

AGA Nashville Chapter CGFM Committee Plan for 2011-2012

Jerry Durham, Chair

The CGFM Committee will continue to promote the CGFM mark and AGA internally and externally, to assist candidates for the CGFM mark with exam preparation, to support current CGFM holders, and to be a resource for CGFM information. The committee will work with the Membership, Early Career, Education, and Newsletter Committees in achieving our plan.

Our goal for 2011-2012 and our long-term goal is to increase the number of government finance professionals becoming CGFM holders.

The CGFM Committee Plan for 2011 - 2012 emphasizes more direct and personal contact with current chapter members who are not CGFMs, members who have taken review courses or the exam in the past, and CGFMs who may not be AGA members. We will continue the promotion of the CGFM outside of our chapter members to government entities in Davidson and surrounding counties, to CPA firms providing services to government entities throughout the state, and to state colleges and universities. We hope to promote AGA membership among private sector professionals and government finance professionals, including those outside of Davidson County and promote the CGFM as a certification to the general public.

We plan to distribute brochures to local colleges and universities via the Early Career Committee's attendance at career fairs and through speaking engagements by the chapter's Accountability Outreach Coordinator. We will inquire about making presentations at other professional society meetings. At any joint meeting of our chapter with other professional societies, we will promote the CGFM through a short presentation and by making brochures available.

We will encourage department heads and personnel directors to promote a professional workforce by supporting their employees becoming CGFMs by sending letters and brochures to the department heads and personnel directors and possibly offer training to educate them on the CGFM mark and its benefits. We will encourage current CGFMs to push the mark among their associates. We will encourage the wearing of CGFM pins and will focus on ways to promote the CGFM mark to the legislature and the governor.

The committee will offer mentoring opportunities. As noted above, we will follow up with participants from prior training classes to determine if they took the exams and whether they passed, as well as provide outreach to those considering the CGFM exams, and establish a mentoring program. As part of the mentoring program, we will offer year round directed study sessions. We will examine the feasibility of using electronic media for video/video conference study sessions that can be viewed by participants at their desks perhaps during lunch hours or at home. The purpose of these sessions will be to assist AGA members who plan to sit for the CGFM exams by discussing the various topical areas of the three exams. The committee will continue providing CGFM classes which will be helpful not only to those who are CGFMs but also for individuals who have yet to take the exam. The training will meet Yellow Book, CGFM, and State Board of Accountancy CPE requirements. As part of this plan, the chapter will maintain a library of CGFM study materials. We have budgeted to expand the library for 2011-2012.

Within the chapter, the committee plans to continue with the exam fee subsidy drawing (six subsidies), distributing brochures at meetings to extol the virtues of becoming a CGFM certificate holder, and providing notice of training relevant to CGFM exam content. The training schedule will also be provided to the Education Committee. We will continue to have the chapter put the CGFM designation on our name tags for luncheons, and the designation will be prominently represented on our website and in our newsletters.

We plan to recognize successful candidates passing the CGFM exams in the newsletter (coordinating with the Newsletter Committee), at chapter meetings, and in press releases. We will continue to offer a free lunch to all who pass the exams.

Below, we outline the plan to specifically meet training and other CGFM goals.

Goal 1: Support current CGFMs

- Assist CGFMs in meeting the CPE requirement of 80 hours of CPE every two years
 - Provide courses that meet CGFM CPE requirements
 - Coordinate with Education Committee to insure CPE meets CGFM CPE requirements as well as other certification bodies' requirements
 - Provide 24 hours in Government Financial Management CPE from the CGFM Committee
 - Identify CPE opportunities from sources outside the chapter including local seminars, Internet courses, and self-study and promote either on chapter website or in newsletter
 - We will identify at least 10 CPE opportunities from sources outside our chapter this year and promote in our newsletter and on chapter website.
 - Promote awareness of CPE requirements
 - We will promote awareness of the CPE requirements for current CGFMs and extol the virtues of becoming a CGFM certificate holder in a newsletter article and on the chapter website.
- Publish CGFM members' achievements in newsletter and local newspapers
 - We will submit press releases recognizing CGFM members' achievements to news outlets and publish in the chapter newsletter.
- Market educational events that meet CGFM CPE requirements to the government accountability community, members, and nonmembers
 - The committee will market the CGFM Financial Management training that aids in preparing to take the CGFM exams with a brochure that has CGFM designation to a wide government accountability community.

