



## Message from the President



Hello everyone! It is hard to believe the program year has nearly finished. Please check out our [Event Calendar](#) to see the great educational events we have coming up. For the remainder of the program year, all events produced by AGA National will be online only. Locally produced events will follow a hybrid model, where individuals can attend online or in-person at ASU SkySong.

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On March 23rd, we had our Cybersecurity/ERM event. On April 20th, we will have the AGA National event, [CARES Act](#). Our annual [Professional Development Training \(PDT\)](#) will be held on April 29th. The PDT is worth 8 CPE credits and can be attended virtually or in-person.

We are always happy to hear from our Chapter members! We regularly check our event feedback, and we are constantly working to improve. If you are not already signed up, we encourage you to register for our Chapter's [Amazon Smile](#) account. At no cost to you, 0.5% of every purchase you make on Amazon can go towards supporting the Phoenix Chapter!

If you are not a member of the AGA, or let your renewal lapse, and are interested in joining, just go to the [AGA website](#), and click join or renew. I would like to welcome our newest member, Angela Estrada. We are happy to have you join! There are many membership benefits, such as free study materials for the CGFM exams as well as discounted CPE events. We are also always looking for interested individuals to consider joining our Chapter's Board. I can personally attest to it being an excellent professional opportunity!

I would like to welcome our newly appointed program year 2022-2023 members! **President:** Nicole Martinez, **Vice-President:** Amber Hill, **Treasurer:** Michal-Anne Miller, and **Secretary:** Joshua Jumper.

The Chapter Board is also always available if you have any questions or concerns. We have listened to the feedback we have gotten on our most recent survey. We will offer both online and in-person events, when possible, to meet all preferences. I am looking forward to the great learning opportunities that the remainder of this program year brings!

Sincerely,

Jordan Dale, CGFM  
 President of the AGA Phoenix Chapter

## AGA Phoenix Chapter Executive Board Program Year 2021-2022

**PURPOSE:** Consists of chapter officers, past president, committee chairs, and other members appointed by the chapter president. Responsible for all chapter business and planning.

**OFFICERS:**

President	Jordan Dale, CGFM
Past President	Michelle Huckabay, CGFM, CPA
Vice President	Michael D. Baumert, CPA
Secretary	Joshua Jumper, CGFM
Treasurer	Marvin Mendieta, CGFM, CPA

**ADDRESS:** AGA Phoenix Chapter, PO Box 64911  
Phoenix, AZ 85082-4911

**EMAIL:** [contact@agaphoenix.org](mailto:contact@agaphoenix.org)

## Our Purpose

### Mission Statement

AGA Phoenix Chapter serves Arizona professionals in the government financial management community by providing quality, low-cost continuing education, promoting professional development and interaction among members, and fostering a commitment to community involvement as well as a sense of responsibility for advancing government accountability.

### Vision

AGA Phoenix Chapter actively creates an avenue for membership to share ideas with each other, to share knowledge and time with the community, and to promote the advancement of government standards and accountability within the profession.

## We'd Love Your Input!

Please remember to send in any articles of interest, including any that you may have written on the subjects of management, accounting, or auditing. We welcome your comments and suggestions.

In addition, please send us any special announcements in relation to promotions, marriages, births, anniversaries, certifications achieved, or any other significant event for any of our chapter members. Any article submitted by the second week of the month will be included in the next month's newsletter.

Please email your news for forthcoming newsletters to:

[contact@agaphoenix.org](mailto:contact@agaphoenix.org)



## Goals for 2021-2022 and Beyond

### • Membership & Education:

- Provide 42 education credits throughout the program year. Audio conferences and live speakers.
- Reach out to new members within first month of membership.
- Reach out to all non-renewing members in May/June.
- Provide social/recruiting event in spring.
- Send out survey to members annually.
- Provide student members the option to attend three meetings for free.

### • Accountability:

- ✓ • Prepare chapter's Citizen Centric Report (CCR) by September 30, 2021 and post to website.
- Submit chapter's CCR to AGA's Certificate of Excellence Review Program.

### • CGFM Goals:

- Continue reimbursements for chapter members who pass all three sessions of the CGFM tests. Reimbursement includes the cost of the three exams and application fee.
- Communicate and promote CGFM designation to Chapter members.
- Provide CGFM study guides to members on a first come first serve basis. Purchase two new sets this year.
- Seek State proclamation for March as CGFM month and provide recognition to CGFM members.

### • Young Professionals:

- Reach out to college accounting clubs to present about jobs in governmental accounting and discuss what AGA is and how it can impact students' careers.
- Annually award up to two scholarships for students enrolled in an Accounting, Finance or Public Administration curriculum.

