

July 31, 2022

Ms. Lauren Walters
Chapter Service Manager
2208 Mount Vernon Avenue
Alexandria, VA 22301
Via Email: lwalters@agacgfm.org

Hafa Adai Ms. Walters:

Re: AGA Guam Chapter Strategic Plan for Program Year 2022-2023

The AGA Guam Chapter is pleased to submit its Strategic Plan for Program Year 2022-2023. The theme for this program year is Leveraging Perpetual Learning and Diversity to thrive in today's rapidly changing world." The theme for this year follows suit with the new AGA rebranding tagline which is **Advance. Grow. Accelerate.**


The Strategic Plan includes the following committee write-ups.

1. Leadership & Development/Adviser/ACE & Nominating Committee
2. Accountability Committee
3. Awards & Chapter Recognition Committee
4. Audit Committee and Budget & Finance Committee
5. CGFM & Professional Certification Committee
6. Community Service & Resource Development Committee
7. Education Committee
8. Marketing & Communications Committee - Newsletter
9. Marketing & Communications Committee – Website
10. Marketing & Communications Committee – Social Media/News
11. Membership Committee
12. Scholarships Committee
13. Young Professionals & Student Committee

The strategic plan also includes the objective of the National Council of Chapter Representatives (NCC Rep) for this plan year for the Guam Chapter. You may also visit us on our website at <https://www.aga.guam.net/>

Should you need additional information, please do not hesitate to contact me at (671) 685-8832 or email me at josiegvg@gmail.com.

Respectfully,



Josephine "Josie" G. Villanueva
MBA, CPA, CGMA, CGFM, CSAF, SHRM-CP, PMP
Chapter President



STRATEGIC PLAN

Program Year 2022 – 2023

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SECTION I. CHAPTER LEADERSHIP, PLANNING AND PARTICIPATION

The outgoing AGA National President Gerry Boaz, program year's theme was focused on "Thought Leadership and Problem Solver." As he passed the gavel to Melinda Miguel, her theme's focus for this year's is "Building Bridges and Cultivating Collaborations. "Following both their visions, AGA Guam chapter theme is "Leveraging Perpetual Learning and Diversity to thrive in today's rapidly changing world."

What it means to our chapter executive leadership is to emphasize the importance of investing in oneself in continued professional education regardless of anyone's career state in life to gain the knowledge and understanding to better improve the job effectiveness of our membership. Diversity is in capitalizing on the AGA rebranding which opens to other professionals beyond government accountants as it advanced government accountability. To be successful in its mission, AGA needs to be inclusive of all professionals who work to ensure good government, transparency, and accountability.

Goal 1. Membership Engagement

Articles VI and VII of the AGA Guam Chapter By-Laws created the Chapter Executive Committee (CEC) which is to be made up of the Chapter President (Chair of the CEC), Chapter President-Elect, Immediate Past Chapter President, Chapter Secretary, Chapter Treasurer, Treasurer-Elect, and Chapter Directors. There are a total of 15 committees, with 43 members of which 17 are new which represents 40%. Currently, the chapter has over 250 members and counting. We want to continue the chapter strong as we ensure members are kept engaged and see the value of their membership. Some of this committee's names were also modified pending updates to our chapter by-laws to reflect the functional role and better serve the membership needs.

The Bylaws and Procedures Committee is also responsible for ensuring the Guam Chapter bylaws are consistent with AGA National bylaws. For PY 2022-2023, the Committee will update according to AGA National's 2022 prototype. The Policies and Procedures Manual was updated in March 2022 and the Committee will update it as necessary. Current Guam Chapter Bylaws are located on the website at <https://www.aga.guam.net/chapterbylaws>.

Below is the complete list of the leadership for the program year 2022-2023.

