



2024–2025
Achievements in Chapter
Excellence (ACE) Awards
Support

Effective Practices to Try!

Supplemental Document to
Guide Chapter Reporting

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AGA's Mission

AGA is a professional association advancing accountability, transparency, and leadership by promoting education, certification, innovation, and collaboration across all levels of government and stakeholders.

Program Objectives

The objective of the Achievements in Chapter Excellence (ACE) Awards is to support, encourage and promote AGA's mission, and to provide flexible guidelines to help the development of a well-rounded chapter. The National Council of Chapters (NCC) and AGA National Office want to recognize chapters for the accomplishments that they achieve in a framework that promotes innovation while also supporting chapters that require additional assistance. Therefore, the program focuses on core items that must be completed for a chapter to maintain baseline operations, and rewards varying levels of achievement. The document that you are currently reading is a supplement to the program, providing ideas and effective practices from fellow chapter leaders on methods to try to achieve goals for the year. To add ideas to this list, please email chapters@agacgm.org.

Program Year

The ACE Program Year begins on July 1 and concludes on June 30. This is now aligned with AGA Chapter's Program Year, which runs July 1 to June 30. The final ACE Pulse Check, however, is May 1. This is to ensure that all awards can be verified and ordered in preparation for the awards ceremony presented at the upcoming National PDT (annually held in July).

Chapter Participation

Each chapter is strongly encouraged to participate in ACE. There is a new designated role on the Chapter Executive Committee (CEC) to be named "ACE Reporting Chair." It is the responsibility of the individual in this role to be knowledgeable about the required documents and deadlines throughout the ACE Program Year for their Chapter. The ACE Reporting Chair will be responsible for uploading attachments, keeping records of their chapter's points, and communicating with AGA National. The Chapter President will be the recipient of the ACE Award at PDT.

The ACE program is a great resource for incoming CEC leadership as it serves as a "checklist" for Chapter functions. We recommend the chapter president-elect, in conjunction with the NCC representative, prepare the reports under the direction and oversight of the chapter president. This allows the chapter president-elect to become familiar with chapter activities *before* taking office.

In addition, we recommend sharing ideas and asking questions of fellow chapter officers. Communication among AGA's volunteer leaders promotes a stronger, connected organization. Responding to requests for comments or information ensures that the National Office can provide aid as needed to chapters and involve the right volunteer team members as needed.

Tiers of Achievement

Each objective of the ACE Awards can be achieved in one of three tiers. Points are earned at the level of the tier of accomplishment. For example, if the chapter exceeds their membership retention goal, they receive 500 points for achieving tier three (**not** 800 points, or a total of all the tiers). You must complete Tier 1 before moving to Tier 2 and complete Tiers 1 and 2 before moving to Tier 3.

Bonus points can be earned throughout the program year. Please review the ACE Recording Template thoroughly as it will provide Chapters with the dates and deadlines for all ACE items.

Awards

Each chapter president whose chapter reaches its goals will be recognized during the PDT with a plaque denoting status attained for the year as follows:

- **Bronze:** 1,000-1,999 points
- **Silver:** 2,000–2,999 points
- **Gold:** 3,000–4,399 points
- **Platinum:** 4,400 + points

The purpose of the Bronze, Silver, Gold, and Platinum designations is to encourage chapters to participate in ACE at the level they feel comfortable with and to develop continuity of sound leadership and programs.

Recording ACE Progress and Documentation

To submit ACE data and pulse checks, the ACE Reporting Chair will login to the ACE webpage, located in Chapter Resources, and select either the Data Recording Form button or the Pulse Check button.

The ACE Reporting Chair should follow the path below:

MyAGA → Chapter Resources → [Achievements in Chapter Excellence \(ACE\)](#)

Data Recording Form

Chapter Pulse Check

Data Recording Form

The Data Recording Form will consist of two tabs to navigate, Key performance Indicators and Chapter Affiliation Requirements. The Data Recording Form can be updated at any time. Uploads are time stamped, specifically for the use of distributing bonus points as applicable. We will be unable to provide bonus points past a specific deadline.

To streamline the ACE process, we are incorporating "upload attachments" to all Key Performance Indicators and Chapter Affiliation Requirements.

As we work on creating these upload attachments, please use the following best practices when submitting documents for ACE:

1. Check the ACE reporting page first to see if you can upload the any attachments. Attachments that are uploaded here are automatically reported to the chapters@agacgfm.org email address.
2. If you cannot upload attachments, send documents to chapters@agacgfm.org.

Pulse Checks

Pulse Checks are performed 3 times per program year to serve as a progress check for Chapters. Progress is noted by providing issues or successes from the reporting period. When the ACE Reporting Chair submits a Pulse Check, they can upload an attachment as well. We recommend that Chapters upload their ACE Recording Template with their Pulse Check as well as any other notes or feedback. Please note that points are not cumulative and will only be calculated once after the May 1 submission.

The following dates are when Chapters should submit their pulse check on or before, as well as the months the pulse check covers:

| Pulse Check Due: | Pulse Check Covers: |
|----------------------|--------------------------|
| November 1 | July through October |
| February 1 | November through January |
| May 1 (final report) | February through June |

ACE Resources and Templates

On the ACE Reporting page in Chapter Resources, you will find a handful of resources to support your chapter's participation in ACE.

