

Report to Our Members 2023—2024 Citizen Centric Report (CCR)

Our Mission

The Albuquerque Chapter (Chapter) serves professionals in government financial management and related areas by providing quality education, fostering professional development and certification, and supporting standards and research to advance government accountability.

Our Vision

To train and inform government financial professionals in the fields of accounting, auditing, budgeting, systems and financial management.

To contribute to the advancement of financial management principles and standards and to improve management control and accountability to the public.

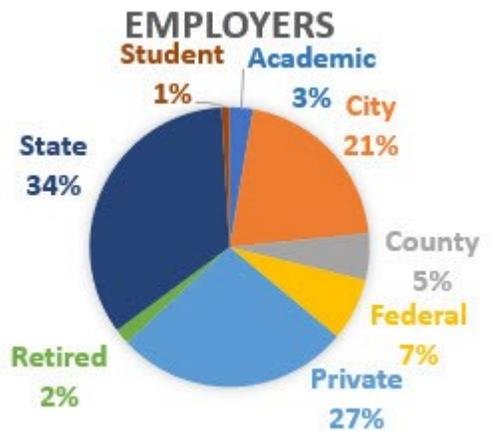
To recognize the unique skills and knowledge required of professionals who specialize in government financial management by sponsoring a professional certification program.



Emily Wilson

Albuquerque Chapter President

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We ended the 2024 Program Year with 119 members; an increase of 20 over Program Year 2023. Further, as of September 30, 2024 we have added 10 new members during the 2025 Program Year. During the year our demographics shifted slightly; our largest membership demographic is now state agency employers as opposed to private employers and is followed by city and federal government employers. The chapter's responsibility areas reflect the trend in other AGA chapters with traditional accountants and audit professionals making up the bulk of membership totals.

I would like to encourage our members to be more involved with AGA and join the Chapter Executive Committee (CEC), we are always excited to welcome new faces! I want to thank everyone for your continued support of AGA Albuquerque.

RESPONSIBILITY AREA

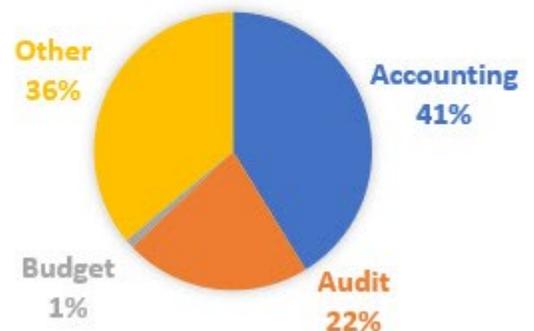


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Do you want to become an [AGA member](#)?

Key Performance Areas

| Objective | 2024 Actual | | | |
|----------------------|-------------|-------------|-------------|-------------|
| | Tier 1 | Tier 2 | Tier 3 | Totals |
| Membership | | 600 | | 600 |
| Educational Meetings | | | 1800 | 1800 |
| CGFM | | | 900 | 900 |
| Communications | | | 500 | 500 |
| Community Service | | | 500 | 500 |
| Strategic Vision | | 400 | | 400 |
| Total | <u>0</u> | <u>1000</u> | <u>3700</u> | <u>4700</u> |

Achievement in Chapter Excellence Awards (ACE)

One of the ways we measure our success year-to-year is through participation in the ACE Awards Program, which was developed to recognize chapters for their innovation and accomplishments. Key performance areas of the ACE awards are grouped into six categories: membership, educational meetings, CGFM, communications, community service, and strategic vision. A Chapter may achieve one of three tiers for each objective with points awarded based on tier milestones reached. ACE can help prepare chapter leaders and committee members for leadership roles and provide a strong basis for drafting their strategic plans and annual goals. By using ACE in planning activities and events for the coming year, each chapter will be prepared to meet the needs of its members and position itself for a successful year.

The Albuquerque Chapter has a long history of receiving the ACE Platinum Award. In fact, we received the ACE Platinum Award for years 2017-2020. In 2021, like many, we struggled to meet our goals due to pandemic restrictions and received the ACE Bronze Award. We have made a strong recovery, however, and received the ACE Platinum Award once again for years 2022-2024.



During the year, we offered both fully virtual and hybrid educational opportunities to our members, including: 1) a hybrid Winter Series event offering 3 hours of technical yellow book CPE, 2) a hybrid joint Professional Development Training (PDT) with the New Mexico chapter serving 215 attendees across two days and 3) several free or low cost webinars. In addition, the Chapter held several Community Service events to benefit local non-profit organizations including a holiday toy drive to benefit PB&J Family Services and a “work day” to benefit Casa Esperanza.

