



2007-2008 Chapter Recognition Program

Objectives and Guidelines

The Chapter Recognition Program (CRP) is a noncompetitive program recognizing a chapter's performance in relation to a standard or benchmark linked to AGA's mission. The objective of the CRP is to support, encourage and promote the accomplishment of AGA's mission, and to provide flexible noncompetitive guidelines for a well-rounded chapter.

Above all, the CRP is a planning guide to be used before the start of the program year, with results reviewed throughout the year by the chapter president or designee.

Program Year

The CRP year begins on May 1 and concludes on April 30. AGA's Program year begins on July 1 and ends on June 30. The two-month difference provides for continuity between chapter officers, that is the incoming officers have a vested interest in the outgoing officers' accomplishments for the program year, and the determination/preparation of the awards presented at the national Professional Development Conference in June.

AGA Chapter Participation

Each chapter is strongly encouraged to participate in this program. We recommend that the chapter president-elect, in conjunction with the chapter recognition chair and the immediate past chapter president, prepare the quarterly reports under the direction and oversight of the chapter president. This allows the chapter president-elect to become familiar with chapter activities BEFORE he or she takes office.

Reporting (Data Entry of Quarterly Credits)

Program credits are entered via the Members Only area of the AGA website. Log on to the AGA Members Only site using your AGA ID number as your login and your first initial followed by your last name as your password. Click on the navigational button called "Chapter Recognition Program" for access to the data entry screen for your chapter. Once you enter your chapter's credits and hit the "update" button, the information is permanently stored in the database. You can come back at anytime throughout the year to edit your chapter's information.

Reports Due by:

August 14
November 20
February 19
April 16

Reports Cover the Months:

May, June, July
August, September, October
November, December, January
February, March, April

Although reports are due to be filled out quarterly, it is recommended that chapters take time out each month to compile their credits for the respective month. Some chapters have found that they can use their newsletter as a tool to prepare the quarterly reports since it usually documents directly or by reference most (but not all) items eligible for credits.

Each chapter should also advise its Regional Vice President (RVP) that their credits for the quarter have been completed. RVPs can access their chapters' reports via the Members Only Site. The information will help the RVP and other National officers and staff be constantly aware of the health of each chapter and provide assistance if necessary. The **Grand Totals Report** can also be accessed on the Chapter Recognition Page at any time to see cumulative credits.

Documentation

Please take note that some areas in the program require you to send in information each quarter. It is highly recommended that chapters also keep copies of this information to pass along to the next chapter president and recognition chair.

Individual Chapter Goals

A chapter will qualify for recognition under the program once it has attained its specified goal for the year. The chapter president-elect, in coordination with the National Office staff, provides the chapter's goal for the recognition year. All chapters are encouraged to achieve at least 10,000 credits for the year.

There are several exceptions to the 10,000-credit goal. New chapters and chapters that have not recently participated in the program are given a goal of 3,000 credits for the first year. At the end of the first year, AGA staff and chapter officials will decide whether the goal should remain at 3,000 or be increased.

Recognition

Each chapter president whose chapter reaches its goals will be recognized with a plaque at the 2007 AGA Professional Development Conference & Exposition to be held in Nashville.

An **Advancement Recognition** will be presented to any chapter that advances its level of participation in the CRP – for example, from the bronze designation one year to the silver designation the next. The chapter president's plaque for the second year will include recognition that the chapter is an Advancement Recognition Chapter

A **Bronze Chapter Designation** will be presented to any chapter that attains between 12,000 and 14,500 credits for the year. The chapter president's plaque will include recognition that the chapter has achieved Bronze status.

A **Silver Chapter Designation** will be presented to any chapter that attains between 14,501 and 17,000 credits for the year. The chapter president's plaque will include recognition that the chapter has achieved Silver status.

A **Gold Chapter Designation** will be presented to any chapter that attains between 17,001 and 19,500 credits for the year. The chapter president's plaque will include recognition that the chapter has achieved Gold status.

The **Platinum Chapter Designation** will be presented to any chapter that attains between 19,501 and 22,000 credits for the year. The chapter president's plaque will include recognition that the chapter has achieved Platinum status.

The purpose of the Bronze, Silver, Gold and Platinum designations is to encourage chapters to participate in the CRP at the level they feel comfortable with and to develop a continuity of sound leadership and programs.

Special Circumstances

To recognize special circumstances such as extra effort in starting a new chapter, an innovative activity not presently covered in the program, or for any other reason, the National Office has the freedom to award bonus credits. For example, starting a new chapter may earn 1,000 bonus credits. Chapters are encouraged to convey this information in writing to the National Office no later than April 9, 2007 for consideration.

