

# About the AGA Indianapolis Chapter

AGA (Advance. Grow. Accelerate.) is a non-profit organization that connects and empowers financial related professionals who support government, from financial management to IT, human resources, cybersecurity and more, to advance good government initiatives, grow their expertise and accelerate their careers.

The Indianapolis Chapter focuses on our members and their needs, as demonstrated by our continued emphasis on accountability, certification, education, research, and service.

Current membership consists primarily of federal government employees, although we do have a small group of private, state/local, and retired members. The Chapter holds monthly Chapter Executive Committee meetings from July to May, and wraps up the year with an end-of-year awards ceremony and banquet in June.

The Certified Government Financial Manager (CGFM) committee provides study guides, flashcards, and monetary incentives to assist candidates in passing the CGFM exams. The committee celebrates CGFM month each year by receiving proclamations from the State of Indiana, City of Indianapolis, IN and Lawrence, IN and also host a networking luncheon for Chapter CGFMs.

Member-oriented community service, networking and wellness activities, and social events are offered throughout the year. The Chapter’s networking activities allow non-members to meet members and learn about the AGA.

The continual development of our members is also accomplished through a diverse mix of educational and professional development opportunities. Twelve audio conferences are hosted regularly to provide insight on current topics, lunch and learns, and an annual Spring professional development conference (PDC).

We recognize the hard work of Chapter members and renew our focus on continued service to our members. We are committed, in the years to come, to continuously focus on developing our Chapter and our people for the advancement of accountability in government.

## Key Metrics

Total Members	CGFMs	CPEs	Community Service
163	64	32	6 Events

## Staying Connected

The Indianapolis Chapter is committed to providing quality, up-to-date information to each of our members. Additionally, the Chapter strives to provide the same information to prospective members and others that share an interest in what AGA-Indianapolis has available.

The Chapter accomplishes this effort through timely email communication to our Chapter members along with a Chapter website and Facebook page.

The Chapter website and Facebook page includes updates on professional, social, and community service related events.

Please visit our websites:



## Points of Interest

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## Our Mission:

**AGA Indianapolis fosters learning, certification, leadership and collaboration for professionals and stakeholders committed to advancing government accountability.**

A report to our membership

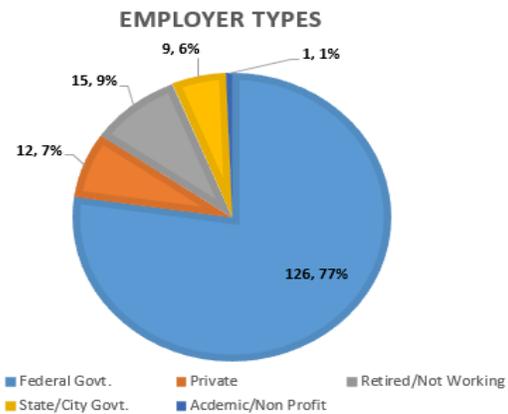
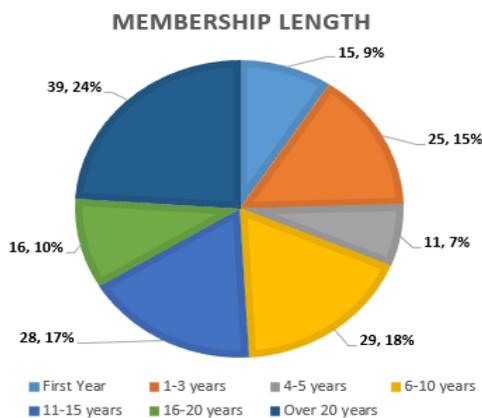
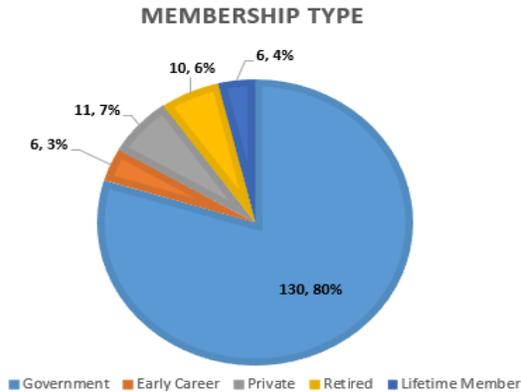
Citizen Centric Report

2024



# Member Information

The AGA-Indianapolis Chapter stresses the joint effort of member retention and new member recruitment to reach an increased level of program year success. The Chapter currently has 163 members (a decrease from 177 in 2023). CGFMs decreased from 67 to 64 over the same period primarily due member retirements.



