



A Report to Our Members Fiscal Year 2021-2022



Who Are We?

About AGA

AGA was founded as the Federal Government Accountants Association (FGAA) by Robert W. King and a group of federal government accountants on Sept. 14, 1950. AGA expanded in 1975 to include state and local government finance professionals. At that time, the organization's name was changed to the Association of Government Accountants (AGA). In 2022 the organization's name was changed to AGA.

About the AGA Baltimore Chapter

Robert King showed an interest in forming a Baltimore chapter in March 1957. The chapter was officially chartered as the 28th chapter in April-May 1958, with 40 members. Joseph F. Giza served as the first president.

Our Mission

The AGA Baltimore Chapter is a professional association advancing accountability, transparency and leadership by promotion education, certification, innovation and collaboration across all levels of government and to stakeholders within the Greater Baltimore Area.

Our Vision

The AGA Baltimore Chapter endeavors to be the premier association for advancing government accountability within the Greater Baltimore Area.

Our Values

AGA's core values include Service, Accountability, Integrity and Leadership (SAIL).

How We Are Organized

The AGA Baltimore Chapter is governed by a member-elected Chapter Executive Committee (CEC), which consists of our President, President-Elect, Immediate Past President, Secretary, Treasurer, and National Council of Chapters Representative. Our committees include Membership, Education & Meetings, CGFM/Professional Certification, Strategic Vision, Accountability, Activities, Awards, Bylaws & Procedures, and Sponsorship.

Our Strategic Goals

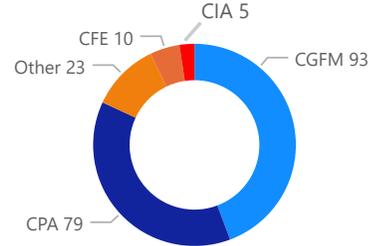
- 1) To provide comprehensive professional training, education, and development opportunities for chapter members and the government financial community.
- 2) To implement a plan to achieve 90% retention rate of current chapter members and increase new membership.

2021-2022 Demographic Snapshot

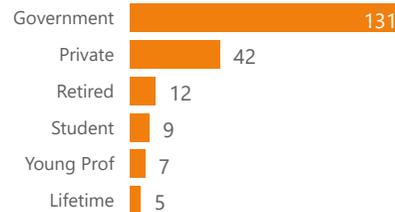
206

Total Members

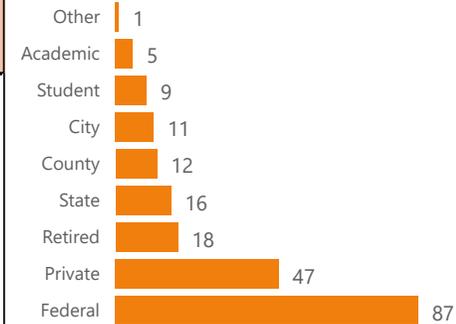
Certifications



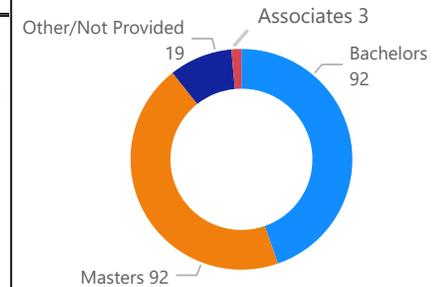
Member Type



Employer Type



Education Level



2021-2022 Services & Activities

From September 2021 through June 2022, we:

- Held 10 monthly virtual board meetings to plan events and vote on matters.
- Maintained our NASBA accreditation as a CPE sponsor.
- Held 9 monthly training sessions totaling 26 CPEs.
- Announced events via social media, emails, local website, and national website.
- Provided \$1000 Scholarships to three local college students - Kelsey Goff, Stevenson University; Richard Adams, Towson University; and Brianna Ditzler, Loyola University.
- Donated \$100 to the PDT National Community Service Fund and \$100 G&M gift card to the PDT Silent Auction. G&M is a local place in the Baltimore area known for their delicious crab cakes.
- Donated to Wreaths Across America - \$150.