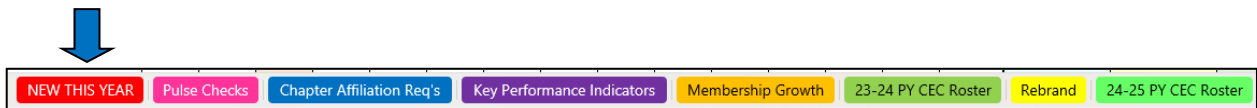
- ACE Handbook
- Strategic Plans and Goals Template
- FAQ's
- Membership Growth Goals
- ACE Recording Template (Excel Sheet)

The ACE Recording Template is designed to serve as a one stop shop for all things ACE. This recording sheet is updated annually for each new program year and contains 8 tabs to support ACE initiatives. The ACE Recording Template incorporates all the Chapter Affiliation Requirements, Key Performance Indicators, and more.

Below you will find a screenshot of the tabs located in the ACE Recording Template. The following paragraphs describe how the ACE Recording Template is structured, the types of data to be collected, and effective practices that other chapters have used to achieve their goals.



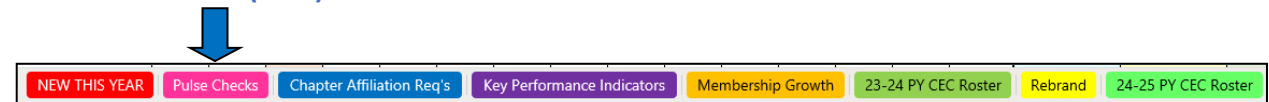
Tab 1: New This Year (Red)



This newly added tab provides Chapters with the revisions that were made for the new program year. Some revisions for the 2024-2025 Program Year include, but are not limited to:

- Date Changes
- Required CEC Roster Roles
- New AGA National Communication Updates regarding ACE
- Tier Level Updates and New Bonus Points Opportunities
- Best Practices for Uploading Documents to the ACE Webpage in Chapter Resources

Tab 2: Pulse Checks (Pink)



The Pulse Checks tab provides Chapters with a Program Year At-A-Glance by including ACE deadlines and Pulse Check reminders on a calendar-like spread.

| AGA | Pulse Check 1 | Pulse Check 2 | Final Pulse Check |
|---|---------------|--|-------------------|
| | November 1st | February 1st | May 1st |
| Program Year Calendar At-A-Glance | | | |
| July | | | |
| New Program Year officially begins on 7/1 | | Strategic Plan and ACE Goals bonus points due by 8/1 | |
| October | | November | |
| Chapter CCR submission deadline 10/31 | | First Pulse Check 11/1 | |
| January | | February | |
| LEAD34 Attendees bonus points submitted by January 15th | | Second Pulse Check 2/1 | |
| April | | May | |
| Submit Award Nominations for bonus points by 4/15 | | Final Pulse Check 5/1 | |
| | | June | |
| | | 24-25 PY CEC Roster due by 6/15 for bonus points | |
| | | 24-25 PY CEC Roster due by 6/30 | |

Tab 3: Chapter Affiliation Requirements (Blue)



| | | | | | | | |
|---------------|--------------|---------------------------|----------------------------|-------------------|---------------------|---------|---------------------|
| NEW THIS YEAR | Pulse Checks | Chapter Affiliation Req's | Key Performance Indicators | Membership Growth | 23-24 PY CEC Roster | Rebrand | 24-25 PY CEC Roster |
|---------------|--------------|---------------------------|----------------------------|-------------------|---------------------|---------|---------------------|

The Chapter Affiliation Requirements tab contains **9 items that every chapter must complete** in order to be considered an active AGA chapter. Requirements not met will disqualify a chapter from receiving an award for the program year. This is not to discourage chapters; rather, it reinforces the critical nature of each of these items for a successful chapter's baseline.

For this reason, points are not assigned for this section. Rather, confirmation and documentation of completion of each item is required. There are bonus points available for submitting particular items early or in a specific format.

- ☐ The Chapter Executive Committee (CEC) reviewed the chapter's bylaws. If necessary, updates were made and approved by members. See [Chapter Leadership Handbook](#).
- ☐ The chapter filed the required IRS tax form (990N or e-postcard, 990-EZ, or 990) by the appropriate deadline. See [Chapter Treasurers Handbook](#).
- ☐ The CEC reviewed required state filings for non-profits and either completed necessary action or determined that no action was necessary. See [Chapter Leadership Handbook](#).
- ☐ The chapter elected and submitted chapter officers for the program year by June 30.
- ☐ The chapter submitted chapter strategic plans and ACE goals for the program year by September 1.
- ☐ The chapter used the correct chapter and AGA-associated logos in all communication.
- ☐ The chapter prepared and disseminated an annual report to members. See [Chapter Treasurers Handbook](#).
- ☐ The chapter maintains an updated website (minimum requirements include accurate roster of chapter leaders and committees as well as an accurate calendar of upcoming events).
- ☐ The chapter undergoes an annual evaluation or audit to ensure accurate accounting practices and appropriate internal controls. See [Chapter Treasurers Handbook](#).

