



LEAD!26

Achievements in Chapter Excellence (ACE)

LEAD! Webinar Series

June 9, 2026

Updates!

I will be creating new Zoom meetings for each of the remaining webinars:

- June 23 – NCC Meeting
- July 7 – LEAD '26 Know Before You Attend

I will manually register LEAD attendees for both. Please be on the lookout for a confirmation email!

Updates!

- LEAD hotel confirmation emails will be sent to the email address provided in early July

Today's focus: understand the Achievements in Chapter Excellence (ACE) program, along with reporting requirements and documentation.



What is ACE?

Achievements in Chapter Excellence (ACE) is a chapter recognition program that:

- Recognizes the accomplishments of AGA Chapters.
- Encourages chapters to share their work and be honored at the annual PDT Awards Ceremony.
- Supports AGA's mission by providing flexible guidelines for well-rounded chapter development.
- Celebrates the efforts of the Chapter Executive Committee (CEC).

ACE is not meant to add extra work, but to serve as a checklist of items Chapters should already be doing!

ACE Program Year Overview

2026 - 2027 ACE Program Year										Preparation for 2027 - 2028		27-28 PY Begins
July 2026	Aug	Sept	Oct	Nov	Dec	Jan. 2026	Feb	March	April	May	June	July 2027
(1) 26-27 PY Begins	(1) Bonus Points Strategic Plans & Goals	(1) Strategic Plans & Goals Due		(1) First Pulse Check (15) CCR's Due			(1) Second Pulse Check		(15) Bonus Points for Award Nominations	(1) Final Pulse Check	(1) Bonus Points Roster (30) CEC Roster Due (30) 26-27 PY Ends	PDT 26-27 Awards

ACE: Achievements in Chapter Excellence
CEC: Chapter Executive Committee
PY: Program Year
CCR: Citizen Centric Report

CEC Role: ACE Reporting Chair

ACE Reporting Chair is a valuable role that offers a holistic view on all things Chapters. It can be a standalone position or combined with another CEC role.

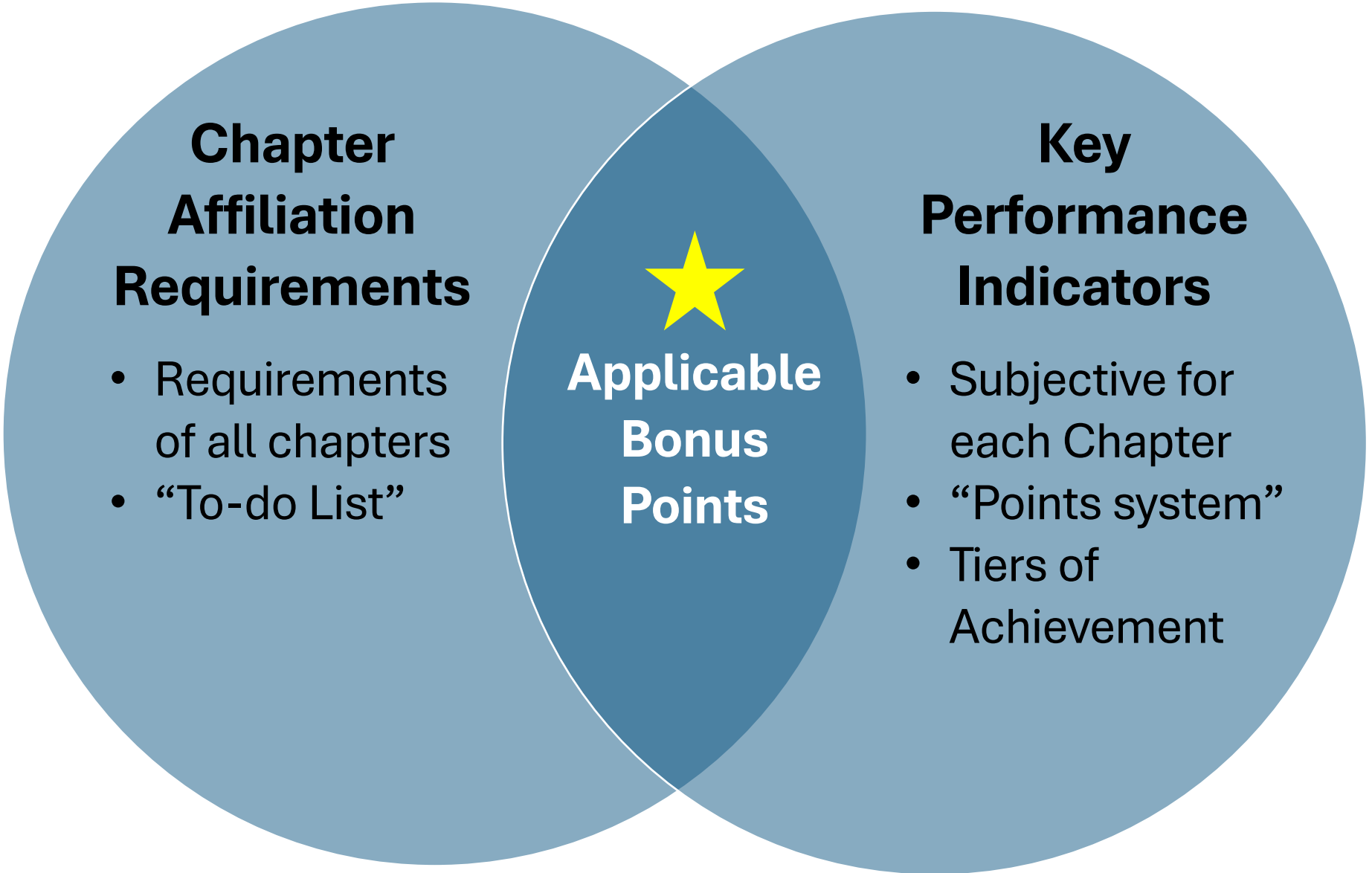
Why is the ACE Reporting Chair an important role on the CEC?

