



## Message from the President



Hello everyone! It is hard to believe that we are already headed towards Spring. Please check out our [Event Calendar](#) to see the great educational events we have coming up. We plan to host virtual-only events for the remainder of the program year.

On February 3rd, we had the Audio GASB event, which was produced by AGA National. On February 26th, we had our Tax and Retirement Seminar. In total, we had 63 individuals attend the seminar. We will have [Audio Improper Payments](#) on March 3rd, which is produced by AGA National. On March 24th, we have another AGA National event, [Audio Cybersecurity](#). On April 7th, we will have [Kenny Kang – sponsored by PUN Group](#).

The ongoing COVID-19 pandemic has required our chapter to look for ways to deliver high quality CPE trainings online. We plan to continue to use Zoom as our primary platform for virtual events. 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, Patrick Dunn. 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!

As we look to continue with virtual-only events, I want to ensure you all that we are as dedicated as ever to providing quality educational events. The Chapter Board is also always available if you have any questions or concerns. While we have not been able to meet in person, I am so happy to see the high levels of turnout we have had for our educational events. Please be safe and enjoy the new year!

Sincerely,

Jordan Dale, CGFM  
 President of the AGA Phoenix Chapter

Inside this Issue:	
Message from the President	1
Executive Board Information, Purpose Statement	2
2020-2021 Goals & Budget	3
Events & Reminders	4
Education Plan	5-6
How to Join AGA	7

# AGA Phoenix Chapter Executive Board Program Year 2020-2021

- 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 | Matthew Turgeon              |
| 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 2020-2021 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, 2020 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.

2020 & 2021 Budget and Spend through 1/31			
Budget Category	'20 Spent	'21 Budget	'21 Spent
Education	\$12,436.12	\$15,109	\$2,409.00
Membership	\$680	\$750	\$0.00
Travel	\$700.60	\$1,000	\$0.00
Board Expenses	\$87.75	\$100	\$0.00
Scholarship	\$1,500	\$1,500	\$0.00
CGFM	\$1,332.25	\$1,000	\$0.00
Com. Service	\$250	\$500	\$250.00
Early Career	\$510.14	\$250	\$0.00
Audit	\$150	\$150	\$150.00
Misc.	\$184.25	\$200	\$10.00
<b>Total</b>	<b>\$17,831.11</b>	<b>\$20,559.00</b>	<b>\$2,819.00</b>

### PY 2020-2021 Committee Members:

#### *Accountability*

- Kim 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*

- Cindy Ensign

#### *Education*

- Jerry Snyder, CGFM, CPA
- Keith Orr, CGFM
- Michael Baumert, CPA
- Robert Hardwood, CPA

#### *Membership*

- Mary Adelman, CGFM, CPA

#### *NCC Representative*

- Kelly Alkhoury, CGFM

#### *Programs*

- Daniela Kunova
- Michelle Huckabay, CGFM, CPA

#### *Scholarship*

- Kelly Alkhoury, CGFM

#### *Young Professionals*

- Getzamany Aragon
- Joshua Jumper, CGFM

# Events & Reminders

## Upcoming Events:

- AGA National will be offering the following webinar: **2021 Performance Improvement Officer/Chief Financial Officer Summit (PIO/CFO Summit)** on **May 19, 2021**. Free for AGA members!
  - **Description:** Join the hundreds of PIOs, CFOs and other government officials, managers and analysts who 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. This training offers 4 CPE hours. To find out more about this event, click [here](#).

## Reminders:

- **Renew AGA Membership Early**
  - All AGA members who renew early are entered into a drawing for a free virtual PDT registration. Three lucky members who renew before **March 15** will be selected to attend AGA's premier training and network event. To renew, click [here](#).
- **Mentoring Program**
  - **Description:** We all have a responsibility to leave this world better than we found it and to have a positive impact on the next generation of government leaders. Mentoring is important, not only because of the knowledge and skills young professionals can learn from mentors, but also because mentoring provides professional socialization and personal support. To find out more about this opportunity, click [here](#).
- Don't forget to support the AGA Phoenix Chapter on **Amazon Smile!**
  - Go to [smile.amazon.com](https://smile.amazon.com) and select the Association of Government Accounts, Phoenix, Arizona as your charity. At no additional cost to you, 0.5% of the money from all of your Amazon transactions can be donated to the AGA Phoenix Chapter.



