



AGA Phoenix Chapter

A Report to Our Members 2019-2020

A Message From Our President

This is the tenth year in a row that the Phoenix Chapter of the Association of Government Accountants has published its Citizen Centric Report. This report embodies the AGA's initiative for governments to provide clear financial information that is accessible to the average citizen.

We would love for you to attend one of our monthly meetings or our annual Professional Development Training. We strive to provide high quality and low-cost continuing professional education for our members and the government accounting community. Please visit our website at <https://www.agacgfm.org/Chapters/Phoenix/>, where you can find information on our events, earning your CGFM certification, and so much more.

We hope our report provides excellent transparency and accountability of our strategic objectives and finances. We welcome any feedback and hope to see you at a future event!

Jordan Dale, CGFM

AGA Phoenix Chapter President

Our Strategic Goals

- Provide high quality, low-cost continuing professional education to the membership and the government accounting community.
- Promote the value of AGA membership in order to retain and expand membership.
- Promote the value of the Certified Government Financial Management (CGFM) program as an important professional designation.
- Promote government financial management to schools and colleges and become spokespersons for the advancement of government accountability through quality course offerings to students.
- Provide a website that the membership can use to research current information relating to the Phoenix Chapter.
- Promote networking among membership at Chapter events.
- Reach out to members consistently, provide social/recruiting events, and survey members annually.
- Recruit additional Executive Board membership in order to diversify our ideas and strengthen our focus.
- Expand AGA membership throughout the state.



Table of Contents

<i>Strategic Objectives</i>	<i>1</i>
<i>How Have We Progressed?</i>	<i>2</i>
<i>Our Finances</i>	<i>3</i>
<i>What's Next?</i>	<i>4</i>

Mission

The Phoenix Chapter serves Arizona professionals in the government financial management community by providing quality, low-cost continuing education, promoting professional development and interaction among members, and fostering a commitment to community involvement as well as a sense of responsibility for advancing government accountability.

Vision

The Phoenix Chapter of the Association of Government Accountants (AGA) actively creates an avenue for membership to share ideas with each other, to share knowledge and time with the community, and to promote the advancement of government standards and accountability within the profession.

How have we progressed?

Where are we going?

2020 Accomplishments

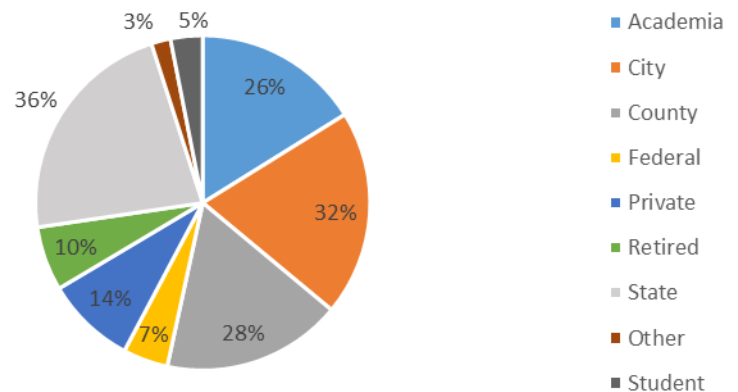
- Our Chapter held fourteen monthly educational meetings throughout the year, as well as an Ethics update and our annual Professional Development Training (PDT) for a total of 42 CPE credits. Attendees averaged 30 for monthly meetings, 29 for ethics, and 114 for the PDT.
- Due to worldwide events, the second half of our program year was quickly converted from live events and offered virtually, including our first ever virtual PDT.
- The Phoenix Chapter of AGA earned enough Chapter Recognition Points during the 2019-2020 Program Year to be the recipient of the Platinum Chapter Designation Award from AGA Nationals.
- This year our Chapter awarded one scholarship totaling \$1,000 to a student identified for academic excellence and community service achievements.
- Our Chapter offered scholarships to members who passed the CGFM exam this year.
- We assisted with homeless/crisis care and homeless pet assistance drives and provided a financial donation to the Phoenix Rescue Mission for the less fortunate.
- We participated in Feed My Starving Children packaging food for people in developing nations.
- We continued our sponsorship program to partner with other organizations to further our mission.
- We held events at Arizona State University and Grand Canyon University to encourage new graduates to seek a career path of working in Government Financial Management.

