



Central Ohio AGA

Annual Report of Accomplishments
July 1, 2008 – June 30, 2009

2008-2009 CENTRAL OHIO AGA EXECUTIVE COMMITTEE

President: Patricia Wooldridge

President-Elect: Caren Murdock

Secretary: Cindy Klatt

Treasurer: Joni Razzano

Immediate Past President: Jim Kennedy

Education Co-Chairs: Deborah Liddil and Jim Kennedy

Community Service: Elizabeth Hosler and Pat O'Block

Membership Co-Chairs: Leanna Abele and Melvin Striblin

Newsletter: Bill Severns

Programs Co-Chairs: Kelly Lammers and Maria Robinson

Scholarship and Awards: Jeff Bankey

Social: Diane Crossland

Sponsorship & Bylaws: Brent Lewis

Web Coordinator's: Virginia Brizendine and Bill Kennedy

MISSION STATEMENT & PURPOSE

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

The purpose of the Chapter is to be a professional organization dedicated to the advancement of government financial management. The Chapter serves its members by providing or sponsoring appropriate educational programs, encouraging professional development, influencing governmental financial management policies and practices and serving as an advocate for the profession. The Chapter serves government officials and the public by sponsoring efforts to ensure full and fair accountability for all public monies and by providing a variety of pro bono services throughout Central Ohio that support that end.

YEAR IN REVIEW

Significant accomplishments for PY 2009 included:

- The professional development conference held in October 2008 was attended by over 300 professionals. The conference offered 22 hours of CPEs.
- The Chapter provided 6 additional training opportunities for a total of 16 hours of CPEs free of charge to its members.
- \$4,500 in scholarship money was presented to several OSU students.
- The Chapter donated \$1,000 to Toys for Tots. The AGA National office matched that donation.
- \$2,500 was donated to the Mid-Ohio Food Bank.
- The Columbus federal chapter and our Chapter held a euchre tournament. The proceeds of \$160 were donated to Mid-Ohio Food Bank.
- Central Ohio AGA donated \$2,000 to a newly formed AGA chapter in Maine to help with upstart costs.
- Leanna Abele received a Top Sponsor Distinction award from the National AGA.
- Bill Kennedy received a Chapter Website award from the National AGA.
- Our Chapter received the Platinum Chapter Recognition award at the National PDC in New Orleans.

EDUCATIONAL EVENTS

The Central Ohio AGA chapter provided the following educational events for its members and guests during the program year:

| Education Description | Date | # CPE |
|-------------------------------------|----------------|-------|
| Professional Development Conference | 10/20–10/22/08 | 22 |
| Retirement Savings/OPERS Overview | 11/17/08 | 2 |
| Performance Management & Auditing | 1/26/09 | 4 |
| Fraud Risk Assessment | 2/11/09 | 2 |
| SAS 70 | 3/23/09 | 4 |
| GAOs role in ARRA | 4/22/09 | 2 |
| Organizational Change Management | 4/27/09 | 2 |

MEMBERSHIP

The Central Ohio Chapter had an outstanding membership year:

- We welcomed **86** new/returning members – well exceeding the 10% goal of 42 new members set for us by the National AGA.
- Our Chapter was **489** strong at the end of this year – up from 461 at this time last year and meeting the 5% base growth goal set for us by the National AGA.
- We are the largest Chapter in the Ohio-Michigan region and rank 4th nationally.
- We are the largest state and local government chapter in the nation.

SOCIAL EVENTS

The Central Ohio chapter hosted two social events for members during the last year. In February, a progressive euchre tournament was held with the Greater Columbus chapter. The event was attended by 30 members and guests, and included a pizza dinner and various prizes. The registration fee was donated to the Mid-Ohio Food Bank. In June, 44 members and guests participated in a golf outing at Westchester Golf Course. Members paid a discounted rate which included course, cart fees and lunch. The event featured a 4-man scramble format, and trophies were provided for the overall winning team and for various skill events.

In addition to these events, in May, 20 Executive and Education committee members were treated to dinner and a show at a local comedy club.

