

Montgomery/Prince George's County Chapter AGA

Citizen Centric Report

July 1, 2022—June 30, 2023

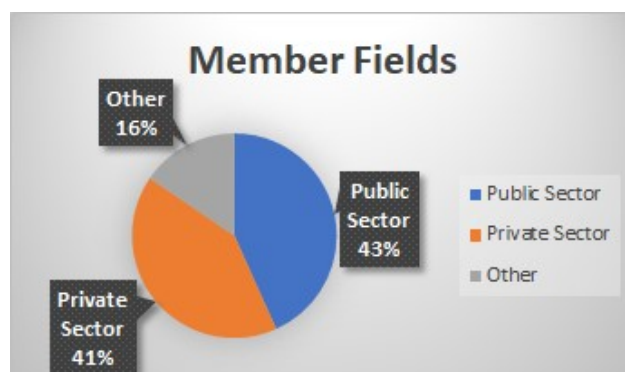
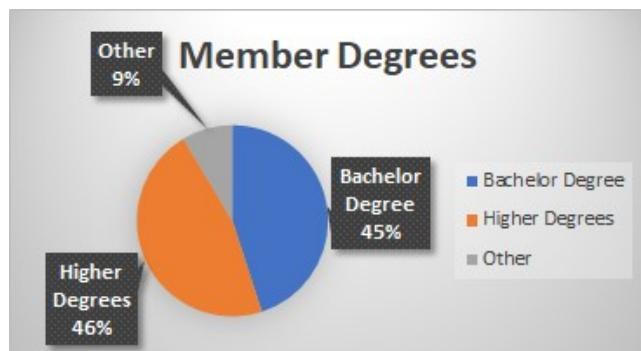


About the AGA and the Montgomery /Prince George's County Chapter

AGA is the association that connects and empowers professionals who support government, from financial management to IT, human resources, cybersecurity and more, to advance good government initiatives, grow their expertise and accelerate their careers.

The Montgomery/Prince George's County Chapter (MPGC) of AGA is a diverse group of financial managers, accountants, and auditors. Chartered by AGA in 1968, our Strategic Themes are: Accountability, Certification, Education and Service. The Chapter's focus is on advancing government accountability, encouraging certification and offering educational events, networking opportunities, and community service activities. We are proud to report the chapter received the Platinum level of recognition from the AGA National organization for the 2022 - 2023 program year!

| Membership Count | | | |
|------------------|-------|------------------------|-------------------------|
| Year | Total | CGFM Certifications | Other Certifications |
| FY 23 | 291 | 149 | 52 |



Mission

Our mission as a chapter aligns with the overall mission of AGA. We want to see our professionals:

- **Advance** – continue to advance accountability, financial practices, transparency, and excellence in government
- **Grow** – achieve growth through learning, excelling, and engaging our network of professionals
- **Accelerate** – accelerate professional careers through learning opportunities and the opportunity to earn the CGFM

Vision

To represent the premier association for advancing accountability in the financial and accounting community. AGA supports the careers and professional development of government professionals working in federal, state, and local governments as well as private sector and academia. Founded in 1967, the AGA has a long history of being the thought leader for the government accountability profession.



Our Achievements

Leadership

Thank you to our 2022-2023 President!!!

Kimberly Penn, CliftonLarsonAllen, LLP - MPGC would like to extend its thanks to our former president for guiding us through the past year. This year marked the start of new beginnings, as we were able to get back to a point of some normalcy following the COVID-19 pandemic. Kimberly encouraged and guided us to excel throughout this past year. From our winter and spring workshops, GAO training, ACA Governance conference, and various community initiatives, your leadership and guidance through all of these events was essential. Your dedication and commitment this year has led to the continued growth and prosperity of our chapter!



MPGC AGA 2023 CCR Scholarship Winners!

The winning team for our 2023 CCR Scholarship was a group of 4 students from Bowie State University! The team prepared a CCR on Prince George's County, documenting the county's rich history, financial position, and aggressive initiatives around education and a cleaner environment. Congratulations to the winning team members, Nancy Martinez, Cindy Feliz, Ibiyemi James, and Joshua Kayode!



