGB approval the eight Directors (for Chapters) for the NGB by April.

AGA's Chapter Services Manager will serve as staff liaison to the NCC and will communicate with NCC members between meetings. The Chair of the NCC, who is the National President-Elect, along with the eight Directors (for chapters), will facilitate communication between the NGB and the NCC.

Participation of every NCC member is essential to the successful execution of the NCC's advisory duties to the NGB as each member is responsible for representing their chapter's needs; therefore, regular attendance at all NCC meetings is expected.

National Governing Board (NGB)

As the highest leadership body of the organization and to satisfy its fiduciary duties, the NGB is responsible for:

- determining the mission and purposes of the organization
- promoting diversity and inclusion
- selecting and evaluating the performance of the CEO
- setting strategic direction for the organization
- ensuring strong fiduciary oversight and financial management
- maintaining AGA's Bylaws and Code of Ethics
- determining Association policies and procedures
- fundraising and resource development
- promoting AGA's programs and services
- reviewing all actions and programs of National Boards, Committees, Councils and Task Forces
- seeking input from the National Council of Chapters and Past National President/Treasurer Council on major governance decisions
- enhancing AGA's public image
- assessing its own performance as AGA's governing body
- representing the best interests of the AGA membership and the profession

The NGB is comprised of the following members:

- National President
- National President-Elect
- National Treasurer
- National Treasurer-Elect
- 8 Directors (for Chapters)
- 2 Directors (At-Large)
- Chair of the Professional Certification Board
- Chair of the Corporate Partner Advisory Group
- Chief Executive Officer (ex-officio)

Boards & Committees

In addition to the National Council of Chapters, AGA has more than a dozen national [Boards and Committees](#) to assist the NGB in governing the organization. More than 300 AGA members volunteer to serve to tackle challenges, propose solutions and serve our profession, AGA, and our members. The great strides AGA has made as a professional association would not have been possible without the tireless efforts of our exceptional volunteer board and committee leaders.

Each spring, AGA solicits board and committee member candidates. The National President-Elect works with the board and committee chairs to fill leadership vacancies. AGA works to ensure each board and committee is representative of the AGA membership and reflects the diversity of the association.

- All board and committee terms begin July 1.
- Training event technical committee terms run for one year; all other committee terms last three years.
- Members can expect to spend an **average of two to four hours per week** reading AGA material, preparing for AGA activities and communicating with other board and committee members.
- AGA reimburses board and committee members for costs associated with official AGA business; in most cases, very little travel is required. **All travel must be approved by the appropriate AGA national office staff member prior to committing to travel.**

Section II – National Office Support

Staff Resources

Each AGA leadership position should work closely with a staff subject matter expert. As you read more about your particular leadership position, make a special note to remember your staff subject matter expert. They will become an indispensable resource as you progress in your AGA leadership term.

Day-to-Day Volunteer Activities, ANY Questions!

chapters@agacgfm.org

Finances & IRS Filings

Cristina Barbudo, MS, CPA
Director of Finance & Administration
finance@agacgfm.org

Education and Training

Kimberly Jones
CGFM and Education Programs Manager
education@agacgfm.org

Chapter Development or Revitalization

Bobby Derrick, MBA, CGFM
Field Representative
bderrick@agacgfm.org

Staff Listing

A [listing](#) of all AGA National Office staff is available on the AGA website.

Logos, Marketing & Communications

Lyndsay McKeown
Senior Manager, Marketing & Graphics
communications@agacgfm.org

Certification

Katya Silver
Director of Professional Certification
cgfmdirector@agacgfm.org

Membership Recruitment, Retention, Young Professionals and Students

membership@agacgfm.org

Section III – Chapter Operations

Thank you for volunteering to lead your chapter! The average AGA member’s experience is made at the chapter level, and you are the backbone of this experience. This section has been created to go over everything you and your CEC members may need to run the chapter. If you have something you think should be added to this handbook, please email the [Chapter Services Manager](#) with your thoughts. And — again — thank you!

Succession Planning for Chapter Officers and Chairs

Succession planning is critical to your chapter’s health. Your committee chairs are a key part of your leadership team, since committees will carry out most of your chapter’s goals. While it is always recommended that you look for individuals who can be relied upon, don’t forget to consider newly involved chapter members who display a great deal of enthusiasm and who have successfully taken on responsibility. This is an opportunity for future leaders to be identified. Make sure that the future of your chapter is in the forefront of your mind — does someone have the underlying potential to make a positive impact in an area for the chapter?

Consider the future of your chapter, and engage new members in chapter operations: Think **Leadership Development** rather than “succession planning”

The following qualities are very important for a committee chair:

- **Leadership.** Can this person organize and delegate workloads, give positive direction and set reasonable goals and objectives for the committee?
- **Enthusiasm.** Does this person have the potential ability to motivate and generate enthusiasm in others for their committees’ goals?
- **Coach/Trainer.** Can this person provide support and training for committee members?
- **Content Expertise.** Does this person have experience or knowledge in the topic area of this committee?
- **Respect of Peers.** Is this person recognized as a leader, or is believed to have the potential for being a leader, either professionally or as volunteer? Will others willingly follow him/her?

The proven, most effective means of getting new volunteers to participate in a committee or serve in a leadership position is not by announcements at a meeting, on the website, in a newsletter, or by email; it is through **one-on-one, direct communication**. Preferably, the member should be asked through a direct invitation in person; but if a face-to-face is unavailable, use the telephone. People want to serve, but they want to be asked and made to feel it is a sincere invitation.

Be prepared to provide reassurance to the member that he or she will be given all the resources to make sure of success and be prepared to give an estimate of how much time will be involved as a volunteer. Remember everyone is dealing with how to juggle and prioritize time commitments which are often conflicting.

Interacting with Current and Potential Members

National officers and staff alike realize and state this often — an individual’s membership experience is **made** at the chapter level. This is where their programmatic and networking experiences are grounded! So, here are some tips on interacting with current and potential members.

