



AGA

Cleveland Chapter

2023-2024

CCR

Advancing Government Accountability Since 1954

The AGA Cleveland Chapter, established in 1954, unites a diverse group of professionals dedicated to enhancing government accountability. Our members represent a wide range of organizations, including:

- Defense Finance and Accounting Service (DFAS)
- U.S. Navy and Marine Corps
- U.S. Coast Guard
- NASA Glenn Research Center
- State, county, and local government agencies across Ohio
- Academic institutions
- Private industry

Our dedicated Board and members are committed to fostering growth and collaboration within our community. Together, we strive to uphold the highest standards of accountability and integrity in government practices. Thank you for being part of our mission!

Membership in the AGA Cleveland Chapter 2024

As of June, we proudly concluded our program year with 74 active members. Our diverse membership includes managers, interns, accountants, financial managers, and information technology professionals, enriching our community and enhancing the collaborative spirit that defines our chapter.

Our members are dedicated to continuous education and professional development. Approximately 64% hold an active Certified Government Financial Manager (CGFM) designation, while over 34% have earned their Certified Public Accountant (CPA) certification. Additionally, more than 53% of our members have obtained various other professional certifications, reflecting our commitment to excellence in government accounting.





Chapter Accomplishments

- **AGA Chapter Recognition Program Silver Award (2019)**
Honored for our outstanding contributions to the field of government financial management.
- **Citizen Centric Reporting (CCR) Certificate of Excellence (2023)**
Acknowledged for our commitment to transparency and public accountability through effective reporting practices.
- **City of Cleveland CGFM Proclamation Recognition**
Recognized by the City of Cleveland for our efforts in promoting the Certified Government Financial Manager (CGFM) designation.

Ohio Board of Accountancy Eligible CPE Sponsor



Chapter Vision

- **Advance** -Promote transparency, accountability, and effective financial management within government agencies.
- **Grow**- Foster an environment of continuous learning and professional development, encouraging members to expand their skills and knowledge.
- **Accelerate** - Provide networking opportunities and resources that help members advance their careers in the field of government accountability.

AGA is the member organization for financial professionals supporting government. We lead and encourage change that benefits our field and all citizens. Through our networking events, professional certification programs, publications, and ongoing education, we help members build their skills and advance their careers. Together, we strive to enhance the effectiveness and integrity of government financial management.

Chapter Mission

The Advance Grow Accelerated (AGA) Cleveland Chapter is dedicated to serving professionals in the government financial management community by:

- **Providing Quality Educational Opportunities**
Offering a range of programs and resources that enhance knowledge and skills.
- **Fostering Professional Development and Certification**
Supporting members in their pursuit of certifications and ongoing career growth.
- **Advancing High Standards of Government Accountability**
Promoting best practices to ensure transparency and integrity in financial management.
- **Contributing to Our Communities**
Engaging in charitable initiatives and outreach events that make a positive impact in the surrounding areas.

Member Events & Community Outreach

Despite the challenges of a virtual environment, we are dedicated to giving back to both our members and the community through engaging events and charitable donations:

- **Job Fair Event**
We participated in a job fair on August 23rd of 2024 at the Huntington Convention Center with approximately 200 people.
- We offered 8-hour professional development training at the Double Tree by Hilton to help members enhance their skills.
- **Luncheon Speaker Events**
We proudly sponsored Joint luncheon speaker events with SDFM, providing employees with one CPE credit for their training.
- **Support for Charities/ Cleveland**
Our chapter is committed to community involvement, with donations made to organizations such as:
 - St. Jude Children's Research Hospital
 - Toys for Tots
 - Cleveland Food Bank
 - Ronald McDonald House
 - Cleveland Animal Protective League
 - Cuyahoga Valley National Park

