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Greetings!

My name is Heather Gillenwater, the AGA Charleston, WV Chapter president for the 24-25 term. I'm so excited & look forward to serving in this capacity!

I currently work for the WV Adjutant General's Office, as a Military Authority Operations Manager II. I have a combined 19 years of accounting/finance experience in the state & private sectors.

What I love most about AGA is the people! Since I joined AGA in 2020, I have had the opportunity to meet some of the most amazing & respected professionals, who have been instrumental in my professional growth. I have had the opportunity to serve on the Board as CGFM chair, help lead the CGFM Governmental Environment study group, serve as president-elect, and now in capacity of chapter president! Through these experiences AGA has helped me grow as a professional and an individual, by increasing my confidence and by developing leadership skills. AGA's primary focus is training & education! Our Charleston Chapter offers quality training events throughout the year on relevant government topics & we bring it locally for the Charleston area! The reason we do this as a chapter, is so that we can help our state, federal & local government members/attendees to become the best version of themselves, and in turn become better public servants & effective government financial managers. It is an honor to serve as president, I look forward to continuing the outstanding work of our past presidents, and hopefully finding new ways to help serve our community.

Awards

Congratulations Charleston AGA!!!



Congratulations to our Volunteer of the Year!



Chapter strategic Goals for program year 2024-2025

Goal 1 – Increase our membership & overall awareness of AGA

- Increase membership to over 100 members
- Promote AGA at conferences, CPE events, and job fairs
- Retain current members and encourage those who have not renewed their membership to renew

Goal 2 – Increase our CGFMs

- Update materials in the CGFM lending library
- Facilitate study groups in formats that work for the study leader & candidates
- Promote the exam reimbursement program for AGA members & potential salary increase up to 5% for state employees

Goal 3 – Maximize AGA members value

- Obtain valuable feedback in the form of member surveys
- Implement suggestions from members feedback
- Encourage members to get involved

Goal 4 - Make sure board members have the tools to be successful in their current roles

- Train board members on conferences i/o & use it to its full potential
- Ensure all board members are able to easily access the shared drive
- Have current chair position descriptions available in shared drive
- Encourage board members to be creative & bring new innovative ideas to the chapter

Chapter Education Plan & Meetings for 2024 - 2025

Chair: Emily Fleck

EDUCATION

- Fall Conference 2024 – 2 days – 16 CPE
 - October 28-29, 2024
- Spring Conference 2025 – 1 Day – 8 CPE
 - April/May 2025
- (6) CPE Lunches – Every other month – 1 CPE
 - January, March, May, July, September, November
- (12) Monthly Board Meetings

AGA CPE Luncheon

Our next luncheon will be held on September 18, 2024, at 12:00 PM in the WV State Capitol Complex, Building 3 - 1st Floor Conference Room. We are excited to welcome Maegan Trout, Director of Operations for Unclaimed Property at the WV State Treasurer's Office, as our speaker. She will be

discussing "WV State Treasurer's Office Unclaimed Property for State Agencies," providing valuable insights into this important topic.

This event has been approved for 1 hour of CPE by the WV Board of Accountancy. The cost of the event is \$15 for AGA members and \$20 for non-members, which includes lunch. Lunch will be provided by Chick-fil-A, with a choice between a Chick-fil-A Sandwich Box Lunch or a Southwest Veggie Wrap Box Lunch, both of which include chips and a cookie.

Please RSVP by September 10, 2024, to emily.s.fleck@wv.gov. Payments can be made at the event by cash or check, or before the event by credit card.

We look forward to seeing you on September 18th and sharing a productive session with Maegan Trout.



Education Events

By: Emily Fleck, Education Chair

On July 10, 2024, the Charleston AGA hosted a CPE Luncheon at WVDEP in Kanawha City.

Lisa Comer with wvOasis presented “Procurement and Commodity Based Payments Overview”. This event was worth 1 CPE hour. There were 48 registered participants. Lisa did a fabulous job!



The next luncheon will be September 18, 2024, at the Capitol Complex Building 3 Training Room. Maegan Trout, Director of Operations, Unclaimed Property of the WV State Treasurer’s Office will be presenting on “Unclaimed Property Procedures for State Agencies”. This will be worth 1 CPE hour.