- Accountability
- Communication
- Low Risk High Reward

Achievement Criteria & Awards

Achievement Criteria & Awards

- Chapter Affiliation Requirements
- Key Performance Indicators
- Tiers of Achievement / Point System
- Awards



Chapter Affiliation Requirements

- Requirements of all chapters
- “To-do List”

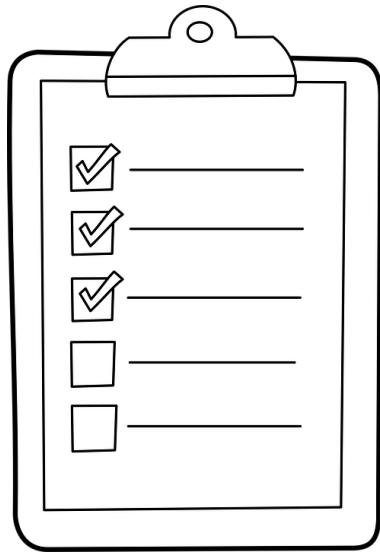

**Applicable
Bonus
Points**

Key Performance Indicators

- Subjective for each Chapter
- “Points system”
- Tiers of Achievement

Chapter Affiliation Requirements

Baseline items that every chapter must complete to be considered an active AGA chapter.



Chapter “To Do List”

- ☐ Review Chapter Bylaws
- ☐ File IRS Form
- ☐ Review Required State Filings
- ☐ Elect and Submit Chapter Officers
- ☐ Submit Chapter Strategic Plans and ACE Goals
- ☐ Prepare and disseminate Annual Report to members
- ☐ Maintains up to date website
- ☐ Annual Financial Inspection

Chapter Affiliation Requirements (excel tab)

Item	Requirements	Deadline	Bonus Date	Resources	Submission Directions *The ACE reporting page is located on the AGA Website	Status Update	Date Submitted or Completed
1	CEC Reviewed the Chapter's Bylaws <i>If necessary, updates were made and approved by members.</i>	Annually		Examples	Upload updated Chapter Bylaw's to the ACE reporting page .		
2	File IRS Form 990-N or e-postcard <i>(due by the 15th day of the 5th month after your Chapter's fiscal year ends)</i>	Varies by State		IRS Form 990-N & e-postcard link	Upload attached IRS Form or e-postcard to the ACE reporting page .		
3	CEC Reviewed Required State Filings Either completed necessary action or determined that no action was necessary and recorded this information in meeting minutes.				Upload meeting minutes to the ACE reporting page .		

- The Chapter Affiliation Requirements tab includes items that every chapter **must complete** to be considered an active AGA chapter and remain eligible for program year awards.
- These requirements are not point-based; however, confirmation and documentation of each item is required.
- Bonus points may be awarded for submitting certain items early or in a specific format, as noted in the "Bonus Date" and "Submission Directions" columns.

What's New?

