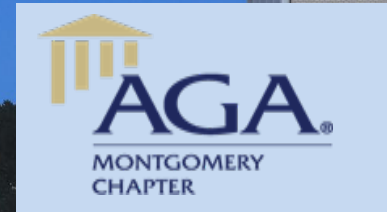


# Report To, Our Members, Program Year 2019-2020

[www.montgomeryaga.org](http://www.montgomeryaga.org)



## Message from our President

The theme for the 2019-2020 program year was “Team AGA”. We started the program year with our Tail Gate Kickoff event. During this event we reflected on the previous program year, fellowshiped with one another and talked about the excitement of the National PDT in New Orleans, Louisiana.

In October the Community Service Community hosted the Making Strides for Breast Cancer Campaign Luncheon. Team AGA went above and beyond for this Community Service Project. In November the chapter held a two day Fall Professional Development Training event. During the Fall PDT the attendees generously supported a community service project for the Friendship Mission. Also, the Chapter recognized the members that are currently Certified Government Financial Managers.

Team AGA was able to take a break and host our first holiday party in December. In January the chapter was back to business with membership drives at several local colleges and universities. At the membership drives the chapter also promoted financial management careers and provided free resources to students. The chapter also hosted a Financial Wellness Workshop that received lots of wonderful feedback. The Montgomery AGA Chapter made history by being the first chapter to help form a joint student membership chapter at Auburn University Montgomery. The Montgomery Chapter sponsored its first Accounting Student Essay Contest. The winner was announced during a joint meeting at the Auburn University Montgomery government financial management student society, Beta Alpha Psi, and AUM Accounting Club.

I would like to thank all the Board Members for their hard work and our chapter members that supported the chapter vision and helped to make the program year a success. We wish success to Nicole Boswell our 2020-2021 Chapter President. We encourage all members to remain active and stay involved with AGA and keep pursuing the next level of certification as a CGFM. It was truly an honor, to serve as your 2019-2020 Chapter president.

## **Our Mission**

The mission of AGA is to be the premier professional association in the advancement of accountability, transparency and leadership by promoting education, certification, innovation and collaboration across all levels of government and stakeholders.

## **Our Vision**

The Montgomery Chapter of AGA is to become a leader in recruitment of new members and encourage participation in continuing education and certification.

## **Chapter Membership**

	FY 2020	FY 2019
Government	259	208
Private	11	8
Retired/Lifetime	8	6
Young Professional	8	10
CGFM	60	52
CPA	37	27
CIA	5	4
CFE	7	5
Other	11	10

Sources: National AGA Membership Reports

## AGA Core Values

Service

Accountability

Integrity

Leadership



President LaTreeka Williams

## What's Inside

**Page 1 Overview**

Page 2 Performance Measurers

Page 3 Finances

Page 4 What is Next?

# Accomplishments and Performance Measurers

## Key Performance Measurers

### Accomplishments

The Montgomery Chapter received the Platinum Award at the 2020 National PDT in Dallas, Texas for Chapter Recognition Points for Group A.

Mr. Courtney Bruce has been selected as the National Chair Representative for the Montgomery Chapter for program year 2020-2021.

The Montgomery Chapter is the first chapter to form a joint student membership chapter, this event was held at Auburn University Montgomery.

The Accountability Committee received the Certificate of Excellence in Citizen Centric Reporting for the Montgomery Chapter Member Centric Report for program year 2018-2019.

The Membership Committee participated in a networking event at Auburn University Montgomery to encourage students to become members of AGA.

The Montgomery Chapter held a two day Fall PDT in November 2019.

The Community Service Committee held a Breast Cancer Awareness Luncheon in October 2019. Chapter members participated in playing Bingo with residents of the Blue Ridge Nursing Home and, also participated in the Making Strides Against Breast Cancer Walk and hosted an event to support the Friendship Mission.

The Accountability Committee joined with the Membership Committee to host the chapter's first Accounting Student Essay Contest for college students. The winner was from Auburn University Montgomery a student at Auburn University Montgomery.

Montgomery Chapter Performance Measurers	Program Year 2020	Program Year 2019	Percentage of Change
<u>Education</u>	CPE Hours Offered	CPE Hours Offered	
The Montgomery Chapter had a good program year. The Chapter had a two day Fall PDT in November 2019. The Spring PDT was cancelled due to COVID- 19. This was the reason for the difference of continuing education offered.	32	41	-22%
<u>Certification</u>	Number of new CGFM	Number of new CGFM	
The CGFM Committee encouraged members to achieve the CGFM Certification through emails, newsletters, luncheon meetings and during the Fall PDT. The committee had study groups and a review of each part of the exam. The committee also honored the members that have their CGFM at the Fall PDT.	8	3	62%
<u>Community Service</u>	Projects	Projects	
The Community Service had a great year. This committee played Bingo with the residents with the residents at the Blue Ridge Nursing Home in October. This committee and Chapter members did a fantastic job with the Friendship Mission project and the Making Strides Against Breast Walk and Luncheon. At least three projects were cancelled due to COVID-19 that makes a difference from last program year.	4	8	-50%
<u>Membership</u>	Members	Members	
The Membership Committee participated in a networking event at AUM and hosted membership drives and local colleges and universities. The Membership Committee partnered with the Accountability Committee to host the Chapter's first Accounting Student Essay Contest.	286	232	19%

