



*Advancing Government
Accountability*

**Association of Government
Accountants**

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July 15, 2016

Louise Burnette, MPA
Chapter Services Manager
Association of Government Accountants
2208 Mount Vernon Avenue
Alexandria, VA 22301

Subject: AGA Guam Chapter Strategic Plan Program Year 2016-2017

Hafa Adai Louise!

The AGA Guam Chapter is pleased to submit its Strategic Plan for Program Year 2016-2017. The Strategic Plan includes the following:

- Chapter Leadership, Planning & Participation
- Education & Professional Development Plan
- Certification 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) 475-0390 extension 210 or by email at yhechanova@guamopa.com.

Sincerely,

Yukari "Yuka" Hechanova, CGFM, CPA, CIA, CGAP, CGMA
Chapter President
Program Year 2016-2017





Advancing Government Accountability

**Strategic Plan
Program Year 2016 - 2017**

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SECTION 1. CHAPTER LEADERSHIP, PLANNING & PARTICIPATION

Goal 1. Guam Chapter Leadership

Chapter Executive Committee (CEC) Program Year 2016-2017

Guam Chapter By-Laws located at website: <http://www.aga.guam.net/#!chapterbylaws/c55q>

OFFICERS:

President: *Yukari B. Hechanova, CGFM, CPA, CIA, CGAP, CGMA*
Member #: 60087
E-mail: yhechanova@guamopa.com

President-Elect: *Clariza Mae Roque*
Member #: 96313
E-mail: croque@guamopa.com

Immediate Past President: *Artemio "Ricky" Hernandez, CGFM, MAcc*
Member #: 100504
E-mail: artemiorh@gmail.com

Secretary: *Floregine Dela Cruz*
Member #: 133643
E-mail: floreginedelacruz@gmail.com

Treasurer: *Josephine G. Villanueva, CPA, CGFM*
Member #: 71186
E-mail: josiegv@gmail.com

COMMITTEES:

Programs/Technical Meetings
Director: *Vincent Duenas, MPA*
Member #: 67025
E-mail: vincentd@guamwaterworks.org

Education
Director: *Rodilyn May A. Gerardo, CGFM, CIA, CPA, CGAP, CGMA*
Member #: 65248
E-mail: rgerardo@guamopa.org

Professional Certification
Director: *Jose Guevara III, CGFM*
Member #: 44115
E-mail: jojo_guevara@hotmail.com

Communications/Website

Director and Webmaster: *Artemio "Ricky" Hernandez, CGFM, MAcc*

Member #: 100504

E-mail: artemiorh@gmail.com

Newsletter

Chair/Editor: *Matthew Quinata*

Member #: 22019

E-mail: mattquinata@gmail.com

Membership

Director: *Debbie Ngata*

Member #: 96010

E-mail: debbie.ngata@gu.ey.com

Early Careers

Director: *Christian S. Rivera*

Member #: 131925

E-mail: crivera@guamopa.com

Student Representative

University of Guam Junior Accountants Society President: *Von Alcoran*

Member #: 137001

E-mail: vonalcoran@hotmail.com

Accountability

Chair: *Maripaz N. Perez, CGFM, CGAP, CICA, CIA*

Member #: 67833

E-mail: mnperetz@gpagwa.com

Community Service

Director: *Frances Danieli, CGFM*

Member #: 92245

E-mail: fdanieli@ghura.org

Chapter Recognition Program

Chair: *Taling Taitano, CPA, CGFM*

Member #: 12754

E-mail: tmtaitano@gmail.com

Awards

Chair: *Vincent Duenas, MPA*

Member #: 67025

E-mail: vincentd@guamwaterworks.org

Scholarship
Chair: *Pamela Aguigui, CM*
Member #: 71197
E-mail: paguigui@gpagwa.com

Research/Standards
Chair: *Christopher Wolseley, CA*
Member #: 52587
E-mail: cwolseley@deloitte.com

By-Laws and Procedures:
Director: *Llewelyn Terlaje, CGFM, CGAP*
Member #: 70753
E-mail: lterlaje@guamopa.com

Goal 2. Planning and Preparation

- Chapter Administration

Yukari B. Hechanova, President
Clariza M. Roque, President-Elect

Director of Programs/Technical Meetings: *Vincent Duenas, MPA*

The AGA Guam Chapter will hold monthly meetings to provide government accountability professionals an avenue 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 non-members about topics relevant to the accountability profession. Continuing professional education credits will be offered as appropriate. The Chapter Executive Committee will meet monthly to plan and discuss, in detail, various Chapter activities.