2006 – 2007 Chapter Recognition Program

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Introduction:

AGA's mission is to serve professionals in the government financial management community by providing quality education, fostering professional development and certification, and supporting standards and research to advance government accountability.

The Chapter Recognition Program (CRP) is designed to support, encourage and promote the accomplishment of AGA's mission, and to provide flexible noncompetitive guidelines for a well-rounded chapter. The CRP is a noncompetitive program recognizing a chapter's performance in relation to a standard or benchmark linked to AGA's mission.

SECTION I - CHAPTER LEADERSHIP, PLANNING & PARTICIPATION - 3,000 Maximum Credits

The purpose of the Chapter Leadership, Planning and Participation section of the Chapter Recognition Program (CRP) is to provide guidance and ideas for the planning, organization and participation within the overall network of AGA. These guidelines include some of the basic structure needed in developing and maintaining a well-rounded AGA chapter. Within your chapter, you will identify other ideas and traditions, which are also very important – incorporate those into your plans and administration as well.

GOAL 1. Chapter leadership

Chapter leadership is listed first in the CRP because it is an essential ingredient for a successful well-rounded chapter. Developing a strong, diverse Chapter Executive Committee (CEC) is important for the long-term development, growth and strength of your chapter. It is important to have an officer succession plan or strategy, especially for the position of chapter president. Who is your chapter grooming to be a future leader?

Diversity within the CEC includes chapter leadership experience (keep some continuity and bring in some new leaders each year), employment positions (auditors, budget, accountants, IT, etc.), and employer (it is always good to have representation from all major AGA member employers), etc. The positions within the CEC vary from chapter to chapter, however all chapters should have a president, president-elect or vice president, treasurer, and coordinators or directors responsible for key areas. Chapter leaders should consistently be encouraging members to become involved, have a method for members to "move up the ranks," and represent the membership in chapter decisions.

The Chapter Bylaws conform to AGA Prototype Bylaws and are on file at the National Office - 300 credits.

Elect officers as designated by Chapter Bylaws –100 credits.

- i) Submit to National Office, Chapter Officers Directory electronically by June 1st – 100 credits.
- ii) Submit to National Office, Chapter Officers Directory electronically by April 30th – 50 additional credits.

Appoint chapter coordinators and committee chairs – 100 credits.

- iii) Submit to National Office, list for chapter CGFM, community service, early careers, education and membership coordinators or directors electronically by April 30th – 50 additional credits.

Encourage members to become involved in chapter leadership. Chapters need to develop and maintain a balance of old (i.e., experienced) and new (i.e., inexperienced) members on the CEC and other committees.

- iv) New CEC member who has not previously held a leadership position – 75 credits (maximum credits 150 per year).
- ii) Have a new member serve on a committee – 25 credits each.

Develop a strategic, multi-year written plan to accomplish the chapter's and AGA's mission.

- v) First year plan developed or revised – 100 credits
- vi) Plan maintained and followed – 25 credits

Prepare financial statements and reports –

- i) Monthly - 25 credits
- ii) Annual - 200 credits

Annual audit/review of chapter finances conducted. The auditor or reviewer should be independent of the treasurer and the finance and executive committees. Submitted to National Office within 90 days after close of chapter's fiscal year – 200 credits.

Publish (i.e., print or electronic) records (minutes) of meetings, activities and events (CEC meetings or regular meetings) – 25 credits each meeting etc.

Maintain and publish (print or electronic) chapter history files – Submit to National Office – 50 credits per year.

Submission of a suggestion to improve the AGA Chapter Recognition Program by November 15. (maximum 50 credits)

GOAL 2. Planning and preparation

Leadership naturally includes yearly planning and preparation to accomplish the chapter's goals and objectives for the program year (July 1st – June 30th). The goals and objectives should be based upon the chapter's strategic plan. A well-rounded chapter consistently considers the needs of the members, potential members and employers. Some chapters have found success in meeting with the principals of the employers involved in government accountability to get

additional input as they are planning. (These employers often include government entities or agencies – federal, state, local, municipalities, school districts, etc. and government contractors.) The following items are by no means all-inclusive – you may want to add other line items for your chapter. Your plans are working documents to communicate and guide your chapter throughout the year. The plans can and should be flexible; they do not need to lock you in. In fact a plan should be reviewed regularly and changed whenever your chapter feels it is appropriate.

Meetings (identify if they will be CPE or non-CPE meetings) Plan submitted (hard copy/electronically) to RVP, SVPRS (Senior Vice President of Regional Services) and National Office by August 30 – 200 credits.

Education and Professional Development Plan submitted (hard copy/electronically) to RVP, SVPRS and National Office by August 30 – 200 credits.

CGFM Plan submitted (hard copy/electronically) to RVP, SVPRS and National Office by August 30 – 200 credits.