2021 & 2022 Budget and Spend through 2/28			
Budget Category	'21 Spent	'22 Budget	'22 Spent
Education	\$10,157.41	\$15,109	\$6,823.37
Membership	\$1,225	\$1,250	\$0
Travel	\$0	\$1,000	\$0
Board Expenses	\$0	\$100	\$0
Scholarship	\$1,500	\$1,500	\$0
CGFM	\$0	\$1,000	\$445
Com. Service	\$250	\$500	\$0
Early Career	\$0	\$250	\$0
Audit	\$150	\$150	\$150
Misc.	\$223	\$200	\$22
<b>Total</b>	<b>\$13,505.41</b>	<b>\$21,059.00</b>	<b>\$7,440.37</b>

### PY 2021-2022 Committee Members:

#### *Accountability*

- Kimberly Prendergast, CGFM, CPA

#### *CGFM/Professional Certification*

- Gergana Kovatcheva, CGFM, CPA
- Jordan Dale, CGFM
- Kelly Alkhoury, CGFM

#### *Communications Committee*

- Jordan Dale, CGFM (Webmaster)
- Myrna Lopez, CGFM, CPA (Newsletter)

#### *Community Service*

- Paola A. Julio De Matson

#### *Education*

- Gerald E. Snyder, CGFM-Retired
- Keith J. Orr, CGFM
- Michael D. Baumert, CPA
- Robert Hardwood, CPA

#### *Membership*

- Mary B. Adelman, CGFM, CPA

#### *NCC Representative*

- Kelly Alkhoury, CGFM

#### *Programs*

- Daniela Kunova
- Michelle Huckabay, CGFM, CPA

#### *Young Professionals*

- Getzamany Aragon
- Joshua Jumper, CGFM

## Events & Reminders

### Upcoming Events:

- AGA National will be offering the following events/webinars:
  - **2022 Performance Improvement Officer/Chief Financial Officer Summit (PIO/CFO Summit) on May 12, 2022. \*FREE for AGA Members\***  
**Description:** Hundreds of PIOs, CFOs and other government officials, managers and analysts attend the PIO/CFO Summit each year to discuss the policies that impact and call for greater collaboration between the federal financial management, evidence and performance communities. For a full description and to find out more, click [here](#).
  - **Enterprise Risk Management (ERM) Workshop on June 15, 2022**  
**Description:** This event provides participants with practical insight from Enterprise Risk Management (ERM) leaders. The integration of ERM is essential for the maturation of the ERM environment. Sessions will include integration of ERM with reporting, cybersecurity, collaboration strategies and enterprise-wide activities. For a full description and to find out more, click [here](#).
  - **AGA's Professional Development Training PDT 2022 on July 17-20, 2022**  
**Description:** PDT brings together a broad audience of more than 2,000 federal, state and local government financial professionals, including federal, state and local government CFOs, inspectors general, accountants, auditors as well as financial professionals from the private sector. For a full description and to find out more, click [here](#).

### Reminders:

- **AGA's Recruitment Challenge – Everyone Get One!**
  - AGA's target for the 2021-2022 membership year is to recruit 2,022 new members **by April 30, 2022**. For a full description and to find out more, click [here](#).



#### **CGFM Study Resources Available:**

For AGA members interested in taking the CGFM please contact our CGFM chair at [cgfm@agaphoenix.org](mailto:cgfm@agaphoenix.org) for more information. Currently there is 3 complete set of materials available for check out.

Also, successful CGFM candidates, who are members, can apply for reimbursement of the application and examination costs.

Contact our CGFM chair for step by step instructions on the CGFM process: [contact@agaphoenix.org](mailto:contact@agaphoenix.org).

### Education & Meeting Plan - 2021-2022 Program Year

<b>Date</b>	<b>Event Type/Times</b>	<b>Topic</b>	<b>CPE Credit</b>	<b>Registration Deadline</b>	<b>Location</b>
9/8/2021	<i>Chapter Meeting (Audio)</i> Meeting: 11:00am-12:50pm Board Meeting 1:00pm-2:00pm	Communications	2	9/3/2021	Virtual
10/6/2021	<i>Chapter Meeting (Audio)</i> Meeting: 11:00am-12:50pm Board Meeting 1:00pm-2:00pm	Internal Control	2	10/1/2021	Virtual
11/3/2021	<i>Chapter Meeting (Live)</i> Meeting: 12:00pm-1:50pm Board Meeting 2:00pm-3:00pm	Effective Interview and Communication Techniques	2	10/29/2021	Virtual
12/15/2021	<i>Chapter Meeting (Audio)</i> Meeting: 12:00pm-1:50pm Board Meeting 2:00pm-3:00pm	Performance Management	2	12/3/2021	Virtual
1/12/2022	<i>Chapter Meeting (Live)</i> Lunch: 11:30am-12:00pm Meeting: 12:00pm-1:50pm Board Meeting 2:00pm-3:00pm	Uniform Guidance	2	1/7/2022	Virtual
1/28/2022	<i>Special Event*</i> Class: 8:30am-12:00pm	Professional Ethics for AZ CPAs	4	1/23/2022	Virtual
2/2/2022	<i>Chapter Meeting (Audio)</i> Meeting: 12:00pm-1:50pm Board Meeting 2:00pm-3:00pm	GASB Update	2	1/28/2022	Virtual
2/25/2022	<i>Chapter Meeting (Live)</i> Lunch: 11:30am-12:00pm Meeting: 12:00pm-3:30pm	Tax & Retirement Updates: ASRS, Nationwide Deferred Comp, IRS, AZDOR	4	2/20/2022	ASU SkySong 1 Room 201 1475 N. Scottsdale Rd. Scottsdale, AZ 85257