Membership Demographics

	2019	2020	% Change
Total Membership	161	165	+2.48%
CGFM Certifications	79	82	+3.80%
CPA Licenses	28	32	+1.43%
Bachelor Degrees	85	79	<7.06%>
Master Degrees	58	61	+5.17%

- *Our membership increased slightly due to strong recruiting efforts and networking.*

Composition of Membership by Employer Type 2020



- *We offered monthly education meetings at varying sites across the valley, and virtual meetings, to encourage participation from non-traditional attendees.*
- *The Chapter provides an Ethics class annually as a benefit to our members, to meet their CPA Ethics requirements.*

Our Finances

Revenues and Expenses

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

PHOENIX CHAPTER SCHEDULE OF SOURCES AND USES

FY 2019 FY 2020

SOURCES

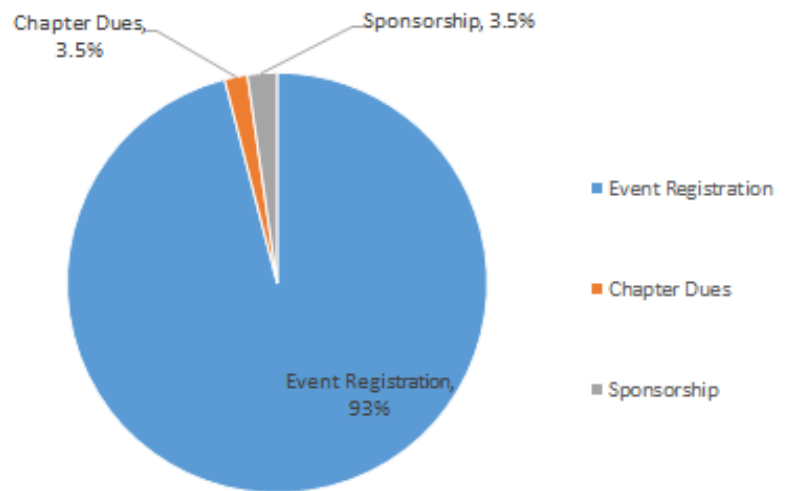
Event Registration	21,474.15	20,559.93
Chapter Dues	829.17	791.67
Sponsors	2,671.50	750.00
Miscellaneous	-	3.73
	<u>24,975</u>	<u>22,105</u>

