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## NASHVILLE CHAPTER



## STRATEGIC PLAN

## ADVANCING GOVERNMENT ACCOUNTABILITY

THREE-YEAR PLAN FOR  
THE PERIOD BEGINNING  
SEPTEMBER 1, 2007

**ASSOCIATION OF  
GOVERNMENT ACCOUNTANTS  
Nashville Chapter  
Strategic Plan**

***Advancing Government Accountability***

The Association of Government Accountants (AGA) organization, established in 1950, is dedicated to the enhancement of public financial management. AGA serves the professional interests of individuals in local, state, and federal governments by offering programs and services to forward its commitment to education and training, professional development, networking, publications, and certification that recognizes the unique skills of government financial managers.

Established in 1978, the Nashville Chapter of AGA is one of more than 90 chapters across the country that promotes the organization's goals by providing professional support, education, and training to members while serving their communities through volunteer activities.

The Nashville Chapter serves the governmental financial community in middle Tennessee, northern Alabama, and south-central Kentucky and is a part of the Southeastern Regional governance structure.

The Strategic Plan Framework, aligned with AGA's Strategic Long-Term Plan, was adopted by the Chapter's Executive Committee on August 2, 2004 for the purpose of defining a clear and compelling mission, vision, and values statement that will guide the Chapter's activities. Each committee strategic plan has been reviewed and updated for the 2007-2008 program year.

**AWARDS COMMITTEE STRATEGIC PLAN**

**Goal:** Acknowledge contributions made by members that enhance Chapter activities and the government financial community.

**Strategies:**

- Develop an annual plan that recognizes contributions to Chapter activities and to the government financial community.
- Explore new ways of recognizing individual achievement in the government financial community.
- Monitor the chapter participation spreadsheet to determine that each member's points are posted in a timely manner.
- Participate in AGA national awards program.
- Publicize the recognition of members and awardees in the Chapter newsletter.
- Select and present the scholarship awards—William R. Snodgrass Scholarship and Fawn W. Ellis Scholarship.
- Establish guidelines for member-of-the-year award.
- Coordinate the selection of nominees for other established Chapter awards.

**Indicators**

- Nominate at least four individuals for national awards on an annual basis.
- Celebrate contributions on an annual basis.

## **FINANCE COMMITTEE STRATEGIC PLAN**

**Goal:** Enable the chapter to meet its Internal Revenue Service reporting requirements; record its history; and provide consultation on financial issues and chapter policies.

**Strategy:**

- Consult with Chapter officers and committees on financial issues, internal controls, and policies and procedures.

### **Indicators**

- Submit the Chapter History Report to the AGA National office, the Regional Vice President (RVP), the Senior Vice President for Regional Services (SVPRS), the Chapter Executive Committee (CEC), and post on the Chapter website by September 30.
- Submit the federal tax return to the Internal Revenue Service by November 15.
- Draft all requested policies and present to the CEC by the end of the Chapter year.
- Collect cash and checks and submit a receipt report at all chapter luncheons and education events.
- Increase funds from the private sector to the Chapter by five percent.

## **ASSOCIATION OF GOVERNMENT ACCOUNTANTS Nashville Chapter Strategic Plan Framework**

### **MISSION**

The Nashville Area Chapter of the Association of Government Accountants provides quality programs, offers services and educational opportunities, fosters leadership and professional development and promotes certification to government accountability professionals.

### **VISION**

To advance government accountability and create leaders in the government accountability community.

### **VALUES**

**Accountability** – Promoting and advancing accountability in government.

**Communication** – Providing opportunities for members to learn and grow through education, meetings and networking events.

**Diversity** – Respecting the ideas and perspectives of all members.

**Integrity** – Fostering the highest professional standards of ethical conduct and behavior, and exemplary services to all levels of government.

**Leadership** – Providing experience to members to advance leadership roles in government.

**Service** – Attending to the needs of our members, the governmental financial sector and the community.

## **STRATEGIC GOALS**

**Service** – Provide members with quality programs, products and services.

- Attract and retain a diverse and growing membership.
- Provide members with opportunities for networking such as meetings and social events.
- Provide scholarship programs to provide financial assistance to members and develop future governmental accountability professionals.
- Maintain fiscal responsibility of chapter financial resources.
- Provide effective communication to members.

**Education/Certification** – Provide continuing education to meet the changing needs of the government accountability profession.

