



# Charleston Chapter

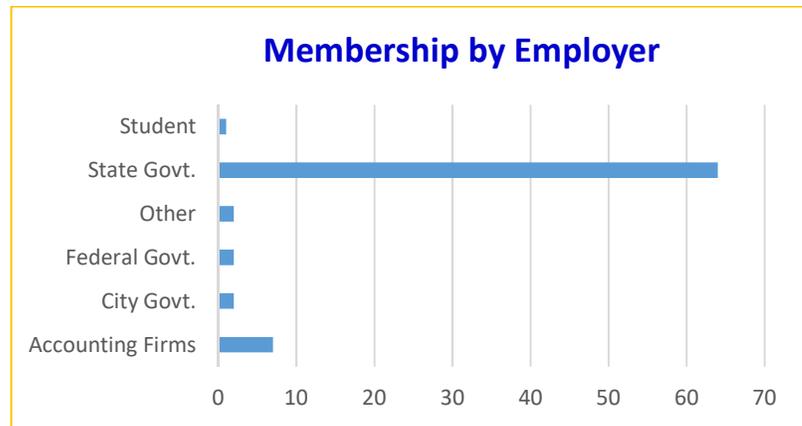
## A 2023 Report to Our Membership

### Our Chapter

The Charleston Chapter is located in West Virginia’s Capital City of Charleston. Charleston’s AGA chapter serves federal, state and local employees working in areas of accounting, auditing, budgets, finance, economics, internal control, and public administration in Charleston and the surrounding area. We also encourage membership from private sector employees working in government environments or who have government clients. Students interested in pursuing a career in government financial management are encouraged to attend chapter events and consider a student membership.

### Membership

	2023	2022	2021
Number of Current Members	78	75	77
Overall Membership Retention Rate	87%	85%	95%
Number of New Members	13	10	15
Members with CGFM	25	17	17



### Our Purpose

AGA and our Chapter are dedicated to the professional development and advancement of the government financial management profession. The Charleston Chapter provides educational opportunities to promote the professional development of its members, and support the use of government financial management practices, policies, and promoting the financial management profession.

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### Mission

AGA fosters learning, certification, leadership and collaboration for professionals and stakeholders committed to advancing government accountability – a government’s obligation to the people for its actions and use of resources.

### Vision

Promote the advancement of government accountability.

### Contact Us

Via e-mail: [Taylor.S.Cole@wv.gov](mailto:Taylor.S.Cole@wv.gov)

Website:

[www.agacgfm.org/Chapters/Charleston-WV-Chapter/Home.aspx](http://www.agacgfm.org/Chapters/Charleston-WV-Chapter/Home.aspx)



# What We've Done

## Goals Update

Goal	Result
<p>#1 Increase our membership:</p> <ul style="list-style-type: none"> <li>✓ Increase membership to 100 members</li> <li>✓ Recruit members from colleges and local governments</li> <li>✓ Recruit members from state agencies which do not currently have members</li> </ul>	<p>We were not successful with reaching the goal of 100 members. We did increase membership by 3 members. We were able to recruit 13 new members to offset the 10 we lost to job changes and retirements. We will continue to spread the word about the benefits of an AGA membership.</p>
<p>#2 Increase our CGFMs</p> <ul style="list-style-type: none"> <li>✓ Keep updated materials in the CGFM Lending Library</li> <li>✓ Facilitate study groups in both virtual and in person formats</li> <li>✓ Continue the exam reimbursement program for AGA members</li> </ul>	<p><b>Success!</b> By continuing our CGFM study groups we increased the number of CGFMs by 47%. The reimbursement program is working well. Though the CGFM reimbursement program is one of our largest expenses, we believe that it is one of our most important. Our chapter has great teachers, who lead interesting study groups and help our members meet their goal of becoming CGFMs.</p>
<p>#3 Promote AGA and CGFM to students</p> <ul style="list-style-type: none"> <li>✓ Outreach to high schools, colleges, and universities</li> <li>✓ More information on our website</li> <li>✓ Provide more opportunities for students to get involved</li> </ul>	<p>We were partially successful with this goal. Our Chapter attended a Careers In Government event at a local university. We were able to tell students about the benefits of AGA. The Chapter hosts a Spring and Fall Education Conference and students from local colleges and universities are invited to attend free of charge.</p>

We continue to work to make our Chapter better for our membership and provide them the benefits they need. Though we did not meet all of our goals last year, we were able to partially meet them all.