USES

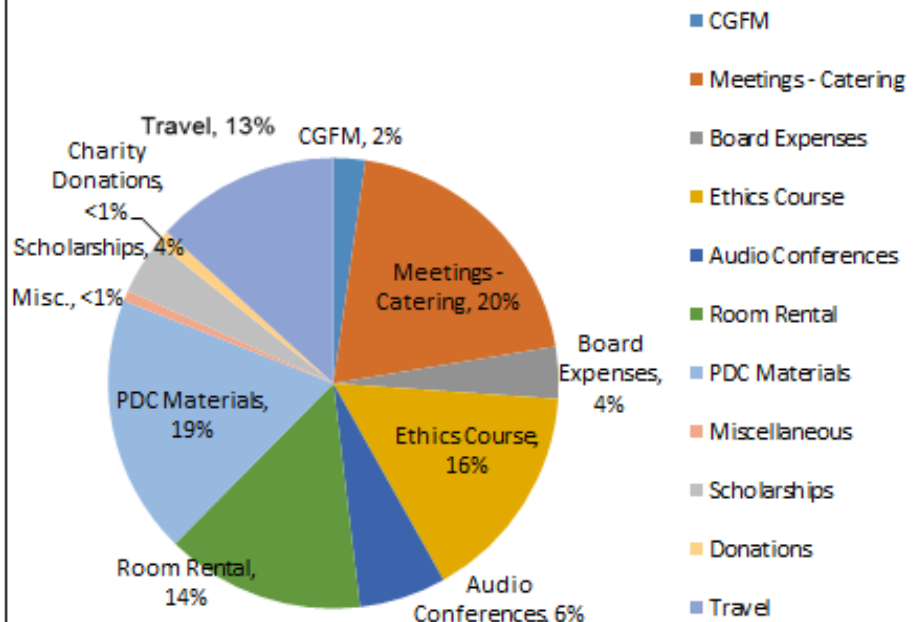
CGFM	570.00	1,332.25
Meetings - Catering	5,028.20	4,459.35
Board Expenses	930.13	1,135.37
Ethics Course	3,944.00	3,248.00
Audio Conferences	1,560.00	2,270.00
Room Rental	3,575.92	1,975.00
PDC Materials	4,646.71	385.92
Miscellaneous	190.56	101.62
Scholarships	1,000.00	1,500.00
Donations	250.00	250.00
Travel	3,315.04	700.60
Website	-	24.00
Community Service	-	-
	<u>25,011</u>	<u>17,382</u>

SOURCES OVER USES (36) 4,723

FY 2020 Sources of Revenue



FY 2020 Uses of Revenue



Independent Audit

An Independent audit of the Chapter's finances was conducted, resulting in a clean opinion. Complete financial information can be found at www.agaphoenix.org.

What's Next?

Key Initiatives

We want to hear from you.

If you would like any additional information on our Chapter or are interested in volunteering for a committee or serving on our Executive Board, please contact any of our Board members. You can find a listing of our Board members on the "Chapter Leadership" page on our website. We look forward to hearing from you.

AGA – Phoenix Chapter

PO Box 64911

Phoenix, AZ 85082-4911

www.agaphoenix.org



To reach any of our officers, please send an email to contact@agaphoenix.org.

Our 2019-20 officers included:

- Michelle Huckabay, CGFM, President, Programs Committee Co-Chair, and Communications Committee Co-Chair
- Cindy Smith, CGFM, Vice President
- Gergana Kovatcheva, CGFM, Treasurer and CGFM Co-Chair
- Paola Matson, Secretary
- Kim Prendergast, CGFM, Accountability Chair
- Jordan Dale, CGFM Co-Chair, Communications Committee Co-Chair
- Getzmany Aragon, Young Professionals/Early Career Co-Chair
- Cindy Ensign, Community Services Chair
- Mary Adelman, CGFM, NCC Representative and Membership Chair
- Kelly Alkhoury, CGFM, Scholarship Chair
- Keith Orr, CGFM, Jerry Snyder, CGFM-Ret, Robert Harwood, and Anthony St. George, Education Committee
- Daniela Kunova, Programs Co-Chair
- Marvin Mendieta, CGFM, Young Professionals/Early Career Co-Chair
- Myrna Lopez, CGFM, Communications

Challenges-FY 19 Targets

- Produce timely and effective communication and information to our members. Our Chapter's goal for FY20 was to produce the Monthly Treasurer's Report and Monthly Newsletter within 10 days of the close of the month. Our Treasurer, Gergana Kovatcheva, and Newsletter Chair, Michelle Huckabay, have worked diligently to meet these goals. Another goal is to produce the Chapter's Citizen Centric Report and have it posted to our website by September 30, 2020.
- Increasing the number of young leaders through outreach with accounting classes at local universities and colleges.
- Increase community service to meet the needs of our community. Cindy Ensign is our Community Services Chair.
- The ongoing COVID-19 pandemic has required our chapter to look for ways to deliver high quality CPE training in a virtual environment.
- We are striving to retain and increase membership. Our Chapter's goal is to retain 95% of our current members, and increase new membership by 5%.

**Feed My Starving
Children food packaging
event**

