

# Report to Our Members

## Citizen-Centric Report for 2020 -2021



Kelly Stefanko  
Chapter President  
2020-2021

### About AGA

The Association of Government Accountants (AGA) is *the* association for all financial management related professionals supporting government. It is the only association that supports professionals working in federal, state and local governments as well as the private, nonprofit and academic sectors. Our 15,000 members count on AGA to provide the tools and support - training and events, professional certification, publications and ongoing education – to help build their skills, advance their careers, and make a mark on the profession. Members include senior executives, mid-level managers, entry-level employees, elected officials and students working in government financial management disciplines, including accounting, auditing, budgeting, financial reporting, performance reporting, grants management, contract management and information systems.



### Our Chapter

Since 1960, the Virginia Peninsula Chapter of the Association of Government Accountants (AGA) has been serving government professionals from the local, state, and federal agencies in the Hampton Roads Area, which includes; Hampton, Newport News, York County, Poquoson, Chesapeake, Norfolk, Portsmouth, Virginia Beach, Suffolk, Williamsburg and Isle of Wight. In its 61st year, the Virginia Peninsula Chapter continues to serve as an active, member-run organization, creating partnerships with immeasurable value for its members and the surrounding communities whom enjoy the rewards of their professionalism and education.

### Selected Demographics

Member Type	#
Govt Member (69%)	102
Private (13%)	19
Retired (7%)	11
E-MBR-Student (4%)	7
Lifetime Member (4%)	6
Young Professional (3 %)	4
<b>Total</b>	<b>149</b>

(as of September 2021)

Employer Type	#
Federal Govt. (46%)	69
City Govt. (15%)	22
Private (15%)	22
Retired - Not Working (10%)	15
State Govt. (5%)	8
Academic - Educator (2.5%)	4
Student (Full-Time) (2.5%)	4
Other (2.5%)	4
Not Employed (1%)	1
<b>Total</b>	<b>149</b>

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### Mission

To create value for our members and communities through the advancement of government accountability by:

- Participating in the future of governmental financial management through research and development.
- Ensuring continuity of quality government accountability professionals.
- Serving our member communities through our time and service.
- Providing quality and affordable educational opportunities.

### Vision

AGA is the premier association for advancing government accountability.

# How We Progressed

## Chapter Year 2020-2021



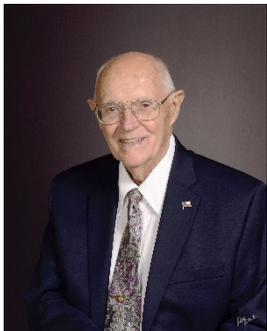
PLATINUM

2021

Achievement in  
Chapter Excellence



We supported several charitable organizations, including making donations to the Foodbank on behalf of our monthly meeting speakers and supporting St. Frances Service Dogs and St. Mary's children home during our PDTs.



Longtime member Dr. Jesse Hughes won the AGA National Educator of the Year



Joy Leyeza was named our Volunteer of the



We were excited to meet IN PERSON for our year end party in June at the Paradise Ocean Beach Club in Hampton, VA

## Accomplishments

- Celebrated our chapter's 60th anniversary!
- Held our 25<sup>th</sup> annual Commonwealth PDT - our first one virtually.
- Nominated 6 people/groups for individual PDT awards - Dr. Jesse Hughes won the Educator Award and Jay Poole won the Distinguished Local Government Leadership Award.
- Named an AGA Volunteer of the Year - Joy Leyeza.
- Conducted a successful (virtual) spring PDT joint with ASMC.
  - 180 attendees
  - 5 sponsors
  - Attendees networked via breakout rooms.
  - Prizes awarded for active engagement.
  - Earned \$20k - split with ASMC.
  - Raised more than \$5k for charity St. Mary's Home for Disabled Children.
- We held a spring community service project - GRAB A BAG - in which we encouraged members to bring up trash in their neighborhood and community....and won the national community service award!
- We obtained a proclamation from the State of Virginia for March being CGFM month.
- Held a meeting our PDT every month, including our annual student night in October, our annual joint meeting with ASMC in January, and our annual joint meeting with IIA in February.
- We reminded members to renew and encouraged new members with incentives. We were a winner in Membership Madness. We recruited 17 new members.
- We conducted a membership survey. 94% of attendees say the chapter "exceeded my expectations".
- Recruited several new volunteers for our 2021-2022 CEC.
- Communicated monthly with members through emails of upcoming events and activities.