## Community Service

We held a food drive for Manna Meal. Manna Meal is a soup kitchen and food pantry that serves free breakfast and lunch daily – 365 days a year. They are located inside St. John's Episcopal Church in downtown Charleston.



# Our Finances

## What were the costs for servicing the membership and how were those costs paid?

The Charleston Chapter is a non-profit organization operating solely on funds raised or donated through various functions. For fiscal year 2024, the Charleston Chapter plans to continue funding its activities through fees for educational programs and working to obtain sponsors for various events throughout the year.

Revenues continued to increase in 2023, as more people were able to attend our in-person spring and fall training events. The 2021 revenues reflect two virtual events. The cost of the training events increased in 2023, due to both spring and fall being held in person. In 2022, the costs were lower as one event was held in-person and the venue had been paid in 2020 prior to the pandemic. The reservation was held by the venue until we were able to hold in-person events. The costs associated with the spring and fall training events declined in 2021 as both events went virtual in response to the pandemic. We were able to hold two in-person CPE luncheons in 2023 and 2022 increasing revenues and expenses. Due to the pandemic CPE luncheons also were held virtually in 2021 at no cost. CGFM expense increased in 2023 as more people from the study group passed parts of the exam and additional study materials were needed for larger study group classes.

## Revenue by Source



Source	2023	2022	2021
Spring & Fall Training Events	\$16,672	\$13,663	\$5,001
Membership Fees	207	560	981
Sponsorships	120	-	-
CPE Luncheons	426	532	97
<b>Total Chapter Revenues</b>	<b>\$17,425</b>	<b>\$14,755</b>	<b>\$6,079</b>

## Expenditures



Costs	2023	2022	2021
Spring & Fall Training Events	\$14,803	\$1,778	\$3,060
Donations	200	450	100
CPE Luncheons	477	467	0
Registration Fees, PDT	2,602	4,125	500
CGFM Reimbursement & Study Guides	2,430	4,346	625
Postage & Other	2,210	416	1,261
<b>Total Chapter Expenditures</b>	<b>\$22,722</b>	<b>\$11,582</b>	<b>\$5,544</b>



# What's Next?

## *Plans for 2024*

### We want to see you!

Be on the lookout for emails about CPE luncheons . This will be a great time to catch up and learn something new – information will be coming soon to your inbox.

The Charleston Chapter sets a goal every year to provide quality CPE for its members. We have adjusted to the new virtual world but are looking forward to in-person events too. Be on the lookout for more information.

### 2023-24 Chapter Board

- Betsy Chapman, CGFM – President, Membership
- Heather Gillenwater, CGFM – President-Elect, CGFM/Professional Certification
- Jamie Chambers, MS,CGFM, CIA, CGAP – National Council of Chapters Representative; Secretary
- Angela Leshon, CGFM – Treasurer
- Kathy Anderson, CGFM –Education, Meetings & Events
- Taylor Cole – Communication
- Beth Farley, CPA, CGFM – Community Service
- Lisa Rutherford, CIA, ISA, CRCM – ACE Reporting/Chapter Recognition
- Marie Long, CPA – Accountability
- Kelli Herr - Webmaster



### We want you to be a CGFM!

We are holding a study group to help you pass those exams.

For more information regarding the Certified Government Financial Manager (CGFM) Program, go to:

<http://www.agacgfm.org/CGFM-Certification/overview.aspx>

or contact the Charleston AGA Chapter.