BUDGET

| | Budgeted FY 2009 (\$) | Actual FY 2009 (\$) | Variance (Over)/Under (\$) |
|-----------------------------------|--------------------------|------------------------|-------------------------------|
| Opening Balance | | | \$40,318.00 |
| Income | | | |
| Luncheon/Training/Misc | \$980.00 | \$760.00 | -\$220.00 |
| Interest from CD | 1,300.00 | 0.00 | -1,300.00 |
| Membership Dues | 2,800.00 | 2,864.95 | 64.95 |
| PDC Registrations | 99,600.00 | 92,753.50 | -6846.50 |
| Sponsorships | 11,250.00 | 7,000.00 | -4,250.00 |
| PDC Merchandise | 0.00 | 0.00 | 0.00 |
| Miscellaneous Refunds | 0.00 | 1,590.88 | 1,590.88 |
| Other (Golf Outing) | 2000.00 | 1,287.00 | -713.00 |
| Total Income | \$117,930.00 | \$106,256.33 | -\$11,673.67 |
| Expense | | | |
| Luncheon/Trainings | \$10,000.00 | \$2,614.27 | \$7,385.73 |
| National Dues | 0.00 | 245.00 | -245.00 |
| Miscellaneous | 2,200.00 | 2,595.08 | -395.08 |
| National/Out of State Conferences | 3,500.00 | 6,177.80 | -2,677.80 |
| Postage/Printing | 3,050.00 | 13.12 | 3,036.88 |
| PO Box Fee | 0.00 | 106.00 | -106.00 |
| Donations | 0.00 | 2,000.00 | -2,000.00 |
| Scholarships | 4,250.00 | 4,500.00 | -250.00 |
| PDC Profit Share | 1,000.00 | 2,173.00 | -1,173.00 |
| Prof. Development Conference | | | |
| Facilities (Food) | 46,000.00 | 37,987.76 | 8,012.24 |
| Facilities – 2009 Deposit | 0.00 | 1,000.00 | -1,000.00 |
| Materials/Supplies | 7,000.00 | 3,332.89 | 3,667.11 |
| Printing/Reproduction | 7,100.00 | 2,177.04 | 4,922.96 |
| Speakers | 35,000.00 | 25,338.74 | 9,661.26 |
| Member Gifts | 1,750.00 | 1,088.15 | 661.85 |
| Regonline/Visa & MC | 3650.00 | 4,119.20 | -469.20 |
| Meals (PDC Mtgs.) | 0.00 | 399.19 | -399.19 |
| Donation | 0.00 | 3,500.00 | -3,500.00 |
| Misc. | 0.00 | 50.00 | -50.00 |
| Postage/Delivery | 150.00 | 236.25 | -86.25 |
| Total PDC | 100,650.00 | 79,229.22 | 21,420.78 |
| Social Events Budget | 6,000.00 | 4,017.18 | 1,982.82 |
| Community Service Budget | 1,000.00 | 0.00 | 1,000.00 |
| Total Expenses | \$131,650.00 | \$103,670.67 | 27,979.33 |
| Net Ordinary Income | -\$13,720.00 | \$2,585.66 | |
| Ending Balance | | | \$42,903.66 |

COMMUNITY SERVICE

One of the most satisfying, fun, and productive ways to unite is volunteering for community service projects. Central Ohio engages in community service because we believe that it carries rewards beyond the obvious and tangible. It also helps build a rich and supportive community. The following community service events were held during 2008-2009.

- Holiday Wish Program: AGA members brought new toys, mittens, hats and scarves to the annual Professional Development Conference held in October. The items were delivered to the Franklin County Children Services Board in Columbus, Ohio.
- \$2,660 was donated to Mid-Ohio Food Bank.
- \$2,000 was donated to a newly formed AGA chapter in Maine to help with start up costs.

EARLY CAREER EVENTS

In November, 2008 the Central Ohio chapter participated in a networking event for college students interested in the accounting field. The event was held at Franklin University.

