



*Advancing
Government
Accountability*

**Association of
Government Accountants**

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June 10, 2013

Ms. Jessica Jones
Chapter Service Manager
Association of Government Accountants
2208 Mount Vernon Avenue
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Subject: AGA Guam Chapter Strategic Plan
Program Year 2013-2014

Hafa Adai, Jessica:

The Association of Government Accountants, Guam Chapter is pleased to submit its Strategic Plan for Program Year 2013-2014. The strategic plan includes the following:

- Chapter leadership, planning and participation
- Education and professional development plan
- Certification plan
- Communications plan
- Membership and early careers plan
- Accountability plan
- Community service plan
- Scholarship plan
- Awards plan

Should you need additional information, please do not hesitate to contact me by phone at (671) 483-1559 or by email at doreentc@uguam.uog.edu.

Best regards,

A handwritten signature in blue ink, appearing to read "Doreen Crisostomo".

Doreen Crisostomo, Ph.D., CGFM
Chapter President
Program Year 2013-2014



AGA Guam Chapter

Strategic Plan

Program Year 2013-2014

Table of Contents

SECTION 1. CHAPTER LEADERSHIP, PLANNING & PARTICIPATION.....	1
Goal 1. Guam chapter leadership	1
Goal 2. Planning and preparation.....	2
Goal 3. Regional, sectional and national AGA participation.....	3
SECTION II. EDUCATION & PROFESSIONAL DEVELOPMENT PLAN.....	4
Goal 1. Education to help accountability professionals' meet CPE requirements.....	4
Goal 2. Education to help individuals attain the skills to pass the CGFM exam.....	4
Goal 3. Professional development to help all current and prospective members obtain additional skills	4
Goal 4. Provide awareness and marketing of educational events	4
SECTION III. CERTIFICATION PLAN	5
Goal 1. Support current CGFMs.....	5
Goal 2. Market CGFM service mark locally.....	5
Goal 3. Assist potential new CGFMs in attaining certification	5
Goal 4. Designate a chapter resource to work with CGFM certification.....	5
SECTION IV. COMMUNICATIONS PLAN.....	6
Goal 1. Chapter meetings and member participation.....	6
Goal 2. Communicate chapter business, events and other items of interest leaders	6
Goal 3. Communicate within AGA.....	6
SECTION V. MEMBERSHIP AND EARLY CAREERS PLAN	7
Goal 1. Actively recruit new members.....	7
Goal 2. Retain current members	7
Goal 3. Make early career and student members a priority	7
Goal 4. Support the growing career of your early career and student members.....	7
Goal 5. Offer educational opportunities for early career and student members.....	8
SECTION VI. ACCOUNTABILITY PLAN	9
Goal 1. Make accountability outreach a priority for both your chapter and chapter members	9
Goal 2. Establish a chapter accountability outreach plan.....	9
Goal 3. Promote accountability in chapter events	9
Goal 4. Participation in AGA's performance accountability programs.....	9
SECTION VII. COMMUNITY SERVICE PLAN	10
Goal 1. Participate in community service	10
Goal 2. Promote community service and AGA.....	10
SECTION VIII. SCHOLARSHIP PLAN	11
Goal 1. Offer academic scholarships	11
Goal 2. Encourage participation of members and dependents of members	11
SECTION IX. AWARDS PLAN	12
Goal 1. Recognize the association and the people who make it up.....	12
Goal 2. Promote the advancement of government financial management to the community and employers.....	12

SECTION 1. CHAPTER LEADERSHIP, PLANNING & PARTICIPATION

Goal 1. Guam chapter leadership

Chapter Executive Committee (CEC) Program Year 2013-2014

[Guam Chapter Bylaws](http://aga.guam.net/uploads/7/8/4/7/7847664/aga_bylaws.pdf) located at website, http://aga.guam.net/uploads/7/8/4/7/7847664/aga_bylaws.pdf

OFFICERS:

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COMMITTEES:

Program Director: Vincent Duenas, MPA

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E-mail: vduenas@guamopa.org

Education Chair: Rodalyn May A. Gerardo, CGFM, CIA, CPA, CGAP

Member #: 65248

E-mail: rgerardo@guamopa.org

CGFM Chair: Jose Guevara III, CGFM

Member #: 44115

E-mail: jojo_guevara@hotmail.com

Communication Director: Mark Palarca

Member #: 105629

E-mail: mpalarca@deloitte.com

Newsletter Editor and Website Director: Artemio Hernandez, MAcc

Member #: 100504

E-mail: artemioh@gmail.com

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Member #: 95562

E-mail: jason.katigbak@gmail.com

Early Careers Chair: Zeny Asuncion-Nace, CGFM, CPA, CFE

Member #: 20535

E-mail: znace@uguam.uog.edu

Early Careers Co-Chair: Sierra Castro, JAS President
Member #: pending
E-mail: sierracastro08@gmail.com