- Provide quality, affordable training events.
- Promote CGFM.
- Provide speakers at meetings to discuss current events and other topics of interest to our members.
- Promote accountability, integrity and competence in government.
- Generate revenue to support other chapter activities.

**Leadership/Professional Development** – Provide opportunities for members to serve the chapter and gain leadership experience.

- Promote involvement in chapter governance.
- Promote active participation by early career members in chapter activities.
- Promote involvement of members in national leadership roles and award opportunities.
- Acknowledge contributions made by members to enhance chapter and national activities.
- Maintain or improve our chapter's leadership position at the regional and national levels.

## **EARLY CAREERS COMMITTEE STRATEGIC PLAN**

**Goal:** Promote early career and student membership, active participation in Chapter activities, government employment, and aid in the development of the management skills of tomorrow's leaders.

### **Strategies:**

- Prepare and implement an annual plan for early career and student membership development.
- Promote education activities targeted toward early career members and student members.
- Encourage supervisors and co-workers to personally engage early career and potential early career members to participate in Chapter activities.
- Provide mentoring and networking opportunities to involve and develop early career members.
- Provide outreach opportunities to college campuses to raise awareness of and encourage participation in AGA chapter.
- Promote careers in government to students.

### **Indicators**

- Submit annual plan by August 30.
- Publicize education activities in the newsletter and early careers section of the website.
- Publish and post newsletter article(s) featuring specific ideas for use by supervisors and co-workers.
- Send out periodic correspondence featuring specific ideas for those working with students and publicize availability of information on the website.
- Increase early career member attendance at luncheon meetings and sponsored social event(s).
- Host a student careers in government day attended by students from at least five campuses.

## **EDUCATION COMMITTEE STRATEGIC PLAN**

**Goal:** Provide professional training, education, and development opportunities that are relevant to the needs of the government professional community.

### **Strategies:**

- Develop and implement an annual plan for continuing education based on topics that are timely and relevant to the government professional community.
- Sponsor and present affordable training conferences, seminars, workshops, and networking opportunities.
- Develop continuing education for targeted sectors of the professional government community.
- Develop direct participation opportunities for existing and potential members to present programs in their particular areas of expertise.

### **Indicators**

- Submit annual plan by August 30.
- Provide a program worth at least 40 CPE credits annually.
- Maintain a satisfaction level of above average for training content.

## **CHAPTER GOVERNANCE STRATEGIC PLAN**

**Goal:** Maintain an effective governance and financial structure.

### **Strategies:**

- Develop and implement a three-year strategic plan that aligns with the Chapter's Strategic Plan Framework and the National Chapter Recognition Program.
- Annually review how Chapter business is organized and conducted.
- Produce and maintain a policy and procedures manual to assist Chapter Executive Committee (CEC) and other committee members in their positions.
- Prepare an annual budget that defines how Chapter funds will be deployed for the fiscal year. Ensure funds are within budget.
- Monitor the Chapter's financial condition by the preparation and review of financial statements.
- Require an annual evaluation of the Chapter's year-end financial statements with a review of the systems of internal control.
- Prepare and obtain approval of CEC and Chapter minutes and conduct business meetings in accordance with Chapter bylaws.

### **Indicators**

- Achieve the maximum points that can be awarded by the National Chapter Recognition Program.
- Publish the year-end financial statements and the service efforts and accomplishments of the Chapter in the Chapter Annual Report and on the website.

**COMMUNICATION—NEWSLETTER, PUBLIC RELATIONS, AND WEBSITE COMMITTEES' STRATEGIC PLAN**

**Goal:** Communicate effectively with the Chapter members, government financial community, and general public in an integrated and timely manner.

**Strategies:**

- Inform members, customers, and stakeholders about AGA National and Chapter programs, benefits, and accomplishments.
- Provide current information of interest to the members, government financial community, and general public.
- Increase the use of electronic communication and personal contact.
- Use multiple means of communication including newsletter, website, press releases, and e-mail.
- Maintain an up-to-date Chapter website.

<b>Indicators</b>
<ul style="list-style-type: none"><li>• Publish at least nine newsletters annually.</li><li>• Notify members by e-mail of relevant information and events during the year.</li><li>• Aid committees in achieving communication objectives.</li><li>• Submit periodic press releases announcing various events and accomplishments throughout the year.</li><li>• Update the chapter web site regularly with the latest accomplishments, events, and news.</li></ul>

**CERTIFIED GOVERNMENT FINANCIAL MANAGER (CGFM) COMMITTEE STRATEGIC PLAN**

**Goal:** Promote the CGFM designation by marketing the service mark, by assisting potential candidates in attaining certification and by supporting current CGFMs.