AGA Charleston Chapter Fall Conference will be October 28 – 29, 2024 at the Holiday Inn in South Charleston. Presentations will include GASB Update, Yellowbook Ethics, E-government Transactions with the WV State Treasurer’s Office, Detecting P-card Fraud with the WV State Auditor’s Office, Obtaining the Certificate of Excellence in Financial Reporting, Uniform Guidance, and more. This event will be worth 16 CPE hours. Watch your email for registration information.

On November 20, 2024, there will be a CPE luncheon at the DNR Office in South Charleston. Jamie Chambers will be presenting on “Fraud Awareness”.

If you have any questions about events or suggestions for trainings, please contact Emily Fleck at emily.s.fleck@wv.gov.

Chapter CGFM Plan for 2024 - 2025

Chair: Corey Wade

The Charleston WV Chapter plans to promote the CGFM certification by building awareness of the CGFM, encouraging members to obtain the CGFM designation and supporting current CGFM members.

CGFM Awareness

- Promote CGFM month on the Charleston Chapter's Linked-in page and newsletter.
- Provide a CGFM awareness presentation at AGA Charleston conferences and luncheons.
- Have current CGFM's write articles for the newsletter about their CGFM experience.
- Promote the benefits of holding the CGFM designation.
- Encourage the Governor to make a declaration for March to be CGFM month.

Encouraging CGFM designation

- Host CGFM study groups both in person as well as virtual.
- Provide CGFM candidates with the most up to date study guides through the chapter's lending library.
- Build the number of CGFM's in the Charleston Chapter by 10 members passing all parts of the exam.
- Reimburse members who meet the following criteria:
 - Pass any part of the CGFM exam
 - Employer did not pay for the exam
 - Has not already been reimbursed by the AGA for the exam cost for that part
 - Apply within 90 days of passing the exam
- Provide an additional discount at Charleston AGA Conferences for those with the CGFM designation.

Support Current CGFM's

- Provide CPE opportunities to CGFM's by utilizing the luncheons.
- Retain at least 80% of current CGFM's.
- Promote CPE and other training opportunities utilizing the newsletters/website.
- Provide CGFM's with an opportunity to submit training ideas for future CPE.



CGFM Exam News: Beta Testing is almost here!

CGFM beta exams will be administered from Sept. 1 through Oct. 31. This is a good time to take an exam and receive additional benefits. Candidates receive a \$30 discount on each exam taken during this period and receive free access to the corresponding 2024 online edition of the CGFM study guide(s).

Learn more on National's website at

<https://www.agacgfm.org/CGFM/Candidates/PreparingforExams/Examinations-Update.aspx>

New CGFM Study Guides

The 2024 CGFM Study Guides are now available on AGA's website. Our chapter plans to purchase updated study guides for the Chapter's Lending Library. Anyone who wishes to purchase their own copy can obtain them at

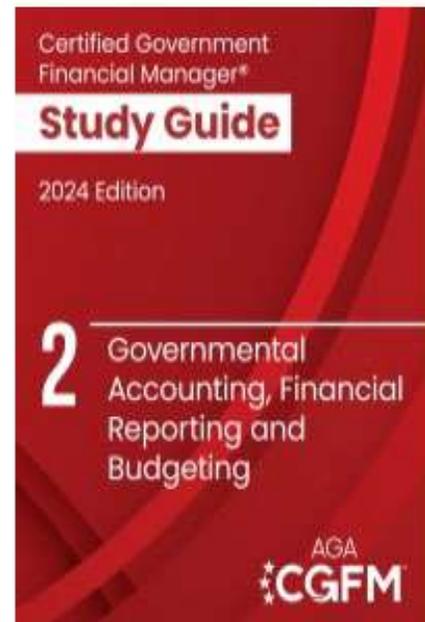
<https://www.agacgfm.org/CGFM/Candidates/PreparingforExams/StudyGuides.aspx>

CGFM Study Group

The CGFM Study Group for Governmental Accounting, Financial Reporting and Budgeting section (exam 2) was postponed due to a lack of availability of study guides for the section.

Our chapter will be purchasing additional copies of the 2024 Study Guides for the lending library. Members of the study group will be given the option to borrow a study guide to be returned to the Charleston WV Chapter's Lending Library.

Members of the AGA and/or Chapter CGFM study group are encouraged to take advantage of this opportunity.