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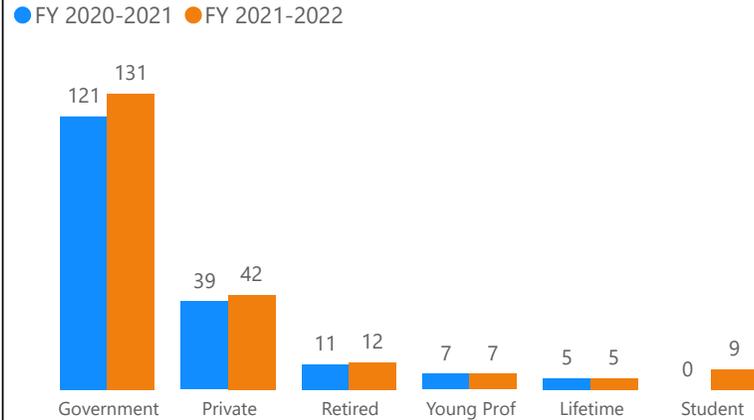
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How Are We Doing?

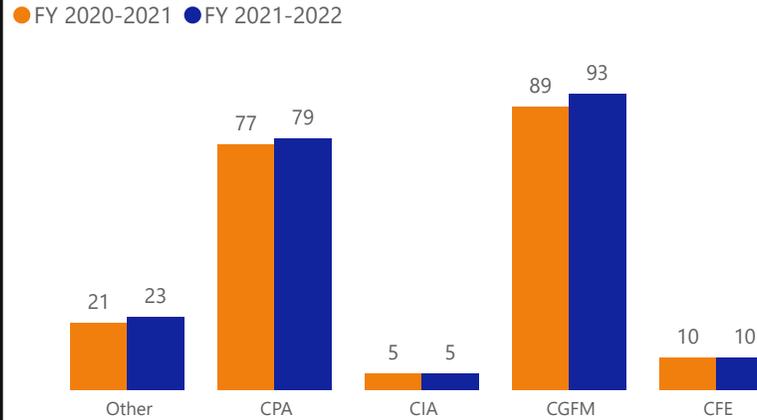
FY2020-2021 versus FY2021-2022 Key Service Areas, Performance & Trends

Recent Accomplishments for Non-Financial Outcomes

Member Type Trend



Certification Type Trend



In FY 2021-2022, the AGA Baltimore Chapter was recognized as a **Gold Chapter** for the **Achievements in Chapter Excellence Award!**



Progress Towards Strategic Goals

We provided comprehensive professional training, education, and development opportunities for chapter members and the government financial community by hosting 9 monthly training sessions totaling 26 CPEs.

- In December 2021 we partnered with the Central Maryland Chapter of ISACA to host a joint meeting offering 3 CPEs on Cybersecurity, Certification, and Ransomware.
- In January 2022, we partnered with the Fort Meade Chapter of the American Society of Military Comptrollers (ASMC) to host a joint meeting offering 2 CPEs on Ethics and Leadership.
- In May 2022, we held our first all day hybrid 8-hr CPE Fraud and Ethics conference at the Maritime Conference Center.
- All other months we provided 2 – 4 hours of CPEs.
- Throughout the year we heard from Cotton & Company, Department of Homeland Security, Social Security Administration, U.S. Customs and Border Protection, RMA Associates, LLC, Coalfire Federal, AGA National Representatives, KPMG LLP, BCA Watson Rice LLP, CliftonLarsonAllen LLP, GAO, Small Business Administration, and AICPA.

We implemented a plan to achieve 90% retention rate of current chapter members and increased new chapter membership by nearly 13%, bringing us from 183 to 206 members!

- We saw the largest increase in memberships from our Students and Government member types.
- We had an increase in the number of CGFM and CPA certifications in our chapter!

Additionally, Scot Cogburn, a member of our chapter received the **2021-2022 Volunteer of the Year Award** at the National AGA PDT held in Anaheim, California in July 2022!



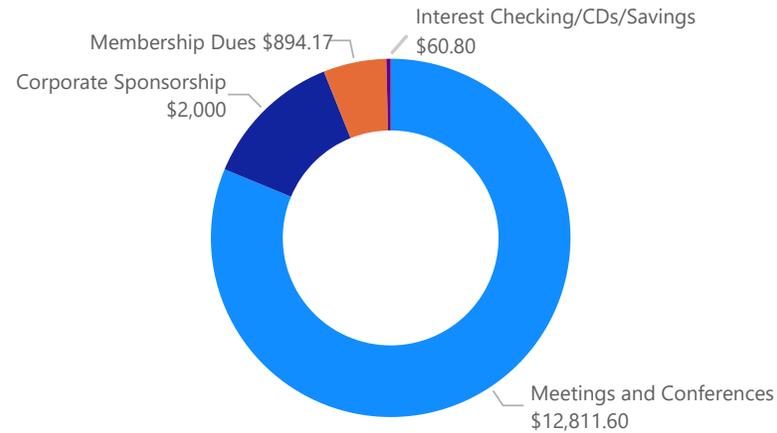
What Are The Revenues & Expenses?

