



AGA
Leadership
Handbook
for National,
Regional &
Chapter Leaders

March 2007

Acknowledgements

AGA's National Office of the Executive Director developed this handbook. However, we did not start from scratch and would therefore like to gratefully acknowledge the Membership Department's hard work in developing the bulk of AGA's Chapter Leadership Manual from which this leadership handbook was created. We also borrowed very heavily from the Community Associations Institute's own leadership manual.

Our leaders are vital to our success!

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INTRODUCTION—BEFORE WE BEGIN

Thank You

Thank you for your interest in serving the premier association for government accountability professionals. The tremendous strides we have taken as an organization are a direct result of the service and commitment of our volunteer leaders and we are grateful for your time, energy, insights, skills and knowledge.

Using This Handbook

Whether you are embarking on your first AGA leadership term, finishing up one of several terms, or just considering an AGA leadership role—welcome.

This handbook provides you with much of the information you need to succeed as an AGA leader and enjoy an exciting and productive term. It is organized into six sections that provide an overview of AGA, give you a good idea of what is expected of you as a leader, tell you what you can expect when you start your term and how you can get the job done. This handbook should be used in conjunction with other resources, such as the National Officer position descriptions, AGA Bylaws and Long-Range Strategic Plan.

How much of this handbook you need to read depends on what you already know and what you want to know. Are you a brand-new committee member who has not been involved at the national level before? Then you might want to read Sections I, II and III (and reference Section VI). However, if you are a veteran leader who is simply accepting another AGA leadership role, then you might just want to hone in on the section that covers the details of that particular position.

Finally, please feel free to copy any portion of this manual, pass it along, cut it up, whatever. If it is of help to you and you think it can be of help to someone else—terrific, pass it along.

Handbook Organization

This handbook is organized as follows:

Section I—General AGA Overview

- Provides a broad overview of AGA membership, programs and services.
- Explains the governance structure.
- Lists boards, committees and task forces

Section II—Leadership Overview

- Addresses the leadership nomination process.
- Includes a general leadership and AGA event calendar.
- Discusses the National Board of Directors.
- Answers questions such as, “How much of a time commitment will this be?” “How do I get reimbursed?” and “How do I schedule a teleconference?”

Section III—National Leadership

- Focuses on the day-to-day administration of national leadership roles such as National President and National Treasurer as well as board and committee members.
- Lists possible projects for boards, committees, task forces and senior advisory council members.
- Defines various roles.

Section IV—Regional Leadership

- Explains the regional governance structure and leadership roles.
- Explains the Regional Vice President position.
- Includes helpful hints and guidelines for getting the job done.
- Summarizes the various regional reports due each quarter.

Section V—Chapter Leadership

- Focuses on chapter-level leadership.
- Discusses working with the regional team and the National Office.
- Includes sample chapter officer position descriptions.
- Covers committee responsibilities, developing chapter programs and chapter communications.

Section VI—Resources

- Compiles the resources referenced throughout the handbook into one convenient place.
- Supplies additional ideas.

INTRODUCTION—BEFORE WE BEGIN

Acronyms and more...

The following is a list of acronyms and shortened names you will encounter in this handbook and in your conversations with AGA members and staff.

Academy—Academy for Government Accountability

AGA—Association of Government Accountants

CEAR—Certificate of Excellence in Accountability Reporting

CEC—Chapter Executive Committee

CGFM—Certified Government Financial Manager

COE in SEA Reporting—Certificate of Excellence in Service Efforts and Accomplishments Reporting

CPAG—Corporate Partner Advisory Group

CPE—Continuing Professional Education

CRP—Chapter Recognition Program

FMSB—Financial Management Standards Board

Fraud—AGA's Annual Internal Control & Fraud Conference

GAR Report—Growth, Acquisition and Retention Report

GFM Courses—Government Financial Manager Courses

NBD—National Board of Directors

NEC—National Executive Committee

NLC—National Leadership Conference

PDC—Professional Development Conference and Exposition

PMC—Performance Management Conference

RVP—Regional Vice President

RVP-Elect—Regional Vice President-Elect

SEA—Service Efforts and Accomplishments

SLM—Sectional Leadership Meeting

SVP At-Large—Senior Vice President At Large

SVPRS—Senior Vice President for Regional Services

Mini AGA Quiz

Just for fun, see if you know the answers to the following questions. The answers are below.

1. What is AGA's Mission Statement?
2. How many members does AGA have?
3. What (approximately) is AGA's current operating budget?
4. Name five AGA educational products.
5. How many sections and regions does AGA have?
6. For RVPs: What section are you in and what is the name of your Senior Vice President for Regional Services?
7. True or False—AGA Chapter Presidents sit on the NBD.
8. When is the NBD meeting traditionally held?
9. You are a current RVP and want to attend a chapter's educational symposium. You go ahead and book your plane ticket. How do you get reimbursed?
10. You need contact information for all AGA National Office staff, but the National Office is closed for the New Year's holiday. What do you do?
11. Name five resources that help AGA leaders do their jobs.

Answers

1. See page 7: AGA serves 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.
2. See page 7: AGA has approximately 14,000 members.
3. AGA's fiscal year 2006-2007 budget is \$5.3 million.
4. See page 7: GFM in-class Courses 1, 2, and 3; GFM Course 1 Online; CPE Online; AICPA/AGA Federal Accounting, Reporting and Auditing video; Journal CPE quizze
5. Four sections (I, II, III and IV) and 15 regions.
6. See page 9 for a map. Since the Senior Vice Presidents serve on the National Executive Committee, refer to the NEC roster for their names and contact information.
7. See page 8: This is true.
8. See page 11: The Sunday prior to the start of the Professional Development Conference and Exposition.
9. See page 14: Complete the Reimbursement Form and submit it with the original receipts.
10. See page 39 or go to the AGA website.
11. See pages 38-40: AGA website, other leaders, staff, Topics, NEC minutes.

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SECTION I—WHAT YOU NEED TO KNOW ABOUT AGA

AGA's Mission

AGA serves accountability professionals by providing quality education, fostering professional development and certification, and supporting standards and research to advance government accountability.

This section introduces AGA's mission, provides an overview of membership, programs and services, outlines AGA's governance structure and lists boards, committees and task forces.

AGA Overview

AGA is the premier educational organization dedicated to the enhancement of public financial management. AGA serves the professional interests of accountability professionals from local, state and federal governments, as well as private sector organizations, responsible for effectively using billions of dollars and other monetary resources every day.

The Association serves the public through its constant efforts to improve accountability and disclosure and to enhance the professionalism of public sector financial managers. As part of a national, professional organization devoted to public sector financial management, the individual members are professionals in various aspects of the field of public financial management, such as accounting, auditing, budgeting, evaluation and systems; representing the public, private and academic sectors.

National Programs and Services

Since 1950, AGA has been addressing the issues and challenges facing government financial managers. Our organization has been instrumental in developing accounting and auditing standards and in generating new concepts for the effective organization and administration of financial management functions, including the passage of the Inspector General Act of 1978 and the Chief Financial Officers Act of 1990. AGA conducts independent research and analysis of all aspects of government financial management.

As a national organization, AGA operates within a national/chapter structure. It is through this successful relationship that we have become THE premier association for government accountability professionals. The success of this partnership relies upon the strengths of both the national and chapter teams combined with a willingness to collaborate and cooperate in areas of mutual interest.

The national organization works to develop programs and services for members that are larger in scale and generally outside the scope of a local chapter. AGA National also works very hard to support chapters in delivering the local services and programs the chapters provide to members.

AGA serves 14,000 members around the world:

- 32 percent represent the federal government sector
- 30 percent represent the state government sector
- 14 percent represent the local government sector
- 13 percent represent the private sector
- 11 percent represent retirees, academia, students and other

AGA Organizes Its Programs Into Three Business Lines:

Services, including:

- Publications (the *Journal*, *AGA Today* and *TOPICS*)
- Membership activities, including leadership and networking opportunities, the Corporate Partner Advisory Group (CPAG) and community service.
- Website
- Accountability programs, including CEAR, the Certificate of Excellence in SEA Reporting, Financial Management Standards Board and the Code of Ethics
- Awards and scholarships

Education, including:

- National Leadership Conference, Performance Management Conference, Internal Control and Fraud Conference, Professional Development Conference & Exposition
- Online CPE
- Audio Conferences
- CEAR and SEA Trainings
- CPAG Research Program
- *The Journal of Government Financial Management*
- AGA-sponsored courses
- The GFM Courses

Certification:

- The CGFM designation

AGA's Educational Products Include:

- GFM Courses 1, 2 and 3
- CGFM Exam 1, 2 and 3 Study Guides
- Monthly Audioconferences
- CEAR and SEA Program Training
- *Journal* CPE Online quizzes

SECTION I—WHAT YOU NEED TO KNOW ABOUT AGA

Current AGA Initiatives

AGA's Operating Plan outlines the details of the various program initiatives. For program year 2007-2008, initiatives include:

- Continue to advance the awareness, knowledge and value of the CGFM designation at all levels of government.
- Deliver the GFM Courses.
- Offer series of monthly audioconferences.
- Continue the Sloan Foundation-funded COE in SEA Reporting Program. A grant has been extended to fund the initiative through December 2007.
- Build recognition of the CEAR Program and expand reviewer pool.
- Expand the Corporate Partner Membership Program.
- Wrap up review of all AGA Chapter bylaws.
- Overhaul Policies and Procedures Manual.
- Continue to expand AGA's research program.
- Work on the citizen-centric reporting initiative, which encourages governments to publish an annual four-page 'state of the government' report to its citizens. The report would provide comprehensible information about the financial condition of the government.
- Sponsor the 2007 Collegiate Case Challenge. The competition encourages college students to form teams to solve a government financial management case. Prizes will be awarded to the top team.

Organizational Structure

Overview

AGA operates under a National-Chapter partnership with AGA's 90 chapters grouped into 15 regions, each led by a team comprised of the Regional Vice President, Regional Vice President-Elect and Immediate Past Regional Vice President.

Each region has four Regional Coordinators who assist chapters in such program areas as Certification, Education, Membership & Early Careers, and Chapter Development and Assistance.

The 15 regions are clustered geographically into four "Sections," I, II, III and IV, each led by a Senior Vice President for Regional Services (SVPRS). The SVPRSs are part of the National Executive Committee, thus the linkage from chapter to region to national AGA. (See Appendix A for a map of sections and regions.)

Governance

National Board of Directors

AGA is governed by a National Board of Directors (NBD) whose roles and responsibilities are outlined in Article VI of the Association's Bylaws. In general, the NBD is responsible for:

- Promulgating the policies and programs of the Association.

The National Board of Directors Consists of the Following Positions:

- National President^{1,3}
- National President-Elect^{1,3}
- Immediate Past National President^{1,3}
- National Treasurer^{1,3}
- National Treasurer-Elect^{1,3}
- Immediate Past National Treasurer^{1,3}
- Senior Vice Presidents At Large^{1,3}
- Senior Vice Presidents for Regional Services^{1,3}
- Regional Vice Presidents³
- Regional Vice Presidents-Elect^{2,3}
- Immediate Past Regional Vice Presidents²
- Immediate Past Five National Presidents
- Remaining Past National Presidents²
- Immediate Past Five National Treasurers
- Remaining Past National Treasurers²
- Chapter Presidents
- Student Chapter Presidents²

¹National Executive Committee Member

²Ex officio member (without vote)

³National Officer

Who Serves on the NEC?

The NEC consists of 16 individuals:

- National President
- National President-Elect
- Immediate Past National President
- National Treasurer
- National Treasurer-Elect
- Immediate Past National Treasurer
- Five Senior Vice Presidents At Large
- Four Senior Vice Presidents for Regional Services
- Executive Director (*ex officio*)
- Corporate Partner Advisory Group Chair (*ex officio*)
- Professional Certification Board Chair (*ex officio*)

- Reviewing the NEC-approved budget.
- Establishing dues schedules for all classes of members and special rates for categories within each.
- Adopting amendments of the Bylaws.

National Executive Committee

AGA's National Executive Committee (NEC) acts for the NBD. It meets quarterly to discuss operational issues. See the above National Board of Directors listing for those positions that serve on the NEC.

SECTION I—WHAT YOU NEED TO KNOW ABOUT AGA

The NEC's responsibilities include:

- implementing operational policies;
- reviewing all actions and programs of national boards, committees and task forces; and
- appointing and assessing the executive director.

The minutes from the NEC meetings are distributed to all NBD members and the highlights of those meetings are published in AGA's bi-weekly newsletter, *TOPICS*.

AGA's National Boards

- Certificate of Excellence in Accountability Reporting Board
- Professional Certification Board
- Professional Ethics Board
- Financial Management Standards Board
- Journal Editorial Board

AGA's National Committees

- Audit Committee
- Awards Committee
- Bylaws and Procedures Committee
- Emerging Issues Committee
- Finance and Budget Committee
- Internal Control and Fraud Conference Technical Committee
- International Development Committee
- National Executive Committee
- National Leadership Conference Technical Committee
- Nominating Committee
- Performance Management Conference Technical Committee
- Professional Development Conference Technical Committee

Advisory Groups and Task Forces

- Corporate Partner Advisory Group
- Early Careers Task Force
- Citizen-Centric Government Reporting Task Force

Senior Advisory Councils

AGA's Bylaws grant the National President the authority to establish Senior Advisory Councils. Currently, AGA does not have any Senior Advisory Councils.

Board and Committee Descriptions/Charters Online

Visit <http://www.agacgfm.org/about/boards/>

Use our online form to indicate your interest in serving!

Implementing Our Mission

The documents referenced below are a vital part of implementing the AGA mission. See Section VI for details about getting copies:

- **Bylaws**—This important document outlines the legal guidelines that specify AGA's rules of operation.
- **AGA's Mission Statement**—This statement summarizes AGA's purpose.
- **Long-Range Strategic Plan**—Lays out strategies for meeting the mission over the course of three to five years.
- **National President's Theme and Goals**—Presents those portions of the Long-Range Strategic Plan the National President will focus on.
- **Policies and Procedures Manual**—This comprehensive volume contains policies and procedures that outline the nitty-gritty details of getting the job done. AGA's National Bylaws and Procedures Committee is overseeing a major multi-year overhaul of this important reference.

Academy for Government Accountability

The Academy for Government Accountability was founded in 2005 with the following mission: To forge relationships among government, business and academia to support research and education initiatives and advance thought leadership in bringing transparency and accountability to government financial management. The affairs of the Academy are managed by a Board of Trustees, and is a separate 501(c)(3) entity from AGA. For more information, contact Eveanna Barry at ebarry@agacgfm.org.

SECTION II—AGA LEADERSHIP IN GENERAL

This section provides an overview of the leadership nominations process, includes a general leadership and AGA training opportunities, discusses the National Board of Directors meeting, and covers basic day-to-day administrative details.

