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July 17, 2015

Ms. Jessica Jones
Chapter Service Manager
Association of Government Accountants 2208 Mount Vernon Avenue
Alexandria, VA 22301

Subject: AGA Guam Chapter Strategic Plan Program Year 2015-2016

Hâfa Adai, Jessica:

The Association of Government Accountants, Guam Chapter is pleased to submit its Strategic Plan for Program Year 2015-2016. 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) 486-4444 or by email at artemiorh@gmail.com.

Best Regards,

Artemio "Ricky" Hernandez, CGFM
Chapter President
Program Year 2015-2016





AGA Guam Chapter

Strategic Plan

Program Year 2015-2016

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SECTION 1. CHAPTER LEADERSHIP, PLANNING & PARTICIPATION

Goal 1. Guam Chapter Leadership

Chapter Executive Committee (CEC) Program Year 2015-2016

Guam Chapter Bylaws located at website, <http://www.aga.guam.net/#!/chapterbylaws/c55q>

OFFICERS:

President: Artemio “Ricky” Hernandez, CGFM

Member #: 100504

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President-Elect: Yukari B. Hechanova, CPA, CGFM, CIA

Member #: 60087

E-mail: yhechanova@guamopa.org

Immediate Past President: Rachel Field, PMBA

Member #: 94772

E-mail: rachelfield87@gmail.com

Secretary: Clariza Mae Roque

Member #: 96313

E-mail: croque@guamopa.org

Treasurer: Josephine G. Villanueva, CPA, CGFM

Member #: 71186

E-mail: josiegv@gmail.com

COMMITTEES:

Programs

Director: Vincent Duenas, MPA

Member #: 67025

E-mail: vincentd@guamwaterworks.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

Communications

Director: Mark Palarca

Member #: 105629

E-mail: mpalarca@deloitte.com

Newsletter

Editor: Matthew Quinata

Member #: 22019

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Website

Webmaster: Artemio "Ricky" Hernandez, CGFM
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Membership

Chair: Jason Katigbak, CPA, CIA, CFE, CGMA
Member #: 95562
E-mail: jasonkatigbak@gmail.com

Co-Chair: Debbie Ngata
Member #: 96010
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Early Careers

Chair: Doreen T. Crisostomo, Ph.D., CGFM, CICA, CFE
Member #: 23737
E-mail: doreentc@triton.uog.edu

Co-Chair: Zeny Asuncion-Nace, CPA, CGFM, CFE
Member #: 20535
E-mail: nacy.zeny@gmail.com

Student Representative and Co-Chair: Lorbea Palaming, University of Guam Junior Accountants Society President
Member #: 128117
E-mail: lorbea.is@gmail.com

Accountability

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

Co-Chair: Zeny Asuncion-Nace, CPA, CGFM, CFE
Member #: 20535
E-mail: nacy.zeny@gmail.com

Community Service

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Member #: 92245
E-mail: fdanieli@ghura.org

Co-Chair: Ariana Villaverde
Member #: 103262
E-mail: ariana.villaverde@gmail.com

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: Cora Montellano, CGFM
Member #: 71186
E-mail: cmontellano@gpagwa.com

Co-Chair: Pamela Aguigui

Member #: 71197
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Historian: Jerrick Hernandez, CGAP
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Research/Standards

Chair: Christopher Wolseley, CA
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By-Laws and Procedures:

Chair: Llewelyn Terlaje, CGAP
Member #: 70753
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Goal 2. Planning and Preparation

Chapter Administration:

Artemio “Ricky” Hernandez, President
Yukari B. Hechanova, President-Elect

Program Chairperson: 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 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
TBA
Time: 12:00 - 1:00 pm

General Membership Meetings

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

During Program Year 2015-2016, the AGA Guam Chapter is celebrating its 45th anniversary as a chapter. The Chapter Executive Committee will be planning the following events aligned with the promotion of the AGA Guam Chapter and its 45th anniversary:

1. September 2015: GovGuam 40 and Under: Emerging Leaders in the Government of Guam Publication and Event
2. November 2015: 3rd Annual High School Essay Competition
3. December 2015: Member Appreciation Christmas Luncheon
4. March 2015: CGFM Month Celebration
5. April 2015: Past Presidents' Appreciation Month Celebration

Goal 3. Regional, sectional and national AGA participation

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

- Taling M. Taitano, Regional Vice President-Elect (*term expires June 30, 2016*)
- Rodalyn May A. Gerardo, Past Regional Vice President
- Taling M. Taitano, Education Regional Coordinator (*term expires June 30, 2017*)
- Jason V. Katigbak, Chapter Development and Assistance Regional Coordinator (*term expires June 30, 2017*)
- Jose B Guevara III, Certification Regional Coordinator (*term expires June 30, 2017*)
- Zeny T. Asuncion-Nace, Accountability Outreach Regional Coordinator (*term expires June 30, 2017*)

Chapter member serving on AGA National Board:

- Doreen Crisostomo, Sectional Vice President, Section III & 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 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.