Current Members

Gaining new members is important, but it takes less time and money to retain a current member than to convince a potential member to join. **This does not mean you shouldn't recruit new members.** Rather, this is a reminder that through keeping a finger on the pulse of your members — and delivering the programs and customer service they need — you will be likely to increase your retention rate and have a strong, continuous membership base. Surveys are one way to achieve this but talking to as many people as possible and hearing it first-hand can't be replaced.

Potential Members

You possess the most powerful recruitment tool — your “AGA story.” Why did you join, and why do you continue to renew? What has AGA membership done for you and your career? There are many benefits to professional associations but speaking personally about your experience is powerful for potential members because you show that **it works**.

Developing Chapter Programs

As the national office tends to focus on industry-wide issues and programs to support all chapters, the jurisdiction of a chapter is in its local area. Chapters deliver programs close to home to their members and on topics that reflect the needs and interests of their members. They can respond quickly to localized concerns or problems.

Chapter programs are among the most important factors leading to the success of a chapter. Interesting and dynamic programs and activities will attract new members, aid in membership retention and ensure the wide participation of the general membership.

AGA members are involved in a wide variety of governmental operations. Thus, chapter meeting programs are most valuable when members can apply chapter programs to their respective field or improve their technical knowledge. Ideally, the program schedule should include a variety of technical projects, although public-service programs should be included during the year.

Programs should be as diverse as your membership – meet their needs, and encourage others to “learn the other side”

AGA is a voluntary organization, so it is important to stimulate interest in the chapter by developing meaningful projects, which will involve as many members as possible. One approach to encourage member involvement in the various chapters' committees is to send each member a list of projects/committees and ask the member to designate the committee(s) to which they prefer to contribute their talents. To further ensure continued interest in chapter activities, each project should be completed, where feasible, in a relatively short period. This, too, encourages individual member involvement.

Chapter Meetings

Some chapters have discovered evening meetings work best; some have luncheon meetings, many are hosting virtual opportunities and others have tried breakfast meetings.

Some chapters are social, some are not. Some simply want good CPE. Some chapters offer CPE at every monthly meeting while others do not. Those Chapters having monthly meetings without CPE have a speaker for a brief twenty-minute presentation. Since the presentation does qualify for CPE, there are vast number of speakers who may not want to do a fifty-minute but would be happy to do a twenty-minute presentation on a wide-variety of interesting and relevant subjects.

Through talking with your members, you will find the right mix of activities; and by continuing to talk with them, you will notice any potential shifts or trends as they begin to surface. We encourage all chapters to conduct regularly scheduled monthly meetings. Some chapters hosting monthly meetings elect not to have meetings during the summer months. Instead, some use this as an opportunity to have strategic planning meetings with the chapter's CEC to plan for the next year's programs, education events, monthly meetings and social events. Networking is an important benefit for our members, and if the chapter is not holding monthly meetings it is very difficult to offer this benefit at the chapter level.

Remember, members want to have an opportunity to network; having a regularly scheduled monthly meeting can be made an excellent venue for networking where members can interact with one another making new relationships.

A chapter meeting is a valuable means of bringing members together regularly. Beyond the benefits derived from the program or chapter activity, individual members are enriched by networking, new contacts and friendships, which come from sharing common interests, backgrounds and experiences, as well as learning from other member experiences in the government accountability community. Topics, speakers and location are crucial to a successful chapter meeting, not to mention price. Many chapters have noted an increase in attendance with a good CPE program.

In planning the year's chapter meetings calendar, take care to tailor each to a specific purpose. If they are to be meaningful technical programs, they should not include chapter business matters requiring discussion. To do otherwise would create an agenda which will become too full — particularly if the meeting also includes lunch or dinner. We highly recommend that the chapter prepare an agenda showing the agenda item and the amount of time to be allocated to that item on the agenda. This will help ensure that the actual meeting will be properly organized and maximize efficiency and effectiveness. For those chapters hosting monthly luncheon meetings, it is imperative to ensure the amount of time away from work will be kept to a minimum. As employers may have strict rules about being away from work, chapters may have to limit their meetings to less than an hour.

For those chapters hosting monthly luncheon meetings, it is imperative to ensure the amount of time away from work will be kept to a minimum. As employers may have strict rules about being away from work, chapters may have to limit their meetings to less than an hour. A prepared agenda will help ensure that the meetings are limited to an hour.

Other important factors in making meetings successful include:

- planning programs well in advance
- adhering to a definite time schedule
- directing technical programs toward much of the membership
- being innovative and provoking thought
- involving the membership — in discussion, through program evaluations and via recommendations
- making new members feel welcome and as an integral part of the chapter. Assigning a CEC member to greet a new member at a chapter meeting or educational event will pay dividends for the chapter.
- sharing member successes — promotions, awards and honors
- establishing a reminder system (perhaps by telephone) wherein each member is contacted on a personal level and encouraged to attend the upcoming meeting
- meeting at the most convenient time and place. Chapter members should participate in the decision-making process, expressing their preference of meeting date, location and cost. Such involvement could directly impact retention — the greater the appeal, the more likely members will attend!

Use the chapter meeting to make the most of your time together. This is the time to communicate to your current and potential members. Those in attendance need to hear more than a chapter officer announcing the speaker. Do not assume everyone in attendance has read the chapter news or visited www.agacgfm.org to know the latest. Take a few moments to share such items as chapter national AGA news; announce the next monthly program meeting with speaker and topic; promote the upcoming chapter educational event (the sooner the better); introduce new members; share member achievements or news; or publicize the chapter community service events and solicit for volunteers.

Members are creatures of habit; we have learned that members like to be able to depend upon a regularly scheduled date and time for a meeting and location. By announcing or publicizing regularly scheduled meetings on a specified date (i.e., like the 3rd Tuesday of the month), a specified time (i.e., 11:30 am to 12:30 pm), and location, the members will be able to add and plan for the monthly meetings by adding the events to their calendars.

Chapter Communications

Keeping chapter members apprised of upcoming events and industry news is an important role that the chapter plays. Communication should be impactful, planned (in timing and organization) and informative but concise.