** Screen clip obtained from
<https://www.vitalsource.com/products/aga-s-cgfm-study-guide-2-governmental-accounting-aga-v9798986434063>*

Chapter Community Service Plan for 2024 - 2025

Chair: Beth Farley

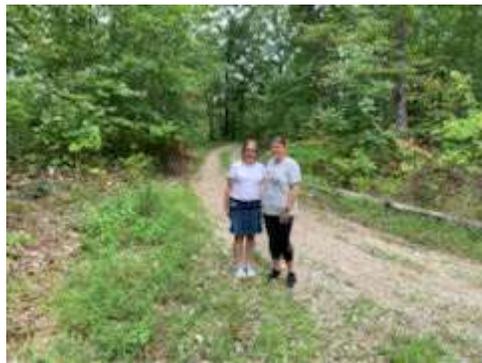
COMMUNITY SERVICE

Support the local community through community service events. Work to help our Chapter grow through recruitment of individuals to volunteer to assist us with these noteworthy events, and by showing them how we help and support the local area.

- July 2024 – PDT Donation - AGA
- September 2024-October 2023 – TBD – in coordination with Fall Conference
- October 2024 – Water-stop/Hydration Station – Kanawha State Forest Half Marathon
- November 2024 – Bingo at Nursing Homes – TBD
- February 2025 – Food drive for local food bank – TBD
- March/April 2025 – TBD – in coordination with Spring Conference

Charleston AGA Chapter Supports Kanawha State Forest and Trail Athletes

The Charleston AGA Chapter proudly supported Kanawha State Forest and its athletes by serving as water-stop attendants during the Kanawha State Forest Race Series. This series included races held on May 25th (5k – 3.1 miles), June 29th (10k – 6.2 miles), and August 15th (15k – 9.3 miles). These challenging races took place on beautiful, rugged trails, offering a true test of endurance for participants.



Volunteers enjoyed the stunning scenery and the gratitude of the racers. Proceeds from these events contribute to maintaining the trails at Kanawha State Forest and support the AP Timing Scholarship.

There is one more race left in the series on October 20th at 9:00 AM. If you'd like to participate, volunteers should arrive an hour before the start time to be transported to their water-stop locations. To volunteer for the half marathon, please register on AP Timing's volunteer page at [AP Timing Volunteer Page](#) and email Jamie Chambers at jchambers.wv.aga@gmail.com to confirm your participation.



Chapter Education Plan & Meetings for 2024 - 2025

Chair: Kelli Herr

For membership growth of young professionals in the local AGA Charleston Chapter, proposed activities:

EARLY CAREERS

- During the upcoming collegiate year, contact the Business Departments of local colleges/universities for opportunities to present the benefits of the AGA and obtaining certification as a Certified Government Financial Manager (CGFM) with the possibility of inviting students to an AGA Luncheon/Meeting. Some potential schools are Marshall University, West Virginia State University, and the University of Charleston.
- Seek opportunities to attend Career Days for the above listed universities doing meet-n-greets with students to answer questions about the AGA and CGFM and have handouts available listing contact information for the AGA and CGFM. If possible, invite interested students to an AGA Luncheon/Meeting.
- Promote AGA scholarship opportunities.

Win a \$1,500 Scholarship in AGA's Government Finance Case Challenge

AGA invites currently enrolled graduate and undergraduate students to compete in a virtual two-and-a-half-week Government Finance Case Challenge. Student teams analyze data from an AGA-specified U.S. state, city or county government and develop a Citizen-Centric Report. Winning team members and their advisors each receive a \$1,500 scholarship! Registration closes on Sept. 20 at 11 p.m. ET. For questions, email challenge@agacgfm.org.

<https://www.agacgfm.org/Standards/CCR/CaseChallenge.aspx>

Chapter Membership Plan for 2024 - 2025

Chair: Nancy Gray

The Charleston WV Chapter plans to promote membership by:

- Inviting potential members to chapter events for free.
- Playing the AGA video at chapter meetings.
- Providing information to non-members about the AGA (Brochures).
- Sending a personalized welcome email to new members to let them know of upcoming events.
- Recognizing membership milestones in Chapter's newsletter.
- Promoting the benefits of becoming a member such as networking and professional development at lower member rates.
- Adding required email addresses to event sign-in sheets to enable communication to non- members attending events.
- Reach out to local governments to promote AGA and the benefits of membership to increase number of members.

Pulse Checks

- Work to maintain current membership levels as well as increase by November 1st.
- Increase membership 10% by February 1st.
- Increase membership 16% to achieve bonus by end of May.