AGA Leaders Are Exceptional

AGA leaders are innovative, energetic professionals who are ready to be catalysts for change and willing to take risks. Furthermore, our leaders are creating our future, defining how we serve financial professionals, and ensuring our success as the premier educational association for government accountability.

We are exceptionally proud of our leadership team and look forward to working with you as we serve government accountability professionals around the world.

Benefits of Leadership

Your leadership in AGA might just be the most important contribution you will make to the profession and to your own career. Active participation in an AGA National board or committee can lead to important leadership positions within AGA and perhaps even within your own organization.

AGA leaders take advantage of the exceptional opportunity to:

- Contribute to the growth and success of the premier association for government accountability professionals.
- Develop solutions to meet present and future challenges.
- Expand your leadership skills.
- Gain insight into the financial management and association management arenas.
- Network with a dynamic group of financial management professionals.
- Stay apprised of hot topics in financial management.

Who Pays For It?

All AGA leadership roles are filled by highly dedicated professionals who volunteer their time and expertise. AGA reimburses leaders for certain expenses incurred while performing in an AGA leadership capacity. Read AGA's Travel Guidelines, which outlines the details of reimbursement. Contact Michiyo Wheeler at mwheeler@agacgfm.org for the current policy or download a copy from the Members Only section of the AGA website at www.agacgfm.org.

Your Agency Benefits From Your AGA Leadership!

- Agency recognition
- Management skill-building
- Public speaking experience
- Opportunity to make industry contacts

Leadership Responsibilities

The depth and breadth of your leadership responsibilities will depend on your position. You should review your formal position description and then reference the appropriate section of this handbook to learn more about the day-to-day details.

Time Commitment

Likewise, the time needed to perform the various responsibilities will depend on your role. Whenever possible, we have included time commitment estimates. Again, go directly to the portion of the handbook that covers your position for an idea of what might be expected of you.

Nominations Process

AGA's Bylaws outline the details of nominating AGA National Officers. In general, each fall, AGA members submit nominations for the various positions and then the National Nominating Committee chooses one individual for each position to take office effective July 1. (Note: The Nominating Committee sometimes receives more than one application per position and it is the committee's responsibility to choose the candidate.)

Each spring, the National President appoints board, committee and task force chairs, which are then approved by the NEC. Also, each spring, the National President works in conjunction with the various teams to appoint board, committee and task force members.

Chapter Presidents and other officers, and board members are elected at the chapter level.

All national leaders receive a letter from the National President confirming their appointment.

Staff Liaisons

Each AGA leadership position works closely with a staff liaison. This individual serves as a vital part of the leadership team and provides a range of support that can include:

- Drafting status reports.
- Providing program updates and prior reports.
- Keeping the team apprised of actions of the National Executive Committee.
- Administering day-to-day details such as coordinating conference calls, running rosters, keeping minutes, processing mailings, etc.

As you read more about your particular leadership position, make a special note to remember your staff liaison. They will become an indispensable resource as you progress into your AGA leadership term.

The National Board of Directors Meeting

All members of the National Board of Directors are asked to attend the annual National Board of Directors (NBD) meeting. (Refer to page 8 for a list of the leadership positions that serve on the NBD.)

SECTION II—AGA LEADERSHIP IN GENERAL

This meeting is traditionally held in conjunction with the annual Professional Development Conference & Exposition. Therefore, if the conference begins on a Monday, the NBD meeting will be held the Sunday prior.

Mark Your Calendars!

The NBD meeting is held the Sunday prior to the PDC. All NBD members should plan on attending this important event.

Who Attends the NBD Meeting?

All NBD members attend this meeting. (See page 8 for a list of NBD members.) All other AGA National and Chapter leaders are encouraged to attend the meeting and are welcome to join us!

The NBD Agenda

The agenda consists of the presentation of the National President's and National Treasurer's reports, Nominating Committee review of the National Officers slate, presentation of the National President-Elect's theme, and other business as necessary (such as votes to amend the bylaws, etc.).

Proxy Voting

AGA bylaws explain that proxy voting is allowable in the following cases:

- The Regional Vice President-Elect may vote in the Regional Vice President's absence. The Immediate Past RVP votes in the absence of the RVP and RVP-Elect.
- The National Treasurer-Elect may vote in the National Treasurer's absence.
- The Chapter President-Elect may vote in the Chapter President's absence. In the absence of both the Chapter President and the Chapter President-Elect, the Chapter President may designate in writing the delegate for the chapter.

NBD-Related Expenses

AGA's Travel Guidelines specifically state that AGA CANNOT reimburse leaders for registration expenses associated with attending AGA's conferences. AGA currently offers a hotel scholarship for RVPs and chapter members to attend the PDC and NLC. Contact Jessica Jones at jjones@agacgfm.org for more information. Please ask for a copy of AGA's Travel Guidelines so that you can have a handy reference for your expense reimbursement questions.

Tip of the Day

Read AGA's Travel Guidelines, which outlines the details of AGA's reimbursement policy. It is available by clicking on Members Resources under the Members Only section of the AGA website or you can contact Michiyo Wheeler at mwheeler@agacgfm.org.

Other Leadership Meetings

AGA hosts Chapter Leadership and Regional Leadership Meetings throughout the week of the Professional Development Conference & Exposition. Generally, ALL chapter leaders/officers are invited to these important get-togethers to discuss program updates, chapter accomplishments and challenges, and other issues.

Again, these meetings are usually held right after the NBD meeting, which means the Sunday prior to the start of the PDC is fairly well booked for AGA leaders!

The AGA Calendars

AGA leaders should be familiar with the structure of the chapter and National program and fiscal year calendars.

Chapter Calendars

First of all, with 90 AGA chapters, it's no surprise that no two operate on exactly the same calendar. AGA leaders should simply be aware that while some chapters begin their program year April 1, others begin their program year July 1.

RVPs-Elect Take Note

Although RVPs officially assume office July 1, their program year begins May 1 when they are still RVPs-Elect.

National Calendars

Furthermore, AGA National operates under three different calendars:

- **The Fiscal Calendar of April 1 – March 31**
- **The Chapter Membership Calendar of May 1 – April 30**
 - This calendar coincides with the RVP Recognition Program period and the Chapter Recognition Program period.
 - Although RVPs assume office July 1 of each year, their program year begins May 1 of each year when they are RVP-Elects. This early start is necessary for the pre-planning activities that are required of RVP positions.
- **The Program Calendar of July 1 – June 30**
 - This calendar encompasses the activities of the AGA National Officers (except RVPs—see above), Boards, Committees and Task Forces.
 - All leadership terms formally begin on July 1 of each year.
 - The following table summarizes the above information and includes additional details. However, it is not all-inclusive! It is intended only as a general guideline to help leaders get a sense of the AGA cycle.

SECTION II—AGA LEADERSHIP IN GENERAL

AGA Leadership Calendar

	AGA Event	National Executive Committee	Boards, Committees, Task Forces	Regional Vice President Teams	Chapter Leaders
January				<ul style="list-style-type: none"> • Quarterly Reports Due 	
February	<ul style="list-style-type: none"> • National Leadership Conference 	<ul style="list-style-type: none"> • NEC Orientation • NEC Meeting Reports Due 	<ul style="list-style-type: none"> • Quarterly Reports Due 		<ul style="list-style-type: none"> • Chapter Rec. Reports Due
March				<ul style="list-style-type: none"> • SLMs 	<ul style="list-style-type: none"> • Natl. Award Nominations Due
April				<ul style="list-style-type: none"> • SLMs 	<ul style="list-style-type: none"> • Chapter Rec. Reports Due • Academic Scholarships Due
May	<ul style="list-style-type: none"> • CEAR Ceremony 		<ul style="list-style-type: none"> • Quarterly Reports Due 	<ul style="list-style-type: none"> • RVP Recognition Program Year Begins • Quarterly Reports Due • SLMs • RVP Regional Goals and Objectives Due • RVPS begin filling upcoming Regional Coordinator Vacancies 	<ul style="list-style-type: none"> • Chapter Rec. Program Year Begins
June	<ul style="list-style-type: none"> • Professional Development Conference & Exposition 	<ul style="list-style-type: none"> • NEC Meeting reports due • NBD Meeting 		<ul style="list-style-type: none"> • NBD Meeting 	
July		<ul style="list-style-type: none"> • Formal Term Start Date 	<ul style="list-style-type: none"> • Formal Term Start Date 	<ul style="list-style-type: none"> • Formal Term Start Date 	<ul style="list-style-type: none"> • Formal Term Start Date • Chapter officers/Director Rosters Due

SECTION II—AGA LEADERSHIP IN GENERAL

AGA Leadership Calendar

	AGA Event	National Executive Committee	Boards, Committees, Task Forces	Regional Vice President Teams	Chapter Leaders
August	Pacific Emerging Issues Conf./RCOW		• Quarterly Reports Due	• Quarterly Reports Due	• Chapter Rec. Reports Due
September	<ul style="list-style-type: none"> • Internal Control and Fraud Conference • Performance Management Conference 	• NEC Meeting Reports Due			
October	Collegiate Case Competition			<ul style="list-style-type: none"> • Natl. Officer Nominations Due • Natl. Leadership Award Noms. Due 	
November			• Quarterly Reports Due	• Quarterly Reports Due	• Chapter Rec. Reports Due
December		• NEC Meeting Reports Due			

A Word (Or Two) About Leadership Titles

"Regional Vice President, Regional Vice President-Elect, Regional Vice President-Elect Designate, Immediate Past Regional Vice President!" What are the differences? Although at first glance, a lesson on AGA's leadership titles seems somewhat daunting, it's easy once you know the secret. The secret is, "July 1" of any given year.

All AGA leaders formally begin their terms as current leaders on July 1, the beginning of AGA's program year. So, for example, on July 1, one begins service as a "Regional Vice President." The individual in line to take office as Regional Vice President after you leave is called a "Regional Vice President-Elect." During the first six months of the program year (remember, for AGA that's July through December), we operate with just these two types of leaders: currents and "elects."

However, during the last six months of the program year (January through June), we operate with a set of three leaders: currents, "elects" and "elects-designate." The "elects-designate" are those individuals who—you got it—will take office as "elects" on July 1. And the cycle continues. (What's a "Regional Vice President-Elect Candidate? A Regional Vice President-Elect Designate whose nomination has not yet been formally certified by the National Bylaws and Procedures Committee. You get bonus points if you already knew that.) This basic idea is true for all AGA leaders, including the National President and National Treasurer. Here's the visual:

Leadership Title as of June 30	Leadership Title as of July 1 (start of the new program year)
Regional Vice President	Immediate Past Regional Vice President
Regional Vice President-Elect	Regional Vice President
Regional Vice President-Elect Designate	Regional Vice President-Elect

What if I Get Stuck?

Yes, it's a challenge but yes, you're up to it!

If at any point you get "stuck," don't know where to begin, are asked a question you can't answer or need to tackle a project that seems overwhelming, turn to your support team for help. Each leadership section of this handbook tells you where to turn.

SECTION II—AGA LEADERSHIP IN GENERAL

FAQs About the Day-To-Day Details

We have compiled a list of answers to the most frequently asked questions about leadership administration. If you have further questions, please ask us!

Do I have to develop and submit an RVP/Board Chair/Regional Coordinator Budget?

In general, no, AGA leaders do not have to develop and submit budgets. We allocate costs for each leadership component (for instance, each region, each board/committee, etc.), according to past actuals and then monitor expenses each month. However, once in a while, when we see we are getting close to the budgeted cap, we will ask leaders to project expenses for us so that we can monitor the situation even more closely.

How do I know if AGA reimburses me for a particular item?

If you have already referred to AGA's Travel Guidelines and you still have a question, then you should contact Michiyo Wheeler at mwheeler@agacgfm.org or 800.AGA.7211, ext. 321.

How do I get reimbursed?

Once you read the AGA Travel Guidelines and know what costs AGA picks up (and most important, doesn't pick up) you can get easily reimbursed by completing AGA's expense report and submitting it along with your original receipts to the staff liaison. The expense report can be found in the Member Resources section of the Members Only portion of the AGA website.

How do I book travel?

Please use AGA's travel agent to book your travel. This allows AGA to approve each transaction, track expenses, and receive bonus points for the direct billing to AGA's account. Additionally, our agent can use our frequent flyer

accounts to book tickets that would otherwise cost \$500 and greater. Please read our Travel Guidelines and then keep a few items in mind:

- Book your flight AT LEAST two weeks in advance.
- Consider different airports if it reduces your airfare and is more economical in the long run.
- Be prepared to book a flight that includes connections and changing planes.
- Be willing to stay a Saturday night if doing so significantly reduces the cost.

How do I set up a conference call?

Simply contact your board, committee or task force staff liaison. They will work with you and your team to coordinate the details.

How do I get a board/committee/staff roster?

All rosters are available by going to the Members Only portion of AGA's website (<https://members.agacgfm.org>). Or, you can contact Michiyo Wheeler at mwheeler@agacgfm.org or 800.AGA.7211, ext. 321.

Booking AGA-Related Travel

- Notify AGA travel liaison Michiyo Wheeler at mwheeler@agacgfm.org of the nature of your travel.
- Call Steve Gardner at Avenue Travel Services at 888.548.5554 or e-mail steve@avenuetravel.com.
- Identify yourself as an AGA leader.
- Steve will work with you to book your travel and will get AGA's approval of your itinerary and the cost before finalizing.
- If you can find cheaper travel arrangements on your own, AGA will reimburse you.

SECTION III—LEADERSHIP AT THE NATIONAL LEVEL

This section builds on Sections I and II and focuses on the roles and day-to-day administration of National Executive Committee members and Board, Committee and Task Force leaders.

Use this portion of the handbook in conjunction with your respective position description. Note that the Senior Vice Presidents for Regional Services role is addressed in this section (and not the regional section) because they serve on the National Executive Committee.

Time Commitment

The time commitment for each AGA leader varies widely. For instance:

- CEAR Board members attend only one two-hour board meeting, but they are expected to dedicate 25-27 hours during one four-week period in the early spring serving as program reviewers.
- Overall, NEC members meet quarterly during the week for a one-day meeting. They are also sometimes asked to spearhead special projects or act as liaisons to the National Boards.

The best way to estimate how much time will be involved in serving in a particular position is to contact the staff liaison or those who have held the position in the past.

National Leadership Roles

Now let's look into the details of the National Executive Committee positions. The following information offers an overview of what to expect and where to turn.