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

Date	Speaker	Topic
June 29, 2016	Doris Flores Brooks, Public Auditor	Oath of Office/Debt
July 13, 2016	CEC Meeting and Strategic Planning	
July 27, 2016	AGA Appreciation Luncheon 15th Annual 5K	
August 10, 2016	CEC Meeting	
August 24, 2016	Christine Baletto, Director, Department of Administration	Government Finances
September 7, 2016	CEC Meeting	
September 14, 2016	Doug Glenn, National President, Association of Government Accountants	AGA National Initiatives
October 12, 2016	CEC Meeting	
October 26, 2016	Public Auditor Forum	Plans and Goals as Elected Public Auditor
November 9, 2016	CEC Meeting	
November 23, 2016	Guam Memorial Hospital Representative	State of Finances in the Hospital
December 14, 2016	CEC Meeting	
December 21, 2016	AGA Christmas Party	
January 11, 2017	CEC Meeting	
January 25, 2017	Personal Health	Personal Health and Wellness
February 8, 2017	CEC Meeting	
February 22, 2017	Joe Bradley	Economic Outlook
March 8, 2017	CEC Meeting	
March 22, 2017	CGFM Month	
April 12, 2017	CEC Meeting	
April 26, 2017	Director, Department of Revenue and Taxation	Update on Revenue Enhancement, Taxes, and Tax Refunds
May 10, 2017	CEC Meeting	
May 24, 2017	Past Presidents' Month	
June 14, 2017	CEC Meeting	
June 28, 2017	AGA Representative	Oath of Office

Goal 3. Regional, sectional and national AGA participation

Chapter member serving as regional officer for the Pacific Rim region:

- Taling M. Taitano, Regional Vice President (term expires June 30, 2017)
Member #: 12754
E-mail: tmtaitano@gmail.com

Chapter member serving on AGA National Board:

- Doreen Crisostomo, Senior Vice President, Section III (term expires June 30, 2017)
Member #: 23737
E-mail: doreentc@guam.net

SECTION II. EDUCATION & PROFESSIONAL DEVELOPMENT PLAN

Director: *Rodalyn Gerardo, CGFM, CIA, CPA, CGAP, CGMA*

Goal 1. Education to help meet continuing professional education (CPE) requirements

- This year, from September 12-14, 2016, we plan to deliver our chapter's biennial Guam Professional Development Conference (GPDC) which will provide up to 24 hours of continuing professional education (CPE) credits. The GPDC will be the first of four quarterly trainings we plan on providing this program year. Doug Glen, AGA National President will present at the GPDC and speak at our monthly membership meeting.
- 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 cost-efficient and cost-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, Office of Public Accountability, and the Federal Bureau of Investigation for other training opportunities.

Goal 2. Education to help individuals attain the skills to pass the CGFM examinations and maintain their certification

- Support the Director of Professional Certification in increasing the number of CGFMs through review classes or study groups.
- Coordinate with the Director of Professional Certification and support efforts to provide CGFM review courses through study groups.
- Ensure the availability of updated 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 throughout the program year.
- 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

Director: *Jose Guevara III, CGFM*

Goal 1. Support CGFMs

- Support current CGFM's in attaining the 80 hours of CPEs 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 in the Chapter's newsletter, website or in the local newspaper. Annually participate in the "March is CGFM Month" awareness campaign.
- Contribute items to the RVP for inclusion in the Pacific Rim's accomplishment and awareness of 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.
- Promote Guam Public Law 33-18 which provides pay incentives to CGFM designation holders working in 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 scholarships by providing registration and test fees reimbursements to members who pass the CGFM examination within one (1) year.
- Provide opportunities for members to review the chapter's CGFM study guides to prepare for exams. Sponsor CGFM preparation courses in Guam.
- Promote study groups or CGFM outreach awareness programs.

