

# Report to Our Members

## Citizen-Centric Report for 2019-2020



Joe Baptiste  
Chapter President  
2019-2020

### About AGA

The Association of Government Accountants (AGA) is *the* association for all financial management related professionals supporting government. It is the only association that supports professionals working in federal, state and local governments as well as the private, nonprofit and academic sectors. Our 15,000 members count on AGA to provide the tools and support - training and events, professional certification, publications and ongoing education – to help build their skills, advance their careers, and make a mark on the profession. Members include senior executives, mid-level managers, entry-level employees, elected officials and students working in government financial management disciplines, including accounting, auditing, budgeting, financial reporting, performance reporting, grants management, contract management and information systems.

### Our Chapter

Since 1960, the Virginia Peninsula Chapter of the Association of Government Accountants (AGA) has been serving government professionals from the local, state, and federal agencies in the Hampton Roads Area, which includes; Hampton, Newport News, York County, Poquoson, Chesapeake, Norfolk, Portsmouth, Virginia Beach, Suffolk, Williamsburg and Isle of Wight. In its 59th year, the Virginia Peninsula Chapter continues to serve as an active, member-run organization, creating partnerships with immeasurable value for its members and the surrounding communities whom enjoy the rewards of their professionalism and education.

### Selected Demographics

Member Type	#
Govt Member (68%)	104
Private (12%)	18
Retired (7%)	11
Lifetime Member (4%)	6
Young Professional (3 %)	5
Other (3%)	5
E-MBR-Student (3%)	4
<b>Total</b>	<b>153</b>

(as of August 2020)

Employer Type	#
Federal Govt. (45%)	69
City Govt. (15 %)	23
Private (14%)	22
Retired - Not Working (11%)	17
State Govt. (5%)	7
Academic - Educator (3%)	4
Student (Full-Time) (3%)	4
Non-Profit (2%)	3
County Govt. (1%)	2
Not Employed (1%)	2
<b>Total</b>	<b>153</b>

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### Mission

To create value for our members and communities through the advancement of government accountability by:

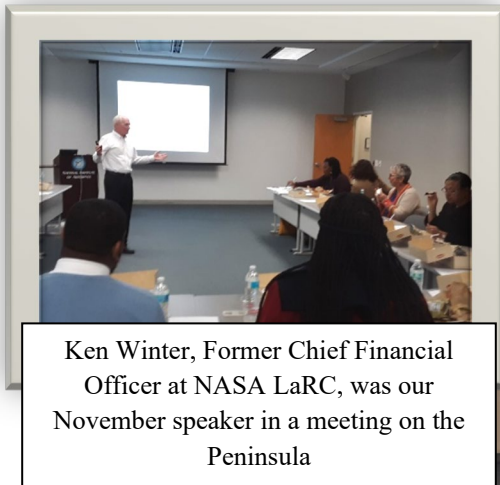
- Participating in the future of governmental financial management through research and development.
- Ensuring continuity of quality government accountability professionals.
- Serving our member communities through our time and service.
- Providing quality and affordable educational opportunities.

### Vision

AGA is the premier association for advancing government accountability.

# How We Progressed

## Chapter Year 2019-2020



Ken Winter, Former Chief Financial Officer at NASA LaRC, was our November speaker in a meeting on the Peninsula



Larry White, who the MAAC club flew in from Florida for our October joint meeting, is a former Captain at the Coast Guard Finance Center.



We visited the GAO office in Virginia Beach to speak about the benefits of membership.



Suzanne Wren, of the local GAO office, was our kickoff speaker for the year in September.



Kelly Stefanko, Curtis Joachim and Evelyn Stallings show off some of the great raffle prizes for the community service fundraiser at the Commonwealth PDT in December.



Lance Poulter was named our Volunteer of the Year

## Accomplishments

- Kicked off chapter year with September meeting at the Black Pelican in Chesapeake featuring Suzanne Wren from our local GAO office.
- Held annual meeting with the ODU Managerial Accounting and Auditing Club (which is also the AGA ODU student chapter) featuring Larry White, Executive Director, Resource Consumption Accounting Institute.
- Held November meeting on the Peninsula, featuring Former Chief Financial Officer at NASA LaRC and member Ken Winter.
- Sold out our annual Commonwealth PDT at the Great Wolf Lodge with the Richmond, Roanoke and Shenandoah Chapters.
- In February, as our annual meeting with the Tidewater Chapter of IIA, held a half day Introduction to Basic Data Analysis in Excel for only \$20/member. Sold out in a week.
- Governor Northam proclaimed March 2020 as CGFM Month in the Commonwealth of Virginia!
- To promote our members to earn the CGFM certification we offered members the opportunity to borrow chapter purchased study guides.
- Gave back to our community in volunteering at the Foodbank, supporting our PDT fundraising raffle, the NCSF raffle at the National AGA PDT. Unfortunately, our annual Clean the Bay outing was cancelled due to the pandemic.
- Unfortunately, our annual spring PDT with ASMC Hampton Roads chapter. was cancelled due to the pandemic.
- Supported other AGA chapters and provided educational opportunities for our members by promoting online PDTs offered by the Roanoke and Shenandoah Chapters.
- Communicated monthly with members through emails of upcoming events and activities.
- Continuing encouraging our member to become a CGFM certificate holders. The CGFM certification is directly applicable to the everyday duties of government financial professionals, at every level. It can help a new employee hit the ground running, while enhancing the performance of existing employees. This year we have more members preparing for the test as well as passing.