Community Service Plan submitted (hard copy/electronically) to RVP, SVPRS and National Office by August 30 – 200 credits.

E. Membership Plan submitted (hard copy/electronically) to RVP, SVPRS and National Office by August 30 – 200 credits.

F. History Report: an annual report of accomplishments and service to members within 90 days of chapter's year-end. The report should include, at a minimum, education provided (i.e., total number of CPEs provided), CGFM, membership, community service and early career activities during the program year.

- i) Submitted to RVP, SVPRS, National Office and Chapter Executive Committee – 200 credits.
- ii) Communicated to members via web, newsletter, etc. – additional 150 credits.

GOAL 3. Regional, sectional and national AGA participation

Each AGA Chapter is a part of the larger AGA structure, which includes the region, section and national AGA. While each chapter has its own strengths and unique structure, it is important for all of us to work together to accomplish AGA's mission.

Participation serves several purposes including the opportunity to network within the organization; communicating successes and challenges; identification of areas needing support or assistance; and actively maintaining a regional-based governance structure. While some of the following items are included in the CRP to facilitate data collection, others encourage overall participation for a well-rounded chapter.

Input quarterly chapter recognition credits via the Members Only Site. Notify your RVP and SVPRS that the information has been inputted - 100 credits each quarter.

Participate in Regional Chapter Officers Workshop – 50 credits per Chapter Executive Committee member (Maximum 500 credits)

Chapter members serve as regional officer or regional coordinator – 25 credits per officer (i.e., RVP, RVP-Elect, Immediate Past RVP) or coordinator (i.e., CGFM,

Community Service, Chapter Development & Assistance, Early Careers, Education, Membership.)

D. Chapter members serve as a national officer (i.e., National President, National Treasurer, etc.)- 25 credits each

SECTION II - EDUCATION & PROFESSIONAL DEVELOPMENT – 4,000 Maximum Credits

Education and Professional Development are integral parts of the AGA mission and provide excellent opportunities within your chapter. The purpose of the Education and Professional Development section within the CRP is to encourage quality education and foster professional development to enable your members to achieve greater heights in their employment and meet certification requirements. The first three goals are suggestions that have worked well in many chapters; you will need to determine how many of these goals are applicable to your chapter and plan accordingly. Professional development encompasses many different educational opportunities. The important thing is to have an effective, quality educational program that meets the needs of your members, potential members and employers in your area (and remember to have FUN with it)!

Note: Goals 1 through 3 are listed to help you plan your chapter education to meet the needs of your members and the professional accountability community.

GOAL 1. Education to help accountability professionals meet CPE requirements

Chapter members who hold professional certification must comply with CPE requirements. Your chapter can serve these members by providing quality education. Typically a CPE hour is granted for each 50 minutes (i.e. one hour) of participation in programs and activities that qualify. At conferences and conventions where individual presentations are less than and/or more than 50 minutes, the sum of the presentations should be considered as one total program (CPE hours equal the total content minutes divided by 50 for each day of the event).

The chapter's CPE records should include the following information for each CPE program or activity.

1. Sponsoring organization (your AGA chapter)
2. List of attendees
3. The location at which the program was given
4. The title of the program and a brief description of its contents (i.e., subject/topics covered)
5. The dates and length of the program
6. The number of CPE hours granted

In addition, your chapter should retain:

1. CPE records for a minimum of three years
2. Participant evaluations of each program and instructor(s)

3. An outline of each program that shows the name of the instructor, learning objectives and subjects and topics covered

Typically these requirements can be met with a signed CPE form that delineates the topics and times, and a sign-in list for attendees. Additional information regarding CPE requirements for the CGFM is available on the website at www.agacgfm.org/cgfm/maintain/cpe_requirements.aspx.

PLEASE CONTACT YOUR STATE BOARD OF ACCOUNTANCY TO DETERMINE IF YOUR EDUCATIONAL ACTIVITIES MEET THE REQUIREMENTS AND CPE STANDARDS FOR OTHER CERTIFICATIONS- <http://www.aicpa.org/states/stmap.htm>.

A. Register your chapter with your state board of accountancy as a sponsor of CPE qualified events. Identify sponsor number- 150 credits.

GOAL 2. Education to help individuals attain the skills to pass the CGFM Exam and maintain their certifications

The Certified Government Financial Manager (CGFM) Program is an integral part of AGA. The CGFM is recognized as the mark of excellence in government financial management, and is another excellent tool in the growth and development of a well-rounded chapter. Provide your members and potential members with the opportunity to gain the skills to meet the examination requirements of the CGFM. Credits are available in Section III - Certification.