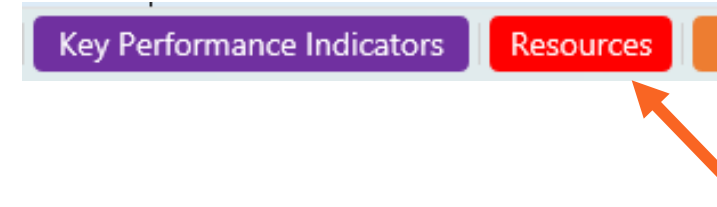
Introducing.. a 'Resources' column!

Click the links to automatically download AGA provided templates and/or see examples.

Item	Requirements	Deadline	Bonus Date	Resources	Submiss
1	CEC Reviewed the Chapter's Bylaws <i>If necessary, updates were made and approved by members.</i>	Annually		Examples	Upload u Bylaw's to t
2	File IRS Form 990-N or e-postcard <i>(due by the 15th day of the 5th month after your Chapter's fiscal year ends)</i>	Varies by State		IRS Form 990-N & e-postcard link	Upload at or e-posi repo
3	CEC Reviewed Required State Filings Either completed necessary action or determined that no action was necessary and recorded this information in meeting minutes.				Upload me the ACE r
4	Elect and Submit Chapter Officers for the NEW PROGRAM YEAR by June 30th.	June 30th	June 22nd 100 points	Roster Template	Upload roster to th
5	Submit Chapter Strategic Plans and ACE Goals for the NEW PROGRAM YEAR by September 1.	September 1st	August 1st 100 points	Strategic Plans and Goals Template	Upload Strategi Goals to th
6	Chapter Citizen Centric Report Chapter Prepares and Disseminates an Annual Report to Members	November 15th	Help a government entity and/or another AGA Chapter prepare a CCR 100 points	Constructing a CCR	Upload Ch the ACE r
			Issue your Chapter Annual Report in Citizen-Centric Report format by October 31st 100 points	Chapter CCR Instructions and Criteria (ADD LINK)	Email a cc chapters
7	Chapter Maintains Up-To-Date Website ** minimum requirements include <i>accurate roster of chapter leaders & committees</i> AND an <i>accurate calendar of upcoming events</i> **	Ongoing			Ensure w current of c
8	Annual Chapter Evaluation or Audit Audit/evaluation ensures accurate accounting practices and appropriate internal controls. This audit or review may be probono by one of your members, who is not involved in chapter operations, or contracted with an accounting firm. As long as chapters conduct and submit a review each year, the specific time period it covers is not a concern.	After completion			Uploc Evaluatio ACE rep

What's New?

Alternatively, click on the **resources** tab.



Here you will find:

- Requirement descriptions
- Links to automatically download AGA provided templates and/or see examples
- Contact information for support

Item Requirement	Description	Resources	Questions?
CEC Reviewed the Chapter's Bylaws	If necessary, updates should be made and approved by members.	Prototype Chapter Bylaws	Contact your Chapter Services Manager at chapters@agacgfm.org
	Chapters have the option use the linked Prototype Chapter Bylaws or develop their own. The Prototype Chapter Bylaws are based on the AGA National Bylaws and serve as both a sample and framework to guide your chapter in drafting or amending your bylaws.	Example	

Key Performance Indicators

- 12 Key Performance Indicators
- Assigned points from 6 overarching domains
- 3-Tiered Points System + Applicable Bonus Points

Membership	Educational Meetings	CGFM
1. Membership Growth 2. Student & Early Career Membership 3. Overall Member Satisfaction	4. Training Events 5. Educational Meeting Attendance 6. Educational Meeting Satisfaction	7. Candidate Support 8. CGFM Support
Communications	Community Service	Succession Plan
9. Communicates with Members	10. Chapter Participation in Service Projects	11. Chapter Leadership 12. Student and Early Career Engagement

Key Performance Indicators (excel tab)

Membership

1. Membership Growth

Objective	Tier 1 100 points	Tier 2 300 points	Tier 3 500 points	Bonuses <i>If applicable</i>	Totals <i>Select the number for your chapter's reporting tier, including any applicable bonus points</i>
Membership					
Membership Growth Calculated using the Chapter Statistical Reports (May 2024–May 2025)	Chapter maintains membership base	Chapter achieves a 10% annual membership growth	Chapter exceeds a 10% annual membership growth	Chapter submits Strategic Plan and ACE goals by August 1st 100 points	

- You must complete Tier 1 before progressing to Tier 2, and complete Tiers 1 and 2 before moving on to Tier 3.
- Tier points **are not** cumulative—chapters earn either 100, 300, or 500 points by the **final May 1 deadline**, with 500 being the maximum for any objective (not including potential bonus points).