Accountability Chair: Maripaz N. Perez, CGFM, CGAP
Member #: 67833
E-mail: mnperez@gpagwa.com

Community Service Chair: Josephine Villanueva, CPA, CGFM, CGMA
Member #: 96981
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Awards Chair: Taling Taitano, CPA, CGFM
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Scholarship Chair: Doris Flores Brooks, CPA, CGFM
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Historian: Gloria Travis, CGFM
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Goal 2. Planning and preparation

Chapter Administration: Doreen Crisostomo, Ph.D., CGFM, President
Rachel Field, President-Elect

Program Chairperson: Vincent Duenas, MPA

The AGA Guam Chapter will hold monthly meetings to provide government accountability professionals a venue and an opportunity to meet with their peers from private and public entities and discuss relevant issues affecting their profession. At each meeting, we will provide committee report updates and invite a guest speaker to address our members and nonmembers on topics relevant to the accountability profession. The Chapter Executive Committee will meet monthly to plan and discuss, in detail, the various activities of the Chapter.

Chapter Executive Committee (CEC) Meetings

Date: Every 2nd Wednesday of the month
Location: TBA
Time: 12:00 - 1:00 pm

General Membership Meetings

Date: Every 4th Wednesday of the month
Location: TBA
Time: 12:00 - 1:00 pm

Goal 3. Regional, sectional and national AGA participation

Chapter members serving as regional officer or regional coordinator for the Pacific Rim region:

- Randall Wiegand, Regional Vice President (*term expires June 30, 2015*)
- Rodalyn May A. Gerardo, RVP-Elect (*term expires June 30, 2016*)
- Taling Taitano, Education Coordinator (*term expires June 30, 2014*)
- Jose Guevara III, CGFM Coordinator (*term expires June 30, 2014*)
- Zeny Nace, Accountability Coordinator (*term expires June 30, 2014*)

Chapter member serving on AGA National Board:

- Doreen Crisostomo, Journal Editorial Board (*term expires June 30, 2016*)

SECTION II. EDUCATION & PROFESSIONAL DEVELOPMENT PLAN

Chairperson: Rodalyn Gerardo, CGFM, CPA, CIA, CGAP, CGMA

Goal 1. Education to help accountability professionals' meet CPE requirements

Continue to provide relevant and affordable training to our members that will encourage them to strive for excellence in their current careers and equip them with the necessary core and specialized skills in the field of financial management:

Coordinate with the Governor's office, key government agencies, and other professional organizations (e.g., Guam Society of CPAs, American Society of Military Comptrollers, etc.) to ensure that the Committee can address the professional development needs of both the government and private sectors. Collaborate with other professional organizations and AGA Chapters in the Pacific Rim (Japan, Hawaii and Saipan) to provide a cost efficient and effective delivery of training to the members through sharing of resources (e.g., instructor time and travel cost).

Coordinate with the Department of the Interior Office of Inspector General and the Federal Bureau of Investigation for other training opportunities.

Goal 2. Education to help individuals attain the skills to pass the CGFM exam

Support the CGFM Committee in increasing the number of CGFMs through review classes or study groups.

Coordinate with the CGFM Committee and support them with their efforts to provide CGFM review courses through study groups.

Ensure the availability of educational materials (CGFM Guides) to our membership.

Goal 3. Professional development to help all current and prospective members obtain additional skills

Coordinate with the AGA National Office, University of Guam, and other professional organizations to secure guest speakers/instructors.

Solicit training course input from constituents in both the public and private sectors.

Goal 4. Provide awareness and marketing of educational events

Explore new training methodologies such as using AGA National's Audio Conference (a cost efficient way of providing training) and other web-based training through corporate sponsors (e.g. Becker):

Coordinate with the University of Guam, through its Academe on training opportunities.

Encourage member participation in various committees (venue, speakers, program, registration, sponsorship, etc.)

SECTION III. CERTIFICATION PLAN

Chairperson: Jose Guevara III, CGFM

Goal 1. Support current CGFMs

Support current CGFM's in attaining the 80 hours of CPE every two years by identifying CPE opportunities provided by AGA-Guam, AGA-National, other AGA chapters and accountability organizations in the Pacific Region.

Promote CGFM's achievements on the Chapter's newsletter, website or in the local newspaper. Annually participate in the "March is CGFM Month" awareness campaign.

Contribute items to the CGFM Regional Coordinator for inclusion in regions' accomplishment and awareness on this certification.