GOAL 3. Professional development to help all members and prospective members obtain additional skills

Obtaining additional skills enhances an individual's employment performance. Professional development assists in the goal of advancing government accountability through enhancing the knowledge and skills of accountability professionals. Quality professional development targeted toward the needs of your members and area employers is an important part of the AGA mission and will go far in the promotion, development, growth and foundation of your chapter.

Credits are awarded based upon the CPE credits available for the educational or professional development event. All CPE must at a minimum be in compliance with the CGFM CPE requirements. Many chapters provide CPE that also meets other certifications held by chapter members such as CPA, CIA, CFE, etc.

CPE credits provided or co-sponsored by your chapter (in accordance with CGFM CPE requirements):

- Monthly Meetings with Speaker –150 credits per CPE hour
- Seminars/Training – 150 credits per CPE hour
- Conferences – 150 credits per CPE hour
- Audio Conferences – 150 credits per CPE hour
- GFM Courses- refer to Section III, Goal 3

Note: Although credits are awarded by CPE hour provided, it is the quality of the professional development that matters most – Are your chapter events of a quality that you and AGA can be proud?

Submit contact information to the AGA Education Department of outstanding speakers used at your chapter event- 25 credits per speaker ([Click for submission form](#))

B. Submit contact information of your chapter member(s) who make presentations at other chapter's educational event – 25 credits per chapter member.

GOAL 4. Provide awareness and marketing of educational events

Education and Professional Development is one of the best ways to get the word out about AGA and your Chapter. Many people become AGA members due to the high-caliber educational events. Help promote AGA and your chapter by showcasing your educational events and reaching out to potential new members. See Section IV Communications.

Market AGA and chapter educational events to the government accountability community, members and nonmembers - 50 credits each promotion.

Partner with other AGA chapters, professional organizations or governmental entities on educational events - 75 credits each joint event.

Publish and distribute a training calendar brochure to the membership (and/or post it to the chapter website) – 250 credits. Market the brochure to the government accountability community – additional 50 credits.

D. Post chapter educational events to the AGA website Events Calendar – 25 credits per event.

SECTION III - Certification is a critical part of the AGA mission and a major focus of the organization. Chapter involvement and support of the CGFM Program is essential and necessary for the continued success of the program CERTIFICATION – 4,000 Maximum Credits

We must work together at all levels to promote the value of the CGFM certification to candidates, employers and governmental entities. Together we can take the CGFM Program to higher levels of recognition, desirability and overall acceptance.

GOAL 1. Support current CGFMs

Our current CGFM members deserve the full support of every AGA chapter. Professional development should be designed to meet the CPE requirements for the CGFM as well as other member certifications whenever possible. Promoting CGFM, recognizing CGFMs' achievements and providing networking opportunities for CGFM members assists in meeting the AGA mission, while serving the CGFM and the government accountability community.

Assist CGFMs to meet 80 hours of CPE every two years. Possible assistance could include:

- i) Providing courses that meet CGFM CPE requirements – 50 credits per CPE (in addition to education credits earned).
- ii) Identifying CPE opportunities from sources outside your chapter including local

seminars, Internet courses, self-study and promote either on chapter website or in newsletter – 25 credits each event.

- iii) Promoting awareness of CPE requirements (see Section II – Education and Professional Development for details) – maximum 100 credits per year if published in newsletter or on chapter website.

Publish CGFM members' achievements in newsletter and local newspapers – 25 credits each.

Market educational events that, at a minimum, meet the CGFM CPE requirements, to the government accountability community, members and nonmembers –50 credits each.

Partner with other professional organizations or governmental entities to promote the CGFM designation –100 credits each.

Encouraging CGFM renewals through personal contact, letters, newsletters or websites – 25 credits per contact.

Recognize local CGFMs by

- iv) Using the CGFM designation in chapter publications, name tags, etc. – 25 credits per event/publication.
- v) Publicizing new CGFMs in chapter and local publications – 100 credits per new CGFM.

GOAL 2. Market CGFM service mark locally

AGA has a commitment to furthering the CGFM service mark, which will benefit chapters, employers, CGFM members and AGA. Your chapter can contribute to this national goal by marketing the CGFM locally. There are many great ideas for marketing CGFM including contacting area government employers, contacting university accounting/business departments, participation in career fairs, partnering with other professional organizations, etc. Additional suggestions and ideas are available through the CGFM National and Regional AGA Coordinators or create your own marketing initiatives. These are just ideas – naturally your chapter will want to choose the most appropriate goals and tasks each program year, perhaps focusing on a few different tasks each year. You can work with your Regional CGFM Coordinator and RVP on major initiatives for additional items or bonus credits. Make the program and goals work effectively for your chapter, members and governmental community.

Contact area government accountability leaders to promote CGFM –

- i) 50 credits per contact.
- ii) 250 credits per formal presentation (National Office has presentations for your use or develop your own and share it with other chapters).