- Explore partnership opportunities with the Pacific Rim 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.
- Coordinate with Director of Education to provide training necessary to meet CGFM requirements.
- Team up with other chapter CGFM's to promote CGFM and provide presentations in CGFM Study groups.

SECTION IV. COMMUNICATIONS PLAN

Director of Communication/Webmaster: *Artemio "Ricky" Hernandez, CGFM, MAcc*

Newsletter Editor/Chairperson: *Matthew Quinata*

Goal 1. Chapter meetings and member participation

- Announce chapter monthly meetings, events, and conferences through the chapter website, newsletters, and email.

Goal 2. Communicate chapter business, events and other items of interest to members, employers and government accountability leaders

- Update the chapter website on a weekly basis or as necessary to reflect chapter activity updates. Distribute the chapter's newsletters to members and the public on the chapter's website on a monthly basis.
- Prepare public service announcements or press releases through:
 - a. Newsletter
 - b. Website
 - c. Local media outlets
 - d. Social Networking Sites
 - e. 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

Director of Membership: *Debbie Ngata*

Director of Early Careers: *Christian S. Rivera*

Student Representative: *Von Alcoran, University of Guam JAS President*

Goal 1. Actively recruit new members

- Increase membership to 200+ members by the end of the program year.

Goal 2. Retain 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.
- Invite members who are celebrating membership anniversaries via email to be recognized during the monthly general membership meetings.
- Recognize members' AGA anniversary date and years of membership in our newsletter and on our website. Provide monthly updates of membership listing and changes.
- Continue with the free lunch raffle program for members who attend our monthly AGA Chapter meetings and encourage non-members to join AGA for additional benefits.
- Continue with the raffle program for members to win airfare, accommodations and registration fee and earn CPEs at the AGA National PDT based on availability of funds.
- Continue to provide discounts for the luncheon during the monthly chapter meetings and training courses to members. Recognize CGFMs in our newsletter and on our website. Contact past members whose memberships have expired.

Goal 3. Make early career and student members a priority

- Offer student and early career members opportunities to network with other AGA members by inviting the student and early career members to be part of the various AGA Guam Chapter committees and events. Incentivize these members by subsidizing cost of membership fees and chapter lunch meetings who are actively involved with AGA.

- Work with the University of Guam (UOG) Junior Accountant’s Society (JAS) and the Directors of Membership, Education and Community Service to continue incentive programs for active participation by students and early career members.
- Emphasize networking opportunities to students and early career members involved in various AGA activities such as assisting in planning/organizing conferences, participating in community service events, and submitting newsletter article, etc.
- Participate in UOG’s Charter Day, promote CGFM by speaking to UOG Junior Accountant’s Society (JAS) members at their meetings, and present/introduce the CGFM certification to UOG’s accounting classes.
- Conduct the Annual High School Essay Competition to increase awareness amongst students in the secondary level.

Goal 4. Support the growing career of Early Career and Student members

- Provide free membership to the student representative (JAS President) 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 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 accounting students 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.
- 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, CICA, CIA*

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

- Complete and release program year 2015~2016 Citizen-Centric Report no later than September 30, 2016 and post the AGA Guam Chapter CCR to chapter website.
- Submit the AGA Guam Chapter CCR to AGA's Certificate of Excellence Review Program no later than December 31, 2016.

