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### Mission

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 Chapter's vision is to become a leader in recruitment of new members and encourage participation in continuing education and certification.

*Celebrating 40 Years of*

*Advancing Government*

*Accountability*

### About the Montgomery Chapter of AGA

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 twenty eight directors who comprise the Chapter Executive Committee (CEC). Each director has committee members that help the respective director to facilitate the initiatives brought forth by the CEC. Each committee's charge is to recruit and retain members while providing continuing education, promoting certification of CGFM (Certified Government Financial Manager), hosting public service events, encouraging participation by Young Professionals and 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 we?

The Montgomery Chapter has 337 members that are currently employed by 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.



### Program Year 2014-2015

<u>Types of Members</u>		<u>Member by Employer</u>		<u>Certifications</u>	
Government	308	State	287	CGFM	62
Private Sector	10	City and County	17	CPA	37
Early Career	5	Federal	8	CIA	4
Students	9	Private Sector	10	CFE	8
Retired	4	Students	4	Other	10
Life Time	1	Academia	6		
		Retired	5		



# How We Have Progressed

## In 2014-2015



### Program Year 2014-2015 Accomplishments

The Montgomery Chapter received the Platinum Award at the 2015 PDT in Nashville, Tennessee for chapter recognition points for Group A.

The Montgomery Chapter is currently celebrating 40 years as an AGA Chapter.

Dr. Keren Deal is a member of the AGA National Ethics Board and is currently the co-chair of the Journal of Government Financial Management Editorial Board.

Dr. Keren Deal is currently serving as the Past Regional Vice President for the Gulf Region.

Mrs. LaTaya Lucas is currently serving as the Education Regional Coordinator for the Gulf Region.

Mr. Robert Childree currently serves as a member of the Financial Management Standards Board Committee.

Ms. Carmen Leonard is currently serving as the Accountability Coordinator for the Gulf Region.

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Montgomery Chapter Performance Measures	2013 Actual	2014 Actual	2015 Actual
<b><u>Membership</u></b>			
Number of new Early Career Members	1	2	2
Number of new Student Members	0	5	4
Number of new Full Government members	12	25	3
Number of new Private Sector Members	1	2	0
Total number of New Members	14	34	9
<b><u>Education</u></b>			
Number of Audio Conferences and Lecturer Series	5	4	2
Number of CPEs offered during the program year	36	26	20
Average number of members attending Audio Conferences and Lecturer Series	7	20	29
Average number of guests attending Audio Conferences and Lecturer Series	2	2	8
<b><u>Meetings and Conferences</u></b>			
Average number attending monthly meetings	68	73	67
Number attending Spring Seminar	128	152	164
Number attending Fall Seminar	239	237	275
<b><u>Certification</u></b>			
Members obtaining CGFM certification	3	3	0
Number of Proclamations	7	15	15



# Chapter Finances

## Revenues 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.

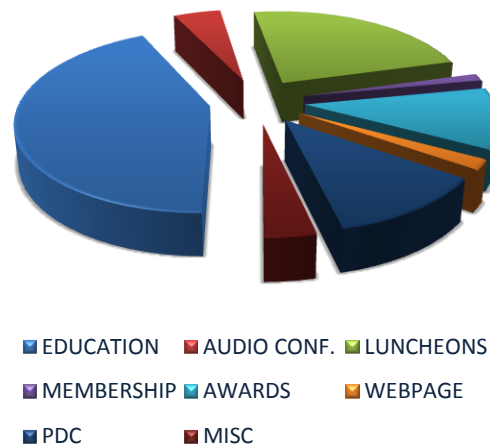
### Revenue by Source

	2013	2014	2015
Audio Conferences/ Webinars	\$640.00	\$710.00	\$35.00
Community Service	\$169.00	\$5,280.83	\$1,938.78
Education	\$45,146.00	\$55,589.86	\$64,033.00
Luncheon/Meetings	\$6,321.00	\$6,535.00	\$6,645.00
Membership Dues	\$1,107.40	\$1,047.50	\$2,362.50
Membership Recruitment/ Early Career	\$313.00	\$378.00	\$908.00
Miscellaneous	\$5,174.72	\$7,173.77	\$3,572.84
Sponsorships	\$500.00	\$375.00	\$750.00
<b>Total Primary Chapter Revenues</b>	<b>\$59,371.12</b>	<b>\$77,089.96</b>	<b>\$80,245.12</b>



### Expenses

	2013	2014	2015
Audio Conf./Lecturer Series/Webinars	\$1,120.00	\$1,065.00	\$385.95
Awards and Scholarships	\$3,979.06	\$3,352.75	\$5,332.85
Community Service	\$200.44	\$5,389.05	\$2,266.20
Education	\$16,885.99	\$20,603.90	\$27,480.14
Luncheons/Meetings	\$7,111.00	\$7,157.19	\$7,637.58
Membership and Mentorship	\$436.00	\$480.00	\$877.86
Membership Dues (National)	\$21,265.00	\$23,712.00	\$27,525.00
Miscellaneous	\$1,381.15	\$2,442.41	\$2,407.16
National PDC Registration & Travel	\$1,778.10	\$4,319.37	\$4,842.00
Printing/Office Supplies/Postage	\$677.38	\$833.95	\$66.35
Webpage and Technology	\$624.95	\$624.95	\$1,489.88
<b>Total Primary Chapter Expenses</b>	<b>\$55,459.07</b>	<b>\$69,980.57</b>	<b>\$80,310.97</b>



Financial records were reviewed and a compilation was performed by an independent Certified Public Accountant.



# What is Next? Challenges Moving Forward



## Increasing Membership and Retention

The Montgomery AGA Chapter currently has 337 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 suspended members and encourage them to become members of AGA again;
- To engage and support the Chapter's Young Professional Advisory Board by providing social development and educational opportunities for YP members through luncheons, and quarterly socials, 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.

## 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](http://www.montgomeryaga.org).

## Chapter Officer Directory

President	LaTaya Lucas
President –Elect	Nakia Tetter
Treasurer	Jeannie Price
Financial Secretary	Janice Duncan
Secretary	Nicole Boswell
Asst. Secretary	Angela Abernathy
Immediate Past President	Margie Toney

Montgomery Chapter AGA

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Montgomery, Alabama 36101

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## Certified Government Financial Manager

The CGFM Committee strives to increase the number of members with the CGFM Certification in the Montgomery AGA Chapter. 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 communicate and support the Young Professional Advisory Board in promoting CGFM to Early Career members ;
- 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.