Inform members of CPE opportunities offered by the Guam Society of Certified Public Accountants, the Association of Pacific Island Public Auditors, the Government of Guam, AGA National, and the AGA Guam Chapter.

Provide at least one (1) AGA Guam Chapter-sponsored training each quarter during the program year.

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 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

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.

Work with the Office of the Governor and the Guam Legislature toward receiving a Proclamation and Legislative Resolution during CGFM Month in March. Publish electronic files of proclamation and resolutions on the AGA website and submit to AGA National.

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.

Encourage existing CGFMs to include designations on their business cards, contact information, email signatures, etc.

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.

Coordinate with Education Chairperson to hold 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

Communication Director: Mark Palarca

Newsletter Editor: Matthew Quinata

Website Director: Artemio "Ricky" Hernandez, CGFM, MAcc

Historian: Jerrick Hernandez, CGAP

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

Publish monthly Chapter Executive Committee and General Membership meeting minutes on the AGA Guam Chapter website.

Publish monthly financial reports on the AGA Guam Chapter website.

Maintain and publish chapter history files for submission to AGA National.

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 Katigbak, MBA, CPA, CFE, CIA, CGMA

Membership Co-Chair: Debbie Ngata

Early Careers Chairperson: Doreen T. Crisostomo, Ph.D., CGFM, CICA, CFE

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

Student Representative and Early Careers Co-Chair: Lorbea Palaming, University of Guam JAS President

Goal 1. Actively recruit new members

Increase membership to 200 members by the end of Program Year 2015-2016, 210 by the end of Program Year 2016-2017, and 225 by the end of Program Year 2016-2017.

Goal 2. Retain current members

Retain 90% of current membership for each of the next three (3) program years.

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' anniversary join 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 attendees at 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 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, provide a subsidized cost of the membership fees and chapter lunch meetings for student and Early Career members who are actively involved with 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.

Participate in the University of Guam's Charter Day, speak at UOG Junior Accountant's Society (JAS) monthly meeting to promote CGFM, present/introduce the CGFM certification to UOG's accounting major classes.

Conduct the Annual High School Essay Competition to increase awareness amongst students in the secondary level.

Goal 4. Support the growing career of your 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 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.

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

Co-Chair: Zeny Asuncion-Nace, CPA, CGFM, CFE

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

The AGA Guam Chapter complete and release its program year 2014~2015 CCR report no later than September 30, 2015.

Post chapter CCR to chapter website.

Submit chapter CCR to AGAs Certificate of Excellence Review Program no later than December 31, 2015.

Goal 2. Establish a chapter accountability outreach plan

Issue reminder notices to all government agencies about P.L. 30-127 requirement to prepare their CCR sixty (60) calendar days after the independent audit report for a government entity has been released by the Office of Public Accountability. Reminder notices to be issued no later than March 31, 2015.

Coordinate with the Office of Public Accountability (OPA) on the monitoring of compliance with P.L. 30-127 requirement for government of Guam entities to issue their CCRs after the completion of their respective financial audits.

Coordinate with the University of Guam Accounting Students and/or Junior Accountants' Society to provide assistance to government entities in the preparation of a CCR.

Prepare at least two (2) government agencies with the preparation of their CCRs.

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 December of 2015.

Present AGA Guam Chapter's program year 2014-2015 CCR report to the membership no later than December 2015.

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: Frances Danieli, CGFM

Co-Chair: Ariana Villaverde

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 90 to 100 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: Cora Montellano, CGFM

Co-Chair: Pamela Aguigui

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 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.

Encourage application to AGA National Academic Scholarships (due during the month of April 2015) including:

- Rising College Freshman
- Current Undergraduates
- Graduate Students
- 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 the Territory of Guam.

President to present awards during the September 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 PDT and local training to members in recognition of their participation in club activities.

- PDT - minimum of 1 scholarships, based on availability of funds.
- Local training - minimum of 2 scholarships, pending funds availability

Encourage application to AGA National Awards (due during the month of March 2015) including:

- Chapter Education Award
- Chapter Service Award
- Community Service Award
- Chapter CGFM Award
- Regional Coordinator Award
- Emerging Leader Award of Excellence
- 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:

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

GovGuam 40 and Under: Emerging Leaders in the Government of Guam Program to recognize leaders that are 40 years old or younger in the government of Guam through the publication of a booklet and celebration during the September General Membership meeting.