



AGA Phoenix Chapter

A Report to Our Members 2014-2015

A Message From Our President

The Phoenix Chapter of the Association of Government Accountants is excited to present our member-centric report for the fifth consecutive year. Member-centric reporting is part of AGA's initiative for governments to provide clear and understandable financial information to not only trained financial professionals, but to the average person.

We invite you to attend one of our monthly meetings or our annual Professional Development Conference as we strive to provide high quality, low-cost continuing professional education to its members and the government accounting community. More info can be found at agaphoenix.org.

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

Josh Consier

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.
- Promote government financial management to schools and colleges and become spokespersons for the advancement of government accountability through quality course offerings to students.
- Seek National AGA support for a consistent local web site format and the technical support necessary to provide a web based venue that the membership can use to research current information relating to the Phoenix chapter.
- Promote networking among membership at chapter events.
- Promote Executive Board membership in order to diversify our ideas and strengthen our focus.
- Expand AGA membership throughout the state.



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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 We Have Progressed

Fiscal Year 2015

2015 Accomplishments

- Our Chapter held eleven monthly educational meetings throughout the year, as well as an Ethics update and our annual PDC for a total of 36 CPE credits.
- The Phoenix Chapter of AGA earned sufficient Chapter Recognition Points during the 2014-2015 Program Year to be the recipient of the Gold Chapter Designation Award from AGA Nationals.



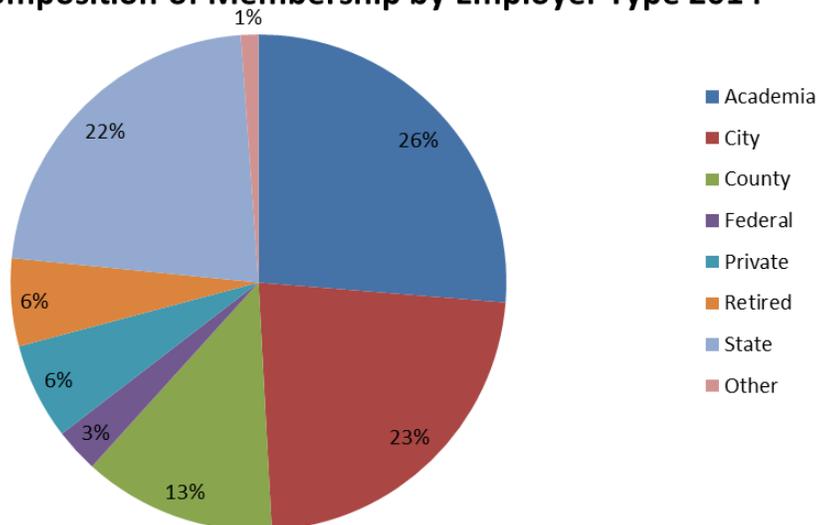
AGA Education Committee Member, Justin Poll, receiving the Gold Award for Chapter Recognition from outgoing AGA National President, Bill Miller at the AGA National PDT in Nashville, TN.

- This year our Chapter awarded one \$1,000 scholarship to a student identified for his academic excellence and community service achievements.
- Our Chapter awarded two scholarships to members who passed the CGFM exam this year.
- This year, our Chapter continued to improve and refine our chapter web site.
- We helped out at the Ronald McDonald House, preparing and serving dinner to families of children staying at Cardon's Children's Medical Centerl.
- We sponsored families through the Christmas Angels program.