National President

The National President works very closely with the Office of the Executive Director. Prior to your term, the Executive Director will contact you to help prepare you for your term. In addition to your many duties, you will be working with the Office of the Executive Director to:

- Coordinate implementation of goals/strategies.
- Formalize the appointment of board, committee and task force chairs.
- Confirm various meeting and conference dates.
- Appoint two Past National Presidents to serve on the National Nominating Committee (since the terms technically begin July 1, you actually appoint these individuals in June, the last month of your National President-Elect term).
- Review and finalize the National Awards Committee list of recommended awards recipients.
- Choose the recipients of the National President's Award.
- Choose a gift to recognize NEC members for presentation at the June NEC meeting

Staff Liaison will work with you to implement day-to-day details, such as:

- Helping to schedule various speaking engagements at AGA events throughout the year.
- Preparing for NEC and NBD meetings (agendas, reports and Decision Memorandums).
- Updating Board, Committee, Task Force and Senior Advisory Council rosters.
- Initiating formal letters of leadership recognition, etc.
- Itinerary for PDC week.

Staff Liaison: Executive Assistant to the Executive Director

National President-Elect

The Office of the Executive Director will contact you soon after the National Bylaws and Procedures Committee validates your nomination (usually in late February), to help prepare you for the position. Some of your first duties as National President-Elect will include:

- Appointing a Senior Vice President At Large to serve on the NEC.
- Acting as the liaison to the Senior Vice Presidents for Regional Services. This includes updating the RVP Recognition Awards Program, modifying the RVP Reporting Program, and determining the recipients of each year's RVP awards.
- Working with the National Office, the National President and the SVPRSs on the NEC orientation and the SLMs, aimed at training incoming RVPs, NEC members and chapter officers. This includes developing the agenda and updating content.

- Developing and presenting your presidential theme, goals and strategies
- Filling vacancies to the various boards, committees and task forces

- Appointing NEC liaisons to the AGA boards

Staff Liaison will support you during your term, including:

- Helping to schedule various speaking engagements at AGA events throughout the year.
- Preparing for NEC and NBD meetings (agendas, reports and Decision Memorandums).
- Contacting you to receive a formal picture for display at the AGA National Office

Staff Liaison: Executive Assistant to the Executive Director

SECTION III—LEADERSHIP AT THE NATIONAL LEVEL

Immediate Past National President

Ahh, as Immediate Past National President, you can sit back and relax. Somewhat. However, while you will have formally turned the gavel over to your successor, you will still work closely with the Office of the Executive Director to perform a variety of duties, including:

- Serving on the NEC.
- Chairing the National Nominating Committee and the Past National Presidents' Council.
- Submitting a Past National Presidents' Council Report at the NEC meetings and NBD meeting.

Staff Liaison: Executive Assistant to the Executive Director

National Treasurer

The AGA National Treasurer will work very closely with AGA's Finance Department, and will perform the following duties:

- Chairing the Finance and Budget Committee.
- Overseeing the Association's fiscal matters.
- Reviewing proposed budget prepared by the National Office.
- Presenting a report to the NEC each meeting.
- Presenting an annual report to the NBD.

Staff Liaison: The Director of Finance and Administration will work with you to implement day-to-day details such as:

- Preparing for and coordinating quarterly Finance and Budget Committee (FBC) meetings.
- Helping you draft and initiate appropriate reports and Decision Memorandums for NEC and NBD meetings.

National Treasurer-Elect

The National Treasurer-Elect will work very closely with AGA's Finance Department, and especially with the Director of Finance and Administration, who will help prepare you for the Finance and Budget Committee and NEC meetings. Duties include:

- Reviewing proposed annual budget prepared by the National Office.
- Serving as Vice Chair of the FBC.

Staff Liaison: Director of Finance and Administration

Immediate Past National Treasurer

The Immediate Past National Treasurer will work very closely with AGA's Finance Department, and especially with the Director of Finance and Administration. Duties include:

- Serving on the Finance and Budget Committee.
- Serving on the Nominating Committee.
- Chairing Past National Treasurers Council.

Staff Liaison: Director of Finance and Administration

Senior Vice President At-Large

SVPs At-Large represent the membership on the NEC. You will work very closely with the Office of the Executive Director.

Staff Liaison: Executive Assistant to the Executive Director

Senior Vice President for Regional Services

Our SVPRSs represent the membership from their respective sections and hold a special position that is "National" on one level because they serve on the National Executive Committee, but "Regional" on another level because they oversee the regional teams for their section. These leaders have additional responsibilities that include:

- **Attending Sectional Leadership Meetings**

Each SVPRS will attend his/her section's SLM and represent AGA National.

- **Submitting Quarterly Reports to the NEC**

Each SVPRSs receives reports from the RVPs and turns them into quarterly written Sectional Reports for the NEC. The Section Report summarizes the RVP reports and highlights any noteworthy accomplishments and/or problems or concerns. SVPRSs should include their perspectives about each region. During the quarterly NEC meeting, the SVPRSs will be asked to provide a verbal update of their report.

- **Coordinate Sectional Leadership Meeting**

Each SVPRS will be asked to help develop the agenda for their SLM.

- **Lead a Session at the Chapter Leadership Meetings**

SVPRSs may be asked to coordinate a session with their RVP teams and chapter officers at some time during AGA Business Meetings at the PDC.

Staff Liaison: Director of Chapter Operations

National Board, Committee, Task Force and Senior Advisory Council Leadership

AGA's National leadership volunteers serve on National boards, committees, task forces and senior advisory councils. These bodies study issues, make recommendations and carry out assigned responsibilities. Currently, more than 300 AGA members are making things happen as members of these teams. Here's a sample of how these individuals spend their time:

- Drafting policy and procedures for Association programs, including the Certified Government Financial Manager Program and the Certificate of Excellence in Accountability Reporting Program.
- Creating the technical program for AGA's conferences.
- Conducting the Association's policies and procedures compliance audit.
- Updating AGA's ethics policy and developing a conflict of interest statement.

SECTION III—LEADERSHIP AT THE NATIONAL LEVEL

- Evaluating policies, regulations and standards affecting government financial management.
- Choosing the Association's National Officers.
- Formally commenting on government financial management policies, regulations and standards
- Recommending the recipients of AGA's leadership awards and selecting student scholarship recipients

Access the online list of AGA's boards, committees and task forces at <http://www.agacfm.org/about/boards/committeeList.aspx>

The Roles of Board, Committee, Task Force and Senior Advisory Council Members

The Role of the Chair

Board, committee, task force and senior advisory council chairs lead their respective teams. Since most chairs assume the role after having served one year as a vice chair, they are usually aware of the team's objectives and goals. However, specific direction will be provided as needed.

In general, responsibilities of the chair can include:

- Taking the lead in developing the team's goals.
- Submitting quarterly reports to the National President.
- Orienting team members about their expected individual contributions and responsibilities.
- Providing necessary background information and/or training to committee members.
- Preparing meeting agendas and relevant information to all members prior to meetings.
- Leading committee meetings and delegating work of the committee to committee members.
- Following up between meetings with members on work assignments.
- Assisting in identifying potential leaders among the team.
- Helping to recruit members to serve on the team.
- Reviewing the various board and committee signups to fill vacancies.

The Role of the Vice Chair

Vice chairs serve as the chair's "right hand" and can expect to assume the chair role after serving one year as vice chair.

The Role of the Team Member

The members of the various board, committee, task force and senior advisory council teams work under the direction of the chair to meet the group's goals and objectives. While most members are regular members, some will serve in an advisory capacity only as an "ex-officio" (nonvoting) member.

You can expect to hear from your chair or vice chair shortly after being appointed to a board, committee or task force. The chair will help you get up to speed on the team's plan for the year.

SECTION IV—LEADERSHIP AT THE REGIONAL LEVEL

This section builds on Sections I and II, and will help Regional Vice Presidents, Regional Vice Presidents-Elect, Regional Vice Presidents-Elect Designate, Immediate Past Regional Vice Presidents and Regional Coordinators do their jobs. (Note that Senior Vice Presidents for Regional Services are addressed on page 16 under the “National Leadership” section.)

AGA’s Regional Team

What could we do without AGA’s regional teams? Well, quite frankly, not much. Under AGA’s regional structure:

- An experienced three-person management team (the RVP, the RVP-Elect and the Immediate Past RVP) manages the region.
- A team of functional specialists (Regional Coordinators) are available to recommend and/or help improve services to chapters and members in the region.
- A National Office liaison (National Coordinator) transmits goals, objectives and strategies for the functions and provides general guidance and assistance.

This team is responsible for assisting chapters in numerous areas, including Education, Certification, Membership & Early Careers, and Chapter Development and Assistance.

Regional Team Members

Each of AGA’s 15 regions has a regional team consisting of the:

- Senior Vice President for Regional Services, who oversees the regional team (see page 16 for more information about the SVPRS role).
- Regional Vice President.
- Regional Vice President-Elect (and, don’t forget that six months out of the year we have a Regional Vice President-Elect Designate).
- Immediate Past Regional Vice President.
- Regional Coordinators for Education, Certification, Membership & Early Careers, and Chapter Development and Assistance.
- Plus, a National Coordinator for Education, Certification, Membership & Early Careers, and Chapter Development and Assistance.

Staff Liaisons to the Regional Team

A National Coordinator will work as a part of the Regional Coordinator teams and help the group remain on track by providing guidance and assistance. (Maintaining files and notes, providing background information to the team, providing status reports when needed, etc.)

The Director of Chapter Operations and the Chapter Services Manager will act as staff liaisons to the RVPs, RVPs-Elect and the Immediate Past RVPs. These individuals will help you remain on track by providing monthly updates and friendly reminders.

Regional Teams Manage Each Region. The teams consist of the:

- RVP
- RVP-Elect
- Immediate Past RVP
- Regional Coordinators
- National Coordinator
- SVPRS

The next six pages focus on helping RVPs get the job done:

- Overview of the Role
- Helpful Hints and Guidelines
- Sectional Leadership Meeting
- RVP Quarterly Reports

The Team Captain—The Regional Vice President

(Extra special thanks to these past RVPs who have contributed tremendously to the development of this section: Angie Billings, CGFM, Bobby Derrick, CGFM, Jeff Hart, CGFM, Joe Kapelewski, CGFM, Cindy Osga, CGFM, Darlene Richard, CGFM, and Joel Wells, CGFM.)

AGA’s Regional Vice Presidents are our superstar ambassadors. It is difficult to overstate their contributions. In their role as the chief elected officers of our 15 regions, they play a critical role in assisting chapters, executing our programs and accomplishing our mission.

RVPs spend the first year of their term as RVPs-Elect, the second year as the official RVP and the third and final year as the Immediate Past RVP.

So Who Are These Captains and What Do They Do?

The position description contains the broad categories of responsibilities. Here are more details.

Regional Team Management

- Identify Regional Coordinators, answer questions, point them in the right direction, etc.
- Initiate and attend various conference calls.
- Help as needed.

Chapter Officer Development

- Assist the SVPRS and the National Office to organize the SLM.
- Help current chapter officers solicit new officers for the chapter (succession planning).
- Encourage chapter officers to seek information and materials from National Office staff throughout their terms of office.

SECTION IV—LEADERSHIP AT THE REGIONAL LEVEL

Chapter Communication

- Keeping apprised of AGA national programs and initiatives and summarizing, reiterating and/or informing chapters of such projects.
- Visiting chapters and communicating back to the National Office success stories, issues, feedback, etc.
- Assisting chapters in resolving common issues.
- Encouraging communication among chapter officers and among the chapters on appropriate national and regional issues.
- Arranging for the exchange of newsletters among the region's chapters.
- Reminding chapter officers of their commitment and responsibilities. All AGA chapter presidents serve as members of the NBD and are responsible for promulgating policies of the Association. This could include encouraging them to submit their votes on amendments to the bylaws, etc. and reinforcing important deadlines.
- Encouraging and monitoring chapter participation in national and regional programs and activities, including the Chapter Recognition Program.

Chapter membership growth and retention, with the assistance of the Regional Coordinator for Membership:

- Work with the chapter presidents to monitor membership growth and retention.
- Monitor each chapter's efforts in the Membership Program and encourage chapters to achieve their membership goals.
- Support, promote and encourage chapter growth through involvement in local chapter meetings and other activities.

Chapter training and educational services, with the assistance of the Regional Coordinator for Education:

- Provide educational and development activities for chapter officers and chapter committee chairs, i.e., help to develop meeting agendas, locate speakers, etc.
- Encourage and promote regional education conferences to provide educational opportunities to all members in their regions.

Miscellaneous

- Locate candidates for AGA leadership positions (including RVPs-Elect).
- Initiate quarterly RVP phone calls.
- Attend the annual NBD meeting.
- Attend the annual Sectional Leadership Meeting.
- Vote on AGA-related matters when required.
- Help train the RVPs-Elect and Regional Coordinators.
- Possibly serve on the AGA Nominating Committee.
- Submit annual regional goals and objectives and complete quarterly reports.

In short—anything goes. And yes, that is a lot of responsibility, but:

- You can do it.
- You are not alone.
- You will learn, grow, connect and... have fun!

Helpful Hints and Guidelines

The following incorporates words of wisdom from RVPs who have been there and done that:

In the Beginning

Get Your Bearings

- Learn what section you are in and who your SVPRS is.
- Connect with the ENTIRE RVP team—the Immediate Past RVP, the RVP-Elect, the RVP-Elect Designate, the Regional Coordinators and the National Coordinator.
 - Consider assigning chapter oversight responsibilities to each member of your team.
- Know your chapters' histories (the Immediate Past RVP or the National Office can provide you with past regional reports).
- Learn the names of your chapter presidents.

Obtain Support

- Get buy-in from your employer, supervisor and local chapter by showing your agency the benefits of your AGA leadership position (see page 10).
- Get your boss involved in AGA as a member, a speaker, a guest at a meeting or write an article about him/her for a chapter newsletter.

What a Great Idea!

Early in your year, connect with the ENTIRE RVP team:

- the Immediate Past RVP
- the RVP-Elect
- RVP-Elect Designate
- Regional Coordinators

and consider assigning chapter oversight responsibilities to each member of your team.

Learn About Your Chapters

Listen:

- to your chapter members, who will tell you what issues are important to them.
- to your past RVP who has "been there and done that."
- to your SVP who has worked with other RVPs in the region.

SECTION IV—LEADERSHIP AT THE REGIONAL LEVEL

Other tips:

- Read chapter and regional newsletters to keep abreast of what your chapters are doing. Read their websites.
- Learn to navigate the national website. Point out significant information to your team and chapter presidents.
- Attend chapter meetings.
- Contact other RVPs you met at the Sectional Leadership Meeting, chapter officers you met at the regional meeting and those at the PDC, etc.
- Learn from your mistakes and let others know what went wrong.
- Pass on what you learned to the National Office and your RVP-Elect.

