

Association of Government Accountants Southern Wisconsin Chapter

A Report to Our Members 2012-2013

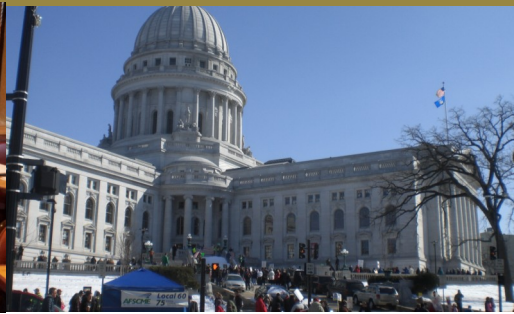


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Mission

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

**Government accountability: A government's obligation to the people for its actions and use of resources.*

Core Values

Service, Accountability, Integrity, and Leadership (SAIL)

About the Association of Government Accountants

The Southern Wisconsin Chapter of the Association of Government Accountants (AGA) is one of 100 chapters across the United States. The AGA has over 15,000 members worldwide.

The AGA has been around since 1950, originally founded as the Federal Government Accountants Association (expanded to include state and local government financial professionals in 1975). Our Chapter was chartered in February, 1966, with 19 members.

How the Chapter Operates

The Chapter is governed by a Chapter Executive Committee (CEC) consisting of officers (President, Past President, President Elect, Treasurer, and Secretary) and Directors (Education, Membership and Early Careers, Historian, Newsletter Editor, Webmaster, Community Service, CGFM, and general). The CEC meets monthly to conduct chapter business and plan chapter educational events. We

operate on a local level, but under the AGA National umbrella.

One of the core principles for AGA is community service. Our Chapter participates in the local community through service hours, donations, and fundraisers at lunch meetings.

To accomplish the Chapter mission, the Southern Wisconsin Chapter provides inexpensive educational opportunities to our members and other professionals in the government community. We search out a diversity of topics that will interest the target community and qualify for continuing professional education (CPE).

In May 2013, the AGA National Office sponsored two Chapter leaders to travel to Louisville, Kentucky for a Sectional Leadership Meeting to discuss the challenges facing AGA chapters at the local level and discuss objectives at the national level. These leaders brought ideas back to the local chapter from National office and Chapters across the North Central Region and Sections 1 and 2.

Selected Demographics

	2012	2013
Number of Members	78	93
Number of Certified Government Financial Managers (CGFM)	31	31
Members Working in State Government	47%	52%
Members Working in Local Government	20%	18%

How We Have Progressed

Fiscal year 2013



AGA Southern Wisconsin Selected Performance Measures

2013 Accomplishments

- The Chapter provided 23 CPE hours that qualify under the CGFM guidelines.
- The Chapter continued our tradition of offering affordable, high quality education events.
- The Chapter earned the Platinum level under the Chapter Recognition Program.
- The Chapter adopted and implemented a formal policy for CGFM study guide checkout and exam reimbursement.
- One CGFM reimbursement was made for a new CGFM candidate who passed all 3 parts and is finishing the work experience required to earn the credential.

	2011 Actual	2012 Actual	2013 Actual
Training			
Total CPE hours offered (qualifying for CGFM designation)	15	20	23
Annual Tax Lunch Attendance	41	32	27
Annual Symposium Attendance	155	165	182
Annual Symposium Evaluations:			
Training Topics Rated Good or Higher	89.5%	95.4%	92.2%
Event Speakers Rated Valuable or Higher	77.1%	74.1%	81.4%
Membership			
Membership Count at Close of Program Year	79	78	93
New members joining during program year	7	10	16
Members with CGFM Designation (including CGFM-retired status)	35	31	31
Other			
Volunteer Income Tax Assistance Hours	180.5	153.5	159.5
Chapter Recognition Level Earned	Gold	Platinum	Platinum

The Chapter will set performance targets to use in better comparing target to actual performance data for the 2014 Report to Members.