Chapter Newsletters

Because it reaches the total membership every month, the chapter newsletter is an important chapter tool. Effective newsletters are attractively designed and contain informative and educational materials that appeal to the general membership. It should be well-organized and succinctly present significant news about members and chapter activities. Periodic short articles of a technical nature can be a positive addition. Reviewing the tenets of the Chapter Communications Award would be helpful here as well. Newsletters frequently reflect the chapter's personality.

Don't spin your wheels – take advantage of all the templates, checklists and samples in Chapter Resources!

A professionally produced newsletter underscores the quality of your chapter's program and its commitment to excellence. It is well worth the thought, production time and cost to produce an effective newsletter. As an image enhancer, it forms the initial impression new members have of the chapter as a whole and becomes the ongoing conduit between the chapter leadership and all members.

Ideally, the newsletter will contain special awards and/or promotions for members. For example, if a member has been recently promoted, having a write-up and picture of the member will be well received by the readers of the newsletters. It is a meaningful way to recognize your members. Maybe the member just got married or the member had a child, this would be another way of recognizing a member.

Chapter Marketing and Logos

Personalized [logos](#) are available for each chapter in the Communications section of Chapter Resources in My AGA. Here you can also download letterhead, brochures, name badges, banners and a variety of other items your chapter will find useful. Everything that you can download on this site has been designed to conform to the AGA corporate identity. By working together, we can build the AGA brand. If you have questions about the site or need technical assistance, please contact the [communications department](#).

Chapter Websites

The chapter website can be an effective tool for communicating with chapter members. As of spring 2016, AGA is working toward hosting all chapter websites. As of March 2020, 98% of active chapters have been oriented on the hosting platform, and 74% are hosting their websites through it. Questions about should be directed to the [Chapter Services Manager](#).

Whether hosted by AGA or on your own, some basic items you may want to include on your website are:

- Chapter officers and directors (name, title, e-mail address, telephone number)
- Chapter bylaws
- Chapter newsletters
- Monthly meeting announcement
- Chapter educational event announcement with registration form
- Link to national website (www.agacgfm.org)
- You may also want to add online registration for chapter meetings and educational events. The important thing is that the website contains **current** information about the chapter.

Chapter Administration

As a chapter leader, it is essential that you have accurate and current information about the federal and state legal and tax issues facing your chapter. An awareness and understanding of these issues can prevent problems and costly errors.

Chapter Incorporation

If your chapter is not incorporated, incorporating is a relatively simple procedure that involves filing articles of incorporation or a certificate of incorporation with the secretary of state of your jurisdiction along with the applicable fee. In addition to articles of incorporation, some states may require bylaws or other documents. Your state may require annual submissions of additional paperwork, such as annual reports, minutes from your annual meetings, or payment of an annual fee in order to retain the incorporation status. Please contact your secretary of state of your jurisdiction for more information.

Chapter Bylaws

While your chapter's articles of incorporation were drafted in general terms to permit maximum flexibility, your bylaws are the legal guidelines that specify the rules of operation for your chapter. As a chapter leader, you have a fiduciary responsibility to ensure that your chapter operates in accordance with your bylaws, which are your governing documents. Additionally, you are responsible for ensuring that your chapter's bylaws have been drafted and remain (if changes are made) in compliance with both the AGA National Bylaws and your state laws.

The Prototype Chapter Bylaws, which are based on the AGA National Bylaws, provide both a sample and parameters for your chapter to follow in drafting or amending your bylaws. A copy of the Prototype Chapter Bylaws is available in the Administration & Operations section of [Chapter Resources](#) in My AGA.

Be sure each chapter member is aware of the chapter bylaws. It is a good idea to post them to the chapter website so anyone can have access to the document. Questions regarding chapter bylaws should be directed to the [Chapter Services Manager](#).

501(C)(3) Status

To be tax-exempt as an organization described in Internal Revenue Code Section 501(c)(3), an organization must be organized and operated exclusively for one or more of the purposes set forth in IRC Section 501(c)(3) and

none of the earnings of the organization may inure to any private shareholder or individual. In addition, it may not attempt to influence legislation as a substantial part of its activities, and it may not participate at all in campaign activity for or against political candidates.

As an exempt organization, you must complete an annual filing with the Internal Revenue Service. The chapter should be aware of the requirements for filing Form 990 or Form 990EZ, Return of Organization Exempt from Income Tax. If you have questions, contact the [Director of Finance and Administration](#) or consult the [Chapter Treasurer Handbook](#).

Employer Identification Number

Your chapter must obtain a federal Employer Identification Number (EIN) by filing IRS Form SS-4. Your EIN is the chapter's federal identification number that is used on most documentation. *The chapter's EIN is not the same as that of AGA National.* Neither the EIN nor any other number is a "tax-exempt" number for federal income tax purposes. *Your chapter is still responsible for the filing of all reports with governmental authorities*, including the fees or taxes associated with these reports. The National Office does not include the income or expenses of its chapters on its annual information report, which is filed with the Internal Revenue Service. If you have questions, contact the [Director of Finance and Administration](#) or consult the [Chapter Treasurer Handbook](#) (under the "Treasurers/Finance & Budget heading).

Insurance

Your chapter may want to consider securing liability of officers and indemnification insurance coverage. Contact your insurance agent to assess the sufficiency of your current coverage.

Records Retention

Throughout each year, chapter officers often accumulate a considerable amount of correspondence and other material. Prior to the conclusion of the chapter year, each outgoing and incoming officer should jointly review the files to retain materials of future or permanent value. Ideally, the CEC should approve a retention schedule for financial and similar records of a semi-permanent nature. In general, the records that should be maintained on a long-term basis include:

- Membership records
- Chapter minutes
- Chapter policy book
- Chapter financial records
- List of chapter officers
- Education program materials (see NASBA requirements for more details)
- Annual chapter history

Achievements in Chapter Excellence (ACE) Awards Program

As one of your first items of business, you should download a copy of the Achievements in Chapter Excellence (ACE) Awards program guide. ACE is a program designed to support, encourage and promote the accomplishment of AGA's mission and to provide best practices for a well-rounded chapter. ACE is designed to recognize a chapter's performance in relation to a standard or benchmark linked to AGA's mission, along with compliance with items critical to a chapter's success.