Tab 4: Key Performance Indicators – Tips to Achieve Your Goals (Purple)



| | | | | | | | |
|---------------|--------------|---------------------------|----------------------------|-------------------|---------------------|---------|---------------------|
| NEW THIS YEAR | Pulse Checks | Chapter Affiliation Req's | Key Performance Indicators | Membership Growth | 23-24 PY CEC Roster | Rebrand | 24-25 PY CEC Roster |
|---------------|--------------|---------------------------|----------------------------|-------------------|---------------------|---------|---------------------|

The Key Performance Indicators tab contains 11 objectives, from 6 overarching domains (Membership, CGFM, Educational Meetings, Communication, Community Service and Succession Plans), that will be used as the criteria for each Tier award status. As mentioned in the Tier of Achievements section, points are not cumulative, but rather a progression towards the next Tier.

The following 11 Key Performance Indicators are explained in depth in the upcoming sections:

- | | | |
|---|--------------------------------------|--|
| 1. Membership Growth | 5. Educational Meeting Satisfaction | 9. Participation in Community Service Projects |
| 2. Overall Member Satisfaction | 6. CGFM Candidate Support | 10. Succession Plans: Chapter Leadership |
| 3. Educational Meeting /Training Events | 7. CGFM Support | 11. Student and Young Professional Engagement |
| 4. Educational Meeting Attendance | 8. Chapter Communicates with Members | |

As your chapter plans and works towards your annual goals, take into consideration some of the effective practices contained in this document as provided by previous chapter officers. As always, feel free to innovate and add your own! Send any ideas to chapters@agacgfm.org for inclusion in this document.

Membership

To ensure a healthy, vigorous AGA, we need to continually seek new members, meet our current members' needs, and strive to retain members and keep potential members interested and involved. In addition, as members continue to retire, it becomes more critical for AGA to develop programs and services to attract young professionals – as well as experienced professionals – to the organization.

A chapter can be successful without growth for a short period of time. Overall, however, each chapter needs to create and enact an annual plan for identifying, inviting and obtaining new members. Simultaneously, reinforcement of value to current members ensures lower turnover rates. Below are some ideas on how to address these areas.

Actively Recruit New Members

- Personally invite potential members to chapter events
- Ensure chapter events are attractive and inviting to potential members
 - Wear nametags
 - Have a greeter at the door and a membership representative (CEC take rotate responsibilities)
 - Make sure non-members have someone to sit with
 - Ask “Have you ever considered AGA membership?”, listen, share how AGA has impacted your professional and personal life
- Create an incentive program and/or emulate the national Super Recruiter program
 - Know what incentivizes your members and use it
- Contact nonmember CGFMs, former members, and/or nonmembers who attended national or local training events in your geographic area (recommend quarterly contact, no spam)
- Involve government leaders by sending a special invitation to heads of federal, state and local financial management disciplines to:
 - Setup a meeting to share the value of AGA for their staff,
 - Join AGA,
 - and/or speak at chapter events.

These items are best accomplished during a meeting, so setting up the meeting provides you the in-person opportunity to hear what their challenges are and relay how AGA can help with those challenges.

- Participate in AGA national recruitment efforts and campaigns
- Assign someone to staff a chapter table at each event/meeting and have membership recruitment materials displayed (order materials from the national office via the form in the Chapter Resources section of My AGA)
- Setup meetings with local employers who are not yet engaged with your chapter. Leverage a national officer's visit to help relay the benefits of AGA.
 - If there is a type of employer (i.e. police department, school district) you are looking to reach out to, let the national office know. They likely have a peer who supports AGA, CCR, CGFM, etc. who would be willing to reach out to have a discussion peer-to-peer.

(Example: Idaho State Police could talk to another state's law enforcement agency about the benefits they've realized by creating a yearly CCR.)

- Create an Awareness Day.
 - Mid-Ohio Valley created "Federal Career Awareness Day" that includes a job fair open to the public and federal vendors.
- Celebrate [Public Service Recognition Week](#)
- Many chapters host a "member appreciation" event, to which members can bring their families.
- Host a "bring a nonmember" event – those with a prospective member receive free entry! Those showing up without a nonmember pay a registration fee.

Retain Members

- Remind members of why membership in AGA is valuable and beneficial at least monthly in communications (newsletter, specific email).
- Conduct a member needs survey, but make sure you're asking for their feedback throughout the year in other ways. Keep the survey short (i.e. "answer this five-question survey"). [Sample survey](#)
- Personally contact members during annual renewal season (January 1 – March 31) and encourage them to renew.
- After March 31, make personal calls/emails to suspended members
- Monthly welcome letters/emails/calls to new members – welcome them, inform them of dates and times of chapter events
 - Be mindful of first- and second-year members – they have the highest drop-off rate.
 - Assign members to greet and welcome new members, help them to meet other members, etc.
- Provide information about current chapter members (especially new members) in chapter publications – people love to see their name in print!
- Conduct a new member orientation prior to a regularly scheduled meeting a couple of times a year – be sure to convey the benefits of membership and how to get involved with AGA volunteer leadership
- Have chapter officers welcome all participants at each meeting/event and recognize new members with special ribbons/badges
- Host at least one free event each year for members (examples: annual holiday party, networking)
- Congratulate members with milestone anniversaries (examples: 1 year, 5 years, 10 years, 20 years, 30 years, Lifetime at 40 years) via the chapter's newsletter and/or website.
- Host events that are community-based. Some community service events can serve as fundraisers for the chapter as well! For example, Greater Columbus volunteers at OSU's sales facility and receives a certain portion of proceeds during football season. They use this revenue to fund scholarships for students.