<b>Education &amp; Meeting Plan - 2021-2022 Program Year</b>					
<b>Date</b>	<b>Event Type/Times</b>	<b>Topic</b>	<b>CPE Credit</b>	<b>Registration Deadline</b>	<b>Location</b>
3/2/2022	Chapter Meeting (Audio) Meeting: 12:00pm-1:50pm Board Meeting 2:00pm-3:00pm	Improper Payments	2	2/25/2022	Virtual
3/23/2022	Chapter Meeting (Audio) Lunch: 10:30am-11:00am Meeting: 11:00am-12:50pm Board Meeting 1:00pm-2:00pm	Cybersecurity/ERM	2	3/18/2022	Virtual
4/6/2022	Chapter Meeting (Audio) Meeting: 11:00am-12:50pm Board Meeting 1:00pm-2:00pm	Ethics	2	4/1/2022	Virtual
4/20/2022	Chapter Meeting (Audio) Meeting: 11:00am-12:50pm	CARES Act	2	4/15/2022	Virtual
4/29/2022	Special Event*/ Professional Development Training 8:00am - 4:30pm	Professional Development Training	8	4/24/2022	ASU SkySong 3 130 Synergy I 1365 N. Scottsdale Rd. Scottsdale, AZ 85257
5/11/2022	Chapter Meeting (Audio) Meeting: 11:00am-12:50pm Board Meeting 1:00pm-2:00pm	Fraud/Data Analytics	2	5/6/2022	Virtual
6/8/2022	Chapter Meeting (Audio) Meeting: 11:00am-12:50pm Board Meeting 1:00pm-2:00pm	Leadership	2	6/3/2022	Virtual
		<b>Total Program Year CPEs</b>	<b>40</b>		

\* These events are not monthly chapter meetings and will be at an additional cost. Details will be provided in future newsletters and/or on the Calendar of Events page on our website (<http://www.agaphoenix.org/events/>).



## Check out AGA's Free Toolkits & Guides:

- Sub-recipient vs. Contractor Checklist
- Blended and Braided Funding
- Leveraging Government Resources in Challenging Financial Times
- Risk Assessment Monitoring Toolkit
- Cooperative Audit Resolution and Oversight Initiative
- Fraud Prevention Toolkit
- Candidate Assessment Toolkit for Grant Managers
- How Federal, State and Non-Profit Collaboration Improved Efficiencies in Delinquent Debt Collection
- Citizen Centric Report: How To

<https://www.agacgfm.org/Tools-Resources/Intergov/Home.aspx>

## Membership Referral Program

Did you know that you can gain \$50 if you get two individuals who are not currently members to join our chapter? All you have to do is have them put your name down on the sponsor section of the membership form.

It is always nice to have new faces become members to our growing organization!

## Board Members Wanted

If you are interested in volunteering for a committee and to be on the Board, please contact AGA at the following e-mail: [contact@agaphoenix.org](mailto:contact@agaphoenix.org)



Photo credit: Harald Felgner on VisualHunt.com

# We Are Always Looking for People Interested in Joining Our Organization

*NOTE: Excerpts and links below are from AGA's national website at [www.agacgfm.org](http://www.agacgfm.org).*

### What is AGA?

Briefly, AGA has been serving the government financial management profession for over 50 years. As a not-for-profit educational organization, AGA serves the professional interests of financial managers from the local, state and the federal governments, as well as public accounting firms, responsible for effectively using billions of dollars and other monetary resources everyday. Members are accountants, auditors, contract, financial and performance, budget analysts, chief financial officers, information systems managers, finance directors, inspectors

general, professors, students. Membership in AGA is like tapping into a reservoir of actual real-world knowledge and experience of government financial management experts.

### Benefits of Joining

If you asked a member which of the benefits they value the most, they probably would say education and networking, which often occur at the same time and place. Here are some of our members' favorites: Continuing Professional Education and Networking Opportunities Keep Up-to-Date on Current Issues Keep Abreast of the Latest Technologies and Financial Systems Professional Guidance and Certification

### How Can You Join?

Click the links below to access the Membership Application and to find out membership types and dues.



#### Click

<https://www.agacgfm.org/Membership/Learn-About-AGA/Join-or-Renew.aspx>

**to complete the online AGA Membership Application.**

\*\*Did an AGA member inspire you to join? Don't forget to enter your AGA Sponsor's Name and Member ID on the application\*\*