# Chapter Accomplishments

During this past program year, the Indianapolis AGA Chapter continued to set high goals. We had numerous networking, community service, and education events headed by dedicated and enthusiastic committee chairs and members.

- We earned Platinum status, which was presented at the Professional Development Training in Denver, CO!
- Obtained three CGFM proclamations for CGFM month from the State of Indiana, City of Indianapolis, and City of Lawrence
- Provided 32 continuing professional education credits to our Chapter members—an increase from 24 the previous year.
- Purchased new CGFM study guides to support Chapter members CGFM exam preparation. The Chapter had one member become a CGFM.

Our Chapter takes pride in its active role of supporting the community through service events and donations. These events are an integral part of the benefits offered to our Chapter members. It's our goal to fuel passion in our AGA members and encourage them to make an impact within their community. During the 2023-2024 program year AGA partnered with a variety of organizations and programs (not all inclusive):

- Making Easter baskets for children in the foster care system
- Collecting school supplies and raising/donating funds for local charities
- Donating wreaths for "Wreaths Across America" whose mission is to place a wreath on every veteran's grave during the holidays.
- Creating and signing homemade Christmas cards for military members overseas



# Financial Information

Revenues by Source			
	2023 - 2024 Budget	2023 - 2024 Actual	2024 - 2025 Budget
Corporate Sponsorship	\$1,000.00	\$0.00	\$2,500.00
Education	\$35,000.00	\$43,770.33	\$23,000.00
Membership	\$1,200.00	\$1,165.84	\$1,200.00
Social Committee	\$3,840.00	\$471.50	\$1,450.00
Treasurer	\$55.00	\$654.88	\$500.00
Other	\$0.00	\$587.27	\$500.00
<b>Revenue Total</b>	<b>\$41,095.00</b>	<b>\$46,649.82</b>	<b>\$29,150.00</b>
Expenses by Source			
	2023 - 2024 Budget	2023 - 2024 Actual	2024 - 2025 Budget
Awards	\$0.00	\$1,000.00	\$0.00
CGFM	\$525.00	\$12.55	\$525.00
Citizen Centric	\$50.00	\$0.00	\$50.00
Community Service	\$1,660.00	\$800.00	\$2,730.00
Corporate Sponsorship	\$0.00	\$0.00	\$0.00
Education	\$21,774.00	\$56,754.77	\$18,341.00
Incentive Points	\$5,200.00	\$4,564.34	\$1,850.00
Membership	\$2,850.00	\$1,430.00	\$550.00
Technology	\$1,106.00	\$849.90	\$0.00
Social/Wellness Committee	\$6,240.00	\$5,133.77	\$7,300.00
Treasurer	\$507.00	\$344.61	\$310.00
<b>Expense Total</b>	<b>\$39,912.00</b>	<b>\$70,889.94</b>	<b>\$31,656.00</b>
<b>Net Income</b>	<b>\$1,183.00</b>	<b>(\$24,240.12)</b>	<b>(\$2,506.00)</b>



## Balance Sheet (As of June 30, 2024)

ASSETS	TOTAL
Current Assets	
Bank Accounts	
Certificates of Deposit - FCFCU	20,953.50
Checking - FCFCU	8,693.98
Money Market - FCFCU	16,291.79
Savings - FCFCU	100.50
<b>Total Bank Accounts</b>	<b>\$46,039.77</b>
Accounts Receivable	0.00
<b>Total Accounts Receivable</b>	<b>\$0.00</b>
Other Current Assets	0.00
<b>Total Other Current Assets</b>	<b>\$0.00</b>
<b>Total Current Assets</b>	<b>\$46,039.77</b>
<b>TOTAL ASSETS</b>	<b>\$46,039.77</b>
LIABILITIES AND EQUITY	TOTAL
Liabilities	
Current Liabilities	
Accounts Payable	0.00
<b>Total Accounts Payable</b>	<b>\$0.00</b>
<b>Total Current Liabilities</b>	<b>\$0.00</b>
<b>Total Liabilities</b>	<b>\$0.00</b>
Equity	
Unrestricted Net Assets	70,279.89
Net Income	(24,240.12)
<b>Total Equity</b>	<b>\$46,039.77</b>
<b>TOTAL LIABILITIES AND EQUITY</b>	<b>\$46,039.77</b>