The Annual Symposium, our main CPE event of the year and largest revenue generator, continues to be successful. 2013 marks the 36th year of the event. We take great pride in having held the event fees steady since 2006 (\$35 for member and \$70 for non-members).

The measures reported on this page were included based on the input we received from a group of members. What would you like to see reported on this page? Please let us know by contacting sherri2_voigt@dot.wi.gov.

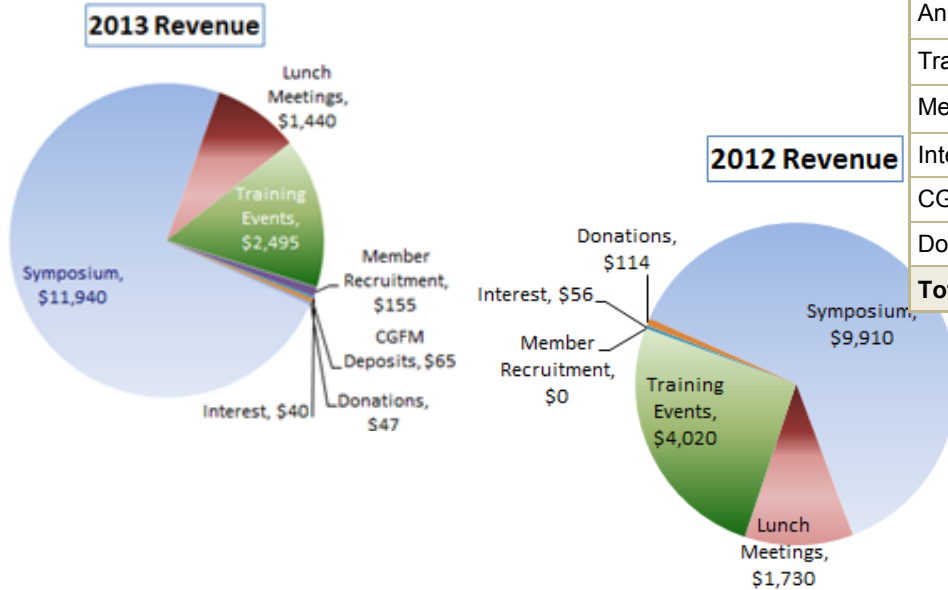
Our Finances

Revenues and Expenditures

What are the costs for serving the membership/government accountability community and how are those costs paid?

The Chapter operates a checking account to handle all transactions.