Recognize Current and Potential Members

Awards are an opportunity to recognize the efforts and accomplishments of individuals and groups, promote AGA and encourage each other. In considering ideas for basic awards, consider your chapter goals and objectives and identify the awards that incentivize what will work best for your chapter and achieve stated goals.

- Engage the press to have award recipients published outside of AGA media (i.e. local newspaper, website or a trade journal)
- Create a chapter awards program for chapter members

- Participate in the national awards programs (NLT, PDT, Volunteer of the Year)
- Recognize chapter officers
- Recognize professional accomplishments
- Recognize leaders, innovators, or rising stars outside of AGA – for example, someone who is not (yet) a member but contributed significantly to the industry

Making a Difference

Many individuals in government financial management sought out their position to provide a service to the public. Provide additional member value by promoting the accountability-based programs of AGA!

AGA remains dedicated to improving the performance and accountability of federal, state, and local governments to the American people. High-quality, accurate and timely reporting is a critical component of performance management effort. Reporting improves communication with internal and external stakeholders, leads to better decision making and, ultimately, can improve performance.

- Prepare a chapter Citizen-Centric Report (CCR) (Hint: this can be your annual report for tab 1!)
 - Submit the report to the CCR review program and post it on your chapter's website!
- Encourage chapter members to pursue a performance management certificate (example: Public Performance Measurement Certificate from Rutgers University), then cheer on their accomplishment!
- Create a CCR for an employer before approaching them about AGA membership; show them AGA's thought leadership!
- Contact governments/agencies and encourage them to produce a CCR
- Help a government/agency to prepare a CCR
 - Help the government/agency publicize the CCR in local media outlets
 - Ensure they submit it to AGA's CCR review program
- Encourage chapter members (those in the federal government or private sector auditors) to investigate participation as a Certificate of Excellence in Accountability Reporting (CEAR) reviewer
- Encourage chapter members to participate as a CCR reviewer

Educational Events & Meetings

Our goal is to encourage high-quality education and foster professional development to enable your members to achieve greater heights in their employment and meet certification requirements.

Education to help meet continuing professional education (CPE) requirements.

Members with professional certification(s) must comply with CPE requirements. Your chapter can serve these members by providing high-quality education. Typically, a CPE hour is equivalent to 50 minutes of participation in qualifying programs and activities. A general rule for calculating CPE hours is to add up the number of content minutes for the educational program. Divide this number by 50 and round down to the nearest half-hour.

The chapter's CPE records should include the following information for each CPE program or activity:

- Sponsoring organization (your AGA chapter)
- List of attendees
- Location where the program was given
- Title of the program and a brief description of its contents (subjects/topics covered)
- Learning objectives and field of study for each program or session

- Dates and duration of the program
- Number of CPE hours granted

In addition, it is important that your chapter retain the following information for at least three years (NASBA recommends five years):

- CPE records (including a sign-in/sign-out sheet)
- Participants' evaluations of each program and instructor(s)
- An outline that shows the name of the instructor, learning objectives and topics covered

Information regarding CPE requirements for the CGFM is available on the AGA website under "CGFM CPE Requirements" - www.agacgfm.org/cgfm/maintain/cpe. Ultimately, an individual's licensing/certifying body has final say over whether to accept or reject any CPE hours. ***Please contact your appropriate licensing/certifying body to determine if your educational activities meet the requirements for their license/certification.***

In the end, high-quality professional development targeted to meet the needs of your members and area employers is an important part of the AGA mission and will aid in the promotion, development, growth, and foundation of your chapter.

Be sure to include a wide breadth of topics at your events. The growth of automation and computer-based processes means an increased need for technical skills and ongoing learning. The top skills needed by 2025 include critical thinking and analysis, problem-solving, active learning, resilience, stress tolerance and flexibility. Review the agendas of AGA [National events](#) for topic ideas.

AGA National Office Events (providing CPE) That are Free for Members

Make sure you are aware of all the Training Events provided by the National Office that provide free training opportunities and free CPE. These events include:

- Free-for member webinars – usually four a year
- The yearly one-day training event (formerly Financial Systems Summit) – for in-person and virtual attendees, providing six-to-eight NASBA CPE as well as equivalent number of Project Management Institute (PMI) professional development units (PDUs)

Collaborate and promote other AGA Chapter Events

With over 80 Chapters around the nation, AGA Chapters are putting on an abundance of events that can be accessible to any and all chapters. Reach out to other chapter leaders to collaborate on any events, provide support for events, or promote chapter events for one another.

Hosting Training Events

Training events can be hosted in a variety of formats, including:

- Monthly meetings (with speaker)
- Seminars/courses
- Conferences/training events
- Webinars

The most important aspect of hosting a training event is to make sure that it's available in some form to everyone. You can make it free for members and a nominal fee for nonmembers, provide a discount to members, or host "free to government" events to give them a sample of your high-quality programming.