Provide information on CPE requirements on a monthly basis through email communication and/or other types of communication

Goal 2. Market CGFM service mark locally

Use the Core Values of Service, Accountability, Integrity, Leadership (SAIL) to promote these values in the local government. Encourage the use of the SAIL acronym in publications and notices.

Emphasize to the highest elected officials and government directors that the CGFM designation denotes excellence, performance and accountability.

Submit a bill to the Guam Legislature recognizing CGFM certification.

Promote the CGFM certification to be recognized officially by the Government of Guam.

Communicate with members at least on a quarterly basis on the advantages of being CGFM certified using the member newsletter, website or email.

Goal 3. Assist potential new CGFMs in attaining certification

Offer CGFM scholarship by providing reimbursement of the registration and test fee to members who pass the CGFM examination within one (1) year.

Provide CGFM review materials to members by borrowing the chapter's study guides. Sponsor CGFM preparation courses in Guam.

Promote study groups or CGFM outreach awareness programs.

Explore partnership opportunities with the Pacific Region Chapters to promote and bring CGFM preparation courses to the region.

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

Ensure the availability of educational materials (CGFM Guides) to our membership.

SECTION IV. COMMUNICATIONS PLAN

Communication Director: Mark Palarca

Newsletter Editor and Website Director: Artemio Hernandez, MAcc

Goal 1. Chapter meetings and member participation

Announce through website, newsletter and email chapter monthly meeting, events and conferences.

Goal 2. Communicate chapter business, events and other items of interest leaders

Update the chapter website on a weekly basis or as necessary to reflect chapter activity updates.

Distribute newsletter to members and public on chapter website on a monthly basis.

Prepare public service announcements or press releases through:

- Newsletter
- Website
- Local media outlets
- Social Networking Sites
- National AGA

Goal 3. Communicate within AGA

Share information with the Pacific Rim chapters on the Guam chapter's monthly meeting, events and conferences.

SECTION V. MEMBERSHIP AND EARLY CAREERS PLAN

Membership Chairperson: Jason V. Katigbak, CPA, CIA, CFE, CGMA

Early Careers Chairperson: Zeny Asuncion-Nace, CGFM, CPA, CFE

Early Careers Co-Chairperson: Sierra Castro, JAS President

Goal 1. Actively recruit new members

Increase base growth by 5% by the end of the program year.

Goal 2. Retain current members

Retain 90% of current membership.

Communicate via email with members on a timely basis notifying them of monthly Chapter meetings and encourage participation in other Chapter activities.

Provide monthly updates of membership listing and changes.

Continue with our free lunch raffle program for attendees at our monthly AGA Chapter meetings and encourage non-members to join AGA for additional benefits.

Continue with our raffle program for members to win airfare, accommodations and registration fee and earn CPEs at the AGA National PDC and Guam PDC based on availability of funds.

Continue to provide discounts for the luncheon during the monthly chapter meetings and training courses to members.

Recognize members' anniversary join date and years of membership in our newsletter and on our website.

Recognize CGFMs in our newsletter and on our website.

Contact past members whose membership has expired.

Goal 3. Make early career and student members a priority

Offer networking opportunities to student and Early Career members with the rest of the AGA members by inviting the student and Early Career members to be part of the various AGA Guam Chapter committees and events. As a form of incentive, waive or provide a subsidized cost of the membership fees and chapter lunch meetings for student and Early Career members who are actively involved with the AGA.

Work with the UOG Junior Accountant's Society (JAS), Membership, Education and Community Service committees to continue incentive programs for active participation by students and Early Career members.

Emphasize networking opportunities involved when attending various AGA activities planning/organization conference, community service events, submit newsletter article, etc.

Goal 4. Support the growing career of your early career and student members

Provide free membership to the student representative on the CEC committee.

Conduct presentations at high school "Career Day" events and/or college accounting courses about the significance, roles and benefits of the accounting profession and AGA membership.

Encourage the University of Guam (UOG) and the Guam Community College (GCC) accounting students and professors to join the AGA Guam Chapter, by inviting them to attend and participate in chapter meetings, community service activities, and other AGA-sponsored events.

Improve the AGA mentorship program by providing opportunities for AGA mentors to interact with their accounting student mentees through student mixers, meetings, and/or job shadow days.

Develop other creative means by which current and prospective UOG and GCC accounting students can network with accounting professionals.

Coordinate with AGA members to facilitate student company tours.

Early career will contribute articles to the Chapter newsletter and website.

Include UOG and GCC students in AGA mailing lists to receive email information regarding AGA activities, i.e. newsletters, community service programs, monthly membership meetings, etc.