Social Media

During FY 2022 - FY 2023, MPGC updated members and the community on upcoming meetings, trainings and social events. MPGC also continued to utilize LinkedIn, Instagram, and Facebook to grow the chapter and encourage members and others to attend events. We plan to continue to engage with our followers online through social media posts that advertise chapter events and encourage feedback about ways we can improve/grow our chapter.

MPGC 2022 Award Winners

Distinguished Leader Award

Paul Kolar—Paul recently retired after serving over 40 years at all levels of government (federal, state, and local). Paul was recognized for his thoughtful, patient, insightful, intelligent, and inspiring role with the AGA as a leader, manager and mentor.

Achievement of the Year Award

Scott Reeser—Scott was recognized for his continued effort in presenting training topics at various chapter functions, including providing important updates on GASB standards.

Chapter Special Achievement Award

Toyin Ojumu—This past year, Toyin worked closely with the Education committee and other organizations to produce our first in-person (since the pandemic) Spring workshop. For this event, included a special series dedicated to the students at the Universities of Shady Grove.

Education and Training

The Chapter had another successful year of dynamic speakers presenting on a variety of topics. Speakers ranged from federal officials such as Scott Reeser with GASB and Josh Williams with FASAB to Private Sector leaders such as Phil Moore, Partner at Kearney and David Scaffido, IT Principal at CliftonLarson-Allen, LLP.

We held two successful workshops during FY2022-2023 which provided CPE credit for all attendees. For our Winter Workshop, we teamed with the Washington DC Chapter to conduct an ethics training focused on both AICPA and International standards. Our Spring Workshop was held at a local community college to cater to both professionals and students. A variety of topics were covered including:

- GASB vs. FASAB comparisons
- The importance of conducting Performance Audits
- Using Governance, Risk, and Compliance (GRC) tools to address cyber risks

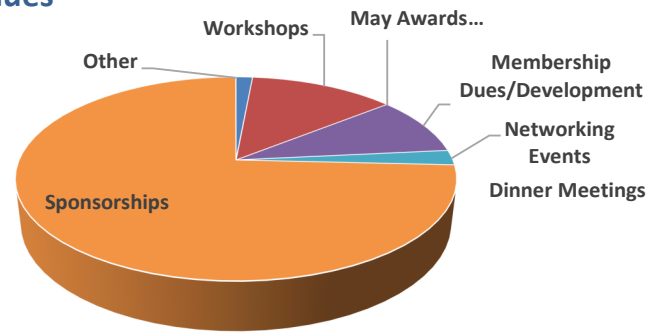
Our Financials

Revenues (by Source)

| REVENUES | FY 2023 | FY 2022 | FY 2023 % |
|-------------------------------|---------------------|--------------------|-------------|
| Programs | | | |
| Dinner Meetings | \$ 370.27 | \$ 399.96 | 1% |
| Workshops | \$ 3,255.00 | \$ 1,505.00 | 13% |
| May Awards Dinner | \$ - | \$ 220.00 | 0% |
| Fundraising/Membership | | | 0% |
| Membership Dues/Development | \$ 2,372.35 | \$ 2,702.02 | 9% |
| Networking Events | \$ 605.00 | \$ - | 2% |
| Sponsorships | \$ 19,000.00 | \$17,000.00 | 74% |
| Other | \$ 5.65 | \$ 1,798.06 | 1% |
| Total Revenues | \$ 25,608.27 | \$23,625.04 | 100% |

Total revenue amounted to \$25,608.27. During FY 2023, our primary source of revenues came from sponsorships (74%). The other areas above made up significantly less sources of revenue. Workshops accounted for 13% of revenue, followed by membership dues/development at 9%, networking events at 2%, and dinner meetings at 1%.