Creating awareness of the value of the CGFM service mark in the general public –100 credits per publication or event.

An employer in your chapter area changes policy to recognize CGFM – 500 credits per formal recognition. (Recognition must be submitted to National CGFM Coordinator.)

Endorsement of CGFM from area employer, elected official or principal – 400 credits each. (Endorsement must be submitted to National CGFM Coordinator and published in local newsletter).

Specific chapter goals to promote CGFM in your area

- i) Goals submitted to regional and national coordinator for CGFM – 50 credits.
- ii) Achievement of goals: 100– 750 credits (work with regional and national coordinator for CGFM and RVP to identify level of difficulty).

GOAL 3. Assist potential new CGFM in attaining certification

The CGFM Examination process includes a wide range of topics at the federal, state and local level. Most candidates will have experience in at least some of the topics, and need training in other areas. Identify the needs of the candidates in your chapter and community and design your chapter goals and tasks to meet those needs.

A. Offer CGFM courses – 100 credits per CPE.

B. Sponsor study groups – 200 credits each study group.

- i) Bonus 50 credits per study group meeting with attendance of six or more members.
- ii) Bonus 100 credits for establishing an online study group (i.e., “localgovernmentfinance” group on Yahoo!).

C. Participate in CGFM mentoring program – 200 credits each.

D. Develop or participate in other study options – 200 credits each.

- ii) Bonus credits for sharing innovative ideas on the CGFM listserv – 50 credits each (maximum 150 per year).

E. Chapter provides CGFM course(s) and/or CGFM Examination scholarships – 200 credits per recipient per year. List recipient(s).

F. CGFM course(s) and/or CGFM Examination credit or scholarship for event door prizes or other drawings – 200 credits each. List recipient(s).

GOAL 4. Designate a chapter resource to work with CGFM certification

The Chapter CGFM Coordinator is a member of the national network of CGFM Chapter Coordinators and has available resources such as a national CGFM listserv; a CGFM Coordinator Toolkit, and the Regional and National CGFM Coordinator. With this level of commitment to the program the chapter CGFM Coordinator will have continued access to ideas, assistance, networking and support. This list is just a few ideas for the coordinator; a successful coordinator will identify specific goals and objectives to advance the CGFM in the chapter area.

A. Communicate with chapter, and the governmental community promoting CGFM – 25 credits each.

Get creative with this one – throw a celebration for a new CGFM at their office; submit articles to employer’s newsletters or interoffice communication, submit articles to local paper recognizing new CGFMs, ask employers to include CGFM and link to national CGFM on their website, etc.

- i) Bonus credits for posting suggestions to the CGFM listserv – 50 credits each.
- ii) Bonus credits for posting suggestions that are implemented nationally – 100 credits each.

Contribute items to chapter newsletter such as CGFM recognition, study suggestions, encouragement, technical requirements, tip of the month, etc. – 25 credits each.

Meet chapter goals and objectives as outlined in the CGFM annual plan for CGFM retention (retention as of April 30 each year).

90 – 100% Retention	400 credits
80 – 89% Retention	300 credits
70 – 79% Retention	200 credits

Note: Some of the international chapters may not currently have the CGFM Exams available in the area. These chapters will work with their Regional CGFM Coordinator, RVP and the National Office to develop annual goals in the area of certification. Helping to identify and secure a proctoring service in the area could well meet all available credits for one year.

SECTION IV - COMMUNICATIONS – 3,000 Maximum Credits

Effective communications is instrumental in the success of any organization. Even though AGA chapters differ in size and demographics, etc. effective communications is essential to successfully accomplishing your chapter's goals and objectives and AGA's overall mission. Today chapter communications takes place on a variety of mediums. Chapters need to choose the modes (print and/or electronic) that are most effective in your chapter and develop your plans accordingly.

GOAL 1. Chapter meetings and member participation

Successful chapters provide opportunities for members to gather and exchange information, network and participate in the chapter's activities. Your chapter will need to identify the appropriate meeting frequency, time, location, etc. for your members. Some chapters meet every month while others choose to take the summer off from meetings, and some chapters partner with other professional organizations and others don't. Chapter meetings are required and provide a valuable service and benefit to your members. However, if your chapter members are unable to meet monthly, then get innovative and determine a meeting frequency that meets your members' needs. Work with your RVP to set your own chapter's meeting plan.

- A. Regular chapter meeting – 100 credits each. Maximum 900 credits per year.
 - i) Government accountability topic and speaker – 50 credits each.
 - ii) CEC meeting – 50 credits each meeting at which a quorum is present.