Plan Your Year

- Set specific goals EARLY (while your term officially begins July 1, your program year begins May 1).
- Include Past RVP and RVP-Elect in goal-setting.
- The RVP Quarterly Reporting Program is a guide to success—incorporate it into your goals for the year.
- Tie your goals into AGA's overall Long-Range Strategic Plan.
- Review your goals/plan each month.
- Do not go overboard—go for what you can reasonably achieve, but still challenge yourself.
- Assist your SVPRS in planning your SLM.
- Communicate expectations.
- Provide a copy of your goals to Chapter Presidents and RVP team members.
- Provide a “Key Dates Calendar” to Chapter Presidents.
- Get to know your Chapter Presidents. Some need hand holding and cajoling, while others operate well and just need a periodic check.
- Collect your chapters' contact information (including names, phone numbers and e-mail addresses).
 - Set up an electronic e-mail list.
 - Distribute Regional/Chapter Directory to Chapter Presidents.
- Plan your chapter visits early in the year.
 - Obtain the chapter meeting dates and times.
 - First visit those chapters that may need assistance. You may want to include the Regional Coordinator for Chapter Development and Assistance for these visits.
 - Try to include those chapters that have not been visited in the last year. While they are generally the ones running smoothly, they like to know they matter and that their efforts are recognized.

Establish Consistent Communication

- Communication cannot be stressed enough. It is very important that you maintain contact with the chapters. It is essential that you know what they are doing.
- Set aside time to call/e-mail each chapter at least twice a month. Remember personal communication is best, so try to call at least once each month.
- Also, remember to keep in contact with the RVP team members and regional coordinators.
- Ask how the chapter is doing (take the good and the bad); ask about programs, educational training events, community service projects; ask if there are any issues the chapters would like the NEC to know (if yes, let the SVPRS know).
- If you do not hear from a chapter after leaving a voice mail or phone call, keep trying. Remember that everyone is busy with their 'paying' jobs and home life.
- Remember to keep track of when you called and/or e-mailed the chapter in your quarterly report.
- Review the monthly Growth, Acquisition and Retention (GAR) membership reports.
- Encourage the chapters to participate in the Chapter Recognition Program. Review the reports. This is an excellent resource to stay abreast of the chapter activities. Use this information for discussions with the chapters.
- Encourage the chapters to participate in AGA programs, such as submitting nominations for national awards, membership drives, website best practices, etc.
- Check the national website, and encourage chapters to do so. It has valuable information for you to communicate with the chapters to keep them abreast of the national and other chapter activities.
- Respond promptly to any requests. You will find that sometimes chapters ask you to obtain information they could get themselves. Try to honor the request rather than referring them. You can always tell them later what you did to get the information. But by honoring their request, they feel that you care and are willing to go the extra step to help make them successful.
- Help the chapters get speakers for the monthly meetings and/or educational training events.
- Encourage and praise your Chapter Presidents and officers at every opportunity. They deserve it and it is amazing how positively they respond.
- Encourage the members to become active with the chapters by serving on the board or committees, and participating in community service events.

SECTION IV—LEADERSHIP AT THE REGIONAL LEVEL

- Write an article for the chapter newsletters.
- Remind the chapter presidents that they are members of the National Board of Directors (NBD). Encourage them to attend the NBD meeting held at the PDC and to vote on matters presented to the NBD for action.
- Keep the National President, President-Elect, National Office, SVPRS and RVP team informed.
- Provide copies of the RVP Recognition Reports, RVP newsletter and any specialized reports you may develop to the RVP team, SVPRS, National Office Executive Director, National President and National President-Elect. Keep them abreast of any pertinent issues.
- Use the RVP-elect to help with chapter visits.
- Get to know the National Office staff. Contact them for assistance and advice. They have a wealth of knowledge and what they do not know they will find out for you.
- Do your paperwork as you go along. Keep notes and e-mails of your discussions with the chapters. You will be glad you did this when the time comes to prepare your quarterly reports.
- Draft articles for your regional newsletter as they occur to you or as you receive information from the National Office or chapters.
- Constantly review your goals and key dates.

Visit Your Chapters

- Visit each chapter at least once during the year. As stated earlier, each chapter is unique and a visit allows you to see this in person. You may find a chapter does not communicate with you, causing concern, only to visit and find the chapter is functioning well.
- Visit chapters needing assistance as often as possible. Be there to support them through the difficult times. Provide whatever assistance you and/or the RVP team or Regional Coordinators can provide. Be sure to work with the Regional Coordinator for Chapter Development and Assistance to improve troubled chapters.
- Visit with the membership as well as the chapter officers and directors. It is important that you talk with the membership. It is a great way to encourage participation on the chapter board or find out why they are unwilling to participate.
- Offer to serve as a speaker at a chapter event.
- Attend one chapter educational event for each chapter. Try to combine this with the chapter CEC and monthly meetings whenever possible. Not only do you earn CPE hours, but you gain information about speakers and topics you can share with other chapters in the region.

Publish a Regional Newsletter

- A monthly newsletter is best.
- A newsletter of one to two pages should be adequate. If it is too long, you may find that it does not get read because time is valuable to the chapter volunteers.

- Remind the chapters of due dates (recognition reports, national membership drives, nominations for awards, voting on NBD issues, etc.)
- Remind the Chapter Presidents they are part of the NBD and should vote on issues put before them.
- Recognize chapter successes. It may be something another chapter could use.
- Include a bio of one of the members of the regional management team.
- Feature “best practices” from the Regional Coordinators.
- Provide some wisdom or motivational quotes.
- Include some humor/funnies. It may give the reader something to look forward to and they may actually read the newsletter.
- Be sure to send your newsletter (e-mail or printed copy) to the RVP team, the Regional Coordinators, Chapter Presidents and the SVPRS.

Develop a Regional Website

- Keep it simple and informative. Use the AGA website template to set up a regional or a chapter website. Directions and the template can be found at: <http://www.agacgfm.org/membership/identity/websites/default.aspx>. Consider the following:
 - the regional management team information
 - links to the chapter websites
 - links to the national website
 - your regional goals
 - your regional newsletter
 - regional speaker information
 - regional and/or chapter educational events
 - anything you think would benefit the region

Sectional Leadership Meetings

This year AGA is offering a new opportunity for national, sectional, regional and chapter leaders to discuss the direction of AGA, share best practices and provide you with the tools needed to succeed. This event will take the place of the Leadership Training Workshop and the Regional Chapter Officer Workshops (RCOWs) of the past and we hope you enjoy the opportunity to network with others in your section.

Here is a list of who is invited for the first year. We will evaluate the SLMs and determine if other chapter representatives should be invited.

- Sectional Vice President for Regional Services
- Regional Vice Presidents—Two of three may attend from the RVP, RVP-Elect and RVP-Elect Designate leadership team.
- National and Regional Coordinators for Certification, Chapter Development and Assistance, Education and Membership & Early Careers.

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- Chapter Presidents—Two of three may attend from the current President, President-Elect and President-Elect Designate group.
- Chapter Chairs or Vice Presidents for certification, education and membership. If the current chair is unable to attend the incoming chair can attend. However, please do not invite chapter chairs from other functions.

AGA will cover the travel costs for each invited participant and there is no registration fee required. If one of these participants is unable to attend, substitutions must be approved by Susan Fritzlen (*sfritzlen@agacgfm.org*) at the National Office.

SVPRS, RVPs and Chapter Presidents should work together to select who will attend from their leadership teams and disseminate the RSVP form to those individuals selected to attend.

RVP Reports

In general, reports take a bad rap, but the good news is, they make a difference. The President-Elect, your Senior Vice President for Regional Services, National Executive Committee members and the National Office staff liaison will actually read them, discuss them, distribute them, provide feedback on them and then act on them.

AGA genuinely relies on your reports to assess how life is going out in the field. So go ahead—test us by asking a question in one of your reports and see if you don't get an answer.

Let's now review the three types of RVP Reports:

- I. Regional Goals and Objectives Report
- II. Quarterly Status Reports
- III. Final Report on Goals and Objectives

Over the next few pages, we take you on a quick trip through these reports. Note that the templates contained in this Leadership Handbook are only samples. The National Office will update them and electronically distribute them to you about a month before they are due.

RVPs Submit Six Reports During Their Term:

- One Regional Goals and Objectives Report
- Four Quarterly Status Reports
- One Final Report on Goals and Objectives

I. Regional Goals and Objectives Report

- RVPs-Elect (those taking office on July 1) take the lead developing this report. RVPs-Elect should have this report 99 percent completed by the time the SLM is over.
- You then submit quarterly reports to your SVPRS to update everyone on the status of these goals and objectives.
- The report is due early in the year—see the chart below.

- Regional Goals and Objectives, for the most part, will fall under categories that correspond to the Quarterly Status Reports, including “Communication with Chapters,” “Education/Training Events,” etc. However, RVPs should feel free to develop goals that will be of best value to their region.
- To submit the report, you will briefly describe how your regional goals and objectives support the Association's goals.
- Then, list your regional goals. Under each goal, list the objectives for that goal and an estimated completion date.
- You will e-mail your completed report to your SVPRS with a “cc” to the National President-Elect, your RVP-Elect and/or Elect-Designate and the National Office.

II. RVP Quarterly Status Reports

- By the time these reports are due, the RVPs-Elect are full-fledged RVPs who have held office for more than a month.
- These reports outline the progress of the regional goals and objectives you submitted in the early spring and are due four times a year to the SVPRS.
- The Senior Vice Presidents for Regional Services will present summaries of these reports at each NEC meeting and will provide the NEC with regional issues, concerns, accomplishments, etc. for consideration.
- You will e-mail your completed report to your SVPRS with a “cc” to the National President-Elect, your RVP-Elect and/or Elect-Designate and the National Office.
- The National Office will distribute an updated electronic version of the report for RVPs-Elect to complete, but in general, the report will be very similar to the following:

1. Regional Administration

- A. Long Range Planning and Regional Organization—You will cite the dates you submitted your Goals and Objectives, Chapter Attribute Inventory and Regional Officer Directory.
- B. Quarterly Reports and Final Report on Goals and Objectives—You will cite the dates you submitted your quarterly reports and Final Report on Goals and Objectives.

2. Communication with Chapters

- A. Summarize how you communicated with each chapter during the quarter (meetings, e-mail, regular mail, telephone, etc.)
- B. Summarize the status of regional and chapter websites.
- C. Coordination and communication with Regional Coordinators.

3. Regional and Chapter Educational Events—Cite the date, and describe the event, the audience and your role.
4. CGFM-Related Events—Cite the date, and then provide a summary of CGFM-related activities in your region.

SECTION IV—LEADERSHIP AT THE REGIONAL LEVEL

5. **Membership Retention and Recruitment**—Describe how your region actively supports National and Chapter membership recruitment and retention programs.
6. **Liaisons with Other Professional Organizations**—Cite the date and then describe initiatives with other professional associations and organizations
7. **New Chapters and Revitalizing Existing Chapters**—Comment on initiatives to start a new chapter or to enhance or revitalize an existing chapter.
8. **Candidates for National Leadership**—Identify candidates for National Officers and national boards and committees.
9. **Regional Governance Structure**—Report on the implementation of the regional governance structure. (For example, what has been accomplished, any problems, comments, etc.)
10. **Chapter Profiles**—Provide a brief profile (or an updated profile) of each chapter in your region.
11. **Feedback for the NEC**—Provide any feedback for the National Executive Committee's next meeting.
12. **Suggestion Box**—Please tell us what your good ideas are, how we can better help you, how we can improve systems, etc.

III. Final Report on Goals and Objectives

- This report provides the National President and the National President-Elect with valuable regional information and will be the basis for the status report presented to the NBD during its annual meeting.
- It is due as outlined below.
- E-mail your completed report to your SVPRS with a "cc" to the National President-Elect, your RVP-Elect and/or Elect-Designate and the National Office.
- To complete the report, simply provide the following information for each goal and objective established at the beginning of the year:

Reports Are Due:

- **Regional Goals and Objectives Report**
May 1, 2007
- **1st Qtrly Status Reports (covers May, June, July)**
August 10, 2007
- **2nd Qtrly Status Reports (covers Aug, Sept, Oct)**
November 9, 2007
- **3rd Qtrly Status Reports (covers Nov, Dec, Jan)**
January 11, 2008
- **4th Qtrly Status Reports (covers Feb, Mar, Apr)**
May 12, 2008
- **Final Report (covers May - April)**
May 12, 2008

- The timeline of when the goal was developed and when it was completed.
- The name of the individual responsible for coordinating progress on the goal.
- Outline any goals still in progress.
- What is the progress toward achieving goals not yet accomplished? When will they be completed?
- Any constraints experienced in accomplishing goals.
- Provide any additional information regarding items or activities that might affect the AGA on a national level, a committee or task force, or the region or affected chapters within a region.
- Provide recommendations, resolutions and requests for action.
- Provide explanation on other matters in which you have been involved which impacts AGA. Include information relative to progress or achievements not included in the original goals and objectives.
- Outline any suggestions that you have for the AGA leadership and for your successor.

RVP Awards

At the end of each program year, the AGA National President-Elect recognizes RVP service with awards presented during the Professional Development Conference & Exposition. The National President-Elect uses the RVP Quarterly and Final Reports to assess progress and accomplishments and in consultations with the SVPRSs, determines the RVP award recipients for the year. RVPs will be recognized as follows:

- **Platinum**—This level recognizes superior leadership and contributions. This award is presented to RVPs who perform "off the scale" and whose service consistently far exceeds responsibilities. Receiving this level award is the exception to the rule.
- **Gold Level**—This level recognizes outstanding leadership and contributions and is presented to RVPs whose service consistently exceeds responsibilities.
- **Silver Level**—This level recognizes great leadership and contributions and is presented to RVPs whose service usually exceeds responsibilities.
- **Bronze Level**—This level recognizes good leadership and contributions and is presented to RVPs whose service consistently meets responsibilities.

SECTION IV—LEADERSHIP AT THE REGIONAL LEVEL

Regional Vice Presidents-Elect

- Prepare regional goals and objectives.
- Attend SLM.
- Be prepared to take over when RVP can't attend.
- Visit chapters.
- When necessary, participate in quarterly RVP phone calls.

Immediate Past Regional Vice Presidents

- Work as a regional team member as needed.
- Provide advice and guidance to the RVP team.
- Possibly serve on Nominating Committee.

Regional Coordinators (RCs)

Currently, each region has a regional coordinator for each of four areas: Certification, Chapter Development and Assistance, Education and Membership & Early Careers.

Regional Coordinators serve a three-year term as specialists in the above areas and are available to assist chapters as needed in each of those areas. For instance, when a chapter membership chair is looking for new ideas and best practices for membership recruiting and retention, he/she would contact the Regional Coordinator for Membership & Early Careers for assistance. They report to the RVPs and participate in conference calls as needed. Shortly after they come on board, the National Coordinator will contact them.

Currently, each AGA region has a Regional Coordinator for:

- Certification
- Chapter Development and Assistance
- Education
- Membership & Early Careers

Recruiting RCs

- Look for strong chapter members, Past RVPs.
- Ask the chapter president.
- Use succession planning.