ACE can help prepare chapter leaders and committee members for their leadership roles and can provide them with a very good basis for drafting their respective strategic plans and annual goals. By using ACE in planning

activities and events for the coming year, the chapter will be best prepared to meet the needs of the Chapter and position the chapter for a successful year. This is because ACE focuses on core areas for chapter success, including:

- Membership engagement and growth
- Education, professional development and networking
- Certification
- Communications
- Community Service
- Succession planning and leadership development

Ideally, the National Council of Chapter Representative should coordinate the required program reporting with the support of the Chapter President-Elect or Chapter President. The Chapter President should ask for an update at each CEC meeting as to how the chapter is progressing towards its goals. Early each calendar year, the Chapter Services Manager will distribute the updated ACE program for the upcoming year and will help chapters prepare.

National Leader Visits to Chapters

An AGA chapter may have one national leader visit per program year. While AGA typically covers the cost of the visit, chapters are asked to contribute what they can toward travel expenses. Chapter visits are classified in the four categories below, and each visit should leverage the national leader's expertise in as many ways as much as possible:

- 1) **Chapter Support Visit:** to discuss chapter strengths and challenges, ideas for chapter growth and resources available to the chapter
- 2) **Employer Support Visit:** to meet with employers in your area to discuss the value of AGA (employer appointments must be set-up by chapter leaders)
- 3) **College Visit:** to meet with college/university representatives or students in your area to discuss careers in government financial management and the value of AGA (college visit appointments must be set-up by chapter leaders)
- 4) **Chapter Event Presentation:** to present on a pre-determined topic at a chapter meeting or training event

To invite a national leader to visit your chapter, complete the [National Officer Speaker Request Form](#), located in Chapter Resources in My AGA.

Remember: AGA national leaders may not be available on the date(s) you select. Preference is given to chapters who have not had a chapter visit in recent program years.

Chapter Officers/Directors Rosters

July 1 is a special time at AGA - it marks the beginning of our program year. To prepare for the new year, the Chapter Services manager will ask chapters for a list of their incoming chapter officers. It is critical that the National Office knows who is serving as chapter leaders, so that they can be kept informed of important events and best practices for use in your chapter. *This includes your **starting** roster and any **updates** throughout the year.* Having the updated officer roster allows us to:

- keep record of chapter service,
- identify potential national leaders,

- grant them access to Chapter Resources in the My AGA section of the website,
- contact appropriate officers to promote awards nominations processes, and
- have the correct officers and contact information listed on your chapter website (once it is hosted by AGA).

Chapter Officer and Director Roles

Officers

Chapter bylaws should specify eligibility for chapter office, election and installation procedures, and timeframes. Usually, officers hold office for one year and may be re-elected. *Best practices show that it is in the best interests of the chapter for a member to not serve for more than two consecutive years as chapter president.* A Chapter Executive Committee (CEC) should consist of the chapter officers, the Immediate Past President and committee chairs. The elected officers of a chapter often include the:

- President
- President-Elect
- Secretary
- Treasurer
- National Council of Chapters (NCC) Representative

Directors

Directors may serve for one or two years, depending on the chapter’s bylaws. When directors serve two years, it is preferable that half be elected in one year and the other half elected in the subsequent year (so that not all directors are “new” in a given year). The directors and other types of chapter positions include, but are not limited to:

- CGFM Director, Chair or Vice President
- Community Service Director, Chair or Vice President
- Education Director, Chair or Vice President
- Programs Director, Chair or Vice President
- Membership Director, Chair or Vice President
- Accountability Outreach Chair
- Awards Director or Chair
- Newsletter Editor
- Webmaster
- Bylaws Chair
- Nominating/Leadership Development Chair

Each AGA chapter is encouraged to develop position descriptions that outline the responsibilities of chapter officers and directors. One of the major benefits of being a chapter member is the opportunity to develop leadership skills, so chapters can establish any number of positions within the chapter if it services the needs of the chapter. Please see the appendix for examples to help you developing a specific position description, and for a list and description of potential committees for the chapter.

A chapter should develop a **chapter policy and procedures manual** that not only describes the duties of the various positions, but also how to best carry out those duties. A sample policies and procedures manual is available in [Chapter Resources](#) (in the Administration & Operations section, under the “Information” heading).

Running a Chapter Meeting

We highly recommend the use of Robert’s Rules of Order for using parliamentary procedure for an organized meeting.

What is Parliamentary Procedure?

It is a set of rules for conduct at meetings, that allows everyone to be heard and to make decisions without confusion. Adherence to Robert's Rules of Order will ensure that the meetings are efficient and effective. Recommend either the Chapter President serves as the parliamentarian or add another position to the CEC with that responsibility. A detailed chart of Robert's Rules is available in the appendix of this handbook.

Why is Parliamentary Procedure Important?

It's a time-tested method of conducting business at meetings and public gatherings. It can be adapted to fit the needs of any organization. Today, Robert's Rules of Order newly revised is the basic handbook of operation for most clubs, organizations and other groups. So, it's important that everyone know these basic rules.

Order of Business

Organizations using parliamentary procedure usually follow a fixed order of business, set by an agenda. Below is a typical example:

1. Call to order
2. Reading of minutes of last meeting
3. Officers' reports
4. Committee reports
5. Unfinished business
6. New business
7. Announcements
8. Adjournment

Motions

The method used by members to express themselves is in the form of moving motions. A motion is a proposal that the entire membership act or a stand on an issue. Individual members can:

1. Call to order.
2. Second motions.
3. Debate motions.
4. Vote on motions.

There are two basic types of motions:

1. **Main Motions:** The purpose of a main motion is to introduce items to the membership for their consideration. They cannot be made when any other motion is on the floor, and yield to privileged, subsidiary, and incidental motions.
2. **Subsidiary Motions:** Their purpose is to change or affect how a main motion is handled, and is voted on before a main motion.

Presenting a motion

1. Obtaining the floor
 - a. Wait until the last speaker has finished.
 - b. Get attention of the Chapter President by saying, "Mr./Ms. President."
 - c. Wait until the president recognizes you.
2. Make your motion
 - a. Speak in a clear and concise manner.

