

## About Our Chapter — AGA Cleveland Chapter (2019-2020)

*We are* — the Association of Government Accountants (AGA) Cleveland Chapter. Established in 1954, our members include employees from the Defense Finance and Accounting Service (DFAS) Cleveland; the National Aeronautics and Space Administration Glenn Research Center (NASA GRC); State, county, and local government agencies of Ohio; universities and colleges; and private industry. Our Board and members are dedicated to ensuring we continue to grow.

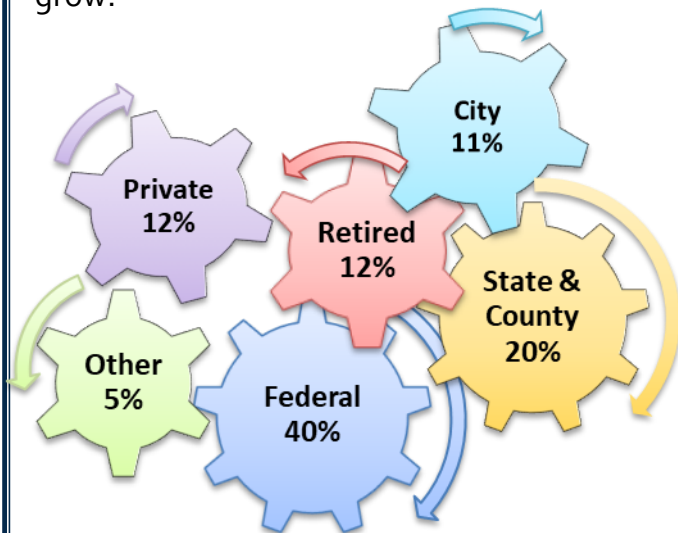


### Membership —

The AGA Cleveland Chapter ended the program year in June with 91 members. Membership includes managers, interns, accountants, financial managers, and information technology professionals.

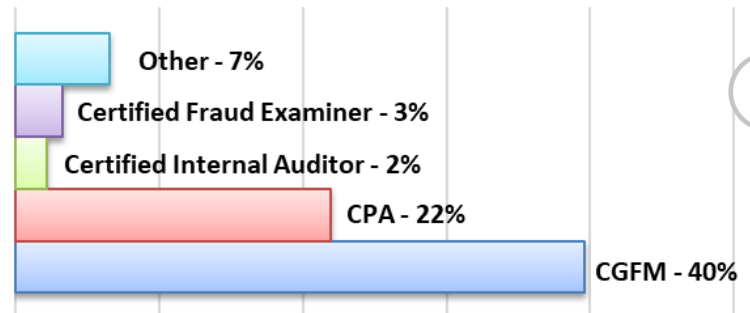
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Our members believe in and support continuing education and certifications. Around 40% maintain an active Certified Government Financial Manager (CGFM) status, over 20% have obtained their Certified Public Accountant (CPA) certification, and over 10% have obtained other certifications.

### 2019-2020 Member Certifications



*AGA is the member organization for financial professionals supporting government. We lead and encourage change that benefits our field and all citizens. Our networking events, professional certification, publications, and ongoing education help members build their skills and advance their careers.*

### Chapter Mission -

The AGA Cleveland Chapter serves professionals in the government financial management community by providing quality educational opportunities, fostering professional development and certification, supporting high standards to advance government accountability, and contributing to the surrounding communities in various charity and outreach events.

### Chapter Vision -

To be a premiere professional association for advancing government accountability in Northern Ohio.



*We believe that the strength in our Chapter is only through members volunteering and participating.*

### Chapter Awards/Recognition —

- ~ AGA Chapter Recognition Program Silver Award (2019)
- ~ Citizen Centric Reporting (CCR) Certificate of Excellence (2018)
- ~ City of Cleveland CGFM Proclamation Recognition
- ~ Ohio Board of Accountancy Eligible CPE Sponsor



### CPE and Training Events —

No other year has presented the challenges we saw this year. Although we were unable to hold our premier event, the AGA/ASMC Annual Professional Development Training (PDT), we offered other venues for earning CPEs and several of our members attended the AGA PDT in New Orleans:

- ~ Purchased CGFM Study Guides
- ~ Purchased Virtual AGA Webinars
- ~ Held a Financial Goal Setting Seminars
- ~ Posted Opportunities on the Chapter Website



### Member Events/Community Outreach —

We're all busy, but we find time to socialize and give back to our community whether through events or donations:

- ~ AGA/ASMC Annual Picnic – Last Blast of Summer, Celebrating 50 years of the Apollo mission and Woodstock.
- ~ Punchbowl Winter Social
- ~ DFAS Diversity Fair Participation
- ~ Local Charities Support – Participation:
  - Empowering Epilepsy - Cleveland Indians & Cavaliers' Games
  - St. Jude Children's Hospital Run/Walk
  - Donations: Salvation Army, Toys for Tots, Cleveland Food Bank