# Our Finances

## Revenues and Expenses

### What are the costs for servicing our members and how are those costs paid?

The VA Peninsula Chapter held its annual professional development training conferences (PDTs) in the fall and spring, which is our primary source of revenue. Due to the COVID-19 pandemic, we had to hold them both virtually, for the first time ever. Thanks to the teamwork of our volunteers and partners and the generosity of our sponsors, both were successful events both educationally and financially. We were able to lower cost due to avoiding event and meal costs, however we still incurred credit card fees, speaker gifts, and community service donations.

#### Revenue

	2020-2021
Fall PDT	\$5,432
Spring PDT	\$10,644
<b>Total Chapter Revenues</b>	<b>\$16,076</b>

For our fall PDT, we partner with three other AGA chapters: Richmond, Shenandoah, and Roanoke. We split responsibilities as well as profits by a preset percentage. As a whole, we netted \$16,714, and the VA Peninsula Chapter's share of the profit was \$5,432. Even in the middle of a pandemic, we had a good PDT.

Our spring PDT was similar. We split the revenues and expenses of the spring PDT (\$21,288) with our partner ASMC (\$23,500 minus expenses \$2,212). We supported a charity (St. Mary's home) through our speaker gifts and encouragement of attendees to donate.

#### Expenditures

	2020-2021
123 Signup/Credit Card Expenses	\$2,146
Speaker Gifts/Donations	\$1,260
Zoom upgrade	\$210
Prizes/Attendees Gift purchased	\$755
End of the year Member's party	\$1,312
<b>Total Chapter Expenditures</b>	<b>\$5,683</b>

By the end of the program year, we were finally able to have an IN PERSON event – our end of the year party for our members! Although the weather wasn't ideal for an outdoor beach party, we had a great turn-out and a good time. The chapter subsidized the cost of this event as a thank you gift to its members. Outside of this cost, the chapter's expenses were relatively minimal.

We plan to use the revenue we have generated in recent years to endow a scholarship that will help local students pursue degrees in government accountability. The chapter executive committee voted to approve putting \$25,000 towards this effort, dependent on how well our 2021 fall PDT does to ensure it doesn't drop our bank account balance below \$20,000.

#### Independent Audit

Brad Smith and Gail Williams, chapter members, conducted an independent audit of the chapter's finances and provided recommendations for improved internal controls which the chapter incorporated into its financial policies and procedures.

# What's Next?

## Key Initiatives

### Rebuild and Remake Ourselves in the Face of a Pandemic

The chapter continues to rebuild after the COVID-19 pandemic grinded to a halt chapter operations in March 2020. The AGA VA Peninsula Chapter had a significant number of members, including chapter leaders, not renew their membership. Given the ongoing safety and health concerns, we held all our meetings and education events virtually, which allowed us to offer monthly chapter meetings free to our members. We continue to reach out to our lapsed members in hopes of getting them to rejoin, and we are looking to attract new members and retain our members by offering significant value in the way of CPEs and networking opportunities.

### 2021-2022 Chapter Goals:

Our goals for the coming year include:

- Membership growth: 10% (We have 153 members as of August 2020, this would require 15 new members)
- Overall Membership Satisfaction: 75% satisfaction (meets or exceeds expectations)
- Training Events: Offer 34 hours of CPE (14 hours of fall PDT, 14 hours of spring PDT and 6 monthly meetings). We are planning time for networking 10 minutes before each virtual meeting.
- Educational Meeting Attendance: 150 average attendance for fall and spring PDTs. 25 average attendance for meetings.
- Educational Meeting Satisfaction: 75% satisfaction (meets quality expectations) as measured by polls at monthly meetings.
- CGFM Candidate Support: We plan on continuing our study guide loaner program and retain 80% of our CGFMs.



We were excited to mingle IN PERSON for our year end party in June 2021 at the Paradise Ocean Beach Club in Hampton, VA. We look forward to having more face-to-face interaction with YOU!

### Why the AGA Virginia Peninsula Chapter?

The AGA Virginia Peninsula Chapter puts you in contact with other government accountability professionals in your area.

Through our chapter, you'll get the chance to participate in social events, business meetings and educational seminars with other professionals who understand your concerns. In addition, your AGA membership means you're part of a tremendous nationwide network.

A significant component of the AGA Virginia Peninsula Chapter is the educational program, including Professional Development Training events and free and reduced priced CPE throughout the year to its members, which meets most professional continuing education requirements.

### We want to hear from you!

- Do you like this report?
- Would you like to see other information?

Please let us know by contacting these, or any of our chapter leadership members:

**Past Chapter President**  
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