FY23 Revenues

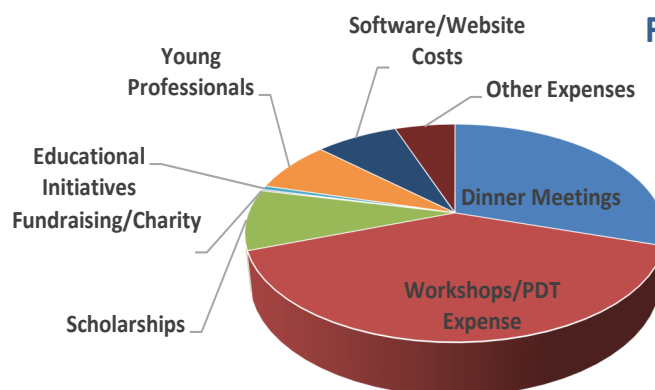


Expenses (by Source)

| EXPENSES | FY 2023 | FY 2022 | FY 2023 % |
|-------------------------------|---------------------|--------------------|-------------|
| Programs | | | |
| Dinner Meetings | \$ 6,619.09 | \$ 3,897.34 | 30% |
| Workshops/PDT Expense | \$ 8,820.50 | \$ 1,242.00 | 40% |
| Scholarships | \$ 2,000.00 | \$ 2,378.34 | 9% |
| Fundraising/Membership | | | |
| Fundraising/Charity | \$ 45.11 | \$ 1,861.80 | 1% |
| Educational Initiatives | \$ 132.46 | \$ 1,212.51 | 1% |
| Young Professionals | \$ 1,682.98 | \$ - | 7% |
| Software/Website Costs | \$ 1,682.82 | \$ 1,790.75 | 7% |
| Other Expenses | \$ 1,226.58 | \$ 410.92 | 5% |
| Total Expenses | \$ 22,209.54 | \$12,793.66 | 100% |

Total expenses amounted to \$22,209.54. This is approximately a 74% increase in expenses as compared to FY 2022. A major reason for the increase was due to the return of in person events post-Covid such as workshops (40%) and dinner meetings (30%). Other significant areas of expenses include Scholarships (9%), Software/Website Costs (7%), and Young Professionals (7%).

FY23 Expenses





Montgomery/
Prince George's
County Chapter

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Do you like this report? Would you like to see other information? Please let us know by contacting:

accountability@marylandaga.com.

For more information on our services, visit our website at
www.marylandaga.com.

You can also find us on Facebook at
www.facebook.com/AGA-MontgomeryPrince-Georges-County-Chapter-206515234344

We would like to thank our generous sponsors:

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What's Next For Our Chapter?

As we look forward to FY 2023-2024, our Board plans to continue to discover creative ways to connect and empower professionals who support government, from financial management to IT, human resources, cybersecurity and more, to advance good government initiatives, grow their expertise and accelerate their career. We plan to continue to implement several initiatives to help grow our base as a chapter and our presence in the community. These initiatives include:

- Host training events throughout the year to provide continuing professional education (CPE) for our members and extended community.
- Achieve the AGA National Certificate of Excellence for the successful completion and submission of the 2022-2023 CCR Report.
- Continue to offer various scholarships in support of college students and young professionals within the state of Maryland, including our annual Citizen-Centric Report Scholarship Contest and Becker CPA Review Scholarship.
- Serving our local communities through various activities such as volunteering at area food banks and making charitable donations to a variety of organizations in Montgomery and Prince George's County.
- Educate members on the opportunities within the Montgomery/Prince George's County AGA board and get involvement from other organizations and participants.

2023-2024 Chapter Board

President – Claire E. Fitch

President Elect – Oluwatoyin O. Ojumu

Immediate Past President – Kimberly D. Penn

Accountability – Brett E. Parris

Awards – Anu Sharma

Certification – Lauren Peck

Community Service – Freda D. Jackson

Chapter Rep – Kimberly D. Penn

Historian – Jeff C. Cole

Membership – Tanequa McQueen

Programs/Education – Brian P. Frey

Programs/Education – Oluwatoyin O. Ojumu

Programs/Education – Carol-Ann V. Boothe

Programs/Education – Jing Huang

Recognition – Jillian Manning

Secretary – Brian P. Frey

Social Media – Scott Cogburn

Special Projects – Nicholas Garrard

Special Projects – Jonathan C. DeBoer

Sponsorship – Claire E. Fitch

Treasurer – Wilson Kayo

Webmaster – Denise Reyes

Webmaster – James C. Gregg

Young Professionals – Sarah D. Erteschik