

Montgomery Chapter AGA Member Centric Report 2016-2017



Gulf Region RVP Elect



Fall PDT 2016



September Luncheon

About AGA Montgomery Chapter

The Montgomery Chapter of AGA serves Federal, State, County and Local Governments, accounting and auditing employees as well as private sector accountants, and academia working primarily in the metropolitan Montgomery, Alabama area.

The Montgomery Chapter is guided by an elected President, President Elect, Treasurer, Financial Secretary, Secretary and Assistant Secretary. The Chapter functions under sixteen directors who comprise the Chapter Executive Committee (CEC). Each director has committee members that help the respective directors to facilitate the initiatives brought forth by the CEC. The Chapter Executive Committee's charge is to recruit and retain members while providing continuing education promoting certification of the Certified Government Financial Manager, hosting public service events, encouraging participation by Young Professionals and hosting membership drives. The continued mission of the Chapter is to promote best practices and accountability in all areas of government and the private sector.

Who are the members of the Montgomery Chapter of AGA?

The Montgomery Chapter of AGA currently has 350 members that are employed by the federal, state and local governments, and the private sector. The other members are students, retirees and academia. The membership crosses many professional fields and disciplines including accounting, auditing, budgeting, finance, grant management, and accounting information systems.

Membership

Government	325	State	298	CGFM	61
Private Sector	13	City and County	19	CPA	39
Early Career	0	Federal	4	CIA	5
Students	5	Private Sector	13	CFE	9
Retired	6	Students	5	Other	11
Lifetime	1	Academia and Retired	11		

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Mission Statement

The Association of Government Accountants serves government accountability professionals by providing quality education, fostering professional development, certification, and supporting standards and research to advance government accountability.

Vision

The Montgomery Chapter of AGA vision is to become a leader in recruitment of new members and encourage participation in continuing education and certification.



Accomplishments and Performance Measurers



Food Bank and Toys for Tots



Toys for Tots Campaign with Santa and Mrs. Claus



December Luncheon



Program Year 2016-2017 Accomplishments

The Montgomery Chapter received the Platinum Award at the 2017 PDT in Boston, Massachusetts for chapter recognition points for Group A.

The Montgomery Chapter received the Certificate of Excellence in Citizen Centric Reporting for the Montgomery Chapter Citizen Centric Report.

Mrs. LaTaya Lucas is the current Gulf Region Vice President.

The Community Service Committee was involved with organizations such as the Montgomery Area Food Bank, Toys for Tots, the Joy to Life Walk and the Montgomery Zoo event for the Montgomery Children's Center.

The CGFM Committee involved AGA members in the study groups for the CGFM designation using SKYPE.

Members of the Montgomery Chapter CEC did a presentation on "What is your AGA membership worth" to help members and nonmembers know the benefits of being an AGA member.

Scholarships were awarded to two members to attend the Gulf Region PDT in Tallahassee, Florida

Joint luncheon meetings were held with the AL Society of Military Comptrollers (ASMC) and the Institute of Internal Auditors (IIA).

The Montgomery Chapter held a Government Accountancy Workshop to refresh knowledge and enhance the accounting software experience.

Montgomery Chapter Performance Measures	2017 Actual	2016 Actual	Percentage Of Change
<u>Membership</u>			
Total number of Members	350	299	15%
<u>Education</u>			
Number of Audio Conferences and Lecturer Series	2	4	- 50%
Number of CPEs offered during the program year	20	35	-43%
Number of Mentoring Programs	4	5	-20%
<u>Meetings and Conferences</u>			
Average number attending monthly meetings	62	43	31%
Number attending Spring Seminar	164	155	6%
Number attending Fall Seminar	275	189	32%
<u>Certification</u>			
Members obtaining CGFM certification	2	1	50%
Number of Proclamations	15	12	20%
<u>Community Service</u>			
Community Service Events	8	4	50%

Chapter Finances

Revenue and Expenses



Chapter Revenue and Expenses

The Montgomery Chapter AGA receives funds from AGA National to help the Chapter with Membership and Recruitment. The majority of revenues are received from educational events such as the Fall Seminar and Spring Seminar. The table and graph include various sources of revenue and expenses in the following program years.