ACE Scoring

CAR Bonus Points + KPI Tiers + KPI Bonus Points = ACE Status

- Honor System: Chapters are responsible for **accurately** reporting scores.
- Points should reflect items activities through **June 30**.
- Bonus Points are only awarded if the **deadline** is met.

CAR: Chapter Affiliation Requirements

KPI: Key Performance Indicators

ACE Awards

Final Tier Points + Bonus Points = ACE Award Status

If your chapter meets its goals, the Chapter President will be recognized at PDT with a plaque indicating the chapter's status for the year:

Bronze: 1,000–1,999 points

Silver: 2,000–2,999 points

Gold: 3,000–4,399 points

Platinum: 4,400 points and beyond!



Navigating the ACE Webpage

Navigating the ACE Webpage

- 1. [My AGA](#) > [Chapter Resources](#)
Bookmark these pages!
- 2. Expand the Achievements in Chapter Excellence section
- 3. Data Recording Form, Chapter Pulse Check, and Helpful Resources

Achievements of Chapter Excellence

Helpful Resources

- New! [2026-2027 ACE Recording Template](#)
- [FAQs](#)
- [ACE Handbook 2026-2027](#)

[Data Recording Form](#)

[Chapter Pulse Check](#)

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

Access

Only **ACE Reporting Chairs** and **Chapter Presidents** have access to the Data Recording Form and Chapter Pulse Check pages.

Achievements of Chapter Excellence

Helpful Resources

- New! [2026-2027 ACE Recording Template](#)
- [FAQs](#)
- [ACE Handbook 2026-2027](#)

Data Recording Form

Chapter Pulse Check

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

Data Recording Form

The Data Recording Form is used update your Chapter Affiliation Requirements (CARs) and Key Performance Indicators (KPIs).

Achievements of Chapter Excellence

Helpful Resources

- [New! 2026-2027 ACE Recording Template](#)
- [FAQs](#)
- [ACE Handbook 2026-2027](#)

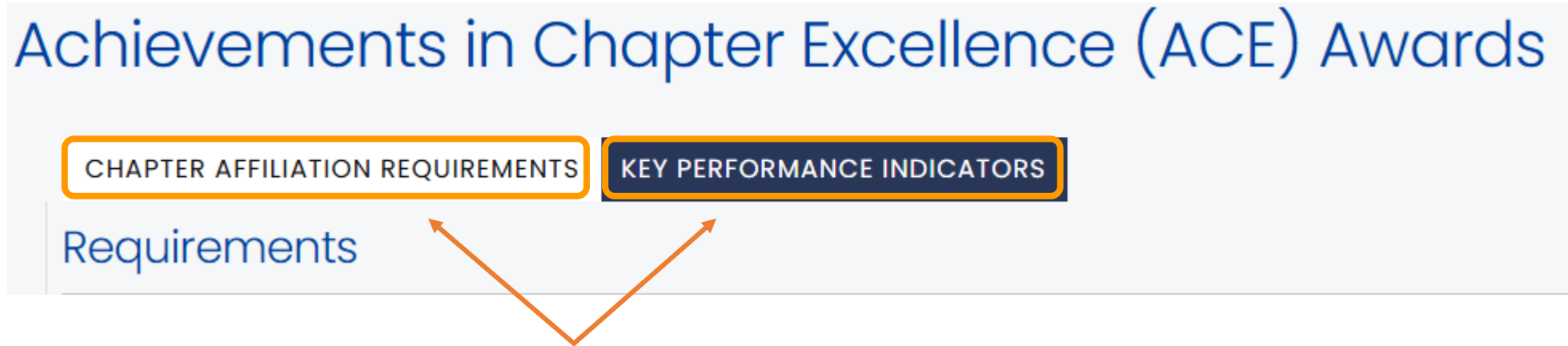


Pulse Recording Due:	Pulse Check Covers:
November 1	June - October
February 1	November - January
May 1 (final report)	February - June

- Documentation can be uploaded at anytime; preferably, on or before the deadline.
- Deadlines for bonus points will not be extended.

Data Recording Form

Toggle between the CAR and KPI tabs to upload documents, update your KPI tiered points, or modify the status of your CARs.



Data Recording Form: Chapter Affiliation Requirements (CARs)

Incomplete requirements will show a blue upload button:

Requirement 2: IRS Form 990-N

Upload IRS Form 990-N or e-Postcard by the appropriate deadline. Due by the 15th day of the 5th month after **your chapter's** fiscal year ends.