- b. Always state a motion affirmatively. Say, **"I move that we ..."** rather than, **"I move that we do not ..."**.
 - c. Avoid personalities and stay on your subject.
- 3. Wait for someone to "second" your motion
 - a. Another member will second your motion or the President will call for a second.
 - b. If there is no second to your motion, it is lost.
- 4. The president restates your motion
 - a. The President will say, **"it has been moved and seconded that we ..."** Thus placing your motion before the membership for consideration and action.
 - b. Members of the CEC or membership (depending if this is a CEC meeting or a meeting with all membership) then either debate your motion, or may move directly to a vote.
- 5. Providing details on your motion
 - a. The time for you to **speak in favor** of your motion is now, rather than at the time you present it.
 - b. The mover is always allowed to speak first.
 - c. All comments and debate must be directed to the President.
 - d. Keep to the time limit for speaking that has been established.
 - e. The mover may speak again only after other speakers are finished, unless called upon by the President.
- 6. Putting the question to the membership
 - a. The President asks, "Are you ready to vote on the question?"
 - b. If there is no more discussion, a vote is taken.
 - c. On a motion to move the previous question may be adapted.

Voting on a motion

The method of vote on any motion depends on the situation and any by-laws your chapter may have established for such as voting at a CEC or business meeting of the entire membership. There are five methods used to vote by most organizations, they are:

1. **By Voice:** The President asks those in favor to say, "aye", those opposed to say "no." Any member may move for an exact count.
2. **By Roll Call:** Each member answers "yes" or "no" as his/her name is called. This method is used when a record of each person's vote is required.
3. **By General Consent:** When a motion is not likely to be opposed, the President says, **"if there is no objection ..."** The membership shows agreement by their silence, however if one member says, **"I object,"** the item must be put to a vote.
4. **By Division:** This is a slight verification of a voice vote. It does not require a count unless the President so desires. Members raise their hands or stand.
5. **By Ballot:** Members write their vote on a slip of paper, this method is used when secrecy is desired.

There are two other motions that are commonly used that relate to voting.

1. **Motion to Table:** This motion is often used in the attempt to "kill" a motion. The option is always present, however, to "take from the table", for reconsideration by the membership.
2. **Motion to Postpone Indefinitely:** This is often used as a means of parliamentary strategy and allows opponents of motion to test their strength without an actual vote being taken. Also, debate is once again open on the main motion.

Parliamentary Procedure is the best way to get things done at your meetings. But, it will only work if you use it properly.

1. Allow motions that are in order.

2. Have members obtain the floor properly.
3. Speak clearly and concisely.
4. Obey the rules of debate.

Section IV – Additional Resources

Tools and Resources for AGA Volunteer Leaders

AGA’s website hosts a variety of tools for chapter leaders. Everything is accessible via Chapter Resources in the My AGA section of www.agacgfm.org.

- *Leadership Matters* is emailed twice a month to all volunteer leaders with important deadlines, tips for chapters and best practices. [Archived](#) versions are available.
- [AGA](#) mission, vision and strategic plan
- AGA [bylaws](#)
- Event budget/function sheets (for meeting planning)
- Information on AGA programs
- [Leader Directories](#) containing listings of NGB members and chapter presidents
- [Membership reports](#) for each chapter
- [NGB Meeting Minutes](#)
- [Tools](#) for membership retention and recruitment

Have a problem? Let us know – maybe we have a tool or can develop one!

Acronyms and Key Terms

The following is a list of acronyms and shortened names you will encounter in this handbook and in your conversations with AGA members and staff.

- **ACE**—Achievements in Chapter Excellence
- **AGA**
- **CEAR**—Certificate of Excellence in Accountability Reporting
- **CEC**—Chapter Executive Committee
- **CGFM**—Certified Government Financial Manager
- **CPAG**—Corporate Partner Advisory Group
- **CPE**—Continuing Professional Education
- **GFM Courses**—Government Financial Management Courses
- **LDC**—Leadership Development Committee
- **LEAD!**—Annual leadership training hosted for chapter leaders
- **NCC**—National Council of Chapters
- **NGB**—National Governing Board
- **NLT**—National Leadership Training, held in Washington, DC and virtually in February
- **PDT**—Professional Development Training, held in a different location and virtually in July

Section V – Appendix

Please note: additional descriptions are available in the sample chapter policies and procedures document available in [Chapter Resources](#) (under the “Information” heading).

Position Descriptions for Chapter Officers, Chairs and Directors

Chapter President

The chapter President leads and directs the chapter through its various programs and events. The success of chapter operations during the year depends on the initiative and creativity demonstrated by the President. The President’s managerial responsibility includes:

- adhering to the national and chapter bylaws, as well as resolutions and rules regulating the administration of the chapter.
- keeping the national office fully informed about chapter activities.
- calling meetings of the membership as prescribed in the chapter bylaws or as may be deemed necessary, and then presiding at these meetings.
- appointing committee chairs, as prescribed in the chapter bylaws.
- serving as an ex-officio member of all committees.
- monitoring the election of chapter officers.
- championing the AGA and chapter with employers, colleges and universities, the media, etc.
- ensuring that the chapter is registered with the State Board of Accountancy (where required) to offer CPEs.

Chapter President-Elect

The chapter president-elect assists the chapter president to prepare for their year as chapter president. These includes the duties of:

- participating in AGA’s annual volunteer leader training (Lead!).
- assisting the chapter president and other officers and board members in carrying out their duties.
- accept assigned specific functions from the chapter president, such as coordination of the ACE Awards information.
- chair the Leadership Development Committee to provide direction in selecting officers and directors for the next year.

If the Chapter President’s position becomes vacant, the President-Elect discharges the responsibilities of the office of the President until the expiration of the President’s term or until the election of a Chapter President to complete the term.

Immediate Past President

The Immediate Past President is an important member of the CEC who can:

- provide guidance to the chapter president.
- offer continuity in chapter governance.
- serve as a special projects leader or chair of a designated task force.
- help identify future chapter leaders.
- help promote the chapter to employers.
- function as a liaison with other associations and organizations, academia, etc.