National Coordinators

Each of the 15 regions operates with four National Coordinators—one National Coordinator for each of the four functions: Certification, Chapter Development and Assistance, Education and Membership & Early Careers. The National Coordinator for each function is the AGA National Office staff member responsible for that function, with the exception of certification, which has a volunteer National Coordinator. For example, the Director of Education acts as the National Coordinator for all 15 Education Regional Coordinators.

The National Coordinator's duties include:

- Transmitting the Association's goals, objectives and strategies.
- Facilitating the sharing of ideas and best practices, generally through regular conference calls and e-mails.
- Posting minutes from Regional Coordinators' conference calls on the AGA website.

It's Online!

Use the **Members Only** section of AGA's website to run rosters for:

- RVPs
- RVPs-Elect
- Immediate Past RVPs
- Regional Coordinators
- And More!

Visit www.agacgfm.org. Click on "Members Only," then "Member Resources."

SECTION V—LEADERSHIP AT THE CHAPTER LEVEL

This section builds on Sections I and II and focuses on chapter-level leadership and administering a successful AGA Chapter.

(Special appreciation goes out to Ray Harris and Cindy Osga for their hard work developing this section of the handbook.)

Our Association currently boasts 90 chapters—each one run by a dedicated and enthusiastic group of leaders making things happen at the grass-roots level while continuing to ensure the success of the organization at large. This section will help our chapter superstars in their leadership roles. We will first address the chapter leadership role in general and then move on to discuss role details, committees, chapter programs, meetings, communications and general administration (such as incorporation, insurance, etc.)

Preparing for Your Chapter Leadership Role

Each year (usually in the early spring), a SLM is held, which is dedicated to preparing you for your chapter leadership role and administering a successful AGA chapter. You don't want to miss this invaluable event. This workshop provides you with an opportunity to meet with other chapter leaders in your regions as well as your RVP team and your Senior Vice President for Regional Services. It is an excellent opportunity to learn what it takes to be a successful chapter. Expect to hear from your RVP team early in the year about this training.

The Chapter Recognition Program

As one of your first items of business, you should get a copy of AGA's Chapter Recognition Program (CRP). The CRP is a program designed to support, encourage and promote the accomplishment of AGA's mission and to provide flexible guidelines for a well-rounded chapter. The CRP is also a noncompetitive program designed to recognize a chapter's performance in relation to a standard or benchmark linked to AGA's mission. Each quarter, chapters submit CRP reports to AGA's Membership Department and at the end of the program year, AGA presents chapters with Chapter Recognition Awards.

However, you will also find that the CRP can help prepare chapter leaders and committee members for their leadership roles and can provide them with a very good basis for drafting their respective strategic plans and annual goals. This is because the CRP follows the basic outline of AGA National's strategic plan and contains detailed objectives categorized by functions such as:

- Chapter Leadership, Planning and Participation
- Education and Professional Development
- Certification
- Membership and Early Careers
- Communications
- Community Service
- Awards

The President-Elect prepares, or coordinates the preparation of the quarterly CRP report as a leadership learning tool.

Early each calendar year, AGA's Membership Department will distribute the updated CRP and will help chapters prepare for the upcoming program year.

Don't Leave Home Without It!

- **The Chapter Recognition Program Manual is available online, in the Members Only section, at <https://members.agacgfm.org>**
- **Or, contact Jessica Jones at the National Office at jjones@agacgfm.org**

Working with the RVP Team

The RVP team is there to help you. Each region has a team to manage the region. The regional team consists of:

- **An experienced three-person management team** made up the Regional Vice President, Regional Vice President-Elect and the Immediate Past Regional Vice President.

The RVP communicates with each chapter president and reports to the Senior Vice President for Regional Services (SVPRS) who oversees the regional management team. The SVPRS is a member of the National Executive Committee (NEC) and reports regional and chapter concerns and successes to the NEC at its quarterly meetings.

- **A team of four functional specialists**, known as Regional Coordinators (RCs), are available to improve services to the chapters and members in the region. The RCs include:
 1. Regional Coordinator for Certification
 2. Regional Coordinator for Chapter Development and Assistance
 3. Regional Coordinator for Education
 4. Regional Coordinator for Membership & Early Careers

The Regional Coordinators work with a national coordinator who transmits goals, objectives and strategies for the functions and provides general guidance and assistance. Most regional coordinator meetings are conducted through a conference call, which is coordinated by the national coordinator.

Don't Forget

You can run all leadership rosters online through the Members Only section of AGA's website, www.agacgfm.org.

SECTION V—LEADERSHIP AT THE CHAPTER LEVEL

Working with the National Office

The National Office staff is also here to help you! Glance at the Resources section to get an idea of where to turn to for help.

AGA Insider and GAR Report

Monthly Updates

- Each month, the AGA Membership Department distributes a membership and recruitment-related e-mail update, called the *AGA Insider*, which includes the current GAR Report (see below for more information), and containing suggestions, updates, reminders, etc. for all membership and early career coordinators and chapter membership chairs.
- This monthly update will help membership chairs and coordinators stay apprised of current initiatives, provide new ideas and keep the membership team connected overall.
- The AGA National Office automatically includes chapter membership chairs, membership and early career regional coordinators and the entire AGA leadership listserv on this distribution list. However, all chapter officers are welcome to join us! If you care to be added to the list of leaders receiving this monthly e-mail, contact Jessica Jones at jjones@agacgfm.org or 800.AGA.7211, ext. 317.

Growth, Acquisition and Retention (GAR) Report

- The GAR Report shows a beginning membership balance and then adds or subtracts each chapter's new members, reinstates, suspends and deceased members, ending up with a current balance. The report also calculates overall growth, new member acquisition, retention goals and progress toward those goals.
- Each GAR Report is posted under the "Chapter Resources" portion of the Members Only section of AGA's website at www.agacgfm.org.

National Officer Speaking Request

- Each AGA Chapter is welcomed and encouraged to invite the AGA National President or National President-Elect to attend a chapter event or speak at a chapter educational seminar.
- To invite him/her to your chapter's event, simply complete a National Officer Speaker Request Form and submit it to the National Office. The form is available under the "Chapter Resources" section of the Members Only portion of AGA's website at www.agacgfm.org.
- Keep in mind that the National President and President-Elect are volunteers too, and may not be available on the date(s) you select. Alternatively, consider inviting another

national officer, such as the Senior Vice President for Regional Services or the RVP to speak to your group.

- Submitting your request 8-12 months ahead of schedule is not too early!
- Contact Michiyo Wheeler at mwheeler@agacgfm.org or 800.AGA.7211, ext. 321, for more information.

Chapter Officers/Directors Rosters

July 1 is a special time at AGA. It marks the beginning of our program year. To prepare for the new year, National Office staff will be asking chapters for a list of their incoming chapter officers, directors and coordinators (such as the CGFM Chair). (This form is available under the "Chapter Resources" section of the Members Only portion of AGA's website at www.agacgfm.org.)

It is critical that the National Office and RVP team know who is serving as chapter leaders. This includes your starting roster and any updates.

We use the information to:

- Send chapter checks.
- Keep record of chapter service.
- Identify potential national leaders.
- Grant proper security level in the Members Only section of the website.
- Add to the AGA Leadership Listserv.
- Contact appropriate officers to promote awards nominations processes.

Recognizing Chapter Excellence

AGA presents a series of awards to chapters:

- Chapter Education Awards
- Chapter CGFM Award
- Membership Recruitment Awards
- Chapter Recognition Awards
- Community Service Awards
- Chapter Newsletter Awards
- Chapter Website Awards

Please keep the National Office and your RVP team apprised of chapter leadership changes. Contact Jessica Jones at jjones@agacgfm.org.

SECTION V—LEADERSHIP AT THE CHAPTER LEVEL

Chapter Officer and Director Roles

Each chapter's bylaws should specify eligibility for chapter office and election and installation procedures and timeframes. Usually, officers hold office for one year and may be re-elected. Directors may serve for one or two years, depending on the chapter's bylaws. When directors serve two years, it is preferable that half be elected in one year and the other half elected in the subsequent year.

Chapters should have a Chapter Executive Committee (CEC) consisting of the chapter officers, the Immediate Past President and committee chairs, and two other standing committees: Nominating, and Bylaws and Procedures. (More information is provided about the CEC in the "Committee" section below.)

The elected officers of a chapter often include the:

- President
- President-Elect
- Immediate Past President
- Secretary
- Treasurer
- Smaller chapters sometimes elect a single officer to serve as both the secretary and treasurer. Also, some chapters have created vice president positions commensurate with the regional governance structure (such as vice president for membership).

The directors and other types of chapter positions include:

- Education Director, Chair or Vice President
- Programs Director, Chair or Vice President
- Membership Director, Chair or Vice President
- Awards Director or Chair
- Webmaster
- Newsletter Editor
- CGFM Director, Chair or Vice President
- Community Service Director, Chair or Vice President

Some larger chapters operate with a Board of Directors as part of its CEC. Members serve overlapping two-year terms in addition to the directors, chairs or vice presidents listed above. In this case, the board provides policy oversight, provides the annual budget and monitors the chapter's strategic plan.

Each AGA chapter is encouraged to develop position descriptions that outline the responsibilities of chapter officers and directors. The following templates might be of use in developing a specific position description. Chapters should tailor these to best serve their interests. A chapter may want to consider developing a chapter policy and procedures manual that not only describes the duties of the various positions but how to best carry out those duties.

Chapter President

The Chapter President leads and directs the chapter through its various programs and events. The success of chapter operations during the year depends to a great extent on the initiative and creativity demonstrated by the president.

Keeping the membership informed about the Association's activities and motivating the membership to take an active part in AGA's programs constitute an important part of the Chapter President's responsibilities.

All Chapter Presidents are members of the National Board of Directors (NBD) and participate in policy decisions affecting AGA.

Chapter Presidents receive information about the goals of AGA through Association communications and subsequently plan programs at the local level to attain these goals.

In addition to the general leadership of the chapter and the motivation of the chapter members, the president is responsible for managing committee or board activities personally or through an appointed representative, as well as championing the AGA and chapter with employers, colleges and universities, the media, etc. This includes:

- Participating in the SLM.
- Attending annual meetings of the National Board of Directors. President-elects are encouraged to attend the PDC and NBD annual meeting prior to becoming chapter president.
- Adhering to the national and chapter bylaws as well as resolutions and rules regulating the administration of the chapter.
- Keeping the Regional Vice President and, through the National Office, the National President and the NEC fully informed about chapter activities.
- Calling meetings of the membership as prescribed in the chapter bylaws or as may be deemed necessary.
- Presiding at meetings of the Chapter Executive Committee.
- Chairing meetings of the membership.
- Appointing committee chairs, as prescribed in the chapter bylaws.
- Serving as an ex-officio member of all committees.
- Monitoring the election of chapter officers.
- Participating in meetings with employers, the media, etc. to promote the AGA and chapter.
- Ensuring that the chapter is registered with the State Board of Accountancy where required, to offer CPEs.

True or False?

Chapter presidents are members of AGA's National Board of Directors (NBD)?

True.

SECTION V—LEADERSHIP AT THE CHAPTER LEVEL

Chapter President-Elect

- The Chapter President-Elect assists the Chapter President and other officers and board members in carrying out their duties.
- The Chapter President may also assign other specific functions to the President-Elect, such as the preparation of the CRP.
- In the event that the Chapter President's position becomes vacant, the President-Elect discharges the responsibilities of the office of the president until the expiration of the president's term or until the election of a Chapter President to complete the term.
- The Chapter President-Elect should also chair the nominating committee to have a direct hand in selecting officers and directors that following year.
- The chapter bylaws should provide guidance concerning vacancies for chapter officers and directors.

Immediate Past President

The Immediate Past President is an important member of the CEC who can:

- Provide guidance to the Chapter President.
- Offer continuity in chapter governance.
- Serve as a special projects leader or chair of a designated task force (such as coordinate anniversary celebrations).
- Represent the chapter as an RVP, Regional Coordinator or on a national committee or task force.
- Help identify future chapter leaders.
- Help market the chapter with employers.
- Function as a liaison with other associations and organizations, academia, etc.

Chapter Treasurer

The Chapter Treasurer is the custodian of chapter funds and is responsible for chapter financial records and reports, including the maintenance of adequate records of all transactions involving chapter funds. Duties can include:

- Preparing the chapter's annual consolidated budget.
- Promptly depositing all receipts of the chapter in a bank account maintained in the name of the chapter.
- Making disbursements from the chapter account only on behalf of the chapter and supported by appropriate documentation. Dual signatures should be considered for large disbursements. Such thresholds should be established by the CEC.
- Establishing petty cash funds for special purposes when approved by a vote of the Chapter Executive Committee.
- Presenting all bills for chapter expenses to the Chapter Executive Committee and the Chapter Finance Committee chair.
- Upon approval by the responsible committee or by authorization of the president (according to chapter policy), paying the bills with a check drawn upon the

- chapter's account, except for disbursements made from the chapter's petty cash fund.
- Presenting, at least once a month, a financial report to the Chapter Executive Committee.
- Recording revenues for all chapter activities forwarded by the responsible committee and paying any expenses in connection with these functions. These collections and payments must be included in the reports of chapter receipts and disbursements.
- Preparing financial reports required by federal, state or local government jurisdictions in a timely manner, submitting these reports to the Chapter President (or appointed representative) prior to transmitting them to the agency involved.
- Determining if the chapter is required to file an IRS Form 990 or Form 990EZ.

The chapter's books and records should be made available to the Chapter Executive Committee at any time and are subject to audit or review at least annually. Following chapter policy, the auditor(s) may be an appointed committee, or a person selected by the President or the Chapter Executive Committee, or a Certified Public Accounting firm. In most instances, it is not cost beneficial to have a full annual audit. Instead, a review or an agreed-upon procedures audit would be sufficient.

The Chapter Executive Committee, often at the recommendation of the Chapter Treasurer, usually approves the selection of the bank in which the chapter will establish its checking account. Bank resolutions and appropriate signature cards are required to establish a bank account in the name of the chapter. Unless it is inconvenient to the Treasurer, the same bank should normally be used from year-to-year. When choosing the depository, the Chapter Executive Committee must also decide the number of signatures required to withdraw funds from the checking account. Most chapters stipulate that two signatures are appropriate—usually the President and the Treasurer.

The Treasurer is responsible for ensuring that the signature authorization forms from the approved bank are signed by the designated chapter officials and given to the chapter secretary, who will, in turn, authenticate the chapter's approval of the signatures. The Secretary usually arranges for the forms to be returned to the bank.