Member satisfaction

- Will conduct a survey before November 1st to determine current level of member satisfaction and determine any needs, desires of members.
- If not already at 80%, work to reach that level by February 2024.
- Work to attain greater than 80% member satisfaction rate by May 2024 by listening to members and potentially implementing suggestions obtained through surveys.
- Submit at least four award nominations for NLT/PDT awards.

MEMBERSHIP



We would like to thank our 79 amazing members for your continued support. Please let us know what we can do for you.

Welcome to our newest member!!!



Name

Join Date

Brian M. Klishis

6/24/2024

Upcoming Events

- ☺ September 18, 2024 - CPE Luncheon – 1 Hour CPE - at the Capitol Complex Building 3 Training Room. Maegan Trout, Director of Operations, Unclaimed Property of the WV State Treasurer’s Office will be presenting on “Unclaimed Property Procedures for State Agencies”.
- ☺ October 2, 2024 (tentative) – CGFM Study group for exam 2 – online at noon (contingent on study guide availability)
- ☺ October 20, 2024 – Community Service/Volunteer opportunity – Half-Marathon water station stop at Kanawha State Forest
- ☺ October 28 – 29, 2024 - AGA Charleston Chapter Fall Conference – 16 Hours CPE - at the Holiday Inn in South Charleston
- ☺ November 20, 2024 - CPE Luncheon – 1 Hour CPE - at the DNR Office in South Charleston. Jamie Chambers will be presenting on “Fraud Awareness”.

[Get Involved: Exciting Opportunities Await You!](#)

Are you looking to make a greater impact and connect with fellow professionals? We have a variety of opportunities for you to get involved and contribute to our community.

Join Our Team!

We currently have an opening for a Newsletter Editor on our Board. This is a fantastic opportunity to help shape the content and direction of our publication. If you have a passion for communication and a knack for organization, we would love to hear from you!

Share Your Expertise

Do you have a subject matter that you're passionate about? Consider submitting an article for our newsletter or becoming a speaker at our events. Your insights and expertise can provide valuable learning opportunities for our members and enhance our collective knowledge.

Get Involved in Community Service

Our community service events are a great way to give back and make a difference. Participating in these events not only benefits those we serve but also strengthens our bonds as a professional community.

Getting involved is a rewarding way to contribute to our organization and grow both personally and professionally. We encourage you to take advantage of these opportunities and help us continue to build a strong, engaged community.

If you're interested in any of these opportunities or have questions, please reach out to us. We look forward to your participation!

Host Committee

By: Jamie Chambers, NCC Rep

Did you know you could cover the registration cost for PDT by participating on the Host Committee?

Organizing a conference involves a lot of hard work and teamwork. Last fall, I discovered that National offers a Host Committee for PDT. Being selected for this committee covers your registration cost, saving you \$950. Additionally, National provides two hotel scholarships for PDT attendees, which can save between \$1,000 and \$2,000.

While being on the Host Committee does have some downsides—such as missing out on certain CPE sessions and being on call throughout the event—the benefits are significant. You'll have the opportunity to meet many great people, work with a fantastic team, and contribute to an event that truly helps others. I highly recommend this experience for anyone looking to get more involved and make a meaningful impact at PDT.

Wondering what your role on the Host Committee entails? Committee members assist with preparing welcome bags, managing registration, directing attendees to their sessions, and scanning people in and out of sessions.



AGA Board

Position	Name
Chapter President	Heather N. Gillenwater, CGFM
Chapter President-Elect	Lisa A. Rutherford, CIA, ISA, CRCM
Secretary	Jamie Lenore Chambers, MS, CGFM, CIA, CGAP
National Council of Chapters Representative	Jamie Lenore Chambers, MS, CGFM, CIA, CGAP
Chapter Treasurer	Lisa A. Rutherford, CIA, ISA, CRCM
Accountability	Marie Long, CPA
ACE Reporting	Lisa A. Rutherford, CIA, ISA, CRCM
CGFM/Professional Certification	Corey Wade, CGFM
Community Service	Elizabeth A. Farley, CPA, CGFM
Communications	Taylor S. Cole
Education	Emily Fleck, CPA, CGFM
Membership	Nancy Gray
Early Careers	Kelli Herr
Webmaster	Kelli Herr
Newsletter	Jamie Lenore Chambers, MS, CGFM, CIA, CGAP (acting until filled)