



Association of Government Accountants Southern Wisconsin Chapter

A Report to Our Members 2013-2014



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Vision

AGA is the premier association for advancing government accountability

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 1 over 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 values 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 2014, the AGA National Office sponsored two Chapter leaders to travel to Baltimore, Maryland 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

	2013	2014
Number of Members	93	90
Number of Certified Government Financial Managers (CGFM)	31	33
Members Working in State Government	52%	51%
Members Working in Local Government	18%	18%

How We Have Progressed

Fiscal year 2014



SOUTHERN
WISCONSIN
CHAPTER

AGA Southern Wisconsin Selected Performance Measures

2014 Accomplishments

- The Chapter provided 20.5 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 purchased a set of the new CGFM study guides for use by members studying for the exam.
- The Chapter partnered with 4 separate state agencies to offer AGA web conference trainings during the year.

	2012 Actual	2013 Actual	2014 Actual
Training			
Total CPE hours offered (qualifying for CGFM designation)	20	23	20.5
Annual Tax Lunch Attendance	32	27	23
Annual Symposium Attendance	165	182	132
Annual Symposium Evaluations:			
Training Topics Rated Good or Higher	95.4%	92.2%	92.6%
Event Speakers Rated Valuable or Higher	74.1%	81.4%	77.0%
Membership			
Membership Count at Close of Program Year	78	93	90
New members joining during program year	10	16	7
Members with CGFM Designation (including CGFM-retired status)	31	31	33
Other			
Volunteer Income Tax Assistance Hours	153.5	159.5	133.0
Chapter Recognition Level Earned	Platinum	Platinum	Platinum

The Chapter is exploring performance targets to use in better comparing target to actual performance data for the 2015 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 in this page? Please let us know by contacting sherri2_voigt@dot.wi.gov.

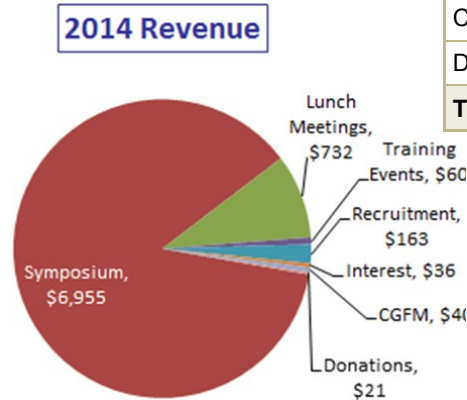
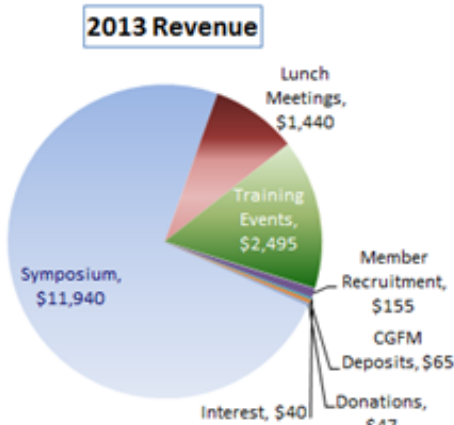
Our Finances

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.

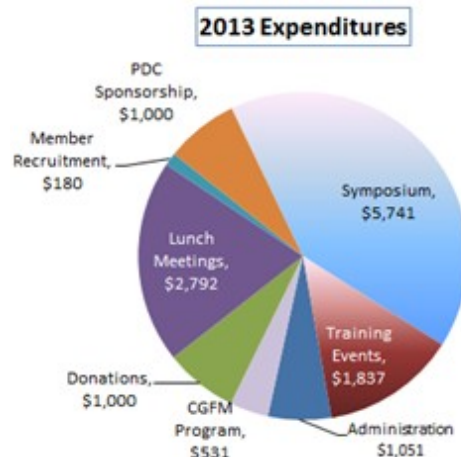
Revenue by Source



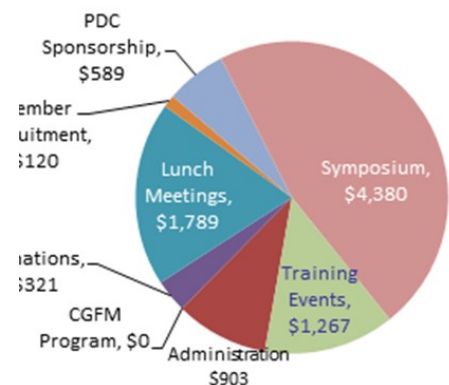
Chapter Revenues	2013	2014
Monthly Lunch Meetings	\$1,440	\$732
Annual Symposium	11,940	6,955
Training Events	2,495	60
Member Recruitment	155	163
Interest on Bank Account	40	36
CGFM Book Deposits	65	40
Donations at Lunches	47	20
Total Chapter Expenditures	\$16,182	\$8,006

Expenditures by Category

Chapter Expenditures	2013	2014
Monthly Luncheon Meetings	\$2,792	\$1,789
Annual Symposium	5,741	4,380
Training Events	1,837	1,267
Community Service Donations	1,000	321
Chapter Administration	865	903
Member Recruitment Efforts	180	120
PDC Sponsorship	1,000	589
CGFM Program	531	0
Total Chapter Expenditures	\$13,946	\$9,369



2014 Expenditures



- ◆ The Chapter began the 2014 program year with a cash balance of \$25,675. 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 web site fees.

What's Next

Challenges and Opportunities



March
is
CGFM
Month
2014

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

Tuesday, May 12, 2015

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



Grow Our Chapter— Recruiting and Retention

- ◆ Membership levels have been decreasing due to retirements and the effect of economic conditions on personal budgets. The Chapter must reach out to members and expand member recruitment programs.
- ◆ The Chapter needs to find ways to engage members and create value in membership to encourage continued membership renewals.
- ◆ The Chapter needs to reach out the government accountability community to find education topics that will both build attendance and better serve training needs.

Build the Certified Government Financial Manager (CGFM) Designation

- ◆ Promote the CGFM to members and the general government accountability community.

- ◆ 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.

Foster Accountability

- ◆ The process continued with this fourth 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.



November 2013 Web
Conference

Backpack
collection
for
Salvation
Army Fall,
2014