Chapter Treasurer

The Chapter Treasurer is the custodian of chapter funds and is responsible for chapter financial records and reports, including the maintenance of adequate records of all transactions involving chapter funds. Duties can include:

- preparing the chapter's annual consolidated budget.
- promptly depositing all receipts of the chapter in a bank account maintained in the name of the chapter.
- making disbursements from the chapter account only on behalf of the chapter and supported by appropriate documentation.
- enforcing rulings that dual signatures should be considered for large disbursements. Such thresholds should be established by the CEC.
- establishing petty cash funds for special purposes when approved by a vote of the CEC.
- presenting all bills for chapter expenses to the CEC and the chapter finance committee.
- paying the bills with a check drawn upon the chapter's account, except for disbursements made from the chapter's petty cash fund.
- presenting, at least once a month, a financial report to the CEC.
- recording revenues for all chapter activities forwarded by the responsible committee and paying any expenses for these functions.
- preparing financial reports required by federal, state or local government jurisdictions in a timely manner, and submitting these reports to the chapter president (or appointed representative) prior to transmitting them to the agency involved.
- determining if the chapter is required to file an IRS Form 990 or Form 990EZ.
- making available to the CEC at any time the chapter's books and records, which are subject to audit or review at least annually.

More detailed information is available in the [Chapter Treasurers Handbook](#) (under the "Treasurers/Finance & Budget" heading).

Chapter Secretary

The chapter secretary is a supporting role in the chapter, providing continuity between years and record keeping. In some chapters, this job is a dual role with the treasurer, webmaster or historian.

- Their primary duty is to maintain the minutes of the CEC meetings, obtain approval of the minutes by the CEC, and ensure the minutes are published in the chapter newsletter and/or on the chapter website.
- The secretary can be both a recording and corresponding secretary for the chapter and, as such, can serve as a communications liaison between the chapter and the national office.
- As custodian of the official chapter files, they may also be the chapter historian.
- The secretary can also (in consultation with the chapter president) issue notices of meetings; prepare the agenda of matters to be covered; keep a record of attendance; and prepare the minutes.

National Council of Chapters (NCC) Representative

The NCC Representative is a crucial role that provides strategic linkage between the chapter and the National Governing Board. The individual serving in this role should be involved in chapter leadership activities, be an excellent communicator, forward and strategic thinker, and be knowledgeable about chapter operations and challenges.

- Their primary duty is to represent and promote the interests of their chapter on the NCC while serving as an active ambassador between the Association's national and chapter leaders.
- Provide input to the National Governing Board (NGB) as requested on strategic issues and program impacts, and communicate relevant information from the NCC and NGB to their chapter members and leaders.

- Facilitate connections between chapters by sharing chapter successes and best practices while offering guidance to fellow council members.
- Build a collegial working relationship with other NCC members and the national staff that contributes to collaboration.
- Encourage their chapter's involvement in the programs and activities of the Association.
- Support and mentor members serving in chapter leadership positions.
- Mentor leaders of new chapters as requested.
- Promote chapter health and growth.

Education Director, Chair or Vice President

The education director, chair or vice president serves as the education committee chair and coordinates high-quality educational events for chapter members and other government financial management professionals.

- Some chapters rely solely on the education director to carry out these responsibilities, while others may use a committee chaired by this person.
- Other chapters use a committee chaired by this person, and they coordinate the outreach efforts for speakers and topics.
- In general, the duties include all aspects of developing and executing chapter seminars, trainings, workshops and conferences.

Program Director, Chair or Vice President

The program director, chair or vice president develops and initiates a comprehensive set of programs for general chapter membership through monthly meetings and special activities. In general, the duties include all aspects of planning monthly meeting activities and planning events to allow informal assembly at social events. Some chapters combine these duties with the education chair.

Membership Director, Chair or Vice President

The membership director, chair or vice president is responsible for attracting new members to the chapter and retaining current members. This person is a key contributor to a successful chapter. Such duties are so important and vast that the chapter should consider a membership committee. Typical responsibilities may include:

- distributing membership applications.
- notifying delinquent and suspended members of their status and encouraging renewal.
- analyzing monthly membership reports and rosters for trends, errors, corrections, etc.
- publicizing chapter and national membership competition awards.
- preparing a monthly membership column for the chapter newsletter, and/or announcing new members in the newsletter.
- integrating new members into the chapter's activities and education sessions.
- coordinating membership outreach activities with the certification, education and program directors to reach out to nonmembers participating in their program areas.

Awards Director or Chair

The awards director serves a critical role in the success of the chapter's award program, as well as AGA's National Awards Program. The awards director generally has the responsibility of:

- soliciting nominations for the chapter awards.
- organizing and chairing the awards committee meeting to select the recipients.
- obtaining award plaques or certificates.
- planning the award ceremony, which may be included as part of chapter education event, a chapter program event, or an evening social event.

The chapter awards program serves to reward those in the government financial community who have contributed to the chapter or its goals. It is an opportunity for the recipients to be recognized by their peers. Award categories may include:

- **Government Financial Manager of the Year:** To recognize an outstanding government financial leader who has led extraordinary initiatives in his/her employment that made a significant contribution to the government financial community.
- **Chapter Ambassador Award:** To recognize a chapter member's outstanding efforts in publicizing AGA's mission, activities and benefits.
- **Professional Development Award:** To recognize an individual's efforts in providing continuing education opportunities for government financial managers and recognizes the importance of life-long learning.
- **Community Service Award:** To recognize a member's personal commitment to community service projects sponsored by AGA and other community activities.

CGFM Director or Chair

CGFM chairs play an important role in promoting the CGFM program. They work closely with other program directors and committees to identify potential CGFM candidates. The CGFM chair is usually responsible for:

- promoting the CGFM credential to members and nonmembers, as well as to state and local government officials for recognition and incentives.
- supporting individuals striving to maintain the CGFM.
- answering questions raised by current and potential CGFMs.
- working with the national office on important projects like CGFM Month and sharing best practices.