Ultimately, make sure that your event information is accessible to the broader community! Ideas for this include:

- Ensure upcoming events are published to your website as soon as location information is available.
- Partner with other AGA chapters, professional organizations or governmental entities on educational events
- Publish/distribute a training calendar (including on the chapter's website)
- Post your educational events to the online AGA Training Opportunities Calendar

Engaging Speakers

Engaging with new speakers can be difficult if you're doing it alone. Leverage one another!

Here are some ideas:

- Pull in connections from other activities – a former classmate, a collaborator on a cross-agency/state/locality project, someone you know in another association.
- Having more speakers who can talk for a short period of time (i.e. 50 minutes) both diversifies the number of topics you can present AND ensures you are involving more people in AGA.
- Ask your supervisor, or their supervisor, to speak – it helps “endear” them to AGA!

Building Partnerships with the Private Sector

The chapter can benefit from partnerships with sponsors, just as the sponsors benefit from the name recognition and ability to learn more about government financial management provided by participating in chapter events. Determine your value proposition and begin the outreach!

Remember: This can help build your training programs and ALSO will provide a boost to your membership!

- Prepare – Create and maintain a listing of sponsorship benefits and opportunities. What is your chapter's unique selling proposition?
 - Sponsors could participate in events, support advertising, or even provide speakers (#1 rule – they cannot sell their product, they must focus on sharing their expertise and experience on the CPE topic!)
 - Another benefit of presenting on a technical topic is that the preparer of the presentation can claim 2 CPE for each 1 hour of training material prepared!
 - Private sector experts can also write an article for submission to the AGA Journal of Government Financial Management for consideration. (Note, CPE can also be claimed for writing and publishing an article)
- Outreach - Reach out in the community to a potential sponsor (find them from employers of members on your roster, consulting firms and contractors, or Google). Host a face-to-face meeting or schedule a conference call to discuss the benefits of a partnership.
- Reinforce - Publicize “benefits available to you courtesy of our sponsor(s)” to the chapter. Examples: “The local PDT was \$175, and now it's only \$150 thanks to...” or “Happy Hour social next Tuesday, appetizers courtesy of our sponsors...”

Certification

Certification is a critical part of the AGA mission and a major focus of the organization. Chapter involvement and support of the CGFM program is essential and necessary for the continued success of the program. We must work together at all levels to promote the value of the CGFM certification to candidates, employers, and governmental entities. Together we can take the CGFM program to higher levels of recognition, desirability, and overall acceptance.

Potential CGFMs

The CGFM examinations cover a wide range of topics at the federal, state, and local levels. Most candidates will have experience in at least some of the topics but require training in other areas. Identify the needs of the candidates in your chapter and community and design your chapter goals and tasks to meet those needs.

- Offer CGFM course(s) through AGA national office
- Sponsor study groups, either in-person or virtual
- Provide scholarships for costs of obtaining the CGFM
- Publish a “tip of the month” – can be for current CGFMs OR candidates, or both!
- Host an information session at a training event on the benefits of CGFM training AND certification (training and pursuing the certification can be done separately – ask us how! cgfm@agacgfm.org). National Office staff are available to speak.
- Link membership and CGFM; the Baton Rouge Chapter offers a “cash bonus” to a member who earns their CGFM, or you can pay for one year of membership.

Virtual or electronic support, as noted in tier two, can be provided in many forms such as virtual study groups or mentors who provide support virtually.

In-person support, as noted in tier three, can be provided in many forms such as in-person study groups or hosting CGFM courses through the AGA national office.

Current CGFMs

Our current CGFM members deserve the full support of every AGA chapter. Professional development should be designed to meet the CPE requirements for the CGFM and other certifications that members hold. Promoting CGFM, recognizing CGFMs’ achievements and providing networking opportunities for CGFMs assist in meeting the AGA mission, while serving the government accountability professional community.

- Lay the groundwork for CGFM month (March) in the preceding November/December. Request a CGFM month proclamation in your state and/or local government. Once received, publicize the CGFM month proclamation in your chapter! AGA National can connect you to chapters who have successfully navigated this process and can provide suggestions.
 - Promote CGFM month on social media
 - If there are other chapters in your state, work together to obtain the governor’s recognition of CGFM month – the more groups asking, the greater the impact!
 - In honor of CGFM recognition month, recognize CGFM members with a door prize for those that attend the March monthly meeting.
- Assist CGFMs in meeting their “80 hours of CPE every two years” requirement
 - Provide courses that meet CGFM CPE requirements
 - Identify CPE opportunities applicable to the CGFM CPE requirement from sources outside your chapter (including local seminars, self-study and online courses) and promote either in chapter newsletter and/or on chapter website
- Promote awareness of the CGFM CPE requirement by publishing them in the chapter newsletter or on the chapter website
- Publish CGFM members’ achievements in newsletter, local newspapers and/or on websites
- Market chapter educational events that (at minimum) meet the CGFM CPE requirements to members and nonmembers