### **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 - 2020-2021 Program Year					
Date	Event Type/Times	Topic	CPE Credit	Registration Deadline	Location
9/9/2020	<i>Chapter Meeting (Audio) &amp; Lunch/</i> Lunch: 10:30am-11:00am Meeting: 11:00am-12:50pm	Audio Communications	2	9/4/2020	Virtual Meeting
10/7/2020	<i>Chapter Meeting (Live) &amp; Lunch/</i> Lunch: 10:30am-11:00am Meeting: 11:00am-12:50pm	Grant Thornton - GASB 87 Leases	2	10/2/2020	Virtual Meeting
11/4/2020	<i>Chapter Meeting (Live) &amp; Lunch/</i> Lunch: 11:30am-12:00pm Meeting: 12:00pm-1:50pm	Lealan Miller, Eide Bailly - Topic TBD	2	10/30/2020	Virtual Meeting
12/9/2020	<i>Chapter Meeting (Live) &amp; Lunch/</i> Lunch: 11:30am-12:00pm Meeting: 12:00pm-1:50pm	Brian Hemmerle, Henry + Horne - Fraud - Report to the Nations Update	2	12/4/2020	Virtual Meeting
1/13/2021	<i>Chapter Meeting (Audio) &amp; Lunch/</i> Lunch: 11:30am-12:00pm Meeting: 12:00pm-1:50pm	Audio Uniform Guidance	2	1/8/2021	Virtual Meeting
*1/22/2021	<i>Special Event*/</i> Continental Breakfast: 8:00am-8:30am Class: 8:30am-12:00 pm	Professional Ethics for AZ CPAs	4	1/15/2021	Virtual Meeting
2/3/2021	<i>Chapter Meeting (Audio)</i> Meeting:12:00pm-1:50pm	Audio GASB Update	2	1/29/2021	Virtual Meeting
2/26/2021	<i>Chapter Meeting (Live)</i> Meeting: 12:00pm-3:30pm	Tax & Retirement Updates: ASRS, Nationwide Deferred Comp, IRS, AZDOR	4	2/19/2021	Virtual Meeting
3/3/2021	<i>Chapter Meeting (Audio)</i> Meeting:12:00pm-1:50pm	Audio Improper Payments	2	2/26/2021	Virtual Meeting

Education & Meeting Plan - 2020-2021 Program Year					
Date	Event Type/Times	Topic	CPE Credit	Registration Deadline	Location
3/24/2021	Chapter Meeting (Audio) Meeting: 11:00am-12:50pm	Audio Cybersecurity	2	3/19/2021	Virtual Meeting
4/7/2021	Chapter Meeting (Live) Meeting: 11:00am-12:50pm	P.U.N. Group	2	4/2/2021	Virtual Meeting
4/21/2021	Chapter Meeting (Audio) Meeting: 11:00am-12:50pm	Audio Data Act	2	4/16/2021	Virtual Meeting
*4/30/2021	Special Event*/ Professional Development Training 8:00am - 4:30pm	PDT Topics TBD Auditor General - SAS and GASB Updates	8	4/23/2021	Virtual Meeting
5/12/2021	Chapter Meeting (Audio) Meeting: 11:00am-12:50pm	Audio Fraud Data Analytics	2	5/7/2021	Virtual Meeting
6/9/2021	Chapter Meeting (Live) Meeting: 11:00am-12:50pm	Heinfeld Meech - Topic TBD	2	6/4/21	Virtual Meeting
		<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/>).*



Photo credit: John Morgan on Visualhunt / CC BY





## 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)

# 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.\*\*