Special meetings or activities as follows:

- iii) Awards and recognition – 50 credits each.
- iv) Joint meeting with other professional organizations – 50 credits each.
- v) General membership business meeting – 50 credits each.

Meeting attendance – Two credits for each full percentage of total chapter membership as of April 30 attending the meeting.

Social event or activity – 50 credits each.

GOAL 2. Communicate chapter business, events and other items of interest to members, employers and government accountability leaders

The content of your communication is typically more important than the mode, however the mode used must meet your members' needs. Your members must have ready access to the material. Some chapters publish monthly printed newsletters, others e-mail the newsletter, and still others post the newsletter on a website. Some chapters have single web pages and others have fully integrated websites. Find the method(s) that works best for your chapter and make the most of it!

Newsletter – including a minimum of president's message, upcoming meetings, events, etc. and CEC contact information.

- i) Published (printed/e-mailed/website) – 100 credits per newsletter.
- ii) Promote AGA – Publicize chapter, regional, sectional and national AGA activities and events – 25 credits each month.

Website – including a minimum of president's message, upcoming meetings, events, etc. and CEC contact information.

- iii) Maintained and updated monthly at a minimum – 100 credits each month.
- iv) Promote AGA – Publicize chapter, regional, sectional and national AGA activities and events – 25 credits each month.

Items communicated – The following items should be included in the monthly communication whether it be a newsletter, electronic communication, such as e-mail or listserves, or website:

- v) President's message – 25 credits each month.
- vi) Future meetings and events – 25 credits each month.
- vii) Recap of past events – 25 credits each month.
- viii) CEC minutes and contact information – 25 credits each month.
- ix) Promote AGA – Publicize local, regional, sectional and national AGA events – 25 per month.

Accountability and financial management articles:

- vi) News article submitted by member – 200 credits (maximum 400 credits per year).
- vii) Previously published article – 25 credits each.
- x) Publicize award recipients and chapter member special achievements – 25 credits each month.

GOAL 3. Communicate within AGA

Communicate with other AGA Chapters, RVPs, SVPRS and National Office – 25 credits per contact (maximum 100 credits per month). For example, responding to requests for comments, information, etc.

SECTION V - MEMBERSHIP – 3,000 Maximum Credits

Membership is the lifeblood of AGA. Without members, we cease to exist. Therefore, to ensure a healthy, vigorous chapter, we need to continually seek new members, meet our members' needs, and strive to keep members and potential members interested and involved. Chapters should strive to attain the maximum membership goals.

GOAL 1. Base growth

A strong healthy chapter will typically increase overall membership by 10% per year. Base Growth is a flat percentage increase from your beginning of the year membership numbers. The National Office publishes a monthly Growth Acquisition and Retention (GAR) report that is very helpful for Chapters to track their progress and membership health. The National Office completes base growth credits at the end of the membership year (i.e. April 30th).

Chapters are encouraged to meet and exceed the annual base growth goals:

Increase base membership by 5% – 900 credits.

Increase base membership by 5 - 9.99% – 700 credits.

Increase base membership by 2 - 4.99 % – 500 credits.

GOAL 2. Member recruitment

Through innovation and perseverance recruiters can ensure that new members are attracted to chapters and the majority of existing members are retained. Make new and prospective members feel welcome and encourage them to become involved. The National Office completes member recruitment credits at the end of the membership year (i.e., April 30th).

New member acquisition – Chapters are encouraged to meet and exceed the 20% new member acquisition goal, which is based on the previous year's April 30 figure.

i) Meet or exceed the 10% goal – 900 credits.

Attain 90 - 99% of the goal – 700 credits.

Attain 70 - 89% of the goal – 500 credits.

ii) Acquisition of CGFM nonmembers – 25 credits each.

GOAL 3. Retention

Retention of current chapter members is a very good indicator of the perceived value of service to the member. In order to successfully meet the retention goals a chapter must be successfully meeting the needs of its members, employers and the governmental accountability community. Contact new members, identify their needs and goals as AGA members and encourage them to

become active in the chapter. The National Office completes retention credits at the end of the membership year (i.e., April 30th).

Chapters are encouraged to meet and exceed the 90% retention goal over the previous year's April 30 figure.

Meet or exceed the 90% retention goal – 900 credits.

Attain 90 - 99% of the 90% goal – 700 credits.

Attain 70 - 89% of the 90% goal – 500 credits.

Adjustment for Special Circumstances – Occasionally extenuating circumstances impact membership growth, recruitment and retention such as establishing a new chapter and some members moving over, loss of members from the closure or relocation of a governmental entity, or an influx from combining or closing chapters. If your chapter experiences extenuating circumstances, work with your Regional Coordinator for Membership, RVP and SVPRS to develop specific goals for your chapter's membership.