The CGFM® is also an important recruitment and retention tool for the chapter, particularly for young professional members and other potential members

Webmaster or Web Coordinator

All chapters should develop and maintain a functional and attractive website to communicate with members and potential new members. The chapter webmaster helps develop the website and works closely with the CEC and other members to ensure that the information on the website is accurate.

In spring 2016, AGA national began hosting chapter websites. Contact your [Chapter Services Manager](#) for more information.

Newsletter Editor

The newsletter editor has traditionally been the key communicator with chapter members regarding upcoming events and chapter activities. Successful editors also provide their readers with interesting articles written by members and other professionals, as well as reprint articles from national AGA publications and professional trade journals. Like their counterpart webmasters, editors should make their newsletters functional and attractive.

Some say being the newsletter editor is “a labor of love” because a quality newsletter takes time, but the rewards outweigh the efforts.

Community Service Director, Chair or Vice President

The community service director develops, promotes and finds volunteers for community service projects, which allow members to contribute skills, labor or funds to community-based activities. Community service projects could include:

- Voluntary Income Tax Assistance (VITA) participation
- Public television fund-raisers
- Food drives
- Toys for Tots
- Walk-a-thons
- Blood Drives
- Assisting a family in need
- Working a soup kitchen
- Working with Special Olympics
- Highway Cleanup

Primary Chapter Committees

Chapter Executive Committee (CEC)

This committee consists of the chapter officers, the Immediate Past President and the Board of Directors (if in chapter bylaws). Some chapters include committee chairs for specific functions to highlight the importance of the activity (certification, membership, education, community service, etc). It is recommended that the Chapter President provide each of the CEC members with a proposed agenda before each CEC meeting, and that the chapter uses Roberts' Rule of Order for conducting all the CEC meetings.

- The chapter president serves as the presiding officer.
- The CEC is responsible for all business of the chapter and may present recommendations to the chapter for action, such as changes to the bylaws.
- The CEC has primary authority over any chapter committee.

Leadership Development Committee

Chaired by the President-Elect, this standing committee is responsible for recommending names for national leaders and for recommending names for chapter elective offices in accordance with the chapter bylaws.

- To issue its report to the membership, the President should appoint a leadership development committee as early in the year as possible.
- In preparing a slate of candidates, the committee should consider a cross-section of the chapter membership (including Young Professional members) and ascertain, in advance, that those nominated would be willing to devote the necessary amount of time to chapter activities.
- Once determined, the committee should promptly report the nominations to the chapter secretary who is responsible for the preparation and tabulation of ballots.
- Committee members should always be on the lookout for potential chapter officers. Encourage new members to become involved so they feel a part of the AGA family and are more likely to serve.

Bylaws and Procedures Committee

This standing committee ensures chapter bylaws are consistent with AGA National bylaws, oversees the chapter's policies and procedures and may be responsible for monitoring the chapter's strategic plan.

Other Possible Committees

Audit Committee

This committee is responsible for conducting or coordinating periodic audits or reviews of the chapter's financial

operations. The results of these audits or reviews are to be contained in at least one written report, submitted annually to the CEC within 60 days after the close of the fiscal year. It is also a good idea to report to the membership on the chapter's finances annually as well. A copy of the final report should be furnished to the [Chapter Services Manager](#).

Awards Committee

This committee is responsible for the chapter's awards program, as well as for submitting nominations for the National Awards Program. The committee should familiarize itself with members' contributions to financial management at all levels of government so it can best identify those, which merit recognition. The CEC approves recommendations of the awards committee.

Budget and Finance Committee

This committee administers the financial affairs of the chapter, including, but not limited to:

- developing budget recommendations for the fiscal year to the CEC prior to its annual meeting.
- selecting and overseeing chapter investments.
- administering the chapter's memorial funds.
- selecting a depository for chapter funds.
- developing a long-range strategic financial plan for the CEC's consideration.

CGFM Committee

This committee is responsible for developing, promoting, and supporting members and nonmembers in earning the CGFM designation. In fulfilling its responsibilities, it should:

- work with the education, young professional, and membership committees to identify and support potential CGFM candidates.
- offer to support study groups that will help CGFM candidates prepare for the examinations.
- work with members who seek support from senior-level government financial officials to gain recognition of the CGFM designation with their employer for job placement and promotion.
- coordinate with the National Office to support retention and renewal of current CGFMs.
- raise awareness of the CGFM designation, including publishing CGFM articles in the chapter newsletters, celebrating chapter members' earning their CGFM, obtaining CGFM Month proclamations and giving presentations on the CGFM at events hosted by AGA and other groups.

Communications Committee

This committee is responsible for enhancing the image of the chapter and that of the governmental accountability professional. This includes promoting a better understanding of financial management functions and practices through recognized media channels and maintaining a timely liaison with other professional organizations to recognize the work of the chapter's committees. This committee:

- develops policies and establishes standards governing all chapter publications for approval by the CEC, including basic publication formats, costs and distribution.
- publishes a monthly or bimonthly newsletter to keep chapter members informed on chapter activities.
- provides technical guidance to the newsletter editor to ensure adequate coverage of financial management subjects and the various government departments to include in the chapter publication.
- is responsible for conducting or overseeing member studies of financial management matters of general interest to the chapter members and publishing the results of these studies after approval by the CEC.
- cooperates with other research organizations and participates in combined endeavors to improve financial management within the financial management profession.
- is responsible for promoting the chapter activities program to the membership.

Community Service

This committee converts the chapter's desire to perform public service into tangible programs by:

- surveying the membership to determine areas of public service interest.
- researching existing projects and programs within the community that could benefit from member expertise.
- investigating areas of unmet need, which can become a chapter-sponsored public service project.
- recommending a program of public service for chapter approval.
- coordinating and overseeing approved public service endeavors.

Education Committee

This committee has the responsibility, within the chapter's geographical area, for developing, promoting and improving the understanding of public sector financial management at the federal, state, territorial and local government levels for:

- members of AGA;
- nonmembers from the public and private sectors who work in or are interested in financial management within the various levels of government; and
- area financial management educators and students.