- Partner with other professional organizations or governmental entities to promote the CGFM designation
- Encourage CGFM renewals through personal contacts, letters, newsletters and/or websites
- Recognize local CGFMs
- Use the CGFM designation appropriately in chapter publications, on name tags, etc.
- Publicize new CGFMs in chapter and local publications
- Promote CGFM to area government accountability leaders
- Contact area government accountability leaders to promote CGFM
- Provide a formal presentation to these leaders (national office has presentations for your use or develop your own – be sure to share it with other chapters and the national office)
- Create awareness of the value of the CGFM to the general public
- Encourage an employer in your area update its policy to recognize the CGFM as a preferred designation (let us know at cgfmdirector@agacgfm.org!)
- Seek endorsement of CGFM from area employer, elected official or principal
- Play the CGFM video at chapter meetings
- Contribute relevant CGFM items to your chapter newsletter (examples include CGFM recognition, study suggestions, encouragement, technical requirements, “tip of the month”)
- Celebrate the achievement of a new CGFM at their office; submit articles to employer’s newsletters or interoffice communication on CGFM, submit articles to local paper recognizing new CGFMs, ask employers to include CGFM information and link to national CGFM site on their website.

Communications

Effective communication is essential to successfully accomplishing your chapter’s goals and objectives, and AGA’s overall mission. Chapter communications takes place through a variety of media; chapters need to choose the modes that are most effective for your chapter and develop your plans accordingly.

Networking Opportunities

Successful chapters provide opportunities for members to gather and exchange information, network and participate in the chapter’s activities. Chapter meetings provide a valuable service and benefit to your members.

- If your chapter members are unable to meet monthly, then get innovative and determine a meeting frequency that meets your members’ needs.
- Consider partnering with other professional organizations; joint meetings can expand your potential pool of members.
- Host an awards and recognition event to celebrate the year and your members.
- Host a social event or activity
- Create and maintain (i.e., post at least once a month) a chapter social networking site (examples: Facebook, LinkedIn, Twitter)
- Interact with/share items from AGA National’s social media accounts

Readily Available Communications

Your current AND potential members must have ready access to your information. Some chapters publish monthly printed newsletters, others email the newsletter, and still others post the newsletter on a website, as well as future events, photos of members, etc. Some chapters leverage everything on their website, others combine website and social media content. Ultimately, the goal is for your information to be available for every person wherever they may be searching for it. Not every outlet will touch a

single member, but every member should have a communication outlet they can rely on for accurate and timely information.

Key Items to Remember

- ALL materials must have the correct chapter, national and/or CGFM logo that is provided by the national AGA organization. Your correct logo can be downloaded from www.agacgfm.org in Chapter Resources – Communications & Marketing – Logos.
- Disseminate a newsletter, including a president's message, upcoming meetings, events and CEC contact information. Other items to possibly include are:
 - Accountability and financial management articles, news article submitted by chapter member to chapter newsletter
 - Accountability and financial management articles, such as articles previously published in another reputable publication published in chapter newsletter
 - Publicize award recipients and chapter member special achievements
 - Highlight new members
 - Feature a current member (i.e., "Get to Know...")
 - NCC Representative column/feature
- Host a chapter website and ensure that it is updated (at minimum) **monthly**. The AGA-hosted sites allow for content to be loaded and published at a future date to ensure timely communication with your current and prospective members.
- Send a personal welcome email to all chapter members at the start of the program and calendar years. Highlight certain activities, new members, and membership milestones. Make it about them as a member. Make sure you talk about the value they receive as an AGA member. Tallahassee does a great job of this and leverages it for nonmembers to join as well.
- Always close out messages with a note encouraging them to contact you!

Community Service

Community service events should enable chapters to make a positive impact on their local communities, using their membership's professional skills whenever possible. Find out what chapter members are interested/involvement in already. Is there a cancer survivor in the chapter? Is there a hyperlocal cause that you can support (e.g., Miriam's Kitchen in Washington, DC, Paws and Effect in Des Moines, IA)?

Some general ideas for community service include:

- Chapter participation in the National Community Service Fund activities at PDT 2020. This is typically done via a donation to the Chapter Challenge or an item to the Silent Auction.
- Technical/skills-based event (e.g. VITA, career day)
- Non-technical event (e.g. food bank, soup kitchen, Toys for Tots)
- Host chapter fundraiser for charitable donations
- Celebrate National Volunteer Week (<http://www.pointsoflight.org/signature-events/national-volunteer-week>) – after all, you all are volunteers! Celebrate one another!
- On Dec. 5, contribute to International Volunteer Day (<http://www.volunteeractioncounts.org/en>)
- Consider discounts on monthly meeting prices for members who participate in community service events.

Examples of potential community services activities include:

- **VITA/TAX-Aide:** Voluntary Income Tax Assistance/Tax Assistance (VITA) for the elderly without the financial means to have their taxes prepared professionally.

