

# Report to Our Members

## Citizen-Centric Report for 2021-2022

### About AGA

AGA is the association that connects and empowers professionals who support government, from financial management to IT, human resources, cybersecurity and more, to advance good government initiatives, grow their expertise and accelerate their careers. 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. AGA National provides members at least 14 hours of training each year from on timely topics for FREE. This \$361 value easily covers the cost of membership. 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 has provided members additional networking, leadership and educational experiences. It serves 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 63rd 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	90
Private	20
Retired	19
E-MBR-Student	7
Lifetime Member	8
<b>Total</b>	<b>140</b>

(As of October 2022)

Employer Type	#
Federal Govt.	63
City Govt.	23
Private	20
Retired - Not Working	19
State Govt.	4
Academic - Educator	4
Student (Full-Time)	7
<b>Total</b>	<b>140</b>



Evelyn Stallings  
Chapter President  
2021-2022

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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've Progressed

## Chapter Year 2021-2022



Claudia Ohar & Suzanne Maddalena were named our Volunteers of the Year.



Kelly Stefanko & Evelyn Stallings sign the scholarship fund agreement.



Evelyn Stallings with President Award winner Canee Bullock



Evelyn Stallings & Anisa Golden volunteering for Wreaths Across America.



Chapter wine tasting social

### Selected Accomplishments:

- Conducted a successful (virtual) 26<sup>th</sup> Annual AGA Commonwealth PDT joint with 3 other AGA chapters:
  - Profit for our chapter of \$4,800.
  - Raised nearly \$4k for charity St. Mary's home.
- Community Support:
  - Worked a water booth at the Wicked 10K
  - Donated to the AGA national community service raffle at PDT
  - Participated in Clean the Bay Day
  - Endowed a \$25,000 scholarship which will benefit an undergrad or grad student studying government accountability from our area in perpetuity!
- Started CGFM study groups:
  - Led by Claudia Ohar (who earned her CGFM).
  - Purchased study guides.
  - Tim Haycox first CGFM of the year!
- Recruited 14 new members:
  - 1 young professional
  - 4 student members
  - Claudia Ohar recruited 3 new members!
- We conducted a chapter satisfaction survey:
  - 76% "excellent value" rating.
  - 100% "enjoy being part of a professional association" rating.

We could not have done this without you, our members; THANK YOU for your support and membership!

# Our Finances

## *Revenues and Expenses*

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

The VA Peninsula Chapter does not collect chapter dues from its members, so all revenue to provide for services it provides must be raised. We generally do this through holding two professional development training (PDTs) annually, one in the fall and one in the spring. In 2021, we held our 26<sup>th</sup> annual fall conference, the AGA Commonwealth PDT, for the second year virtually, together with the Richmond, Southwest VA and Shenandoah Valley chapters of AGA. In the spring, we unfortunately did not hold our normal joint conference with ASMC after our longtime partner, the Hampton Roads Chapter of ASMC, decided to pursue a different type of spring conference without us.

Thanks to the success of prior years' PDTs and the chapter's conservative spending, we were fortunate to have a significant enough account balance to make a significant investment into the future of our profession. Our chapter executive committee voted to provide \$25,000 to the Hampton Roads Community Foundation to an endowment that will provide an annual scholarship to a graduate or undergraduate student from our area interested in government accountability in perpetuity.

#### **Revenue**

Bank Dividends	4
123 Sign up return of security deposit	2,000
Commonwealth PDT revenue (net of fees)	4,842
AGA payment (receivable from prior year)	200
12-22 deposit	26
<b>Total Revenue</b>	<b>7,072</b>

#### **Expenses**

Chapter President PDT attendance	1,352
AGA PDT NCSF prize	50
PO Box fee	134
Scholarship endowment	25,000
CFFM incentive	250
CGFM Study Guides	453
Chapter Awards and CEC gift	445
End of Year Party - Top Golf	1,669
Payments for chapter services	307
Gift cards - chapter meetings	60
Wine social bus	150
Bounced 123 check fee	15
<b>Total Expenses</b>	<b>29,885</b>

**Independent Audit** - Chapter members Brad Smith and Gail Smith (unrelated to each other), 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*

### Continue to Adopt, Pivot and Grow in a Changing Environment

VA Peninsula AGA's plan for 2022-2023 is to continue to pivot, advance, grow and accelerate in this uncertain environment. New members are crucial in infusing new and innovative ideas that will impact change and the opportunity we can provide. Our chapter, like many others, success depends on being able to active members bringing in and retaining as well as recruiting new members. We continually look for volunteers to help us plan and offer member services.

We seek to improve our social media presence, expanding our organization's visibility on platforms like LinkedIn and Facebook to attract potential members. Our volunteers continue to hone skills using audio-visual equipment and offering valuable training using remote tools such as zoom. We continue to offer our members free access to our monthly meetings, which are worth 1 CPE each. Our CGFM study group meets consistently, has grown and we expect several new CGFMs this year. We will offer reimbursement incentives for the first chapter CGFM certified members of the year

We face significant audio-visual fees in trying to emerge from the pandemic and offer our 27<sup>th</sup> Annual Commonwealth PDT as a hybrid event. We continue to look for a partner for our spring PDT.

### 2022-2023 Chapter Goals:

Our goals for the coming year include:

- Membership Growth
- Increase Overall Membership Satisfaction
- Offer 25 hours of CPE with networking opportunities before and after each meeting.
- Average 100 attendees for fall and spring PDTs. average 20 attendees for meetings.
- Maintain Educational Meeting Satisfaction
- Provide CGFM candidates support
- Retain CGFMs

### 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 your 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 the or any of our chapter leadership members:

**Past Chapter President**  
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**Chapter President**  
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Members and their families enjoying our year end party in June 2022 at Topgolf