FY 2021-2022 Revenues - Trends & Explanation of Changes

Revenues by Source, Comparison

Revenues	FY 2019-2020	FY 2020-2021	FY 2021-2022
Meetings and Conferences	\$5,619.00	\$ 8,347.00	\$12,811.60
Corporate Sponsorship	6,000.00	10,000.00	2,000.00
Membership Dues	1,054.00	1165.00	894.17
Interest Checking/CDs/Savings	263.00	51.00	60.80
CGFM Training	0.00	0.00	0.00
Miscellaneous Proceeds	0.00	0.00	0.00
Total	\$12,936.00	\$19,563.00	\$15,766.57

FY 2021-2022 Revenue By Source, in Dollars (\$)



The financial data provided is for the Fiscal Year 2021-2022 and is presented on a cash basis. During this year, our revenues have exceeded our expenses. This is as a result of hosting more events in the virtual setting due to COVID-19 restrictions, resulting in less money spent on education programs and meeting/conferences, such as identifying more free speakers, including our sponsors and taking advantage of opportunities to partner with other professional organizations to host events.

Additionally, we do show a significant decrease in corporate sponsorship, membership dues, and education programs/meetings/conferences but this is due to a lag in deposits and pay out of expenditures during the pandemic and transition process. Thus, these proceeds and expenditures have been captured on the Fiscal Year 2022-2023 financial information. Our Fiscal Year 2021-2022 sponsors included KPMG LLP, Grant Thornton LLP, and Kearney & Company, PC.

As we have begun to re-introduce in-person events for Fiscal Year 2022-2023, our goal is to ensure our events remain within our budget and our expenses do not exceed our revenues. Based on the excess funding received, we plan to increase our scholarship awards during Fiscal Year 2022-2023 to benefit local colleges and universities in the Greater Baltimore area and we plan to host an end of year holiday party in December 2022, with an opportunity to support a Can Food Drive and Marine Toys for Tots initiative.

To demonstrate accountability for our chapter finances, the Treasurer submits monthly reports to the CEC, who then submits our yearly revenues and expenses for a review by another AGA Chapter. For the review of our Fiscal Year 2021-2022 financial information, the AGA Dallas Chapter is currently conducting this review and it has not yet been completed. Based on prior reviews done by the AGA Dallas chapter, we have received a clean review with no issues or recommendations to be addressed.

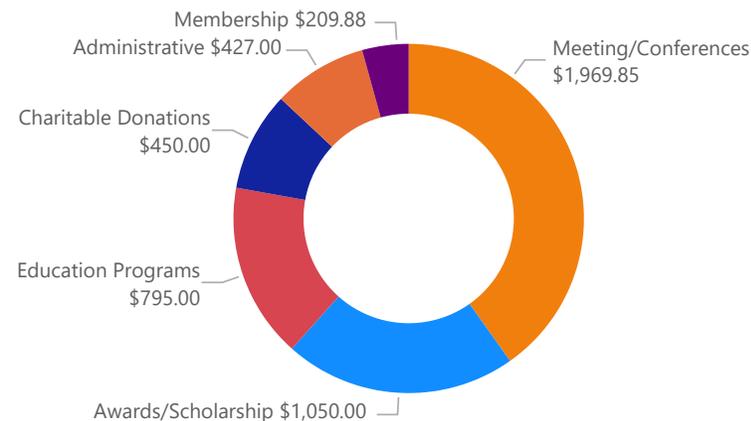
Visit [AGA Baltimore Chapter \(agacgfm.org\)](http://agacgfm.org) for more information!