In fulfilling its responsibilities, the committee should work closely with the Chapter Programs Committee, the National Office, educational institutions within their area and other professional organizations who have an educational mission. *To ensure the best possible attendance, seminars must receive advance publicity.*

Appropriate continuing professional education credits should be arranged. When group leaders are carefully selected and well briefed in their respective seminar subjects, the program will be a success.

Membership Committee

This committee is responsible for attracting members to the chapter and maintaining the active interest of current members. Through implementation of a well-conceived membership recruitment and retention plan, the committee:

- analyzes the chapter's membership mix to determine areas in public sector financial management that are not represented.
- defines a recruitment process to attract professionals within these targeted groups to AGA.
- reviews registration rosters from recent chapter events to identify nonmember participants and follow-up with these leads.
- queries the membership on how to better respond to their needs and forwards the recommendations to the CEC for use in developing new programs and services to members.
- reviews and appropriately revises letters used for recruiting and welcoming new members, as well as reactivating suspended members.
- maintains an up-to-date record of the names and addresses of all chapter members and makes current lists of all active chapter members available to chapter leadership.

AGA has an account for chapters to use SurveyMonkey for chapter activities – just ask the Chapter Services Manager for assistance!

Meetings Committee

This committee is responsible for ensuring good attendance at meetings, whether through phone reminders, surveys to non-attendees or ensuring a good location and time for members. The committee should:

- canvass the membership as to the preferred meeting times and places.

- work closely with the education and program committee(s) to ensure that their logistical needs are met.
- make provisions for beverage service, menus and table arrangements for each event.
- notify the management of the meeting place of the number of expected meeting attendees.
- ensure that facilities and audio-visual equipment required by the speaker are available.
- arrange the head table in the manner specified by the Chapter President.

Program Committee

This committee has the responsibility of developing and initiating a comprehensive program in the field of public sector financial management for the general chapter membership. Ideally chaired by one of the chapter's more seasoned members, the committee should prepare an annual program plan for approval by the CEC.

In implementing the chapter programs, this committee is generally assigned responsibility for securing guest speakers/panel members for meetings, as well as obtaining the necessary program materials for technical meetings. More specifically, these tasks include:

- coordinating meetings, including arranging for speakers and required audio-visual needs.
- arranging adequate accommodations for speakers and guests, taking times and points of arrival/departure into consideration.
- securing biographical data from speakers and forwarding it to the proper chair in ample time for preparation of publicity releases and chapter meeting notices.
- sending a letter of appreciation to each speaker.

As previously noted, some chapters combine the education and program committees.

Robert's Rules of Order

Robert's Rules of Order provides common procedures for deliberation in order to place everyone on the same footing. The rules allow everyone to be heard and make decisions without confusion.

Please view these videos and online resources for more information on Robert's Rules of Order:

[Short Video 1](#)

[Short Video 2](#)

[In-depth Video](#)

[National Association of Parliamentarians](#)

Types of Motions

Motions are typical methods used by members of a body to express themselves during a meeting. A motion is a proposal that the entire membership can take action on. There are six basic types of motions.

- (1) **Main Motions:** Introduces items for consideration. Cannot be made when any other motion is on the floor.
- (2) **Subsidiary Motions:** Change or affect how a main motion is handled and is voted on before the main motion.
- (3) **Privileged Motions:** Bring up items that are urgent about special or urgent matters unrelated to pending business.
- (4) **Incidental Motions:** Provide a means of questioning procedure concerning other motions and must be considered before the other motion.
- (5) **Motion to Table:** Used in an attempt to kill a motion.
- (6) **Motion to Postpone:** This is often used as a means of parliamentary strategy and allows opponents of a motion to test their strength without an actual vote being taken. Also, debate is once again open on the main motion. The postponement can be until a set date or indefinitely.

Parliamentary Procedure at a Glance

The motions and points listed below are in listed in order of established precedence. When any one of them is pending, you may not introduce another that is listed below it but you may introduce one listed above it.

Desired Action	Statement	May you interrupt the speaker?	Need a second?	Is it debatable?	Can it be amended?	What vote is needed?	Can it be reconsidered?
adjourn meeting	I move to adjourn.	no	yes	no	no	majority	no
recess	I move to recess until ...	no	yes	no	yes	majority	no
protest about room temperature or noise level, etc.	I rise to a question of privilege. -or - Point of privilege.	yes	no	no	no	no vote	no
temporarily suspend	I move to lay the motion on the table. -or- I move that we table the motion.	no	yes	no	no	majority	no
end debate and amendments	I move to the previous question.	no	yes	no	no	2/3	no

Desired Action	Statement	May you interrupt the speaker?	Need a second?	Is it debatable?	Can it be amended?	What vote is needed?	Can it be reconsidered?
postpone discussion	I move we postpone this matter until.	no	yes	yes	yes	majority	yes
give closer review of something	I move to refer the matter to committee.	no	yes	yes	yes	majority	yes
amend a motion	I move to amend the motion by...	no	yes	yes	yes	majority	yes
introduce business	I move that...	no	yes	yes	yes	majority	yes

The following motions have no established order of precedence. Any of them may be introduced at any time except when the meeting is considering the one of the top three matters listed above (motion to adjourn, recess, or point of privilege.)

Desired Action	Statement	May you interrupt the speaker?	Do you need a second?	Is it debatable?	Can it be amended?	What vote is needed?	Can it be reconsidered?
protest breach of conduct or rules	I rise to the point of order.	yes	no	no	no	no vote	no
vote on a ruling of the chair	I appeal the chair's decision.	yes	yes	yes	no	majority	yes
suspend the rules temporarily	I move to suspend the rules so that...	no	yes	no	no	2/3	no
avoid considering an improper matter, object to considering some undiplomatic or improper matter	I object to consideration of this motion.	yes	no	no	no	no	yes
verify a voice vote by having members stand	I call for a division. Or say division.	yes	no	no	no	no vote	no
request information	Point of information...	yes	no	no	no	no vote	no
take up a matter previously tabled	I move to take from the table...	no	yes	no	no	majority	no
reconsider a hasty decision	I move to reconsider...	yes	yes	yes	no	majority	no