- We will work with the Education Committee to advertise chapter training that meets CGFM CPE requirements.
- Partner with other professional organizations or governmental entities to promote the CGFM designation
 - We will make an announcement to promote the CGFM at other professional societies' meetings.
 - We will promote the CGFM at joint meetings with our chapter.
- Encourage CGFM renewals through personal contact, letters, newsletters, or websites
 - We plan to encourage CGFM renewals for applicable individuals, using the pro forma letter that will be provided on the listserv, by phone, and by personal contact.
- Recognize local CGFMs by using the CGFM designation in chapter publications, name tags, etc.
 - The committee will use the CGFM designation in newsletters and on chapter luncheon name tags.
 - The committee will encourage members who are CGFMs to wear their CGFM pin at chapter events.
- Recognize local CGFMs by publicizing new CGFMs in chapter and local publications
 - We will recognize individuals who pass the exams in the local newsletter. We will submit press releases recognizing new CGFMs to news outlets.

Goal 2: Market CGFM service mark locally

- Contact area government accountability leaders to promote CGFM
 - In conjunction with the Membership Committee, the committee will distribute via email a letter to local and state government accountability leaders to promote CGFM. This letter will extol the virtues and benefits of becoming a CGFM certificate holder and will educate those leaders about the importance of maintaining a professional staff. Additionally, we will distribute a letter via email to the Governor and State Legislature and to local government elected officials in the chapter area about the value of CGFMs in providing better government through a more professional staff.
- Create awareness of the value of the CGFM service mark in the general public
 - We will send a press release in conjunction with the March 2012 CGFM month about the value of CGFMs in providing better government to area newspapers. We will send press releases extolling CGFM members' achievements.

- An employer in the chapter area changes policy to recognize the CGFM.
 - Our long-term goal is to get employers in our area to recognize the CGFM and provide monetary incentives.
- Endorsement of CGFM from area employer, elected official, or principal
 - The committee will contact the Comptroller of the Treasury and the Director of the Department of Audit for endorsement letter.
- Specific chapter goals to promote the CGFM in our area
 - Goals submitted to regional and national coordinator
 - Achievement of goals

Goal 3: Assist potential new CGFMs in attaining certification

- Offer CGFM courses
 - The committee will offer three 8-hour CPE events, which, at a minimum, will cover the information contained in CGFM Exams 1, 2, and 3.
- Sponsor study groups
 - The committee will provide study sessions for members planning to take the exams.
 - We will maintain a CGFM Exam course website to support candidates and participants in our directed study sessions and review classes as well as in self-study.
- Participate in CGFM mentoring program
 - Members who are CGFMs will be assigned as mentors to CGFM candidates.
- Develop or participate in other study options
 - The committee will assist potential candidates in obtaining study materials and remind the local membership and other potential candidates of the CGFM exam online study paper prepared by the committee.
 - We plan to put at least 3 ideas on the listserv.
- Provide CGFM courses or CGFM examination scholarships
 - The committee will have a drawing for exam fee subsidies (six winners, excluding application fee).

Goal 4: Designate a chapter resource to work with CGFM certification

- The chapter CGFM coordinator is Jerry Durham, CGFM. Jerry and members of the CGFM Committee will serve as the chapter resource to work with CGFM certification.
- Communicate with chapter and governmental community promoting CGFM
 - We will share innovative ideas with the listserv.

- Contribute items to chapter newsletter such as CGFM recognition, study questions, encouragement, technical requirements, tip of the month
 - We will have six articles in the chapter's monthly newsletters.
 - We will put a tip-of-the-month in the newsletter and share it with the listserv.

- Meet chapter goals and objectives for CGFM retention
 - Meet 90-100% retention goal