GOAL 4. Participate in membership recruitment and retention programs

Here are some great ways to meet your chapter membership recruitment and retention goals. You can team up with other chapters and your Regional Coordinator for Membership on some of these items. Be creative, find the best formula for your area and have fun.

- A. Develop and implement an annual or biennial Chapter membership satisfaction survey – 200 credits. Share results with Regional Membership Coordinator, RVP, SVPRS and National Office – 100 additional credits.
- B. Contact members at annual renewal time and encourage their renewal. Get ½ or more of the chapter's April 1st balance of members who have not yet renewed to renew before May 31st – 500 credits.
- C. Chapter members make personal calls to suspended members (25 credits per reinstatement).
- D. Monthly welcome letters or calls to new members – tell them dates and times of chapter events, welcome aboard, etc. – 25 credits per month contact(s) are made.
- E. Provide information about current chapter members and recognize outstanding recruitment and retention efforts in newsletters and websites – 25 credits per month published.
- F. Post or submit membership accomplishments to the National AGA Members Only Site – 25 credits per submission.
- G. Invite prospective members to chapter events – 25 credits per month.
- H. Attend local conferences, college and university fairs, and seminars to market and promote membership in AGA – 100 credits per event.

I. Emulate the national Get-A-Member campaign, or participate in the National Get-A-Member campaign – 25 credits per campaign.

J. Mailings or other recruitment of CGFM nonmembers, former members, and/or nonmembers that attended national, regional or local conferences and events in your chapter geographic area – 25 credits per recruitment effort.

K. Other retention and/or recruitment activities (describe activity) – 25 credits per activity.

GOAL 5. Participation in AGA's Performance Accountability programs

A. Chapter member participates as a [CEAR reviewer](#)-100 credits/member

B. Chapter member participates as a [SEA reviewer](#)- 100 credits/member

SECTION VI - Early Career and Student Members- 2,000 Maximum Credits

GOAL 1. Make Early Career and Student Members a priority for both your chapter and chapter members.

A. Early Career plan submitted (hard copy/electronically) to RVP, SVPRS and National Office by August 30 – 200 credits

B. Early Career or Student application submitted to National- 25 credits per application

C. Chapter pays for an Early Career or Student membership in AGA- 50 credits per member

D. Set up an Early Career/Student mentor program- 300 credits

E. Hold a "Job Shadow" day- 100 credits per participant

F. Chapter members getting involved in local accounting organizations

i) Chapter member speaking at local academic accounting class/club- 50 credits per event

ii) Participate in local career fairs- 100 credits per event

iii) Invite local college/high school students to chapter meetings free of charge- 25 credits per attendee

GOAL 2. Support the growing career of your Early Career and Student members by getting them involved in all aspects of chapter, regional and national activities. Helping your Early Career and Student members make connections and learn how to network are invaluable lessons they will use throughout their career.

A. Early Career member attends regional conferences-25 credits per attendee.

B. Chapter sends an Early Career or Student member to AGA's National PDC- 50 credits per attendee

C. Early Career/Student member volunteers with planning/hosting conferences

i) Local- 25 credits per member per event

ii) Regional- 50 credits per member per event

- iii) National- 100 credits per member pre event
- C. Early Career member serves as part of the Chapter Executive Committee- 50 credits per member
- D. Student member part of the Chapter Executive Committee- 50 credits per member
- E. Early Career member submits an article to the chapter newsletter- 25 credits per submission

GOAL 3. Offer educational opportunities for Early Career and Student members in your chapter to gain professional certifications and education.

- A. Chapter sponsors CGFM certification for an Early Career member- 50 credits per certification
- B. Academic scholarships
 - i) Undergraduate level- 100 credits per scholarship
 - ii) Graduate level- 150 credits per scholarship

SECTION VII- COMMUNITY SERVICE – 2,000 Maximum Credits

Community service events should provide the local chapters with the means of making a positive social impact on their local communities. Chapters are encouraged to focus these events around the community and utilize their membership's professional skills, whenever possible. Here are some suggestions for community service events:

GOAL 5. Participate in Community Service

VITA/TAX-Aide – Voluntary Income Tax Assistance/Tax Assistance for the Elderly for those without the financial means to have their taxes prepared professionally.

Food bank – collecting food and money to be donated to a local food bank. Many chapters focus this effort around the Thanksgiving and Christmas holiday seasons, however, this can be done at any time of the year as food banks are always in need of assistance.

Adopt-A-Family – typically done around the Thanksgiving or Christmas holidays. Local women's shelters and youth homes can provide your chapter with the name of a family in need of assistance.

Toys-For-Tots – run by the U.S. Marine Corps, but a local chapter can get involved and find out how to help, either by collecting and donating toys and money, or volunteering, as a group, at a collection site.