Aga Cleveland Chapter Finances

Statement of assets, liabilities, and fund balance as of June 30, 2024

AGA CLEVELAND CHAPTER
CHAPTER FINANCES FOR
PROGRAM YEAR ENDING JUNE
30, 2024

ASSETS	
Checking Account Balance	\$1,986.74
Savings Account Balance	5.69
CD Balance	14,177.83
TOTAL ASSETS	\$16,170.26
LIABILITIES	\$-
FUND BALANCE	
Fund Balance 7/1/2023	\$16,696.76
Net Deficit for Fiscal Year	(\$526.51)
FUND BALANCE 6/30/2024	\$16,170.26
TOTAL LIABILITIES AND FUND BALANCE	\$16,170.26

REVENUES	PY 2024	PY 2023	PY 2022
Annual Spring PDT 2023	6,466.10	-	-
Membership Dues	563.75	144.17	303.33
Dividends/ Interest	341.53	83.42	15.64
LEAD Reimbursement	100.00	200.00	-
TOTAL REVENUES	\$7,471.38	\$427.59	\$318.97
EXPENSES			
Annual Spring PDT 2023	\$5,796.67	-	-
Annual Spring PDT 2024	\$121.00		
Charity Giving	1,450.00	1,200.00	1,200.00
Fall Picnic	151.50	-	-

Chapter Website	\$156.22	130.68	128.51
AGA Webinars		-	129.51
CGFM Study Guides		-	-
PO Box	\$96.00	106.00	-
Checks		-	-
Winter Social	226.50	-	-
House of Blues Social		190.00	
LEAD travel expense		32.87	
TOTAL EXPENSES	\$7,997.89	\$1,659.55	\$1,458.02
NET SURPLUS (DEFICIT)	(\$526.51)	(\$1,231.96)	(\$1,139.05)

Our revenues for the year were primarily derived from the Spring 2023 Professional Development Training (PDT), membership dues, and interest and reimbursement for LEAD. Membership dues saw an increase due to AGA National disbursing the Spring 2023 dues in July 2023. This report includes \$6,466 in revenue from the Spring 2023 PDT. Additionally, we have increased our charitable giving to further support our community initiatives.

Challenges

While the AGA Cleveland Chapter is a successful and thriving organization, we recognize several potential challenges for the current program year:

- 1. Membership Growth and Retention**
We aim to increase and retain membership while encouraging participation in Chapter leadership and committees.
- 2. Relevant Training Opportunities**
Providing training events that members find interesting and applicable to their professional development is essential.
- 3. Raising Public Awareness**
Expanding public knowledge about the benefits and value of AGA and the Certified Government Financial Manager (CGFM) designation will help boost our membership.
- 4. Adapting to Hybrid Formats**
In response to the COVID-19 pandemic, the Cleveland Chapter adopted a hybrid model for our monthly meetings and educational events. As organizations transition back to in-person work, we will continue to monitor our members' preferences and adjust our approach as needed to maximize participation and impact.

What's Next — Goals

Our Chapter continuously seeks ways to better serve our members and the community. Our strategic goals and plans are centered around overcoming these challenges. This past year has been especially stressful as we adapt to new methods of providing high-quality benefits in our evolving “virtual” landscape.

Looking ahead, we aim to strengthen our focus on universities to engage and energize students, fostering a new generation of members.

Chapters Leaders 2022-2023

1. President: Dr. Balwinder Beasley
2. Past President: Tonya Hughes-Scruggs
3. President: Elect Jeannine Anderson
4. Web Master: Nathaniel Overby
5. Secretary: Rob Beasley
6. Treasurer: Jackie Hall-Carrillo
7. Treasurer: Elect: Jene Philippy
8. Professional Certification: Ron Gedeon
9. Education: Tatiana Fonseca / Balwinder Beasley
10. ACE Reporting: Laura Restrepo
11. Community Service: George Bermeo
12. Communications: Raji Welch-Bey
13. CCR/Outreach: Lou Ockunzzi
14. Membership: Laura Restrepo/ Tatiana Fonseca /Abisoye Olayinka

We Want to Hear from You!

We value your feedback. Do you like this report? Is there other information, educational, community service or social events you would like to see? Please let us know your thoughts. You can reach us at accountability@agacleveland.org

Thank you for your input.

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