Chapter Secretary

- The primary duty of the Chapter Secretary is to maintain the minutes of the Chapter Executive Committee meetings, obtain approval of the minutes by the CEC, and ensure the minutes are published in the chapter newsletter and/or on the chapter website.
- The Secretary can be both a recording and corresponding secretary for the chapter and, as such can serve as a communications liaison between the chapter, the Regional Vice President and the national Association.
- As custodian of the official chapter files, the Secretary may also be the chapter historian.

SECTION V—LEADERSHIP AT THE CHAPTER LEVEL

- The Secretary can also issue notices of meetings; after consultation with the President, prepare the agenda of matters to be covered; keep a record of attendance; and prepare the minutes.

Education Director, Chair or Vice President

The Education Director, Chair or Vice President normally serves as the education committee chair and coordinates quality educational events for the chapter members and other government financial management professionals. Some chapters rely solely on the education director to carry out these responsibilities, while others may use a committee chaired by the Education Director. A chapter may also use a brainstorming session with chapter members and nonmembers to discuss potential topics and speakers. This brainstorming session may also be held with the chapter's Program Director and/or committee. In general, the duties include all aspects of developing and executing chapter seminars, trainings, workshops and conferences, with the assistance of the Education Committee.

Education Chairs are strongly encouraged to attend the SLM, as well as AGA national conferences to identify speakers and topics. The AGA National Office maintains a speaker and topics database to assist chapters in developing their training events. Contact Joe Jozefczyk at jjozefczyk@agacgfm.org.

Program Director, Chair or Vice President

The Program Director, Chair or Vice President, who may chair a Program Committee, develops and initiates a comprehensive set of programs for general chapter membership through monthly meetings and special activities. In general, the duties include all aspects of planning monthly meeting activities and planning events to allow informal assembly at social events.

Note: Some chapters combine the titles and functions of the Education and Program Chairs, and assign social activities to a different director or member. As noted above, the Program Director and/or committee may want to participate in a brainstorming session to develop topics and speakers for the chapter's programs and educational events.

Membership Director, Chair or Vice President

The Membership Director, Chair or Vice president is responsible for attracting new members to the chapter and retaining current members. The Membership Director is a key contributor to a successful chapter. Such duties are so important and vast that the chapter should consider a membership committee. Typical responsibilities may include:

- Distributing membership applications.
- Notifying delinquent and suspended members of their status and encourage renewal.
- Analyze monthly membership reports and rosters for trends, errors, corrections, etc.
- Publicize chapter and national membership competition awards.
- Prepare a monthly membership column for the chapter newsletter. Announce new members in the newsletter.
- Make new members feel they belong to the chapter's AGA family.
- Coordinate membership outreach activities with the certification, education and program directors. These directors will have a list of potential new members who attend chapter activities or who have expressed an interest in the CGFM.
- Attend the SLM to exchange ideas with other membership directors in the region and section.

Don't miss the "Chapter Resources" portion of the Members Only section of AGA's website at <https://members.agacgfm.org>. It is FULL of recruitment ideas, best practices, helpful tips, etc!

Awards Director or Chair

The Awards Director serves a critical role in the success of the chapter's award program, as well as AGA's National Awards Program.

Chapter Awards Program

The Awards Director generally has the responsibility of:

- Soliciting nominations for the chapter awards.
- Organizing and chairing the awards committee meeting to select the recipients.
- Obtaining award plaques or certificates.
- Planning the award ceremony, which may be included as part of chapter education event, a chapter program event, or an evening social event.

The chapter awards program serves as a means to reward those in the government financial community who have contributed to the chapter or its goals. It is an opportunity for the recipients to be recognized by their peers. Award categories may include:

- **Government Financial Manager of the Year:** To recognize an outstanding government financial leader who has led extraordinary initiatives in his/her employment that made a significant contribution to the government financial community.
- **Chapter Ambassador Award:** To recognize a chapter member's outstanding efforts in publicizing AGA's mission, activities and benefits.
- **Professional Development Award:** To recognize an individual's efforts in providing continuing education opportunities for government financial managers and recognizes the importance of life-long learning.
- **Community Service Award:** To recognize a member's personal commitment to community service projects sponsored by AGA and other community activities.

SECTION V—LEADERSHIP AT THE CHAPTER LEVEL

National Awards Program

The National AGA awards program depends on the hard work of these enthusiastic leaders to promote the awards opportunities and to develop and submit nominations. Chapters receive credits for submitting awards nominations. (See Chapter Recognition Program for more information.) Each year, AGA presents a series of awards designed to recognize excellence in government accountability:

National Awards, PDC

The AGA National President presents these awards each year at the Professional Development Conference & Exposition. They include the Frank Greathouse Award, Achievement of the Year Award and many others. AGA also recognizes chapters with the Chapter Education Award, the Community Service Award and the Chapter Service Award and Chapter CGFM Award.

Federal, State, Local and Private Sector Leadership Awards

The AGA National President presents these awards each year at the National Leadership Conference.

Chapter Awards Directors are encouraged to contact the National Office for either a listing of prior recipients or help completing the awards forms. Simply contact Michiyo Wheeler at mwheeler@agacgfm.org or 800.AGA.7211, ext. 321.

Download Awards Nominations Forms!

Visit www.agacgfm.org/membership/awards/.

CGFM Director or Chair

CGFM Chairs play an important role in promoting the CGFM Program. They work closely with other program directors and committees to identify potential CGFM candidates. The CGFM Chair is usually responsible for:

- Promoting the CGFM credential to members and nonmembers as well as to state and local government officials for recognition and incentives.
- Supporting individuals striving to maintain the CGFM.
- Answering questions raised by current and potential CGFMs.

CGFM Chairs work with Certification Regional Coordinators on important projects like CGFM Month initiative and share ideas and best practices with their counterparts. CGFM Chairs are part of the CGFM listserv used by AGA National to disseminate information about CGFM news and activities (promotions, events, etc.), share tips and send out articles related to the CGFM designation.

The CGFM designation is also an important recruitment and retention tool for the chapter, particularly for early career members and other potential members. Some chapters have recognized the importance of this position and have elevated it to an officer position on the CEC.

Webmaster or Web Coordinator

All chapters should develop and maintain a functional and attractive website to communicate with members and potential new members. The Chapter Webmaster helps develop the website and works closely with the CEC and other members to ensure that the information on the website is accurate. In addition, it should convey the information in a way that encourages members and future members to return to the website often. Use the AGA website template to set up a regional or a chapter website. Directions and the template can be found at: www.agacgfm.org/membership/identity/websites/default.aspx

Newsletter Editor

The Newsletter Editor has traditionally been the key communicator with chapter members regarding upcoming events and chapter activities. Successful editors also provide their readers with interesting articles written by members and other professionals, as well as reprint articles from national AGA publications and professional trade journals. Like their counterpart webmasters, editors should make their newsletters functional and attractive. Some say that being the newsletter editor is “a labor of love” because a quality newsletter takes time, but the rewards outweigh the efforts.

Community Service Director, Chair or Vice President

The Community Service Director develops, promotes and finds volunteers for community service projects, which allow members to contribute skills, labor or funds to community-based activities. The director must prepare an annual community service plan as part of the Chapter Recognition Program.

Probably the most important community service project for any chapter should be the Voluntary Income Tax Assistance (VITA) program. This program prepares income tax returns for low-income individuals who cannot afford to a professional. Your chapter may sponsor a site or work with another community program offering the program. One chapter works with the local university providing an AGA member to each location so an “expert” is on hand to work with the students who are preparing returns. In addition, the chapter provides labels and envelopes so the prepared returns make it to the correct location. Other community service projects could include:

- Public television fund-raisers
- Food drives
- Toys for Tots
- Walk-a-thons
- Blood Drives
- Assisting a family in need
- Working a soup kitchen
- Working with Special Olympics
- Highway Cleanup

SECTION V—LEADERSHIP AT THE CHAPTER LEVEL

Chapter Committees

Chapters are encouraged to establish as many committees as may be required for efficient chapter operations and development of quality chapter programs. Depending on your chapter's size, you may have only four or five committees. One of your most important responsibilities is to use your volunteers effectively, add to the core of active volunteers and recognize your volunteers throughout the year for their efforts.

Shared leadership is a key ingredient to a successful chapter and it is important that chapter officers and chairs become actively involved in fulfilling their respective responsibilities.

Chapter bylaws detail the committees authorized by the chapter; their size; and the selection process for identifying committee chairs.

Although committee chairs may be selected through election or appointment, the Chapter President usually makes individual committee assignments.

Types of Committees

According to the bylaws, each chapter should have three standing committees:

- Chapter Executive Committee
- Nominating Committee
- Bylaws and Procedures Committee

In addition, other committee interests in a typical chapter might include:

- Audit Committee
- Awards Committee
- Budget and Finance Committee
- CGFM Committee
- Communications Committee
- Community Service Committee
- Education Committee
- Membership/Early Careers Committee
- Meetings Committee
- Newsletter/Website Committee
- Programs Committee

Selection and Roles of Committee Chairs

Your committee chairs are a key part of your leadership team, since committees will carry out most of your chapter's goals. While it is always recommended that you look for individuals who can be relied upon, don't forget to consider newly involved chapter members who display a great deal of enthusiasm and who have successfully taken on responsibility. This is an opportunity for future leaders to be identified. The following qualities are very important for a committee chair:

Leadership. Can this person organize and delegate workloads, give positive direction and set reasonable goals and objectives for the committee?

Enthusiasm. Does this person have the ability to motivate and generate enthusiasm in others for their committees' goals?

Coach/Trainer. Can this person provide support and training for committee members?

Content Expertise. Does this person have experience or knowledge in the topic area of this committee?

Respect of Peers. Is this person recognized as a leader, either professionally or as volunteer? Will others willingly following him/her?

The following few pages provide guidance and ideas on various committees, their scope and objectives.

Standing Committees

Chapter Executive Committee (CEC)

This committee consists of the chapter officers, the Immediate Past President and Board of Directors. Some chapters include committee chairs on the CEC, as well as vice presidents for specific functions to highlight the importance of the activity (certification, membership, education, community service, etc.).

- The Chapter President serves as the presiding officer.
- The Chapter Executive Committee is responsible for all business of the chapter and may present recommendations to the chapter for action, such as changes to the bylaws.
- The Chapter Executive Committee has primary authority over any chapter committee.

Nominating Committee

Chaired by the President-Elect, this standing committee is responsible for recommending names for national leaders and for recommending names for chapter elective offices in accordance with the chapter bylaws.

- To issue its report to the membership, the President should appoint a nominating committee as early in the year as possible.
- In preparing a slate of candidates, the committee should consider a cross-section of the chapter membership and ascertain, in advance, that those nominated would be willing to devote the necessary amount of time to chapter activities. Also, consider having an early careers member on the CED to represent that group.
- Once determined, the committee should promptly report the nominations to the chapter secretary who is responsible for the preparation and tabulation of ballots.
- Committee members should also always be on the look out for potential chapter officers. Encourage new members to become involved with the chapter so they feel a part of the AGA family and are more likely to serve.

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Bylaws and Procedures Committee

This standing committee ensures chapter bylaws are consistent with AGA National bylaws, oversees the chapter's policies and procedures and may be responsible for monitoring the chapter's strategic plan.

Other Possible Committees

Audit Committee

This committee is responsible for conducting or coordinating periodic audits or reviews of the chapter's financial operations.

The results of these audits or reviews are to be contained in at least one written report, submitted annually to the Chapter Executive Committee within 60 days after the close of the fiscal year.

It is also a good idea to report to the membership on the chapter's finances annually as well.

A copy of the final report should be furnished to the National Office.

Awards Committee

This committee is responsible for the chapter's awards program, as well as for submitting nominations for the National Awards Program.

The committee should familiarize itself with members' contributions to financial management at all levels of government so it can best identify those, which merit recognition.

The Chapter Executive Committee approves recommendations of the awards committee.

Also see the Awards Director information on page 29.

Budget and Finance Committee

This committee administers the financial affairs of the chapter, including, but not limited to:

- Developing budget recommendations for the fiscal year to the Chapter Executive Committee prior to its annual meeting.
- Selecting and overseeing chapter investments.
- Administering the chapter's memorial funds.
- Selecting a depository for chapter funds.
- Developing a long-range strategic financial plan for the Chapter Executive Committee's consideration.

CGFM Committee

This committee is responsible for developing, promoting, and supporting members and nonmembers in earning the CGFM designation. In fulfilling its responsibilities, it should:

- Work with the education, early career, and membership committees to identify and support potential CGFM candidates.
- Offer to support study groups that will help CGFM candidates prepare for the examinations.
- Work with members who will seek support from senior-level government financial officials to gain recognition of

the CGFM designation at the state and local government level for job placement and promotion.

- Coordinate with the National Office to support retention and renewal of CGFM holders.
- Raise awareness of the CGFM designation, including publishing CGFM articles in the chapter newsletters, celebrating chapter members' earning their CGFM, obtaining CGFM Month proclamations and giving presentations on the CGFM at AGA and other events.

Communications Committee

This committee is responsible for enhancing the image of the chapter and that of the governmental accountability professional. This includes promoting a better understanding of financial management functions and practices through recognized media channels and maintaining a timely liaison with other professional organizations to recognize the work of the chapter's committees.

- This committee develops policies and establishes standards governing all chapter publications for approval by the Chapter Executive Committee, including basic publication formats, costs and distribution.
- The committee is responsible for publishing a monthly or bimonthly newsletter to keep chapter members informed on upcoming meetings and chapter activities.
- The committee also provides technical guidance to the newsletter editor to ensure adequate coverage of financial management subjects and the various government departments to include in the chapter publication. The newsletter competition at the national level, as well as the Chapter Recognition Program, provides further guidance in this area.
- This committee is responsible for conducting or overseeing member studies of financial management matters of general interest to the chapter members and publishing the results of these studies after approval by the Chapter Executive Committee.
- The committee cooperates with other research organizations and participates in combined endeavors to improve financial management within the financial management profession.
- This committee is responsible for promoting the chapter activities program to the membership and preparing reports for the national association, showing credits earned in accordance with guidelines contained in the Chapter Recognition Program rules. (The Chapter Recognition Program Manual is available by going to the Members Only section of the national website at www.agacgfm.org. Some Chapter Presidents assign the CRP reporting to the President-Elect.)

Community Service

This committee converts the chapter's desire to perform public service into tangible programs by:

- Surveying the membership to determine areas of public service interest.

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- Researching existing projects and programs within the community, which could benefit from member expertise.
- Investigating new areas of unmet need, which could become a chapter-sponsored public service project or program.
- Recommending a program of public service for chapter approval; and
- Coordinating and overseeing approved public service endeavors.

The National Office can provide chapters with a Community Services Handbook filled with many ideas for public service activities.

Education Committee

This committee has the responsibility, within the chapter's geographical area, for developing, promoting and improving the understanding of public sector financial management at the federal, state, territorial and local government levels by:

- Members of the Association;
- Nonmembers from the public and private sectors who work in or are interested in financial management within the various levels of government; and
- Area financial management educators and students.

