



Charleston Chapter

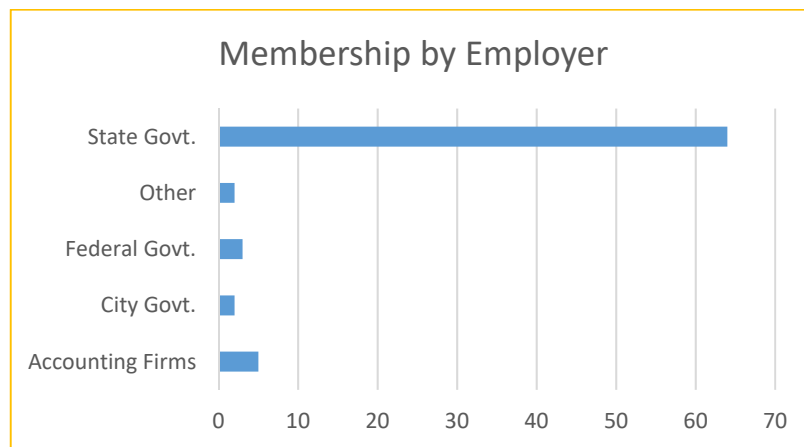
A 2024 Report to Our Membership

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

	2024	2023	2022
Number of Current Members	77	78	75
Overall Membership Retention Rate	80%	87%	85%
Number of New Members	15	13	10
Members with CGFM	28	25	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.

Table of Contents

<i>About Us/Purpose</i>	1
<i>What We've Done</i>	2
<i>Our Finances</i>	3
<i>What's Next?</i>	4

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

Website:

www.agacgfm.org/Chapters/Charleston-WV-Chapter/Home.aspx



How Are We Doing?

Goals Update

Goal	Result
<p>#1 Increase our membership:</p> <ul style="list-style-type: none"> ✓ Increase membership to 100 members ✓ Recruit members from colleges and local governments ✓ Recruit members from state agencies which do not currently have members 	<p>We were not successful with reaching the goal of 100 members. We decreased in membership by 1 member. We were able to recruit 15 new members to offset the 16 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"> ✓ Keep updated materials in the CGFM Lending Library ✓ Facilitate study groups in both virtual and in person formats ✓ Continue the exam reimbursement program for AGA members 	<p>Success! By continuing our CGFM study groups we increased the number of CGFMs by 12%. 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"> ✓ Outreach to high schools, colleges, and universities ✓ More information on our website ✓ Provide more opportunities for students to get involved 	<p>We were partially successful with this goal. The Chapter hosts a Spring and Fall Education Conference and students from local colleges and universities are invited to attend free of charge. We have been reaching out and maintaining contact with area schools looking for opportunities.</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 fundraisers for the Putnam County Animal Shelter and the Shriner’s Children’s Hospital, collecting much needed funds for both. We also were hydration heroes for the Kanawha State Forest Race Series. We keep the runners going with high quality H2O.



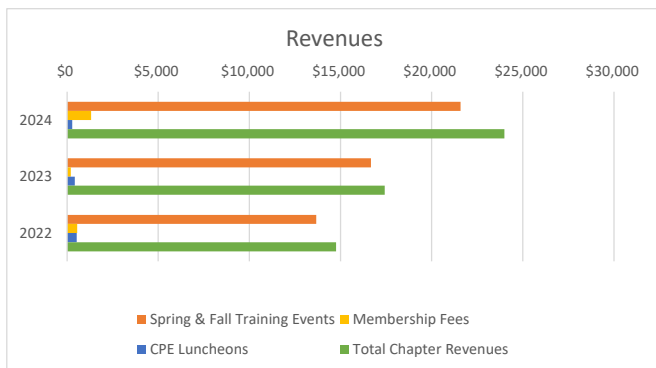
Our Finances

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 2025, 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.

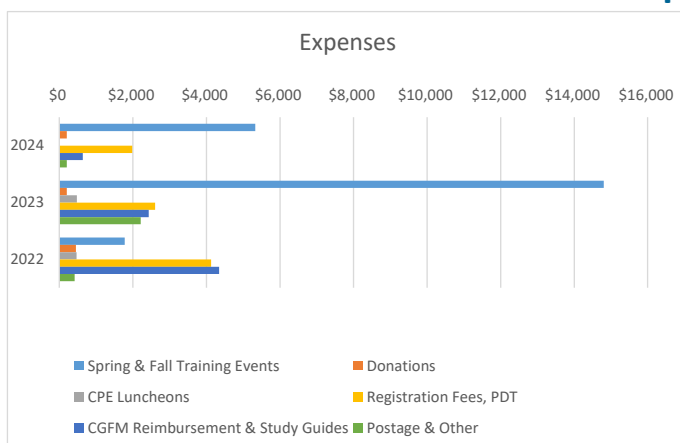
Revenues continued to increase in 2024, as more people were able to attend our in-person spring and fall training events. The cost of the training events decreased as we tried out new venues. The training events in 2023 were in person and we used much more expensive venues. In 2022, the costs were lower 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. We held two CPE luncheons in 2024, where the attendees brought their own lunch to a board member's office. The Chapter incurred no cost for these luncheons. We were able to hold two in-person CPE luncheons in 2023 and 2022 increasing revenues and expenses. CGFM expenses in 2024 decreased as no new materials were needed. 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	2024	2023	2022
Spring & Fall Training Events	\$21,581	\$16,672	\$13,663
Membership Fees	1320	207	560
Sponsorships	791	120	-
CPE Luncheons	293	426	532
Total Chapter Revenues	\$23,985	\$17,425	\$14,755

Expenditures



Costs	2024	2023	2022
Spring & Fall Training Events	\$5,329	\$14,803	\$1,778
Donations	200	200	450
CPE Luncheons	-	477	467
Registration Fees, PDT	1,983	2,602	4,125
CGFM Reimbursement & Study Guides	637	2,430	4,346
Postage & Other	206	2,210	416
Total Chapter Expenditures	\$8,355	\$22,722	\$11,582



What's Next?

Plans for 2025

We want to see you!

2024-25 Chapter Board

- Heather Gillenwater, CGFM – President
- Lisa Rutherford, CIA, ISA, CRCM – President-Elect/Treasurer/ACE Reporting
- Jamie Chambers, MS, CGFM, CIA, CGAP – National Council of Chapters Representative/Secretary/Newsletter
- Emily Fleck, CPA, CGFM – Education, Meetings & Events
- Taylor Cole – Communications
- Beth Farley, CPA, CGFM – Community Service
- Marie Long, CPA – Accountability
- Kelli Herr – Webmaster/Early Careers
- Corey Wade, CGFM – CGFM/Professional Certification

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 hope you enjoyed our Fall Conference. There will be a CPE Luncheon on November 20th at the South Charleston DNR Offices on Fraud Awareness.



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.



Find us online www.agacgfm.org/Chapters/Charleston-WV-Chapter/Home.aspx