Goal 5. Offer educational opportunities for early career and student members

Provide academic scholarships to UOG and GCC students. See scholarship plan.

SECTION VI. ACCOUNTABILITY PLAN

Chairperson: Maripaz N. Perez, CGFM, CGAP

Goal 1. Make accountability outreach a priority for both your chapter and chapter members

The AGA Guam Chapter complete and release its program year 2012~2013 CCR report no later than September 30, 2013.

Collaborate with pertinent oversight entity to provide useful CCR trainings.

Work with the Office of Public Accountability in identifying and establishing a potential list of agencies that did not comply with the CCR reporting requirement. The committee will work with these entities in ensuring that they prepare their respective CCR and comply with the legislative mandate. Chapter representatives can schedule a meeting with government representatives and discuss or provide a CCR examples prepared by other government entities.

Goal 2. Establish a chapter accountability outreach plan

Collaborate with pertinent oversight entity to provide useful CCR trainings.

Goal 3. Promote accountability in chapter events

Secure officials from government entities to present their CCR during a regularly scheduled membership meeting. Presentation will also include sharing some of their stories and experience when compiling their respective CCR.

Issue a *"Best Citizen Centric Report Award"* to recognize an outstanding CCR that meets the design elements cited in P.L. 30-127 and the National AGA. CCRs posted at the OPA's website will be automatically entered in the contest and the winning CCR will be presented no later than September of 2014.

Present AGA Guam Chapter's program year 2012-2013 CCR report to the membership no later than September of 2013 meeting.

Goal 4. Participation in AGA's performance accountability programs

Submit at least 5 CCR reports prepared by government of Guam agencies to National.

Encourage and assist government entities to submit their CCR to National to conduct its Certificate of Excellence review.

SECTION VII. COMMUNITY SERVICE PLAN

Chairperson: Josephine Villanueva, CPA, CGFM, CGMA

Goal 1. Participate in community service

AGA to participate or conduct at least one community service project each month for the program year.

Achieve 50% of total AGA membership to participate in at least one community service project for the program year (estimate 85 AGA members).

AGA members to support community service events that will utilize members' experience and expertise on the field such as tax clinics, credit awareness and savings education.

Participate in regional or international community service events to promote Professional Social Responsibility (PSR) for the program year such as the International Coastal Clean-up, Relay for Life event, World Environment Day and Red Cross initiatives.

Goal 2. Promote community service and AGA

Participate in at least one regional or international community service event for the program year.

Partner with other non-profit organizations on community service projects that will foster professional and civic relationships with the AGA such as the Go Green Initiatives/I-Recycle Team, Salvation Army, Kusina Kamalen Karidat, Guam Animals in Need (GAIN), Habitat for Humanity and Adopt a School and Bus Stop project.

SECTION VIII. SCHOLARSHIP PLAN

Chairperson: Doris Flores Brooks, CPA, CGFM

Goal 1. Offer academic scholarships

Set aside funds from the Educational Fund (to be determined by CEC) to support accounting and business student(s) in accordance with the AGA Guam Chapter Scholarship Criteria. Programs include but not limited to the Herminia Dierking scholarship, GCC scholarship and graduate-level scholarship.

Solicit involvement of private sector to gain support of AGA-Guam chapter's scholarship programs.

Offer free AGA membership to donors for each \$1,000 support.

Recognize donors by inviting them as speakers.

Goal 2. Encourage participation of members and dependents of members

Distribute the Scholarship Program requirements during the general membership meetings and encourage members' involvement in the recruitment of potential candidates to the Scholarship Program. Announce regularly in the AGA membership meetings.

SECTION IX. AWARDS PLAN

Chairperson: Taling Taitano, CPA, CGFM

Goal 1. Recognize the association and the people who make it up

Continue the John Phillips Excellence in Accountability Award, which will recognize individuals for superior dedicated service and outstanding achievement in enhancing government transparency and accountability in the Territory of Guam.

President to present awards during the July membership meeting or as appropriate for the following categories:

- John Phillips Excellence in Accountability Award
- Certificate of Appreciation/Participation
- Membership Longevity Award (10, 15, 20, 25 years, etc.)
- Professional Accomplishments
- New CGFMs

Provide scholarships to PDC and local training to members in recognition of their participation in club activities.

- PDC - minimum of 2 scholarships, based on availability of funds.
- Local training - minimum of 2 scholarships, pending funds availability

Goal 2. Promote the advancement of government financial management to the community and employers

Prepare public service announcements or press releases for nominations, awards and scholarships and submit to:

- Newsletter
- Website
- Local media outlets
- Social Networking Sites
- National AGA
- Other trade journals