In fulfilling its responsibilities, the committee should work closely with the Chapter Programs Committee, the National Office, educational institutions within their area and other professional organizations who have an educational mission.

The committee may also arrange seminars on financial management and invite the participation of members of other professional organizations and local business representatives.

To ensure the best possible attendance, seminars must receive advance publicity. Appropriate continuing professional education credits should be arranged.

When group leaders are carefully selected and well briefed in their respective seminar subjects, the program will be a success.

Membership Committee

This committee is responsible for attracting members to the chapter and maintaining the active interest of current members. Through implementation of a well-conceived membership recruitment and retention plan, the committee:

- Analyzes the chapter's membership mix to determine areas in public sector financial management that are not represented and defines a recruitment process to attract professionals within these targeted groups to AGA. This might include special initiatives targeted to recruiting and retaining Early Career members.
- Reviews registration rosters from recent chapter events to identify nonmember participants and follow-up with these leads. Audio conferences are a good source of nonmembers, for example.

- Queries the membership on how to better respond to their needs and forwards the recommendations to the Chapter Executive Committee for use in developing new programs and services to members. Consider using the National Office's survey tool to gain feedback.
- Reviews and appropriately revises letters used for recruiting and welcoming new members, as well as reactivating suspended members.
- Maintains an up-to-date record of the names and addresses of all chapter members and makes current lists of all active chapter members available to chapter chairs.

Meetings Committee

This committee is responsible for improving and maintaining good attendance at meetings.

So that meetings can be successful, optimum attendance is essential. The committee might arrange reminder calls to chapter members in advance of scheduled meetings, and should call members who do not attend meetings regularly to ascertain the reason and encourage them to attend the next meeting.

The meetings committee may also be responsible for arranging chapter meetings, including meeting locations. The committee should, at a minimum:

- Canvass the membership as to the preferred meeting times and places.
- Work closely with the education and program committee(s) to ensure that their logistical needs are met.
- Make provisions for beverage service, menus and table arrangements for each meeting.
- Notify the management of the meeting place of the number of expected meeting attendees.
- Ensure that facilities and audio-visual equipment required by the speaker are available.
- Arrange the head table in the manner specified by the Chapter President.

Program Committee

This committee has the responsibility of developing and initiating a comprehensive program in the field of public sector financial management for the general chapter membership.

- Some chapters establish subcommittees to assist the program committee.
- The efforts of the Program Committee have a marked impact on the success of the chapter in achieving its goals.
- Ideally chaired by one of the chapter's more seasoned members, the committee should prepare an annual program plan for approval by the Chapter Executive Committee.

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- In implementing the chapter programs, this committee is generally assigned responsibility for securing guest speakers/panel members for meetings, as well as obtaining the necessary program materials for technical meetings. More specifically, these tasks include, but are not limited to, the following:
- Coordinating meetings, including arranging for speakers and required audio-visual needs.
- Arranging adequate accommodations for speakers and guests, taking times and points of arrival/departure into consideration; securing biographical data from speakers and forwarding it to the proper chair in ample time for preparation of publicity releases and chapter meeting notices; and following the meeting, sending a letter of appreciation to each speaker.

As previously noted, some chapters combine the Education and Program Committees.

Chapter Bylaws

AGA National would like to have a copy of each AGA chapter bylaws on file. This is particularly important if your chapter is included under AGA's Group Ruling tax exemption status.

Contact Michiyo Wheeler at mwheeler@agacgfm.org or 800.AGA.7211, ext. 321, for more details or for a copy of the bylaws template.

Developing Chapter Programs

While the National Office tends to focus on industry-wide issues and programs to support all chapters, the jurisdiction of a chapter is in its local area. Chapters deliver programs close to home to their members and on topics that reflect the needs and interests of their particular members. They can respond quickly to localized concerns or problems.

Chapter programs are among the most important factors leading to the success of a chapter. Interesting and dynamic programs and activities will attract new members, aid in membership retention and ensure the wide participation of the general membership.

AGA bylaws offer the following objectives:

- To instruct, train and inform government accountability professionals in the fields of accounting, auditing, budgeting and financial management. This continuing education process will provide for the professional development of government accountability professionals so that they may better serve the public.
- To encourage and provide educational events for the interchange of ideas among accountability professionals in government service and among government and non-governmental financial managers.
- To contribute to the advancement of financial management principles and standards and through educational events, promote appropriate utilization of

financial management methods and techniques to improve management control and accountability to the public.

- To bring together accountability professionals in the government and the community for education and other constructive endeavors.
- To promote the observance of professional standards and ethics in the accomplishment of government accountability activities.
- To recognize the unique skills and knowledge required of professionals who specialize in government financial management by sponsoring a professional certification program.

As you can see, these objectives are far-reaching. In devising local plans, the Chapter Executive Committee should recognize the role the national Association committees play in establishing national objectives directed toward the improvement of financial management in government.

Each chapter, to the greatest extent possible, should plan to provide support for the national programs. However, the impetus for new programs need not necessarily stem from the national committees. Suggestions for projects to improve financial management or otherwise meet the Association's objectives often emanate from the chapters.

In implementing the objectives concerning professional development, the primary concern of the chapter leadership should be to determine the needs of the chapter membership. The Chapter Executive Committee (possibly through a program committee) should contact the Regional Vice President, obtain local ideas and plan chapter goals at the beginning of each year and share them with the membership. The goals may consist of a general program or a "shopping list" of projects. By bringing the stated goals to the active chapter members' attention, members are given the opportunity to suggest revisions and subsequently commit themselves to an agreed-upon program. When specific projects are accepted, committee chairs should be appointed to undertake the various projects.

AGA members are involved in a wide variety of governmental operations. Thus, chapter meeting programs are most valuable when members can apply chapter programs to their respective field of endeavor or improve their technical knowledge. Ideally, the program schedule should include a variety of technical projects, although public service programs should be included during the year.

AGA is a voluntary organization, so it is important to stimulate interest in the chapter by developing meaningful projects, which will involve as many members as possible. One approach to encourage member involvement in the various chapters' committees is to send each member a list of projects/committees and ask the member to designate the committee(s) to which they prefer to contribute their talents. To further ensure continued interest in chapter activities, each project should be completed, where feasible, in a relatively short period of time. This, too, encourages individual member involvement.

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Chapter Meetings

Some chapters have discovered evening meetings work best; some have luncheon meetings and others have tried breakfast meetings. Some chapters are social, some are not. Some simply want good CPE.

A chapter meeting is a valuable means of bringing members together regularly. Beyond the benefits derived from the program or chapter activity, individual members are enriched by the new contacts and friendships, which come from sharing common interests, backgrounds and experiences, as well as learning from other member experiences in the government accountability community. Topics, speakers and location are key to a successful chapter meeting, not to mention price. Many chapters have noted an increase in attendance with a good CPE program.

In planning the year's chapter meetings calendar, take care to tailor each to a specific purpose. If they are to be meaningful technical programs, they should not include chapter business matters requiring discussion. To do otherwise would create an agenda, which will become too full—particularly if the meeting also includes lunch or dinner.

Other important factors in making meetings successful include:

- Planning programs well in advance.
- Adhering to a definite time schedule.
- Directing technical programs toward the majority of the membership.
- Being innovative and provoking thought.
- Involve the membership—in discussion, in program evaluations and recommendations.
- Making new members feel a welcome, integral part of the chapter. Assigning a CEC member to greet a new member at a chapter meeting or educational event will pay dividends for the chapter.
- Sharing member successes—promotions, awards and honors.
- Establishing a telephone reminder system wherein each member is called and encouraged to attend the upcoming meeting.
- Meeting at the most convenient time and place. Chapter members should participate in the decision-making process, expressing their preference of meeting date, location and cost. Such involvement could directly impact retention—the greater the appeal, the more likely members will attend!

Use the chapter meeting to make the most of the time together. This is the time to communicate to the membership or potential membership. Those in attendance need to hear more than a chapter officer announcing the speaker. Do not assume everyone in attendance has read the chapter news or visited the National AGA website to know the latest. Take a few moments to share such items as chapter news, regional news, national AGA news, announce the next monthly program meeting with speaker and topic,

announce the upcoming chapter educational event (the sooner the better), take the opportunity to introduce new members, announce any member achievements or news, announce the chapter community service events and solicit for volunteers.

Chapter Communications

Chapter Newsletters

Because it reaches the total membership every month, the chapter newsletter is a very important chapter program.

Effective newsletters are attractively designed and contain informative and educational materials that appeal to the general membership. It should be well organized and succinctly present significant news about members and chapter activities. Periodic short articles of a technical nature can be a positive addition. Reviewing the requirements contained in the Chapter Recognition Program would be helpful here as well.

Newsletters frequently reflect the chapter's personality. A professionally produced newsletter underscores the quality of your chapter's program and its commitment to excellence. It is well worth the thought, production time and cost to produce an effective newsletter. As an image enhancer, it forms the initial impression new members have of the chapter as a whole and becomes the ongoing conduit between the chapter leadership and all members.

The National Office has developed a Chapter Communicators website and a Newsletter Editors Handbook to help develop a chapter newsletter.

Another resource is the AGA website template, which helps chapters set up a regional or a chapter website. Directions and the template can be found at www.agacgfm.org/membership/identity/websites/default.aspx

Don't Miss Out!

Sign up to access AGA's Chapter Communicators website. Visit www.agacgfm.org/membership/communicators/Welcome.aspx?ReturnURL=default.aspx for:

- AGA logos
- Letterhead
- Brochures
- Name badges
- Newsletter Editors Handbook
- Leadership Bios
- Annual Newsletter and Website Contest Information

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Chapter Corporate Identity Website

Personalized logos are available for each chapter on the Chapter Corporate Identity Website found at www.agacgfm.org/membership/identity. Here you can also download letterhead, brochures, name badges, banners and a variety of other items your chapter will find useful. Everything that you can download on this site has been designed to conform to the AGA corporate identity. By working together, we can build the AGA brand. If you have questions about the site or need technical assistance, please contact Marie Force, Director of Communications, at mforce@agacgfm.org.

Chapter Websites

The chapter website can be an effective tool for communicating with chapter members. Some basic items you may want to include on your website:

- Chapter officers and directors (name, title, e-mail address, telephone number)
- Chapter bylaws
- Chapter newsletters
- Monthly meeting announcement
- Chapter educational event announcement with registration form
- Link to national website
- (You may also want to add online registration for chapter meetings and educational events.)

The important thing is that the website contain current information about the chapter.

Chapter Administration

As a chapter leader, it is essential that you have accurate and current information about the federal and state legal and tax issues facing your chapter. An awareness and understanding of these issues can prevent problems and costly errors.

Except where noted, for help with any of the following subjects, contact AGA's Finance and Administration Department, Cristina Barbudo at cbarbudo@agacgfm.org or 800.AGA.7211, ext. 304.

Chapter Bylaws

While your chapter's articles of incorporation were drafted in general terms to permit maximum flexibility, your bylaws are the legal guidelines that specify the rules of operation for your chapter. As a chapter leader, you have a fiduciary responsibility to ensure that your chapter operates in accordance with your bylaws, which are your governing documents. Additionally, you are responsible for ensuring that your chapter's bylaws have been drafted and remain (if changes are made) in compliance with both the AGA National Bylaws and your state laws.

The Prototype Chapter Bylaws, which are based on the AGA National Bylaws, provide both a sample and parameters for your chapter to follow in drafting or amending your bylaws. A copy of the Prototype Chapter Bylaws is available from Michiyo Wheeler at mwheeler@agacgfm.org or 800.AGA.7211, ext. 321.

Be sure each chapter member is aware of the chapter bylaws. It is a good idea to post them to the chapter website so anyone can have access to the document.

A copy of the Model Chapter Bylaws is available in the Members Only section of the website at <https://members.agacgfm.org>

501(C)(3) Status

To be tax-exempt as an organization described in Internal Revenue Code Section 501(c)(3), an organization must be organized and operated exclusively for one or more of the purposes set forth in IRC Section 501(c)(3) and none of the earnings of the organization may inure to any private shareholder or individual. In addition, it may not attempt to influence legislation as a substantial part of its activities and it may not participate at all in campaign activity for or against political candidates.

As an exempt organization, you may still need to file with the Internal Revenue Service. The chapter should be aware of the requirements for filing Form 990 or Form 990EZ, Return of Organization Exempt from Income Tax.

Organizations are required to file an annual information return when the **gross receipts are in excess of \$25,000**.

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Chapter Incorporation

If your chapter is not incorporated, incorporating is a relatively simple procedure that involves filing articles of incorporation or a certificate of incorporation with the secretary of state of your jurisdiction along with the applicable fee.

In addition to articles of incorporation, some states may require bylaws or other documents. Your state may require annual submissions of additional paperwork, such as annual reports, minutes from your annual meetings, or payment of an annual fee in order to retain the incorporation status.

Employer Identification Number

Your chapter must obtain a Federal Employer Identification Number (EIN) by filing IRS Form SS-4. Your EIN is the chapter's federal identification number that is used on most documentation. The chapter's EIN is not the same as that of AGA National.

Neither the EIN nor any other number is a "tax-exempt" number for federal income tax purposes. Your chapter is still responsible for the filing of all reports with governmental authorities, including the fees or taxes associated with these reports.

The National Office does not include the income or expenses of its chapters on its annual information report, which is filed with the Internal Revenue Service.

Insurance

Your chapter may want to consider securing liability of officers and indemnification insurance coverage. Contact your insurance agent to assess the sufficiency of your current coverage.

Records Retention

Throughout each year, chapter officers often accumulate a considerable amount of correspondence and other material. Prior to the conclusion of the chapter year, each outgoing and incoming officer should jointly review the files, retaining materials of future or permanent value. Ideally, the Chapter Executive Committee should approve a retention schedule for financial and similar records of a semi permanent nature. In general, the records that should be maintained on a long-term basis include:

- Membership records
- Chapter minutes
- Chapter policy book
- Chapter financial records
- List of chapter officers
- Chapter recognition reports
- Education program materials (see NASBA requirements for more details)
- Annual chapter history

Building On Your Chapter Leadership Role

Please consider expanding your AGA service by serving on a National board or committee, as an RVP-Elect, Senior Vice President for Regional Services, etc. Contact Michiyo Wheeler at mwheeler@agacgfm.org to learn more.

SECTION VI—LEADERSHIP TOOLS AND RESOURCES

How Can We Help You?

The following pages are filled with ideas, suggestions, examples, contacts and tools that will help AGA leaders get the job done. Remember, AGA stands prepared to help you in any way it can. Feel free to contact the National Office to let us know how we can help.

AGA's Website www.agacgfm.org

- AGA's website contains a wealth of information.
- An entire section is dedicated to "best practices" in all function areas, including membership, education, etc.
- Don't forget to take advantage of the Chapter Communicators Website. This comprehensive resource allows chapter newsletter editors to download all AGA logos and stationery templates.

