

# A Report to Our Members

Citizen-Centric Report for 2013-2014

<b>Table of Contents</b>
<b>Page 1 - Who Are We and What We Do</b>
<b>Page 2 - The Chapter by the Numbers</b>
<b>Page 3 - Finances</b>
<b>Page 4 - Accomplishments, Challenges, Goals</b>



## Mission :

The Central Indiana Chapter was founded in 2001, to be a professional organization dedicated to the advancement of government financial management in the central Indianapolis area.

The Central Indiana chapter is one of three located in Indianapolis. This chapter serves the state's growing state and local community.

The Association serves its members by providing and sponsoring appropriate educational programs, encourages career and professional development, and advocates for government accountability and transparency.

## Benefits we provide to both members and guests:

**Monthly Luncheon Meetings:** Our chapter held ten monthly luncheon meetings which provided networking and learning opportunities to members and guests. Presentations provided one (1) CPE per lunch. We had a wide variety of speakers who shared their knowledge on many topics. Meetings are held the first Thursday of each month in the downtown area starting at 11:45am to 1:30pm.



**Audio Conferences:** Our chapter offered four (4) of the National AGA audio conferences to provide additional educational opportunities to our membership and local financial community. Each Audio conference provides 2 CPE.

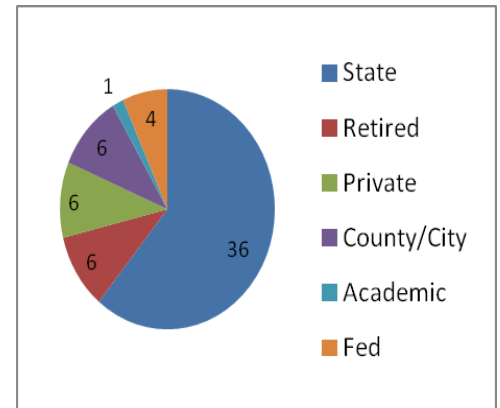


**Annual Awards Banquet:** The Central Indiana Chapter awards those who have, in our estimation and from nominations of our members, provided outstanding service to local and state government during the year preceding the award. 2014 Awardees were : Joseph P. Fistrovich, Controller, Indiana State Budget Agency  
Barbra Hackman, Bartholomew County Auditor.

**Annual Professional Development Conference:** On September 12, 2013 we held our annual professional development conference entitled "Accountability for a Sustainable Future" at the Hampton Inn, down town Indianapolis. The presentations provided 8 hours of CPE and included topics of interest at the federal, state and local levels.

## The Chapter By the Numbers – How are we doing:

	2014	2013
<b>Membership</b>		
Total members	59	59
Members with CPA	25	24
Members with CGFM	24	20
Members with CIA/Other	2	0
<b>Continuing Professional Education (CPE)</b>		
Lunch (1 CPE per Lunch)	10	10
Professional Development Conf (PDC)	8	8
Audio Conferences (2 per audio conf)	8	8
Total CPE Available	26	26
<b>Lunch</b>		
Avg # of members attend/lunch	23	22
Avg # of nonmembers attend/lunch	3	3
Avg # of Total Lunch Attendees	26	25
<b>Audio Conference</b>		
Avg # of members Attend/audio conf	7	8
Avg # of nonmembers attend/audio conf	0	1
Avg # of Audio Conf Attendees	7	9
<b>Professional Development Conf (PDC) *</b>		
Members attended	27	30
Nonmembers attended	8	14
Sponsors attended	3	2
Total Attended	38	46

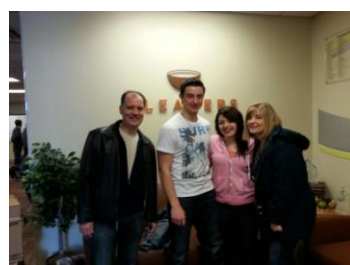


\* 2014 PDC held Sept 12, 2013

2013 PDC held Sept 13, 2012

## Community Events:

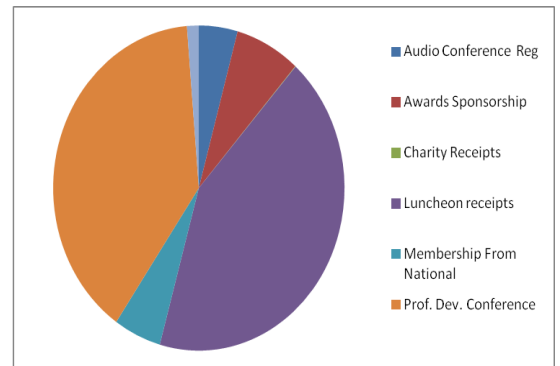
The Chapter held a food drive collecting canned foods and cash donations for Gleaners Food Bank. Several of our members volunteered on 4 different occasions throughout the year at Gleaners Food bank serving on the line to pack sack lunches for children.



