



## CITIZEN- CENTRIC REPORT FOR 2020-2021

### About AGA

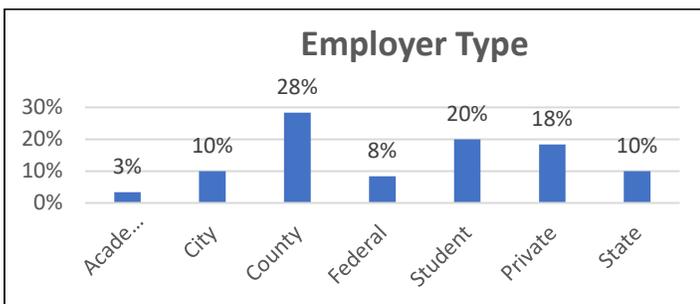
AGA is the member organization for professionals who support government financial management and other related disciplines.

### The Southwest Virginia Chapter

The Southwest Virginia Chapter (renamed in 2021) was founded March 24, 2001, as the Roanoke Chapter. The chapter represents members across Southwest Virginia, including vibrant cities, internationally recognized universities (Virginia Tech, Radford University and Roanoke College) and a broad range of geographic and cultural diversity.

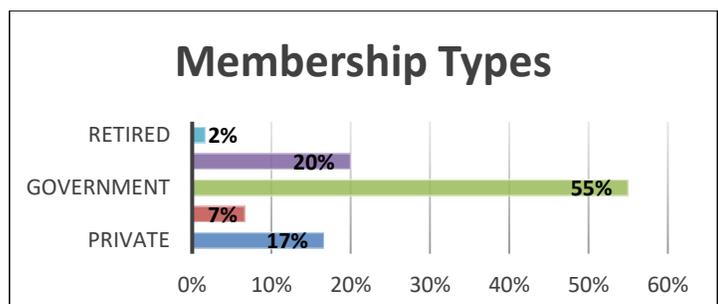
### Who We Are

Our chapter members include financial management professionals with various titles such as Auditor, Comptroller, Payroll Supervisor, Director of Finance, CFO, Business Analyst, Accountant, and More...



### Our Mission

Our mission is to advance accountability, transparency, and leadership by promoting education, certification, innovation, and collaboration across all levels of government and to stakeholders.

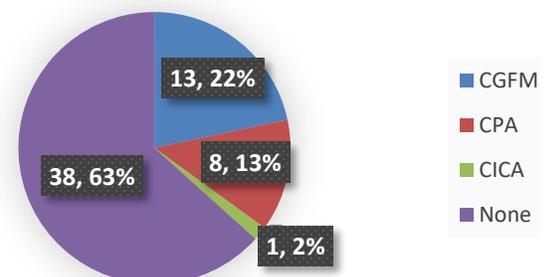


### Our Strategic Goals align with AGA National's and include:

- Serving as the catalyst for innovation and thought leadership in government financial management.
- Educating and empowering professionals to advance government accountability.
- Advancing Certified Government Financial Manager® (CGFM®) as the certification for government accountability professionals.
- Enhancing the public's perception of government financial management.

For a full list visit <https://www.agacgfm.org/About/Strategic-Goals.aspx>

### Certifications



# Accomplishments

	2018-2019	2019-2020	2020-2021
Number of Regular Members	45	45	48
Number of Student Members	0	11	12
Total Members	45	56	60
Overall Membership Retention Rate	85%	89%	93%
Number of New Regular Members	6	3	5
Members not Renewed	5	5	4

Free Webinars

**7**

Average Members Attended Webinars

**25 = 41% of members**

Student Members

**12**

Newsletters Published

**8**

Updated Chapter By-Laws

CPEs provided

**31**

Charity Raised & Donations

**\$10,598.95**

College Presentations

**3**

ACE Award Level

**Platinum**

Chapter Awards

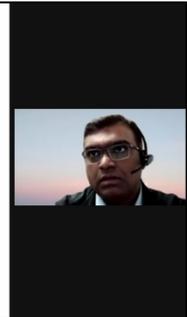
- Volunteer of the Year
- Certificate of Excellent in CCR Reporting

## COVID-19 Workplace Issues and Stress

Dr. Badr Ratnakaran MBBS

Academic Chief and PGY-4 Resident in Psychiatry  
Carilion Clinic- Virginia Tech Carilion School of Medicine

Speaker at Spring Virtual PDT



### Training Topics include

- Virginia and National Economic Outlook
- CCR Development
- Using Blockchain for Grant Payments
- Cybersecurity
- Introduction to the CGFM
- GASB Proposed Changes to the Reporting Model
- CARES ACT and American Rescue Plan
- COVID-19 Workplace Issues and Stress
- Inclusive Leadership
- Excel Tips and Tricks
- Inclusive Leadership
- VA Legislative Update
- Remote Auditing
- Personal Investment Strategies
- GASB Update

In addition to the **15 CPEs** listed above that were provided by our chapter, we also participated in the Virginia Commonwealth PDT with the other 3 VA chapters which gave our members the opportunity to earn **16 additional CPEs** for a total of **31 CPEs** for the AGA year.

Attendance at monthly meetings due to combination of virtual format, free attendance for AGA members of any chapter, sending invitations to other chapters and having interesting and relevant topics.