FY 2021-2022 Expenses - Trends & Explanation of Changes

Expenses by Source, Comparison

Expenses	FY 2019-2020	FY 2020-2021	FY 2021-2022
Meeting/Conferences	\$ 8,464.00	\$ 150.00	\$1,969.85
Awards/Scholarship	2,071.00	1,855.00	1,050.00
Education Programs	795.00	7,020.00	795.00
Charitable Donations	689.00	550.00	450.00
Administrative	219.00	0.00	427.00
Membership	1,120.00	0.00	209.88
Director Expenses	545.00	0.00	0.00
Other (i.e Web, CGFM)	1,151.00	0.00	0.00
Total	\$15,054.00	\$9,575.00	\$4,901.73

FY 2021-2022 Expenses By Source, in Dollars (\$)



What's Next?

Challenges & Priorities

Our current challenges include:

- Lack of communication with AGA National to learn and use all resources available to our local chapter
- Inadequate communications due to emails going to our local chapter members spam/junk/quarantine folders or changing jobs without updating their email addresses
- Inconsistent communication to members on the value of their AGA membership and CGFM
- Lack of outreach to keep sponsors engaged
- Low attendance at our virtual CPE trainings and strained resources to run CPE meetings
- Technological issues hosting virtual and hybrid meetings
- Lack of in-person networking and community service opportunities during the ongoing COVID-19 pandemic
- Lack of involvement within colleges and universities to build the pipeline within AGA and the government industry
- Lack of engagement and commitment of our local chapter members, as well as our Chapter Executive Committee

To address these challenges, our primary goals for the 2022-2023 Program Year include:

- Enhance communication with AGA National
- Create an AGA Baltimore Chapter domain email (Done! Our email is: info@agabaltimore.com)
- Provide alternative ways to offer great values to our members
- Enhance awareness of the benefits and importance of the CGFM designation (Started monthly CGFM Tuesday social media posts)
- Engage and increase AGA Baltimore Chapter sponsors
- Collaborate with other AGA chapters and professional organizations via multi-chapter events (See FY23 past events!)
- Shift from monthly trainings and offer three quarterly 8-hour day CPE training sessions (See FY23 past events!)
- Streamline our CPE certification process through the shift from Go-to-Meetings Webinar to Zoom and Conferences
- Host in-person networking and community service events (see FY23 past events!)
- Develop and/or support student AGA chapters at colleges and universities (see FY23 past events! We have also reached out to other Baltimore-area universities)
- Consistently recruit new members to the AGA Baltimore Chapter, as well as our Executive Committee (Our FY23 board consists of 8 so far!)

Changes in priorities:

- Due to the COVID-19 pandemic, we were unable to host many of our in-person events. Therefore, a priority this year will be to safely re-engage our in-person initiatives as the workforce has moved to more in-person and hybrid events. Additionally, to re-establish our personal contacts and connections with our colleges and universities through presence at on-campus events and community service.

Key Leaders - Contact List



Renée Rawlins, CPA, CGFM - Current Chapter President

- Email: reneerawlins@kpmg.com
- Phone: 202-533-3341



Angela Rice Shields - Immediate Past President

- Email: mdterpcpa@gmail.com
- Phone: 410-490-9631



Amanda Merlino - Chapter Accountability Director

- Email: amerlino@kpmg.com
- Phone: 917-763-3010

Useful Links & Upcoming Events

FY2022-2023 Past Events Held:

- Hosted a Multi-Chapter Picnic with the Montgomery County/Prince George's County, District of Columbia, and Northern Virginia Chapters on September 10, 2022.
- Attended the Loyola University Maryland Meet the Firms Event on September 14, 2022.
- Held our first quarterly CPE session covering Accounting & Audit Updates on September 14, 2022.
- Attended a Stevenson University Accounting Fair with AGA National on September 27, 2022.
 - Organized the Happy Helpers Community Service Initiative on October 10, 2022.
- Presented to the University of Maryland Baltimore Campus with AGA National on October 13, 2022.

Our upcoming events include:

- Holiday Party, Can Food Drive & Marine Toys for Tots Initiative on December 15, 2022 (tentative)
- Quarterly CPE discusses Emerging Trends, Tools, and Technologies on February 15, 2023 (virtual)
 - Quarterly CPE discusses Fraud and Ethics on May 17, 2023 (hybrid)

Visit [AGA Baltimore Chapter \(agacgfm.org\)](https://agacgfm.org) for more information on our Chapter! We want to hear from you! How do you like our report? Should it include other information? Please let us know at info@agabaltimore.org. Don't forget to follow us on social media!!!

AGA Baltimore Chapter



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