SCHOLARSHIPS

In order to promote the government accounting profession, the Central Ohio chapter provided numerous scholarships to those studying in the field of business. This past year we awarded seven scholarships ranging from \$500 to \$1,000. The criteria for winning a scholarship included:

- Part-time or full time student in an undergraduate or graduate program;
- Strength of past course work including GPA; and
- Plan of study including a statement on proposed career plan.

Our \$1,000 scholarship winner was Jaclyn Eads. She was a junior at the Ohio State University majoring in accounting and carried a 3.94 GPA in the honors accounting program. Jaclyn had already been accepted into OSU's Masters of Accounting program. In addition, she interned for PriceWaterhouseCoopers, and had secured a position with the firm starting in the fall of 2010.

SPONSORSHIP PROGRAM

The Sponsorship Program was established as an affordable way for area businesses to support the Central Ohio AGA's strategic goals and attain recognition in the government finance community. Since the Central Ohio AGA is Ohio's premier association in advancing government accountability, being a sponsor provides visibility to many of the areas chief financial officers, auditors, accountants and treasurers.

Each year the Central Ohio AGA (COAGA) solicits sponsorship dollars from many of the local accounting firms, banking institutions, and other business in the Central Ohio area. The businesses that elect to become sponsors are provided with a variety of marketing opportunity's and benefits based on upon their level of participation. During the 2008 – 2009 program year, the Central Ohio AGA offered the following sponsorship levels:

- Platinum Level – \$5,000
- Gold Level – \$3,750
- Silver Level – \$2,500
- Bronze Level – \$1,000
- Blue Level – \$500

The Central Ohio AGA had the following eight sponsors for the 2008 – 2009 program year:

Bronze Level: Charles E. Harris & Associates
Cohen & Company
J.L. Uhrig & Associates, Inc.
Kennedy Cottrell Richards LLC
Rea & Associates, Inc.
Schneider Downs & Company, Inc.

Blue Level: Maximus
Wilson, Shannon, & Snow, Inc.

WEBSITE AWARD

During the year Central Ohio AGA updated and redesigned its chapter website and subsequently received an honorable mention award in the National AGA's chapter website competition. The award was presented in June at the National PDC in New Orleans.

LOOKING FORWARD TO PROGRAM YEAR 2009-2010

The Central Ohio AGA has another exciting year planned for our members. We have three new CEC volunteers this year, including Jay Easterling (President-Elect, Pohler and Associates, LLC), Nancy Barber (Community Service, Bureau of Workers' Compensation), and Jim McLaughlin (Program Co-Chair, State Auditor's Office).

Our Chapter Executive Committee (CEC) is already hard at work planning for the upcoming months. One of our Chapter goals is to increase the number of FREE CPE hours offered to our members. This year, our Chapter will provide more audio conferences hosted by National AGA. These educational events will help our members keep abreast of current issues and help satisfy their CPE requirements. The educational events will be posted on the website and email blasts will be sent throughout the program year. Below is a list of training opportunities scheduled for our members during program year 2009-2010:

- Wednesday, August 12th: AGA Audio: Stimulus Spending – Are the Internal Controls in Place? ARAA presented by Auditor of State (3 hours CPE)**
- Monday, September 14th: Time Management (4 hours CPE)**
- Monday, Wednesday, October 19th – 21st: AGA Professional Development Conference (21 hours CPE)
- Monday, November 9th: AGA Audio - Grants Management in Today's Environment (2 hours CPE)**
- Monday, December 14th: Process Improvement (8 hours CPE)**
- Wednesday, January 13th: AGA Audio: Internal Controls (2 hours CPE)**
- Monday, February 8th: To Be Determined (4 hours CPE)**
- Monday, March 8th: To Be Determined (4 hours CPE)**
- Wednesday, April 21st: AGA Audio: Fraud and The Latest Tools and Techniques for Auditors (4 hours CPE)**
- Wednesday, May 19th: AGA Audio: Internal Controls for Auditors, Management and Staff: Making Government Organizations More Effective and Ethics (4 hours CPE)**
- Monday, June 14th: Part I - Strategic Planning, Part II - Successful Project Management (4 hours CPE)**

**=Free training provided to Central Ohio AGA Members