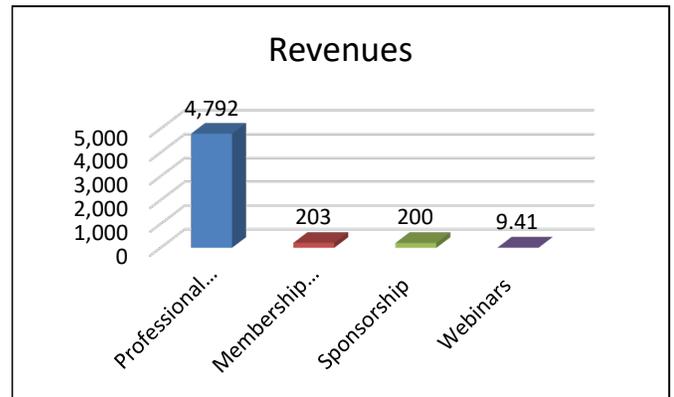


# Finances



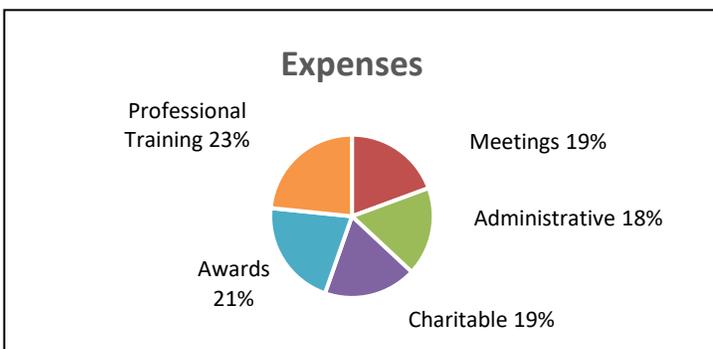
Virtual participation in Spring PDT

Revenues			
	2018-2019	2019-2020	2020-2021
Professional Training	\$2,243	\$3,585	\$4,792
Membership Dues	215	253	203
Sponsorship	774	300	200
Other	101	17	9
<b>Total Revenues</b>	<b>3,333</b>	<b>4,155</b>	<b>5,204</b>
<b>Year- End Balance</b>	<b>\$3,881</b>	<b>\$6,987</b>	<b>\$10,148</b>



Expenses			
	2018-2019	2019-2020	2020-2021
National PDT	\$ 875	\$ 0	\$ 0
Meetings	58	0	300
Administrative	102	149	272
Charitable	345	200	285
Recruiting	0	79	0
Awards	366	366	329
Professional Training	1,050	255	362
CGFM Study Guides	0	0	150
Membership Fees	0	0	348
<b>Total Expenses</b>	<b>\$ 2,796</b>	<b>\$ 1,049</b>	<b>\$2,045</b>

Curtis leading a Zoom Chapter meeting.



Despite the challenges of COVID-19, our chapter has fared financially well. Increased revenues were a result of more members attending our PDTs because of the virtual format, participation in the Commonwealth PDT, inviting other chapter to attend our functions and reaching out to non-AGA members in our region.

We continue to progress in achieving our strategic goals. Membership is growing, including young professionals and students. We are increasing member value by providing free CPEs, free CGFM study guides and free membership for serving on the board, which are beginning to pay off.

Complete financial information is included in the monthly newsletters. Also a chapter financial review was conducted on 9/10/2021. Both documents can be found on the chapter website at <https://www.agacgm.org/SouthwestVirginia>



Southwest Virginia Chapter receives Platinum Award in 2021.

# What's Next

## Chapter Challenges

Our challenges remain growing the chapter, getting more members to serve in leadership positions and finding ways to demonstrate membership value in a virtual environment. Webinars and virtual board meetings are no longer optional but mandatory in what is now our virtual reality. Access to nationwide speakers through virtual platforms has presented more opportunities to hear from a variety of speakers on a range of topics, however more work needs to be done to motivate more members to serve on our board and participate in chapter events.

This year we were successful in our efforts to change our Name from the "Roanoke Chapter" to the "Southwest Virginia Chapter". This change is a better representation of our chapter membership and reflects our geographical dispersion in this beautiful section of our state.

During 2020/2021, four members did not renew their chapter membership, one less than the previous year. One member changed employment and no longer worked in the public sector. The reasons for the other three not renewing were not disclosed. Finding ways to reach out to major employers despite travel and social distancing restrictions, will go a long way in helping to promote AGA and grow our membership.

## Looking Ahead

The future of our Roanoke Chapter looks promising. We are surrounded by opportunities to challenge ourselves, expand our network, knowledge and careers in government financial management. We have lots of untapped potential in our chapter and in our region. They represent potentials for growth, career advancement, and personal development. 2020/2021 showed that we could sustain chapter excellence despite the challenges of a major pandemic. Now it is time to use what we have learned to grow. Continue our forward progress. Grow our membership, continue college outreach, engage with students and young professionals, increase the number of CGFMs and motivate our members to get involved by serving on our Board. It is a tall order but certainly doable. Join us, it will be a fun, exciting, and challenging adventure.

Curtis Joachim, CGFM, CPA, MBA, CGMA, Chapter President

**Find us online** AGA website: <https://www.agacgfm.org/Chapters/Southwest-Virginia-Chapter/Home.aspx>

We want to hear from you. Do you like this report? Would you like to see other information? Please let us know by contacting Regina Williams, CPFO, Accountability Chair at [regina.williams@wytheco.org](mailto:regina.williams@wytheco.org) or 276-223-4526.



## 2020- 2021 Chapter Board

Curtis Joachim, President

Vicki Delp, Treasurer

Melissa Cable, Secretary

Joshua Levenstein, Education/Meetings

Gillian Cadogan, Membership/Emerging Leaders

Leah Kirby, Community Service

Vicky Moore, Webmaster/National Council of Chapters Representative

Misty Hamed, Communications & Newsletter

Ashley Colaiacovo ,Accountability