### What's Inside

# Montgomery Chapter Revenues and Expenditures

The Montgomery Chapter receives a majority, of its revenue from educational events such as the Fall PDT and Spring PDT. The table and graph include various sources of revenues and expenditures for the following program years. The Montgomery Chapter financial statements were not audited for program year 2020.

## Revenues

	Program Year 2020	Program Year 2019
Education	\$29,430.00	\$33,938.00
Meetings	\$460.00	\$2,706.16
Membership	\$2,947.50	\$2,680.00
Sponsorships	\$2,750.00	\$1,350.00
Miscellaneous	\$7,259.62	\$3,406.71
Totals	\$42,847.12	\$44,080.87

## Expenditures

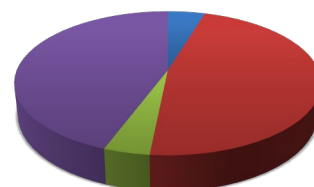
	Program Year 2020	Program Year 2019
Awards/Scholarships	\$2,251.73	\$2,581.06
Education	\$22,634.54	\$27,032.77
Webpage/Technology	\$1,988.95	\$1,124.95
Miscellaneous	\$21,374.66	\$10,543.64
Totals	\$48,249.88	\$41,282.42

## Revenues



■ Education
 ■ Meetings
 ■ Membership
 ■ Sponsorships
 ■ Miscellaneous

## Expenditures



■ Awards/ Scholarships
 ■ Education
 ■ Webpage/ Technology
 ■ Miscellaneous

### What's Inside





**Membership Committee**

The Montgomery AGA Chapter has 286 members. The goal is to retain the Montgomery Chapter membership and increase the membership to 300 members. The challenges of this committee are creating new and innovative ways to attract members and to help prospective members to see the advantages of member ship in AGA. The goals of this committee are:

- To retain current members and provide promotional materials on the benefits of being an AGA member. To spotlight successful member in the Chapter Newsletter. To contact retired members and encourage them to renew their membership;
- To engage and support the young professionals, colleges and universities by providing social development and educational opportunities that are specifically targeted to and hosted by the young professionals and college students;

**Certified Government Financial Manager**

The CGFM Committee will promote the CGFM certification and assist candidates in preparing for the exams and act as a resource for CGFM information while increasing CGFM candidates. The goals of this committee are:

- To develop strategies to increase the number of CGFM candidates, by providing study groups and supporting materials to prepare and pass all the CGFM examinations;
- To display brochures for luncheons, seminars, social media and the chapter website, also assist in identifying CPE opportunities through online study, seminars, and self-study, publish member achievements in the chapter newsletter, local papers, websites and social media;
- To communicate and coordinate with other committees in identifying, supporting and recognizing new CGFM candidates.

**Education Committee**

The Education Committee is challenged with offering an increasing number of continuing educational opportunities for AGA members. The goals of this committee are:

- To increase the number of CPE credits offered through virtual lunch and learns and professional training events. Also promote the webinars and educational events hosted by AGA National and the Journal Online quizzes;
- To partner with other organizations to increase the number of participants thereby making it more cost effective to attend educational events;
- To include Chapter educational events on the National AGA online calendar of events, social media, brochures, and the Chapter website.

**Community Service Committee**

The challenge of this committee is increase, the visibility committee service projects to members and prospective members. The goals of this committee are:

- Encourage participation in upcoming projects planned for the current program year, increase social media coverage, and highlight sponsored organizations, and how they are assisted;
- Showcasing the organizations in the Chapter's newsletters, social media, and websites with testimonials, reach the local community by serving small organizations, encourage more donations, and community service hours.



**Montgomery AGA Chapter Officers  
Program Year 2020-2021**

**We would like to hear from you**

Do you like this report? If you would like to see other information or if you would like more information on our services, visit our website at:  
[www.montgomeryaga.org](http://www.montgomeryaga.org)

Follow us on: Facebook, Twitter, and LinkedIn

**Chapter Office Director**

President	LaTreeka Williams
President-Elect	Nicole Boswell
Treasurer	Tashundrea Patterson
Financial Sec.	LaShawn Pierce
Secretary	Charlene Daniel
Immediate Past	
President	Courtney Bruce
NCC Rep.	Pamela Hill



**“Team AGA”**