CHAPTER OFFICERS PROGRAM YEAR 2022-2023		
AGA Member Name	Position	AGA Member ID
Ms. Josephine Guico Villanueva, MBA,CGFM,CPA,CGMA, SHRM-CP,PMP	President	96981
Mr. Rizalito Gino F. Paglingayen,CPA	President - Elect	99243
Odeth Bealial F. Ignacio, CGFM	Secretary	158622
Mr. Justin B. Castro, CGFM, CFE	Treasurer	139456
Mr. Jerricho C. Garcia, CGFM	Treasurer-Elect	148550
Ms. Maripaz Nogoy Perez, CGFM, CICA, CFE	Immediate Past President / CGFM/Professional Certification - Director/By-Laws & Procedures Co-Director	67833
Ms. Pilar O. Pangelinan	National Council of Chapters (NCC Representative) and ACE Co-Chair	99790

COMMITTEE DIRECTORS & CO-DIRECTORS PROGRAM YEAR 2022-2023			
AGA Member Name	Committee	Position	AGA Member ID
Ms. Taling M. Taitano, CGFM, CPA	Leadership Development Committee	Leadership Development/Adviser /ACE & Nominating Committee Director	12754
Dr. Doreen T. Crisostomo-Muña, Ph.D.,CGFM,CFE,CICA	Accountability Outreach Committee	Accountability Director	23737
Ms. Shannaleen Braiel	Accountability Outreach Committee	Accountability Co-Director	172299
Mr. Vincent Jon G. Duenas	Awards & Chapter Recognition Committee	Awards & Chapter Recognition Committee Director	67025
Ms. Maria C. Lizama	Awards & Chapter Recognition Committee	Awards & Chapter Recognition Committee Co-Director	171331
Ms. Mary Grace V. Edrosa, CGFM	Audit Committee	Audit Committee Director	43450
Ms. Evangeline C. Albis	Audit Committee	Audit Committee Co-Director	172240
Ms. Llewelyn Restuvog Terlaje, CGFM, CGAP	Budget & Finance Committee	Budget & Finance Committee-Director	70753
Ms. Yukari B. Hechanova, CGFM, CPA, CIA	By-Laws & Procedure Committee	By-Laws and Procedures-Director	60087
Ms. Joy V. Bulatao, CGFM	By-Laws & Procedure Committee	By-Laws and Procedures Co-Director	96134
Ms. Frances Danieli, CGFM	By-Laws & Procedure Committee	By-Laws and Procedures Co-Director	92245
Ms. Maria Thyrsa DC Bagana, CGFM	CGFM/Professional Certification Committee	CGFM/Professional Certification Co- Director - Outreach	113118
Ms. Royelle Mae S. Carter	CGFM/Professional Certification Committee	CGFM/Professional Certification Co-Director - CGFM Month	161440
Ms. Vanessa D. Valencia	Community Service & Resource Development Committee	Community Service & Resource Development - Director	137374
Mr. Steve Eric S. Terlaje	Community Service & Resource Development Committee	Community Service & Resource Development Co-Director	116151
Mr. Romar P. Tapeceria	Community Service & Resource Development Committee	Community Service & Resource Development Co-Diretor	136489
Dr. Artemio Hernandez, CGFM, IAP, CPPO	Education Committee	Education Committee - Director	100504
Mr. Jason V. Katigbak, CPA, CGMA, CIA, CFE	Education Committee	Education Committee - Director	95562
Ms. Rodalyn May A. Gerardo, CGFM, CIA, CPA, CGAP, CGMA, CICA	Education Committee	Education Co-Director - CPE Sponsor Compliance & Reporting	65248
Ms. Danica Anne I. Batac	Education Committee	Education Co-Director - Technical & Admin Support	156898
Mr. Thomas Eladio M. Battung, CFE	Education Committee	Education Co-Director - Technical & Admin Support	161732
Ms. Debbie CM Ngata	Marketing & Communications Committee	Marketing & Communications Director - Newsletter	96010
Ms. Sandra Angelica M. Doria	Marketing & Communications Committee	Marketing & Communications Co-Director - Newsletter	170070
Ms. Clariza Mae G. Roque, CGFM	Marketing & Communications Committee	Marketing & Communications Director - Website	96313
Ms. Almira Rosiel B. Balagtas	Marketing & Communications Committee	Marketing & Communications Co-Director - Website	171951
Ms. Margie Lorenze F. Castro,CPA	Marketing & Communications Committee	Marketing & Communications Director - Social Media /News	138096
Ms. Kate VB Jeszenszky	Marketing & Communications Committee	Marketing & Communications Co-Director - Social Media/News	170073
Mr. Jose B. Guevara, III, CGFM	Membership Committee	Membership Committee Director	44115
Ms. Amacris V. Legaspi, CGFM	Membership Committee	Membership Co-Director (General)	131480
Ms. Pamela R. Aguigui	Membership Committee	Membership Co-Director (Outreach)	71197
Ms. Mariane M. Dela Cruz	Membership Committee	Membership Co-Director (Events & Meetings)	171376
Ms. Mariah J.C Castro	Membership Committee	Membership Co-Director (Events & Meetings)	169991
Ms. Jorizaira R. Borja	Scholarship Committee	Scholarship Committee Director	156339
Mr. Ritzmar C. Erni	Scholarship Committee	Scholarship Committee Co-Director	137866
Ms. Rachel F. Cubacub	Young Professional Committee	Young Professional Chair	94772
Ms. Tiera Nikole B. Santos	Young Professional Committee	Young Professional Co-Chair	172204