Goal 2. Establish a chapter accountability outreach plan

- Issue reminder notices no later than July 31, 2016 to all government agencies about Public Law 30-127 which requires Government of Guam agencies to prepare their CCRs no later than sixty (60) calendar days after their independent audit reports have been released by the Office of Public Accountability.
- Coordinate with the Office of Public Accountability to monitor Government of Guam agencies' compliance with Public Law 30-127 to issue their CCRs after their respective financial audits are issued.
- Coordinate with the UOG accounting students and/or the Junior Accountants' Society to assist Government of Guam agencies in the preparation of their CCRs.
- Coordinate with the Guam Community College (GCC) accounting students and/or the Association of Junior Accountants to assist government of Guam agencies in the preparation of their CCRs.
- Coordinate with UOG and GCC accounting students and/or AGA members to implement a CCR review committee to provide agencies with suggestions for improvements to enhance the quality of the CCRs.

Goal 3. Promote accountability in chapter events

- Present the 2015~2016 Chapter CCR to the membership during a General Membership meeting no later than December 31, 2016.
- Secure officials from government agencies to present their CCRs during a regularly scheduled membership meeting. The presentations will also include sharing their experiences of preparing their respective CCRs.

- Issue a “Best Citizen-Centric Report Award” to recognize an outstanding CCR that meets the design elements cited in Public Law 30-127 and the AGA National guidelines. CCRs posted on the OPA’s website will be automatically entered in the contest and the winning CCR will be presented no later than December 2016.
- Recognize government of Guam entities who have complied with the mandates of P.L. 30-127 for the last seven years since the law’s inception in FY 2008.
- Submit at least five CCRs prepared by Government of Guam agencies to AGA’s Certificate of Excellence review program.
- Encourage and assist government of Guam agencies to submit their CCRs to AGA’s Certificate of Excellence review program.

Goal 4. Participation in AGA’s performance accountability programs

- Encourage chapter members to participate as a Certificate of Excellence in Accountability Reporting (CEAR) and/or CCR reviewer.

SECTION VII. COMMUNITY SERVICE PLAN

Chairperson: *Frances Danieli, CGFM*

Goal 1. Participate in community service

- Participate or conduct at least one community service project each month for the program year by partnering with needy organizations or others who are hosting community service events.
- Encourage members to participate in at least one community service project for the program year to achieve 50% participation of total AGA membership (estimate 90 to 100 AGA members).
- Encourage members to support AGA community service events that will utilize members' experiences and expertise in their fields such as 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

- Host and coordinate the annual AGA Guam Chapter 5k Run to raise funds for scholarship programs.
- Partner with other non-profit organizations in community service projects that will foster professional and civic relationships with the AGA such as the Go Green Initiatives/I-Recycle Team, Salvation Army, Kusinan Kamalen Karidat, Guam Animals in Need (GAIN), and Habitat for Humanity.

SECTION VIII. SCHOLARSHIP PLAN

Chairperson: *Pamela Aguigui, CM*

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, AGA Guam Chapter scholarship and graduate-level scholarships.
- Solicit involvement of the 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.
- Encourage application to AGA National Academic Scholarships (due during the month of April) including:
 - a. Rising College Freshman
 - b. Current Undergraduates
 - c. Graduate Students
 - d. Community Service

SECTION IX. AWARDS PLAN

Awards Chairperson: *Vincent Duenas, MPA*

Chapter Recognition 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 Guam.
- AGA Guam Chapter President to present awards during the September membership meeting or as appropriate for the following categories:
 - a. John Phillips Excellence in Accountability Award
 - b. Certificate of Appreciation/Participation
 - c. Membership Longevity Award (10, 15, 20, 25 years, etc.)
 - d. Professional Accomplishments
 - e. New CGFMs
- Provide scholarships to PDT and local training to members in recognition of their participation in club activities.
 - a. PDT - minimum of 1 scholarships, based on availability of funds.
 - b. Local training - minimum of 2 scholarships, pending funds availability
- Encourage application to AGA National Awards (due during the month of March 2017) including:
 - a. Chapter Education Award
 - b. Chapter Service Award
 - c. Community Service Award
 - d. Chapter CGFM Award
 - e. Regional Coordinator Award
 - f. Emerging Leader Award of Excellence
 - g. Chapter Newsletter and Website Awards

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:
 - a. Newsletter
 - b. Website
 - c. Local media outlets
 - d. Social Networking Sites
 - e. National AGA
 - f. Other trade journals