Upload Form 990-N

Data Recording Form: Chapter Affiliation Requirements (CARs)

Submitted requirements will show “completed,” and bonus points (if applicable).

If you need to make changes to your submission, click the “request changes” button.

Requirement 5: Chapter Strategic Plans & ACE Goals

Submit Chapter Strategic Plans and ACE Goals for the program year by October 10.

Bonus: Submit by October 10 – 100 Points

Completed



Bonus: 100

[Request Changes](#)

Data Recording Form: Key Performance Indicators (KPIs)

Incomplete requirements will show a blue upload button:

CGFM

Goal 6: **CGFM Candidate Support** – Email questions to cgfm@agacgfm.org

- Tier 1: Chapter holds an information session on CGFM
- Tier 2: Chapter provides CGFM exam preparation materials or exam reimbursement
- Tier 3: Chapter organizes CGFM study group or sponsors CGFM course(s)

Bonus: Chapter obtains a CGFM Month proclamation (100 points)

CGFM Candidate Support

Data Recording Form: Key Performance Indicators (KPIs)

Submitted requirements will show “completed,” and bonus points (if applicable).

If you need to make changes to your submission, click the “request changes” button.

Education

Goal 3: Training Events – Monthly meetings with speakers, Seminars & Training, Conferences, and Webinars

- Tier 1: Chapter provides or co-sponsors at least one CPE opportunity per year for member education
- Tier 2: Chapter offers CPE opportunities in multiple formats (e.g. in-person and virtual)
- Tier 3: Chapter includes networking and/or social time in at least 50% of their CPE opportunities

Bonus: Chapter co-hosts a CPE event with another AGA chapter (100 points)

Status: **Completed**



Tier Points: 500



Bonus: 100

[Request Changes](#)

Data Recording Form → Pulse Check

Changes to submitted requirements can only be made on the Data Recording Form.

Before submitting your chapter's Pulse Check, review the Data Recording Form and request any necessary updates.

After you've confirmed your CARs and KPIs are accurate and up to date, navigate to the Pulse Check page and submit.

Pulse Check

Pulse Checks are progress check ins to highlight chapter successes and identify areas needing additional support.

Achievements of Chapter Excellence

Helpful Resources

- New! [2026-2027 ACE Recording Template](#)
- [FAQs](#)
- [ACE Handbook 2026-2027](#)

Data Recording Form

Chapter Pulse Check

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

The Final Pulse Check (May 1) is used to calculate your ACE status.

Submitting Pulse Check

- Rent is due on the 1st – and so are your Pulse Checks!
- Submit on, *or before*, the deadlines
- It is especially important to submit the **FINAL PULSE CHECK** in May on time, as this submission is used to confirm points with Chapters and order ACE Awards!

Submitting Pulse Checks

The Pulse Check page provides a comprehensive overview of your chapter's status and submitted documentation.

Your only action on this page is to select "Submit Your Chapter's Pulse Check."

Changes submitted requirements **cannot** be made this page.

Achievements in Chapter Excellence (ACE) Awards – Pulse Checks

Chapter	ACE Award Status Levels	ACE Award Status
Topeka Chapter	Bronze Silver Gold Platinum 1,000 – 1,999 2,000 – 2,999 3,000 – 4,399 4,400 +	Bronze
Total Bonus Points	Total Tier Points	Total Points
Bonus Points: 475	Tier Points: 1,300	Total Points: 1,775

Submit Your Chapter's Pulse Check

Best Practices

Keeping Track of Your Points

- The ACE webpage tracks your chapter's points, but technology isn't always perfect. We recommend that you keep an internal record of your points using the ACE Recording Template.

Templates

- All provided templates are **optional**.
 - If your chapter has a template or resource used for ACE that you'd like to share, please email chapters@agacgfm.org.

Submitting Chapter Executive Committee (CEC) Roster

1. Complete the 2026–2027 CEC Roster Spreadsheet [\[download here\]](#)
 - AGA IDs can be found on your [chapter membership report](#)
2. Send the completed spreadsheet to chapters@agacgfm.org by **June 30, 2026**
 - submit by June 15 for bonus point
 - Use this [\[email template\]](#) to help with your submission
3. For ACE credit, upload your completed roster to your chapter's Data Recording Form (new page opens June 26*)

If we do not receive your chapter's roster by July 1, you will lose access to Chapter Resources and your chapter website.

Before Our Next Session...

- ✓ [Submit](#) one *new* question or challenge to discuss

What's Next?

National Council of Chapter (NCC) Representative Meeting

Tuesday, June 23 | 2-3 PM ET

New Zoom link sent on 6/9