Membership Demographics

	2014	2015	% Change
Total Membership	196	177	-10%
CGFM Certifications	87	85	-2%
CPA Licenses	90	84	-7%
Bachelor Degrees	119	100	-16%
Master Degrees	46	51	11%

Composition of Membership by Employer Type 2014

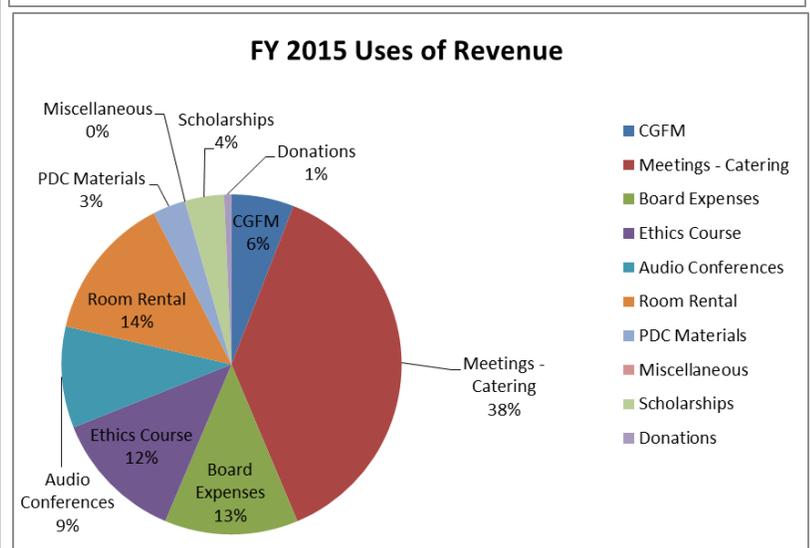
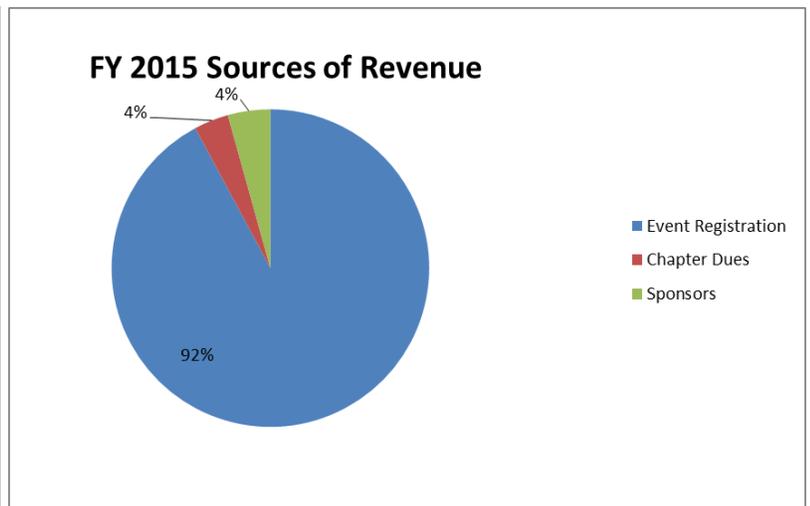


Our Finances

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 2014	FY2015
SOURCES		
Event Registration	23,989	24,270
Chapter Dues	1,702	926
Sponsors	0	1,139
Miscellaneous	26	13
	<u>25,717</u>	<u>26,348</u>
USES		
CGFM	526	1,603
Meetings - Catering	9,709	10,182
Board Expenses	4,337	3,431
Ethics Course	3,026	3,397
Audio Conferences	685	2,600
Room Rental	2,208	3,741
PDC Materials/Catering	8,484	840
Miscellaneous	872	10
Sponsorships/Scholarships	1,190	1,000
Donations	378	188
	<u>31,415</u>	<u>26,991</u>
SOURCES OVER USES	-5,698	-644



Expenses related to the FY 2014 PDC Materials/Catering were higher due to a change in venue based on availability of conference centers.

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

Challenges-FY 15 Targets

- Produce timely and effective communication and information to our members. Our Chapter's goal for FY15 is to produce the Monthly Treasurer's Report and Monthly Newsletter within 10 days of the close of the month. Our treasurer, Leslie De'Reche, 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 Sept 30, 2015.
- Increase community service to meet the needs of our community. John Schutter continues as the Community Services Chair.
- We are striving to retain and increase membership. Our Chapter's goal is to retain 90% of our current members, and increase new membership by 5%.

**Ronald McDonald House volunteers in May 2015
after making dinner for residents**



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 "Contact Us" page on our website. We look forward to hearing from you.

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