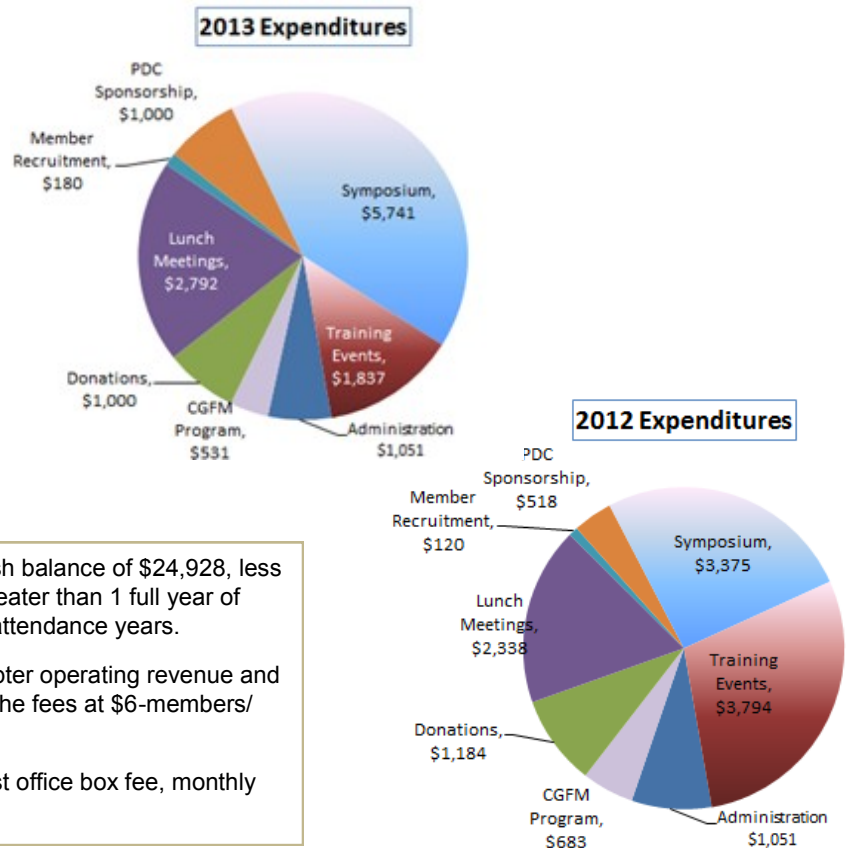
Revenue by Source



Chapter Revenues	2011	2012
Monthly Lunch Meetings	\$1,730	\$1,440
Annual Symposium	9,910	11,940
Training Events	4,020	2,495
Member Recruitment	0	155
Interest on Bank Account	56	40
CGFM Book Deposits	0	65
Donations at Lunches	114	47
Total Chapter Expenditures	\$15,830	\$16,182

Expenditures by Category

Chapter Expenditures	2012	2013
Monthly Luncheon Meetings	\$2,338	\$2,792
Annual Symposium	3,375	5,741
Training Events	3,794	1,837
Community Service Donations	1,184	1,000
Chapter Administration	1,051	865
Member Recruitment Efforts	120	180
PDC Sponsorship	518	1,000
CGFM Program	683	531
Total Chapter Expenditures	\$13,063	\$13,946



- ◆ The Chapter began the 2013 program year with a cash balance of \$24,928, less outstanding checks of \$1,508.. The goal is to keep greater than 1 full year of operating budget on hand to cover costs for any low attendance years.
- ◆ The Annual Symposium brings in the bulk of the Chapter operating revenue and is used to subsidize monthly lunch meetings to keep the fees at \$6-members/ \$12-non-members.
- ◆ The Chapter Administration category includes the post office box fee, monthly board meeting dinners, bank fees, and the web site.

What's Next

Challenges and Opportunities



March
is
CGFM
Month
2013

We want to hear from you.

Do you like this report? Would you like to see other information? Please let us know by contacting Sherri Voigt at: sherri2.voigt@dot.wi.gov. For more information on our services and calendar of events, visit our website at www.aga-wis.org.

Hold the Date!

The Annual Symposium
will be held at Union South

Thursday, May 8, 2014

Contact Information:

Southern Wisconsin AGA
PO Box 1454
Madison, WI 53701-1454

Chapter web site: www.aga-wis.org
National web site: www.agacgfm.org



Growing Our Chapter— Recruiting and Retention

- ◆ Membership levels have been decreasing over the past few years, due to retirements and the effect of economic conditions on personal budgets. The Chapter must reach out to members and increase retention efforts. We had a slight increase this year based on increased member recruitment programs.
- ◆ The Chapter needs to find ways to engage members and create value in membership to encourage continued membership renewals.

Building the Certified Government Financial Manager (CGFM) Designation

- ◆ Promote the CGFM to members and the general government accountability community.
- ◆ Build upon the success of the new policies for the lending library of

CGFM review books and CGFM exam reimbursement advertise their availability to members.

- ◆ Actively follow up with exam candidates to encourage study groups, note sharing, and targeting exam scheduling so the eligibility period does not expire.
- ◆ Create goals to increase CPE opportunities offered by the Chapter to meet at least half the annual requirements for maintaining the CGFM designation.

Fostering Accountability

- ◆ The process continued with this third member centric report for our chapter.
- ◆ Moving forward, we want to encourage other entities in our area to prepare Citizen Centric Reports. We will create plans to partner with local governments/other entities to help them prepare an easy-to-read, four-page report of performance and finances to their constituents.



2013 Chapter Social



July,
2013
PDC
Dallas