## Financial Information Notes:

- Net income for 2023-24 was -\$24.2K. The initial budget projection was \$1.2K. Net income was negative due to increases in expenses from our education events to include an expense from the previous year not paid until 2023-24.
- The Chapter projects a net income of -\$2.5K in 2024-25. There will be increase budget expenses from the social/wellness committee from holding additional events to reengage Chapter members.
- The AGA Indianapolis financial position remains extremely strong due to our continued strong financial management practices. The Chapter seeks creative and meaningful ways to reinvest excess funds into our Chapter members while maintaining a healthy cash balance for future Chapter needs.
- The Chapter's financial information presented in this report was reviewed by a certified public accountant. Please visit the website to review the current and past financial information. Please contact Virginia Smith-Milan at [virginia.smith-milan.civ@mail.mil](mailto:virginia.smith-milan.civ@mail.mil) for any additional questions on AGA Indianapolis Chapter finances.

# Looking Towards the Future

## Chapter Challenges and Changes

- After growing our membership pre-COVID, our Chapter was unable to maintain traction during the pandemic and are still struggling to demonstrate AGA benefits to our members in a hybrid work environment. We need to work to rebuild our membership as the Chapter has lost 20% of our members since 2020.
- Our Chapter was able to host an in person conference this past year which was a huge success—our first since pre-COVID! Attendees were able to hear from financial management, data analytics, and information technology experts and share best practices in government accountability.
- Due to the decrease in membership and engagement during COVID, the Chapter struggled to fill all of its Chapter Executive Committee positions.

Our Chapter is what you want it to be and how successful you want us to be. With all the distractions surrounding us, each Chapter member should look at where we want our-

selves and the Chapter to be in the years ahead as we strive to build upon our successes, strengths, and grow our membership.

Our program chairs have started to think about new ideas to rejuvenate the Chapter. They include increasing community service options, personal outreach to new employees on the benefits of our Chapter's membership and partnering with other organizationally sanctioned activities.

## Chapter Improvement Opportunities

In looking towards this program year, we are faced with new, and unprecedented challenges. We came out of the pandemic, with mostly virtual events and opportunities for our members, and now are in a hybrid environment, where we struggle with membership involvement due to the comfort of staying virtual. However, on the heels of our Spring 2024 in-person PDC and the large audience, we see there is a desire to connect, network, and rebuild those relationships.

The AGA Indianapolis Chapter theme for this year is New Year. New Growth.

There are two areas which the Chapter leadership has challenged our membership:

- **Engage:** Get involved and make a difference for your Chapter.
- **Innovate:** What are some new ideas for adding value to our membership?

We are looking to leverage our hybrid environment to form new, collaborative channels – by reaching across AGA Chapters, sites, and geographical locations in order to build a wider network for our membership.



## Chapter Contacts

### OFFICERS

President	Mrs. Brooke Neuerman
President-Elect	Mr. Carlos Rivera-Ortiz
Treasurer	Virginia Smith-Milan
Treasurer-Elect	Vacant
Secretary	Jordan Cochran
Previous President	Mrs. Katie Gambill

### BOARD OF DIRECTORS

LaTrice Akers  
Pam Wolff  
Stevie McGill  
Colette Cormier  
Meg Hart  
Barry Waits

### NATIONAL COUNCIL of CHAPTERS REPRESENTATIVE: Dani Powers

### COMMITTEE CHAIRS

Accountability Chair: Dan Neumann  
Awards: Catrina Thompson  
CGFM Coordinator: Dan Neumann  
Achievement in Chapter Excellence (ACE) Awards: Dani Powers  
Community Service: Catrina Thompson/Latrice Akers  
Corporate Sponsorship: Pam Wolff/Palette Bekolo  
Education: Latrice Akers/Melissa Jacobs/Dani Powers/JW Sanders  
Historian: Brooke Neuerman  
Membership/Early Careers: Jennifer Welch  
Newsletter: Vacant

Programs: Amy Hole  
Publicity/Marketing: Colette Cormier  
Social: Catrina Thompson  
Social Media: Meg Hart  
Technology: Quenton Hale  
Website: Vietanh Nguyen  
Wellness: Lora Clayborne/Angi Wilson

### WE WANT TO HEAR FROM YOU!

Do you like this report? Do you believe it should include additional information? Please let us know your opinion by contacting Daniel Neumann at [daniel.b.neumann2.civ@mail.mil](mailto:daniel.b.neumann2.civ@mail.mil)