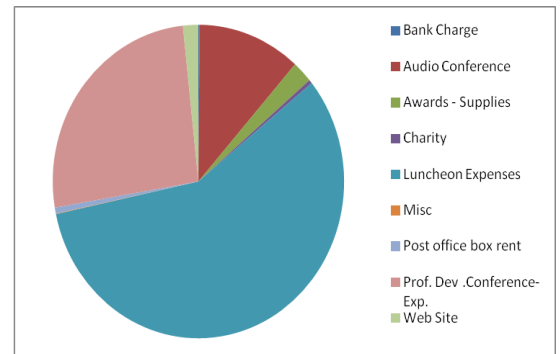
## CHAPTER FINANCES:

AGA Central Indiana Chapter Profit and Loss (3 year Comparison)			
REVENUES	07/11-06/12	07/12-06/13	07/13-06/14
Audio Conference Reg	\$775	\$550	\$475
Awards Sponsorship	\$600	\$1,000	\$800
Charity Receipts	\$0	\$45	\$5
Donation From National	\$9		
Luncheon receipts	\$4,560	\$3,950	\$4,730
Membership Dues	\$188		
Membership From National	\$290	\$625	\$583
Prof. Dev. Conference	\$7,477	\$5,293	\$4,325
Recruitment Grant		\$142	\$145
<b>TOTAL INCOME</b>	<b>\$13,899</b>	<b>\$11,605</b>	<b>\$11,063</b>
EXPENSES			
Bank Charge	\$11		(\$12)
Audio Conference	(\$896)	(\$896)	(\$1,040)
Awards - Supplies	(\$137)	(\$152)	(\$205)
Charity	(\$140)	(\$45)	(\$35)
Luncheon Expenses	(\$5,900)	(\$5,008)	(\$5,234)
Misc	(\$9)	(\$104)	(\$5)
PDT (National) Registration	(\$895)	(\$920)	
Post office box rent	(\$44)	(\$69)	(\$56)
Prof. Dev .Conference	(\$4,618)	(\$3,308)	(\$2,365)
Web Site	(\$65)	(\$155)	(\$155)
<b>TOTAL EXPENSES</b>	<b>(\$12,692)</b>	<b>(\$10,657)</b>	<b>(\$9,107)</b>
NET INCOME (LOSS)	<b>\$1,207</b>	<b>\$948</b>	<b>\$1,956</b>

REVENUES 7/13-6/14



EXPENSES 7/13-6/14



Financial statements for 2012 thru 2014 and related cash transactions were reviewed in accordance with standards established by the American Institute of Certified Public Accountants.

Proposed Budget 7/14 to 6/15			
REVENUES	Budget	EXPENSES	
Audio Conference Registrations	\$640	Postage	(\$59)
Sponsorship	\$ 1,800	PDT National Registration	(\$1000)
Luncheon receipts	\$4,000	Award Supplies	(\$60)
Membership From National	\$590	Charity/Gifts	(\$250)
Prof. Dev. Conference	\$5,000	Web Site	(\$156)
Recruitment Grant	\$145	Audio Conference	(\$1,040)
<b>Total Income</b>	<b>\$12,175</b>	Luncheon Expenses	(\$5,000)
		Prof. Dev Conference	(\$4,500)
		Total Expenses	(\$12,065)
		NET INCOME (LOSS)	\$110

## ACCOMPLISHMENTS:

**CI AGA Newsletter** - The Chapter issued several newsletters starting March 2014 to notify members of upcoming events, updated news on chapter events and member accomplishments, welcome new members, and new accounting guidance. Newsletters are published on the chapter's web site: [www.agacentralin.org](http://www.agacentralin.org).

**Central Indiana Chapter wins AGA Bronze Level Chapter Recognition award** The local chapter received the Bronze Level Chapter Recognition Award at the National PDT. Latrice Akers accepted the plaque on behalf of the chapter at the July 18 awards breakfast at the PDT in Orlando. This award is based on the work of the chapter for the 4/1/13-3/31/14 year. Thanks to everyone that participated over the last year and helped us win.



**Accountability in Government Month** The Governor issued a Proclamation in March promoting the Certified Government Financial Management Certification and advocating transparency and accountability in government.

## CHALLENGES :

- Increase membership by retaining current members and recruit new members
- Participation of the general membership to help augment the core members serving on the board and chapter officers
- Recruiting Quality Speakers for lunches



## GOALS:

- Sponsor the student chapter and help them get their chapter started
- Increase the use of technology by offering credit card payment for lunches
- Promote the CGFM certification
- Give back to the Community
- Increase general member participation