**Strategies:**

- Aggressively market the value of the CGFM to governmental employers and the public.
- Encourage employers to use the CGFM amount qualification for employment and promotion.
- Encourage internal recognition by our Chapter membership of the value of the CGFM through the use of the mark on nametags and in our newsletter.
- Provide continuing education.
- Encourage CGFM certification renewals.
- Actively support attainment of the CGFM through review classes and directed study groups.
- Provide incentives to potential CGFM candidates (e.g., exam subsidies) and successful CGFM candidates (e.g., a business meeting luncheon certificate).
- Recognize new CGFMs through Chapter recognition in the newsletter, at monthly business meetings, and in press releases.

<b>Indicators</b>
<ul style="list-style-type: none"><li>• Submit annual plan by August 30.</li><li>• Receive CGFM recognition from the Legislative and Executive Branches of State Government and other governmental entities.</li><li>• Increase the number of Chapter members and nonmembers attending CGFM training and taking the CGFM exam over the prior year.</li><li>• Submit articles, exam-taking tips, and notices to the newsletter and listserv.</li><li>• Retain at least 90% of Chapter CGFMs.</li></ul>

**PROGRAM COMMITTEE STRATEGIC PLAN**

**Goal:** Ensure that appropriate speakers are available at each business meeting and provide an opportunity for members to network at a social event.

**Strategies:**

- Develop and implement an annual social event.
- Develop a plan and schedule of potential speakers for business meetings.
- Confirm speakers for eight business-meeting dates.
- In conjunction with the meetings and attendance committee, identify and coordinate one joint meeting with another professional organization.

**Indicators**

- Develop a plan of potential speakers by September 1.
- Confirm speaker, provide biography and photograph for the subsequent month's speaker before the newsletter editor's monthly deadline.
- Implement an annual social event.

**COMMUNITY SERVICE COMMITTEE STRATEGIC PLAN**

**Goal:** Promote and conduct community service activities that enhance the Chapter and the Association of Government Accountant's image and reputation.

**Strategies:**

- Establish an annual plan of volunteer service projects that demonstrate the Chapter's commitment to serve the community.
- Encourage Chapter members to volunteer their time and effort to community service projects.
- Increase awareness of members' community service activities.

**Indicators**

- Participate in or conduct at least five community service projects annually.
- Submit annual plan by August 30.

**MEETINGS AND ATTENDANCE COMMITTEE  
STRATEGIC PLAN**

**Goal:** Coordinate all chapter meetings.

**Strategies:**

- Secure a location for all chapter meetings—monthly Chapter Executive Committee (CEC) meetings, the year-end CEC appreciation luncheon, the monthly chapter business luncheon meetings, and the chapter awards luncheon banquet.
- Publicize policies regarding luncheon reservations and attendance.
- Maintain a list of meeting attendees for all meetings.
- Coordinate the member name tags, chapter banner, and the fishbowl for door prizes for the business meetings.
- Prepare and provide the program for the business meetings.
- Provide lunches for the monthly CEC meetings and coordination of lunch for chapter meetings.
- Seek volunteers for the monthly business meeting invocation.
- In conjunction with the program committee, identify and coordinate one joint meeting with another professional organization.

**Indicators**

- Submit annual plan by August 30.
- Secure locations for all meetings.
- Provide lunches on a timely basis for all meetings.
- Ensure that accompaniments necessary for business meetings are available.
- Ensure policies are communicated to membership.

**MEMBERSHIP COMMITTEE STRATEGIC PLAN**

**Goal:** Attract and retain a diverse and growing membership.

**Strategies:**

- Develop and implement a membership recruitment and retention plan annually.
- Seek input from both Chapter members and the government financial management community to assess and/or enhance the value of Chapter membership.
- Promote the value of Chapter membership to heads of various governmental departments and agencies
- Provide membership incentives to attract and retain a diverse and growing membership.
- Review existing recruitment tools and approaches, and enhance them as necessary.
- Welcome all new members by contacting and promoting active participation within the organization.

**Indicators**

- Submit annual plan by August 30.
- Maintain a 90% retention rate.
- Increase chapter membership by 10% annually
- Increased member participation in Chapter activities.