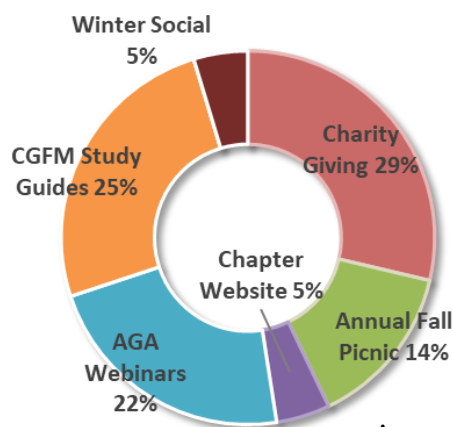
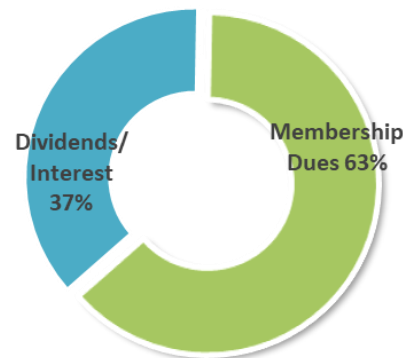


## Revenues



	PY 2020	PY 2019	PY 2018
Annual Spring PDT	\$ -	\$ 8,295.00	\$ 8,795.50
Membership Dues	\$ 388.33	\$ 414.58	\$ 553.00
Dividends/Interest	\$ 225.73	\$ 140.18	\$ 9.91
Total Revenues	\$ 614.06	\$ 8,849.76	\$ 9,358.41

Along with membership dues, dividends and interest represented the majority of our revenue for the year. With the onset of COVID-19 restrictions, we were not able to hold our annual AGA/ASMC PDT.



Our reduced expenses mirrored the reduced revenue. In lieu of the AGA/ASMC PDT event, we provided additional CPE event resources through AGA Webinars and other free events.

## Expenses

	PY 2020	PY 2019	PY 2018
Annual Spring AGA/ASMC PDT	\$ -	\$ 5,288.42	\$ 5,968.41
Charity Giving	\$ 740.00	\$ 850.00	\$ 1,000.00
Annual Fall Picnic	\$ 366.67	\$ 225.00	\$ 154.25
Chapter Website	\$ 119.88	\$ 119.88	\$ 128.22
AGA Webinars	\$ 578.00	\$ -	\$ -
CGFM Study Guides	\$ 655.18	\$ -	\$ -
PO Box	\$ -	\$ 74.00	\$ -
Winter Social	\$ 121.00	\$ -	\$ -
Total Expenses	\$ 1,347.55	\$ 6,557.30	\$ 7,250.88



**Program Year Comparison:** As described in the Revenues and Expenses, COVID-19 impacted our Chapter. Without the annual combined AGA/ASMC PDT, not only were we unable to provide much needed CPEs, we also lost an opportunity to recruit and retain membership and to network with everyone in attendance. We were able to continue our community outreach and donations, but did not meet our prior year mark and have fallen behind. Efforts into the next program year are to concentrate on retaining and recruiting membership and finding opportunities for virtual training and social events.

## What's Next —

Our Chapter continuously seeks ways to serve our members and the community. Our Strategic Goals and plans are based on overcoming the Challenges. This past year has been especially stressful and challenging as we find new ways to provide a high level of benefits in our new "virtual" world.



## Strategic Goals —



Encourage member participation in Chapter and national CPE and educational events.

Promote community service by regularly scheduling events.


Encourage people to become involved in AGA, Chapter leadership and committees.

Seek outside training events and provide assistance in CGFM training.

Promote relationships with AGA Chapters and other professional organizations.



## Challenges —

- ~ Increasing and retaining membership and participation in the Chapter leadership and committees.
- ~ Providing training events and opportunities that members find interesting and relevant.
- ~ Expanding public knowledge on the benefits and value of AGA and the CGFM to increase our membership.
- ~ Growing the  in our Chapter and supporting other certifications.



Hi,

## Leadership —

### Chapter Leaders 2019-2020

President	• Jana Sjoquist
Past President	• Jackie Hall-Carrillo
President-Elect	• John Kanya
Secretary	• Roderica Curbeam
Treasurer	• Michael Hoffman
Treasurer-Elect	• Jene Philippy
Directors	Professional Certification: Ron Gedeon Education: Balwinder Beasley Membership: Annette Schmunk Community Service: Lou Ockunzzi Communications: Hoffman/Sjoquist CCR/Outreach: Shared

### Incoming Chapter Leaders 2020-2021

President	• John Kanya
Past President	• Jana Sjoquist
President-Elect	• Tonya Hughes-Scruggs
Secretary	• Michael Hoffman
Treasurer	• Jackie Hall-Carrillo
Treasurer-Elect	• Jene Philippy
Directors	Professional Certification: Ron Gedeon Education: Balwinder Beasley CCR/Outreach: Shared Communications: Hoffman/Sjoquist Membership: Vacant Community Service: Vacant

We want to hear from you!

Do you like this report? Would you like to see other information? Please let us know. Contact us at [accountability@agacleveland.org](mailto:accountability@agacleveland.org).