Career Day – designed to provide information to junior and senior high school students with information on various career options. Obviously, our thrust would be to inform these young adults about our chosen profession – governmental accounting and

auditing. Some chapters have done this in concert with the state association of CPAs, which provides some financial support for a booth and literature about the accounting profession.

Gifts to charities or non-for profit organizations – cash and non-cash gifts from the chapter such as to the GASB (Governmental Accounting Standards Board), or local women’s shelters, youth homes, etc.

Scholarships – for students pursuing a career in accounting and auditing, preferably governmental accounting and auditing. This can be established with a local college or community college, through a community foundation, or the chapter can administer the scholarship on its own.

Sponsor a blood drive – contact your local chapter of the American Red Cross for details. Your AGA chapter can sponsor a mobile site and provide volunteers to assist with donor intake, refreshment hosts, etc.

Public television fundraisers – work as a group on the phone bank fielding calls from monetary donors.

Soup kitchen – Volunteer as a group at a local soup kitchen.

Walk-a-thons – March of Dimes, etc. as a group, get friends, family, co-workers, etc. to pledge financial support.

Special Olympics – As a group, assist with your local Special Olympics games, or act as chaperones for your local Olympians at the statewide Special Olympics games.

Participate in National Community Service Week.

NOTE:

There are many projects/events that are worthy of credits and recognition. The above list is by no means a complete list or the only areas that will be considered for recognition.

If you have an idea for an event and would like to have it considered for the Chapter Recognition Program please contact your Regional Leaders for direction. In addition, your Regional Leader may be able to provide ideas and insight for enhancing the event. If your event is new/innovative and is successful you may consider informing National of the outcome so that it can be emulated by other chapters.

GOAL 6. Promote community service and AGA

Get creative – Have FUN! Find events that will excite your members.

Community service often includes volunteering service hours for organizations. Some chapters have also found success emulating the National Community Service Fun Raffle at the local level and donating the funds. Perhaps your chapter has other innovative ideas for fundraisers.

Community service event – List event and Date.

- i) Technical event, e.g., VITA, career day, etc. – 300 credits each.
- ii) Non-technical event, e.g., food bank, soup kitchen, Toys-for-Tots, etc. – 200 credits each.

Community service donation – 100 credits each. List charity or nonprofit organization and amount, e.g., National Community Service Fund (NCSF) donations, GASB \$1,000.00; City Homeless Shelter \$1,000.00. – 500 maximum credits per year.

Chapter fundraiser for charitable donations – 200 credits each. List charity or nonprofit organization and amount raised, e.g., American Heart Association \$1,000; Make A Wish Foundation \$2,500, City Homeless Shelter \$1,000.00. – 500 maximum credits per year.

Member Participation in chapter-sponsored community service event – The chapter may claim 25 credits per hour for each member who participates in a chapter community service program/event. Yearly maximum credits – 600 maximum credits per program or event and 1,000 maximum credits per year.

SECTION VIII- AWARDS – 1,000 Maximum Credits

Awards are an opportunity to recognize the efforts and accomplishments of individuals and groups, promote AGA and encourage each other. In considering ideas for basic awards, consider your chapter goals and objectives and identify the awards that will work best for your chapter.

GOAL 7. Recognize the Association and the people who make it up.

Blow our horn! Cheer on the great achievements of AGA members and others. Celebrate and acknowledge the successes. Find creative and fun ways to encourage others, have a special awards presentation, announce the awards everywhere you can. Make someone's day!

Chapter awards program for chapter members:

- i) Chapter service – 200 credits each.
Plus 150 bonus credits if also nominated for National Chapter Service Award.
- ii) Recognition for chapter officers – 200 credits per year.
(Describe the type of recognition and date)
- iii) Advancing government accountability – 200 credits each.
- iv) Recognition for professional accomplishments – 200 credits each.

Chapter recognition of others outside of AGA

- v) Scholarships – 300 credits each.
- vi) Nonmember contributions to advancing government accountability – 200 credits each.

C. Participation in AGA national awards program – 100 credits per nomination submitted.

GOAL 8. Promote the advancement of government financial management to the community and employers

Speak up, announce and invite nominations throughout your chapter area. Recognize the award recipient's further by publicizing the award in as many places as possible. Getting the word out with a positive message promotes AGA, the award recipient, the chapter and the award recipient's employer – so toot those horns all you can.

Award recipients published outside AGA

- | | | |
|------|----------------------------------|-------------------|
| i) | Newspaper of general circulation | 100 credits each. |
| ii) | Non-AGA newsletters or websites | 100 credits each. |
| iii) | Trade journals | 100 credits each. |
| iv) | Television | 100 credits each. |

Good Luck and Have A Successful Chapter Year!