- **Financial Literacy for High School Students:** Teach high-school students about how to manage their personal finances.
- **Food bank:** Collecting food and money to be donated to a local food bank. This can be done any time of the year as food banks always need assistance.
- **Adopt-A-Family:** Local shelters and youth homes can connect you with a family in need.
- **Toys for Tots:** Organized by the U.S. Marine Corps, but a chapter can get involved and find out how to help, either by collecting and donating toys and money, or volunteering at a collection site.
- **Career Day:** Designed to provide information to high school juniors and seniors on various career options.
- **Gifts to charities or non-for-profit organizations:** Cash and non-cash gifts from the chapter such as local women's shelters, food banks, etc.
- **Blood drive:** Contact your local chapter of the American Red Cross for details. Your AGA chapter can sponsor a mobile site or provide volunteers to assist as needed. You can also find out who may be sponsoring a blood drive and organize a group of chapter members to donate blood.
- **Soup kitchen:** Volunteer as a group at a local soup kitchen.
- **Walk-a-thons:** As a group, get friends, family, co-workers to pledge financial support or walk in events such as the March of Dimes or local charitable events.
- **Special Olympics:** Assist with your local Special Olympics games, or act as chaperones for your local Olympians at the statewide Special Olympics games.
- **Points of Light:** Check out their [website](#) for more opportunities by country/state.

AGA's National Community Service Fund

AGA's National Community Service Fund (NCSF) was created in 1995 to support the impact AGA chapters make in their communities. Annually at PDT, attendees are encouraged to donate, buy raffle tickets and/or bid on silent auction items to raise money for the NCSF. Chapters are asked to contribute goods to be raffled off and to make monetary contributions. Half of the funds raised at PDT are split amongst three to four national charities (selected annually). The other half of the funds remain in the NCSF and are used to match donations that chapters make to IRS-recognized charities in their area. Match requests are submitted via the Community Service Fund Match Request form in Chapter Resources. Limits may apply on the amount or frequency of matches made for a chapter event. Please email chapters@agacgfm.org if you have any questions.

Succession Plan

While listed last, this piece may be one of the most important items to coalesce chapter leadership around. It is as important to the chapter's health as any other previously listed in this document. Chapter leadership is an essential ingredient for a successful well-rounded chapter. Developing a strong, diverse Chapter Executive Committee (CEC) is important for the long-term development, growth, and strength of your chapter. It is important to have an officer succession plan or strategy, especially for the position of chapter president. Who is your chapter grooming to be a future leader?

Diversity within the CEC includes chapter leadership experience (keep some continuity and bring in some new leaders each year), job functions (such as audit, budget, accounting, IT, etc.), and employer type, etc. Chapter leaders should continually encourage members to become involved, have a method for members to "move up the ranks," and represent the membership in chapter decisions.

Here are some general tips for thinking about future chapter leaders:

- When asking people to serve in leadership roles, don't just do a generic "if you're interested email us." Individual conversations should be held – strategic succession planning! Make a specific "ask" such as "Would you like to serve on our educational event planning team?"
- Ask Young Professional members to co-chair the community service committee; it's fun, can be for a single event, and begins to invest them in their association.
- Micro volunteering (e.g. work on a single project or event) to get folks interested/involved early. You can see their leadership style, and they get a sense of whether this is where they want to invest their time!
- Trenton's Membership Scholarship program draws in new members with a focus on young professionals and allows them to get involved in leadership roles within our Chapter. The success of the Membership Program has resulted in three previous scholarship winners becoming chapter presidents.

Thinking specifically about students and young professionals, below are some tips and best practices for recruiting and retaining them as members.

Make Student Members a priority!

- Attend local training events, college and university fairs, and seminars to market and promote AGA membership
- Invite local college/high school students to meetings and events free of charge
- Submit professor names to agamembers@agacgfm.org to receive complimentary one-year electronic memberships (may be given to professors who are not AGA members)
- Host a "job shadow" day
- Connect with a local professor and ask them to give 'extra credit' to students who join, attend and engage with AGA
- Email chapters@agacgfm.org for a list of Beta Alpha Psi (BAP) chapters in your area
- Involve a student member to serve as part of the CEC, and even write for your newsletter.
- Offer scholarships to undergraduate and/or graduate students – for school, to attend your events...whatever you feel would best help them!
- Scholarships are expensive, especially for smaller chapters, however Northern New Jersey was able to offer a relatively low-price alternative by offering a free textbook with an AGA stamp on the inside cover which advertised Northern New Jersey. The textbook also allowed for multiple users for the useful life of the textbook.
- Tallahassee offers one year of free membership to undergraduate students who volunteer to help at their annual Government Training Event (GTE).
- Tallahassee partners with their local Young People's Network to get the name and mission of AGA out to prospective members.
- Hawaii has a plan on how to solicit engagement ideas from students, rather than a specific plan of how to engage them. This effort works only because they utilize the ideas they receive, ensuring they are tapping directly into what interests the students at a location, rather than coming at the students with a "We know what you will like" plan. It still takes careful planning!
- Jackson sponsors one Young Professional and one Student membership per year.
- Baton Rouge hosts a Student Meeting Night at a local restaurant (students eat free) and invites professors and students from local universities.