Bookmark AGA's Website and Visit Often!

www.agacgfm.org

Members Only Section of AGA's Website (<https://members.agacgfm.org>)

Access the Chapter Recognition Program and forms, order bulk membership and CGFM materials online, update your membership record, learn more about AGA's membership recruitment campaign, run labels for your chapter's upcoming event or recruitment drive, search for members and CGFMs, run your chapter's list of suspended members, access the Growth, Acquisition and Retention (GAR) Report and the Membership Analysis Report, run specialized reports and export data, submit information for TOPICS online and access sample PowerPoint presentations.

To access this vital resource, visit AGA's website at www.agacgfm.org, click on "Members Only" at the top, then log in. Use your AGA membership number to log in and your first initial/last name as your password.

Manuals and Documents

The following are resources that, along with this manual, will help round out your leadership training.

- **AGA National Bylaws**
- **Long-Range Strategic Plan:** Get a broad view of where AGA is going over the next few years.
- **National President's Theme and Goals:** Learn what the current National President is focusing on during his/her term.
- **Policies and Procedures Manual:** Chapter 14 of AGA's Policies and Procedures Manual is especially helpful to AGA leaders. Need to know which portion of your AGA-related trip you can get reimbursed for? Read the "Travel Guidelines," for more information.
- **AGA Leadership Handbook:** A "must have" for all AGA leaders, whether you are the National President or a chapter awards program chair.

- **The Journal of Government Financial Management and TOPICS:** Teach others what you know—submit an article for publication and get yourself published. Contact Marie Force at mforce@agacgfm.org or 703.562.0399 for a copy of an article or for details on article submission.
- **Past Regional Reports:** Understanding a region's history will help leaders build their region's future and will facilitate a smooth transition. Contact Michiyo Wheeler at mwheeler@agacgfm.org or 800.AGA.7211, ext. 321, for a copy of your region's past reports.

Your Leaders are Resources!

AGA's National President

- AGA Chapters are encouraged to invite the National President or President-Elect to speak at chapter and regional events.
- If you are interested in hosting the National President, complete the National Officer Speaker Request Form.
- Contact Michiyo Wheeler at mwheeler@agacgfm.org or 800.AGA.7211, ext. 321, for more information

Senior Vice Presidents for Regional Services (SVPRS)

- Under AGA's regional governance plan, these four individuals—one from Sections I, II, III and IV—provide essential leadership of the regional team and ensure that the National Executive Committee is kept abreast of accomplishments, challenges and updates.
- Since they serve on the National Executive Committee, you can run an NEC roster from the Members Only portion of AGA's website at www.agacgfm.org or contact Michiyo Wheeler at mwheeler@agacgfm.org or 800.AGA.7211, ext. 321, for more information.
- SVPRS may be asked to fill in for the National President or President-Elect for specific speaking engagements.

The RVP and RVP-Elect

- These star performers are here to help chapter leaders succeed! Contact them if you have a question or problem.
- Your RVPs and RVPs-Elect will keep you updated on AGA priorities, remind you of important deadlines, distribute regional newsletters, help you develop and promote your educational events, and help you identify problems and develop solutions.
- Visit the Members Only section of AGA's website at www.agacgfm.org for a roster of RVPs and RVPs-Elects or contact Michiyo Wheeler at mwheeler@agacgfm.org or 800.AGA.7211, ext. 321, for more information.

The RVP-Elect Designate

- Remember, six months out of the program year (from January to July), the regional team includes the RVPs-Elect Designate.
- RVPs teams should keep their RVP-Elect Designate in the loop and apprised of issues. More important—ask for their help and keep them involved.
- Think about asking them to monitor the AGA website and distribute regular updates.

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- Use the Members Only section of AGA’s website to run these rosters or contact Michiyo Wheeler at mwheeler@agacgfm.org or 800.AGA.7211, ext. 321, for more information.

The Immediate Past RVP

- Don’t lose touch with the individual who just left the RVP function. They are vital for a smooth transition and are a wealth of information.
- Feel free to contact them to ask for their opinions, find out how they did something in the past, or to get a feel for a certain chapter in your region.
- Use the Members Only section of AGA’s website to run these rosters or contact Michiyo Wheeler at mwheeler@agacgfm.org or 800.AGA.7211, ext. 321, for more information.

Regional Coordinators

- Chapters should contact our Regional Coordinators for ideas, suggestions, solutions and best practices, in the areas of Certification, Chapter Development and Assistance, Education and Membership & Early Careers.
- Use the Members Only section of AGA’s website to run these rosters or contact Michiyo Wheeler at mwheeler@agacgfm.org or 800.AGA.7211, ext. 321, for more information.

National Coordinators

- These are your special contacts with the specific knowledge in the four program areas: Certification, Chapter Development and Assistance, Education and Membership & Early Careers.
- They oversee the Regional Coordinators in their specialty and are another link between the National Office and the chapters.
- The National Coordinators are listed on each of the Regional Coordinator rosters.
- Use the Members Only section of AGA’s website to run these rosters or contact Michiyo Wheeler at mwheeler@agacgfm.org or 800.AGA.7211, ext. 321, for more information.

AGA National Office Staff

- Visit the AGA website at www.agacgfm.org/about/natloffice for the roster. Better yet, run the roster yourself and get familiar with the Members Only portion of AGA’s website at www.agacgfm.org.

Contact AGA’s Membership Department for:

- Recruitment and retention ideas such as a PowerPoint presentation (complete with speaker notes) on the benefits of AGA membership.
- Membership demographics and trends.
- Bulk membership materials (membership application and/or “Value of AGA Membership”).
- AGA merchandise.

- Various membership-related reference documents such as the Chapter Recognition Program Manual, Community Service Guidebook, Education Manual, Model Chapter Bylaws, New Chapter Organization Manual and the Affiliate Chapter Formation Manual.

- Contact Jessica Jones at jjones@agacgfm.org or 800.AGA.7211, ext. 317, for more information.

Contact the Office of the Executive Director for:

- Information about AGA’s Awards Programs. Help someone else get recognized for his or her contributions or nominate yourself! Michiyo Wheeler at mwheeler@agacgfm.org or 800.AGA.7211, ext. 321, is your contact.
- Scheduling a visit by the National President, or other governance-related resources (National Office position descriptions, minutes from past NEC and NBD meetings, National bylaws, etc.), contact Michiyo Wheeler at mwheeler@agacgfm.org or 800.AGA.7211, ext. 321.

Contact AGA’s CGFM Department for:

- Ideas for promoting the CGFM Program and increasing the number of CGFMs in your chapter.
- Information and support on obtaining state and local government recognition of the CGFM Program.
- Bulk CGFM materials.
- A CGFM PowerPoint presentation (complete with speaker notes).
- The CGFM Listserv.
- Information on bringing the GFM courses to your chapter.
- Contact Katya Silver at ksilver@agacgfm.org or 800.AGA.7211, ext. 305, for more information.

Contact AGA’s Office of Finance and Administration for:

- More information on the IRS group ruling.
- Chapter dues checks.
- Questions about your status as a nonprofit organization.
- AGA’s financial statements.
- Contact Cristina Barbudo at cbarbudo@agacgfm.org or 800.AGA.7211, ext. 304, for more details.

Contact AGA’s Communications Department for:

- Press releases about a recent accomplishment.
- Help in creating effective newsletters.
- AGA logos and stationery, newsletter and other templates.
- Contact Jenn Curtin at jcurtin@agacgfm.org or 703.562.0770, or Marie Force at mforce@agacgfm.org or 703.562.0399, or Christina Camara at ccamara@agacgfm.org or 703.562.0400 for more information.

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Contact AGA's Education Department for:

- All our available educational opportunities and questions about CPE policy. Contact Joseph Jozefczyk at jjozefczyk@agacgfm.org for more information.
- Rutgers Scholarship Program. Contact Joseph Jozefczyk at jjozefczyk@agacgfm.org for more information.

Contact AGA's Chapter Operations Office for:

- Latest information on AGA's Audio Conferences and CPE opportunities. Contact Raymond Harris, CGFM, at rharris@agacgfm.org for more information.
- Help with any facet of chapter activities.

Contact AGA's Director of Research for:

- Questions about AGA's Research Program, the Financial Management Standards Board or the Code of Ethics.
- Contact Anna Miller, MBA, CPA, at amiller@agacgfm.org or 800.AGA.7211, ext. 313, for more information.

Contact AGA's Conferences Department for:

- A schedule of upcoming conferences and questions about registration.
- Ribbons and badges for chapter events
- Contact Julie Cupp at jcupp@agacgfm.org or 800.AGA.7211, ext. 322, for more information.

Contact AGA's Performance Reporting Department for:

- Information on the SEA and CEAR Programs, including becoming a reviewer.
- The annual Performance Management Conference.
- Contact Evie Barry at ebarry@agacgfm.org, or 800.AGA.7211, ext. 324.

Other Resources

Regional Website

- Mid-Atlantic Region
www.agamidatlantic.org

AGA Today

This is a free, bi-weekly e-mail newsletter that will keep you regularly plugged in to what's happening in the government accountability community. Sign up at www.agacgfm.org/publications/agatoday/.

AGA Insider

This monthly electronic newsletter includes the current GAR Report, suggestions, updates and reminders for all chapter membership chairs, membership and early career Regional Coordinators and the entire AGA leadership listserv. All chapter leaders are invited to receive the newsletter. Contact Jessica Jones at jjones@agacgfm.org.

Perspectives on Performance

This new electronic newsletter includes the latest information about AGA's Certificate of Excellence in Service Efforts and Accomplishments Reporting Program and other news around the country. Contact Evie Barry at ebarry@agacgfm.org.

Leadership Rosters

These rosters contain hundreds of current and past AGA leaders, who are potential speakers, good contacts and professionals who have been through the AGA leadership cycle before. Run these rosters by visiting the Members Only section of AGA's website at www.agacgfm.org or contact Michiyo Wheeler at mwheeler@agacgfm.org.

Growth Acquisition and Retention (GAR) Report

The GAR provides a monthly update on AGA's membership numbers by chapter. Use it to motivate your fellow chapter officers, develop your goals, and monitor your chapter's progress.

Run the latest report via the Members Only section of AGA's website at www.agacgfm.org.

Also, the National Office regularly distributes these reports to AGA leaders. Direct any questions about the report to Susan Fritzlen at sfritzlen@agacgfm.org or 800.AGA.7211, ext. 314.

AGA Communicators' Listserv

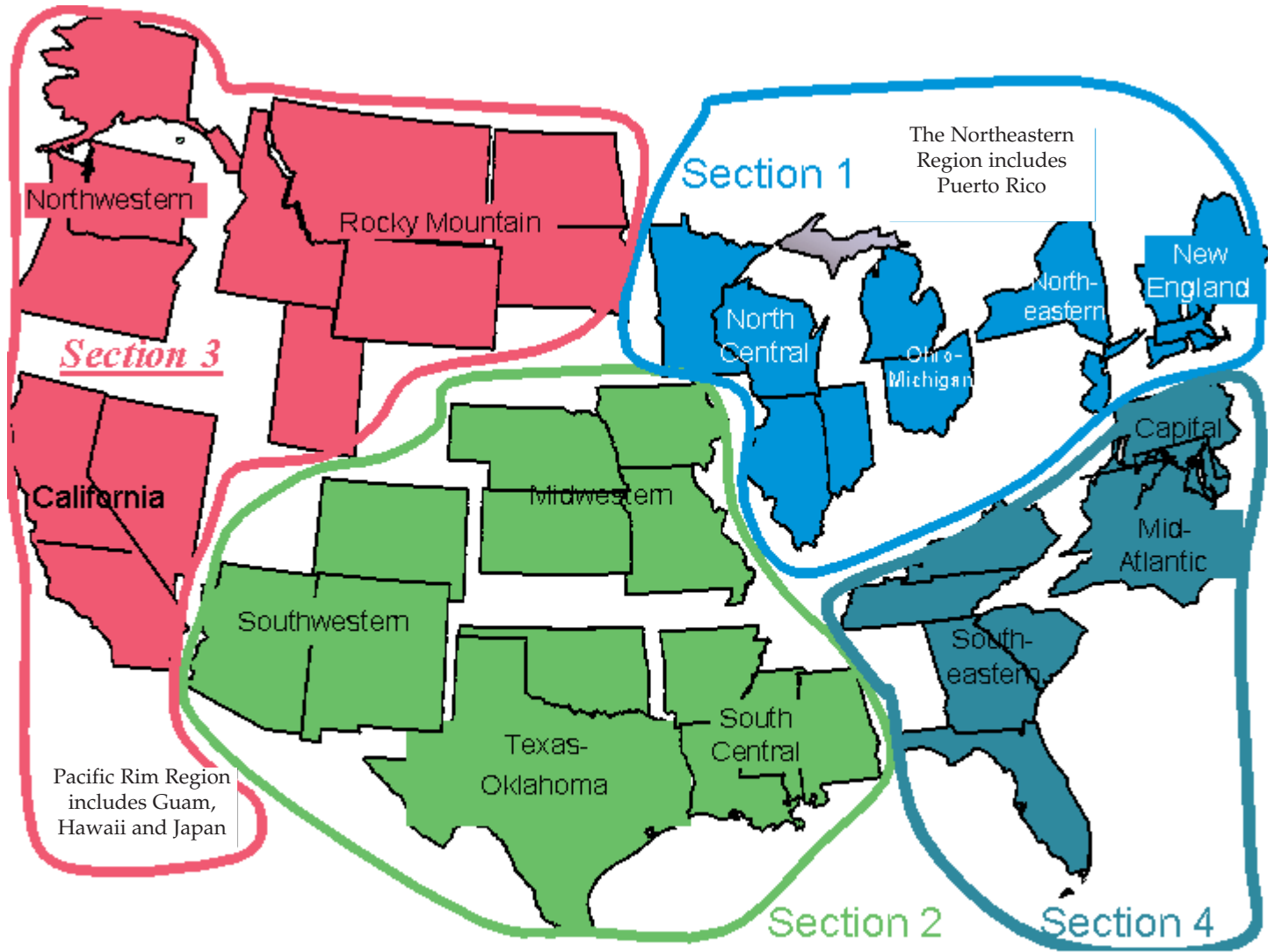
AGA's Communications Department regularly contacts each chapter newsletter editor to keep them apprised of important AGA and government accountability community issues.

Sign up for this invaluable resource by going to www.agacgfm.org/membership/communicators/Welcome.aspx?ReturnURL=default.aspx.

THANK YOU FOR YOUR AGA LEADERSHIP!

APPENDIX A—AGA SECTIONS AND REGIONS

Regional/Sectional Boundaries





*Advancing
Government
Accountability*

Association
of Government
Accountants

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