# Our Finances

## *Revenues and Expenses*

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

The VA Peninsula Chapter has a General Fund. Revenues from our fall and spring professional development training conferences are typically our largest source of revenue. In 2019-2020, the COVID-19 pandemic forced us to cancel our spring PDT. However, thanks to the success of prior years' training and the chapter's conservative spending, we are fortunate to have a healthy account balance. Our expenditures include subsidizing member meal costs for meetings, speaker gifts, community service donations. Because of the pandemic, we did not have a year end celebration or provide chapter awards as is our normal tradition.

### Revenue

	2019-2020
Lunch Meetings	\$303
PDT and Excel Training	\$3,930
Sponsorship	\$6,400
<b>Total Chapter Revenues</b>	<b>\$10,633</b>

Money was taken in through our 123-signup system for registrations for our lunch meetings, spring PDT and February excel course. However, this had to be netted against the cost of lunch vendors. Additionally, when the spring PDT cancelled, we had to refund the registration fees paid (see "expenditures" below). The sponsorship line was largely for the Commonwealth PDT, which is net against other revenues and expenses collected by the Richmond chapter and settled according to our profit-sharing agreement. Some of the training revenue includes the settlement from that PDT.

### Expenditures

	2019-2020
Instructor for Excel	\$500
Office Supplies	\$11
AGA Banner	\$181
123 Sign up	1,118
Meeting/PDT	\$5,489
<b>Total Chapter Expenditures</b>	<b>\$9,299</b>

We split the cost and the revenues of the February excel course with the local IIA chapter. We purchased a stand-up AGA banner. As previously discussed, "Meetings/PDT" included payments to lunch meeting vendors and refunds of spring PDT registrations once it was cancelled due to the COVID-19 pandemic

### Independent Audit

Brad Smith, a chapter member was not part of the 2019-2020 Chapter Executive Committee, conducted an Independent audit of the Chapter's finances and provided recommendations for improved internal controls which the chapter incorporated into its financial policies and procedures.



# What's Next

## *Key Initiatives*

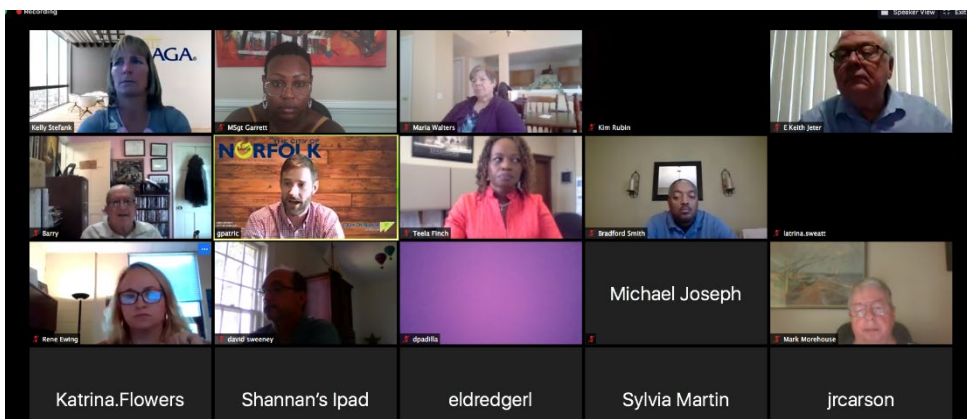
### Rebuild and Remake Ourselves in the Face of a Pandemic

As chapter operations grinded to a halt in March 2020 due to the COVID 19 pandemic, the AGA VA Peninsula Chapter had a significant number of members not renew their membership. Given the ongoing safety and health concerns going into this year, we are planning virtual meetings, which we are offering free to our members. We are reaching out to our lapsed members in hopes of getting them to rejoin, and we are looking to attract new members and retain our members by offering significant value in the way of CPEs and networking opportunities.

### 2020-2021 Chapter Goals:

Our goals for the coming year include:

- Membership growth: 10% (We have 153 members as of August 2020, this would require 15 new members)
- Overall Membership Satisfaction: 75% satisfaction (meets or exceeds expectations)
- Training Events: Offer 34 hours of CPE (14 hours of fall PDT, 14 hours of spring PDT and 6 monthly meetings). We are planning time for networking 10 minutes before each virtual meeting.
- Educational Meeting Attendance: 150 average attendance for fall and spring PDTs. 25 average attendance for meetings
- Educational Meeting Satisfaction: 75% satisfaction (meets quality expectations) as measured by polls at monthly meetings
- CGFM Candidate Support: We plan on continuing our study guide loaner program and retain 80% of our CGFMs.
- CGFM Support: 80% CGFM retention.



The new look of AGA VA Peninsula Chapter meetings as we adjust in getting through the pandemic.

### Why the AGA Virginia Peninsula Chapter?

The AGA Virginia Peninsula Chapter puts you in contact with other government accountability professionals in your area.

Through our chapter, you'll get the chance to participate in social events, business meetings and educational seminars with other professionals who understand your concerns. In addition, your AGA membership means you're part of a tremendous nationwide network.

A significant component of the AGA Virginia Peninsula Chapter is the educational program, including Professional Development Training events and free and reduced priced CPE throughout the year to its members, which meets most professional continuing education requirements.

### We want to hear from you!

- Do you like this report?
- Would you like to see other information?

Please let us know by contacting these, or any of our chapter leadership members:

**Chapter President**  
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