Make Young Professional (YP) Members a Priority

- Setup a chapter social media page and actively post to it
- Setup a mentor program
- Send a YP member to AGA's PDT! (Check out the 50 under 30 program)
- Involve YP member volunteers with planning/hosting training events
- Involve YP members to serve as part of the CEC – the position can be ex-officio (and maybe even write for your newsletter or AGA's *Journal*)

Tab 5: Membership Growth (Orange)



| | | | | | | | |
|---------------|--------------|---------------------------|----------------------------|-------------------|---------------------|---------|---------------------|
| NEW THIS YEAR | Pulse Checks | Chapter Affiliation Req's | Key Performance Indicators | Membership Growth | 23-24 PY CEC Roster | Rebrand | 24-25 PY CEC Roster |
|---------------|--------------|---------------------------|----------------------------|-------------------|---------------------|---------|---------------------|

The Membership Growth tab incorporates the number of members each Chapter needs to qualify for each Tier of Achievement. Membership Growth data is based on overall chapter growth, not just the addition of new members to the Chapter. To move from Tier to Tier, Chapters must meet or exceed the following expectations.

| Tier 1 (100 points) | Tier 2 (300 points) | Tier 3 (500 points) | Bonus Points |
|---|---|--|--|
| If, by May 1, 2025, your overall membership growth ranges from the baseline data (maintains) to a 5% increase in membership, then you received the Tier 1, 100 points, for ACE this program year. | If, by May 1, 2025, your overall membership growth ranges between greater than 5% (Tier 1) to a 10% increase (Tier 2), then you will receive the Tier 2, 300 points, for ACE for this program year. | If, by May 1, 2025, your overall membership growth ranges between greater than 10% (Tier 2) to a 15% increase (Tier 3), then you will receive the Tier 3, 500 points, for ACE for this program year. | If, by May 1, 2025, your overall membership growth exceeds 15% of your baseline data, then you will receive the extra 100 points in addition to the Tier 3, 500 points, for ACE this program year, making a total of 600 points. |

Please note, Tier 1, 100 points, will not be applicable to Chapter's whose membership decrease from that of the baseline data.

Tab 6: 24-25 PY CEC Roster (Green)



| | | | | | | | |
|---------------|--------------|---------------------------|----------------------------|-------------------|---------------------|---------|---------------------|
| NEW THIS YEAR | Pulse Checks | Chapter Affiliation Req's | Key Performance Indicators | Membership Growth | 23-24 PY CEC Roster | Rebrand | 24-25 PY CEC Roster |
|---------------|--------------|---------------------------|----------------------------|-------------------|---------------------|---------|---------------------|

Provided in the ACE Recording Template is a tab for the current CEC Roster. You do not need to use this format if you prefer another option. It is the responsibility of the previous CEC to upload the incoming CEC Roster.

For example: 2023-2024 CEC Members are to submit the 2024-2025 Program Year CEC roster between June 1-30, 2024.

When submitting your CEC Roster, be sure to include the following information and **required** CEC Positions:

Legal First and Last Name
CEC Position
Member ID #
Email address

Chapter President
NCC Representative
Treasurer
ACE Reporting Chair
Membership Chair

Tab 7: Rebrand (Yellow)



| | | | | | | | |
|---------------|--------------|---------------------------|----------------------------|-------------------|---------------------|---------|---------------------|
| NEW THIS YEAR | Pulse Checks | Chapter Affiliation Req's | Key Performance Indicators | Membership Growth | 23-24 PY CEC Roster | Rebrand | 24-25 PY CEC Roster |
|---------------|--------------|---------------------------|----------------------------|-------------------|---------------------|---------|---------------------|

The Rebrand tab serves as a checklist for Chapters while implementing the AGA National Rebrand. The AGA Rebrand should be implemented throughout all aspects of your Chapter including, but not limited to:

- ☐ Chapter Apparel and other promotional items/materials
- ☐ AGA Chapter Website
- ☐ Chapter Communications: Emails and Newsletters
- ☐ Social Media: Facebook, Instagram, Twitter, LinkedIn, etc.
- ☐ Chapter Bylaws

AGA Rebrand items, such as Chapter Logos and our brand assets, can be found in Chapter Resources under [Communications and Marketing](#).

Tab 8: 25-26 PY CEC Roster (Lime Green)



| | | | | | | | |
|---------------|--------------|---------------------------|----------------------------|-------------------|---------------------|---------|---------------------|
| NEW THIS YEAR | Pulse Checks | Chapter Affiliation Req's | Key Performance Indicators | Membership Growth | 23-24 PY CEC Roster | Rebrand | 24-25 PY CEC Roster |
|---------------|--------------|---------------------------|----------------------------|-------------------|---------------------|---------|---------------------|

The addition of this tab is to provide a space for the drafting of the new program year's Chapter Executive Committee. You do not need to use this format if you prefer another option. It is the current Chapter Program's Year responsibility to submit the upcoming program's year CEC Roster.

For example: 2024-2025 CEC Members are to submit the 2025-2026 Program Year CEC roster between June 1-30, 2025.

When submitting your CEC Roster, be sure to include the following information and **required** CEC Positions:

| | |
|---------------------------|---------------------|
| Legal First and Last Name | Chapter President |
| CEC Position | NCC Representative |
| Member ID # | Treasurer |
| Email address | ACE Reporting Chair |
| | Membership Chair |

Chapter

Goals

The chapter president and chapter president-elect should set the chapter's goals. As the strategic conduit between the chapter and national-level organizations, the NCC representative is responsible for reporting. Each chapter's goals should be submitted as soon as possible, but no later than September 1. Chapters can use whatever format they prefer, however, there is an optional template located on the ACE webpage that Chapters may use.

Questions? Contact AGA National at chapters@agacgfm.org

Best wishes and have a successful chapter year!