The AGA Albuquerque Chapter renewed our commitment to community service this year through several community service events. Pictured to the left are the results of our holiday toy drive benefiting PB&J Family Services.

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[@AGAAbuquerque](#)



AGATM Chapter Finances

Albuquerque Chapter

The largest source of revenues and expenses for the Chapter is the joint PDT with the New Mexico Chapter. Both chapters worked many hours to plan our second hybrid PDT held in March 2024. More than 200 attended either in-person or virtually to receive 16 hours of CPE. Since the Chapter partners with the New Mexico Chapter to hold the annual

PDT, the biggest fluctuations in revenues and expenses are related to the PDT. In odd numbered years, the Albuquerque Chapter takes the lead in the planning process which includes the collection of all revenues and payment of all expenses associated with the event. Upon final reconciliation, any profits are split between the two chapters.

In 2024, other notable expenses included the purchase of webinars, which were then provided free to members and at a cost of \$10 to non-members. Additionally, we held a winter series with 3 hours of CPE at a cost of \$35 for members and \$50 for non-members. In 2023 the Winter series was a virtual event therefore the Chapter did not incur additional costs. In 2024, however, we conducted a hybrid Winter series and incurred some related expense.

One of the challenges of the Chapter is to encourage more members to undertake the challenge of becoming a CGFM. We offer up to \$500 to those that pass the CGFM exam series. The 2024 program year saw the program's first payout in many years!

Lastly, the Chapter normally sends two CEC members to the National PDT. The travel costs associated with the 2024 PDT held in Denver, CO were lower than those for the prior year in Orlando, FL.



The 2024 NM and Albuquerque Chapter PDT attendees

The Albuquerque Chapter Executive Committee reviews the monthly financial statements. To request detailed financial information on the chapter please reach out to us at aga.abq.chapter@gmail.com or carlanieto@cabq.gov

Looking to Next Year!

The Chapter ended the program year on a happy note with a platinum chapter award but the current program year brings many challenges. Our toughest challenges are typically related to recruiting new members and getting members more involved in Chapter leadership roles. Our goals for the 2024-2025 program year are as follows:

Goal 1: To provide a quality PDT with the New Mexico chapter and attendance in excess of 200; host another winter series.

Goal 2: Send membership survey to generate interest and involvement ; Recruit new student members and have them participate in our annual PDT

Goal 3: To have 3 - 5 new CGFMs during the program year; we are concentrating on employer groups to start a trend.

Goal 4: Partner with Lobo Cancer Challenge to participate in their 5k run/walk to benefit cancer research

Goal 5: Update and maintain the website and social media accounts in order to generate consistent messaging and com-



CEC members along with friends and family hard at work during a community service event benefiting Casa Esperanza.



Chapter Executive Committee (CEC)

| | |
|-------------------|--|
| President | <i>Emily Wilson, CPA, CFE</i> |
| President-Elect | <i>Carla Nieto, MAcc</i> |
| Treasurer | <i>Mari Hughes, MAcc, CGFM</i> |
| Secretary | <i>Ben Martinez, CPA</i> |
| Accountability | <i>Donna Sandoval, CGFM, CISA, CISM</i> |
| Awards | <i>Christopher Gregory, CPA</i> |
| | <i>Webmaster: Heather Prudhomme, CPA, CGFM, CGMA; Newsletter: Alan D. "AJ" Bowers Jr., CPA, CITP; Social Media/Email: Natalie Zamora</i> |
| Communications | <i>Jennifer Baca, CGFM, CFE & Sarah Specht, CPA, CFE, CGFM</i> |
| CGFM | |
| Community Service | <i>Kory Hoggan, CPA, CIA & Jeff Roybal, CPA</i> |
| Membership | <i>Krista Ganes-Chavez</i> |
| Historian | <i>Bryan Maestas</i> |
| | <i>Emily Wilson, CPA, CFE & Matt Bone, CPA, CGFM, CGMA</i> |
| Education | |
| Student | <i>Marisa Maestas</i> |

Visit our website [AGA Albuquerque](#) and help us in reaching our goals!

We meet the first Tuesday of every month at 5:30pm.

Contact us at
aga.abq.chapter@gmail.com or
carlanieto@cabq.gov to get involved in
AGA Albuquerque!