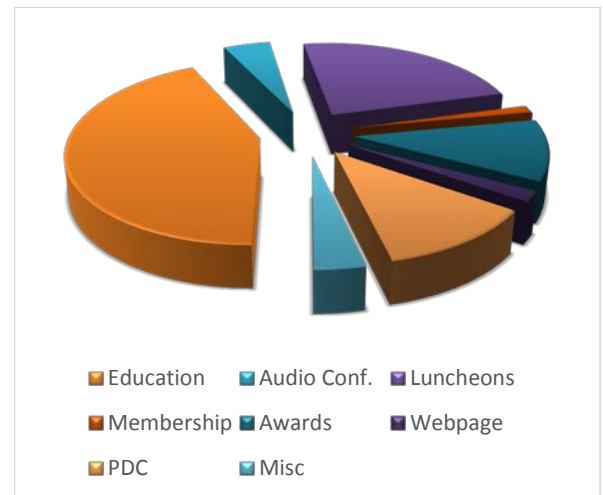
Revenue by Source

	2015	2016	2017
Audio Conferences/ Webinars	\$35.00	\$0.00	\$0.00
Community Service	\$1,938.78	\$4,194.25	\$1,012.00
Education	\$64,033.00	\$69,191.00	\$57,382.00
Luncheon/Meetings	\$6,645.00	\$2,998.00	\$2,972.50
Membership Dues	\$2,362.50	\$660.00	\$1,023.34
Membership Recruitment/ Early Career	\$908.00	\$771.16	\$0.00
Miscellaneous	\$3,572.84	\$8,676.64	\$5,350.75
Sponsorships	\$750.00	\$2,250.00	\$0.00
Total Primary Chapter Revenues	\$80,245.12	\$88,741.05	\$67,740.59



Expenses

	2015	2016	2017
Audio Conf./Lecturer Series/Webinars	\$385.95	\$0.00	\$0.00
Awards and Scholarships	\$5,332.85	\$2,702.44	\$2,029.73
Community Service	\$2,266.20	\$3,318.75	\$1,251.89
Education	\$27,480.14	\$29,862.07	\$23,368.83
Luncheons/Meetings	\$7,637.58	\$3,560.00	\$4,550.76
Membership and Mentorship	\$877.86	\$4,146.81	\$654.49
Membership Dues (National)	\$27,525.00	\$22,700.00	\$21,700.00
Miscellaneous	\$2,407.16	\$6,012.25	\$6,758.95
National PDC Registration & Travel	\$4,842.00	\$3,360.01	\$4,628.72
Printing/Office Supplies/Postage	\$66.35	\$27.67	\$64.54
Webpage and Technology	\$1,489.88	\$1,154.95	\$1,224.95
Total Primary Chapter Expenses	\$80,310.97	\$76,844.95	\$66,232.86



The Financial records for the Montgomery Chapter of AGA have not been reviewed by a Certified Public Accountant

What is Next? Challenges Moving Forward



Increasing Membership and Retention

The Montgomery AGA Chapter currently has 350 members. The goal is to increase the Montgomery Chapter membership to 400 members. The challenges of this committee are creating new and innovative ways to attract new members and to help prospective members see the advantages of membership in AGA. The goals of this committee are:

- To retain current members and provide promotional materials on the benefits of being an AGA member. To spotlight successful members in the Chapter Newsletter. To contact retired members and encourage them to renew their membership;
- To engage and support the Chapter's Young Professional Advisory Board by providing social development and educational opportunities for YP members through luncheons, social events, and conducting projects and events that are specifically targeted to and/or hosted by YP members;
- To expand our relationship with local educational institutions and encourage faculty to become members of AGA and also provide a job shadow day for student members that participate in the local Universities Accounting Clubs.

Certified Government Financial Manager

The CGFM Committee will promote the CGFM certification and assist candidates in preparing for the exams and act as a resource for CGFM information while increasing CGFM candidates. The goals of this committee are:

- To develop strategies to increase the number of CGFM candidates, by providing study groups and supporting materials to prepare and pass all the CGFM examinations;
- To display brochures at luncheon and seminars, also assist in identifying CPE opportunities through on line study, seminars and self- study, publish member achievements in the chapter newsletter, local papers and websites;
- To communicate and coordinate with other committees in identifying, supporting, and recognizing new CGFM candidates.

Mentorship

The Montgomery Chapter Mentorship Committee is challenged with increasing participation of members and nonmembers in the mentoring programs. The goals of this committee are:

- To provide mentees with training and resources to develop skills and characteristics to become successful professional leaders;
- To promote and advertise the mentorship program to AGA members, colleges, high schools and community organizations;
- To assist the Membership Committee with promoting the benefits of being an AGA member to the Young Professionals and maintaining membership to AGA.

Education

The Education Committee is challenged with increasing the number of affordable continuing education opportunities to AGA members. The goals of this committee are:

- To increase the number of CPE credits offered annually and promote the webinars and educational events hosted by AGA National and the **Journal** online quizzes to earn CPE;
- To partner with other organizations to increase the number of participants thereby making it more cost effective to attend educational events;
- To secure sponsorships to support the educational programs conducted throughout the year;
- To include Chapter educational events on the National AGA online calendar of events, social media, brochures, and the Chapter Website.



Courtney Bruce at Boston PDT with other attendees

We would like to hear from you

Do you like this report? If you would like to see other information or if you would like more information on our services, visit our website at: www.montgomeryaga.org.

Chapter Officer Directory

President	Marcus Johnson
President –Elect	Emma Cole
Treasurer	Kimwana Robinson
Financial Sec	Beverly Dean
Secretary	LaTika Stepp
Asst. Secretary	LaTreeka Williams
Immediate Past President	Nakia Tetter

Montgomery Chapter AGA

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