Goal 2. Expanding Reach

Last program year we started to reach out to nearby islands of Guam such as the Commonwealth of the Northern Mariana Island to become Guam's satellite chapter and take advantage of the virtual training opportunities Guam Chapter offers. We will continue this outreach and hope to see future opportunities for collaboration on training events. In "expanding reach" we are also looking to explore additional community service projects that AGA has not previously been involved in and extend the scholarships to online accounting and finance students.

Goal 3. Technology Maximization

As technology evolves, we see the need for our chapter to continue to advance on technology such as digitizing its records, using various affordable platforms, QR codes, and adapting to paperless processes. This includes meetings registration with Google forms which integrates to the Payable platform and AGA PayPal account for a touchless experience for our members and, integration of Zoom and Conference IO accelerate the turn-around time for training certificates. For CEC Meeting with vote polling, we are now using SLIDO to poll votes and feedback.

Goal 4. Succession Planning for future AGA Guam Chapter Leaders

With 16 new Chapter Executive Committee Members and new members signing up, officers and CEC are using mentorship and mixers to encourage more interest in chapter leadership to hone skills, step up to the plate and take the lead and look for opportunities for committee cross training specifically for students and your professionals with an emphasis in volunteerism and AGA Guam Chapter succession planning.

For the AGA Guam Chapter Participation and Planning, we have set up 3 additional chapter official emails to increase responsiveness in communications. The 3 emails added with uses are as follows:

1. agaguamchapterevents@gmail.com
The email account is dedicated to event-related emails and inquiries. Pre-registration forms for chapter events will be hosted using this email.
2. agaguamchapterpresident@gmail.com
Repository of chapter executive committee resources and electronic files which will be passed on to the next chapter president
3. agaguamchaptermembership@gmail.com
The email account is dedicated to our members inquiries, which we also intend to use for membership surveys.

Chapter Executive Committee Meetings will be held every second (2nd) Wednesday of the month from 12:00 pm to 1:00 pm. As COVID-19 protocols are easing up and event venue protocols are gradually resuming back to normal, we are looking to have our CEC meeting In-Person every quarter starting September 2022.

General Membership Meetings will be held every fourth (4th) Wednesday of the month, from 11:45 am to 1:00 pm. As COVID-19 protocols are easing up and event venues protocols are gradually resuming back to normal, we are looking to have our CEC meeting In-Person every quarter starting September 2022.

The CEC Directors and Co-Directors will meet monthly to plan and discuss, in detail, various Chapter activities. A quorum for a CEC meeting is at least one-third (1/3) of the voting members of the CEC. Other members of the organization or special guests are welcomed to attend CEC meetings. In order to be effective, meetings will follow the Roberts Rule of Order.

Below is the tentative calendar of events for the program year:

DATE	MEETING/EVENT	DELIVERY TYPE	TITLE	CPE
Wednesday, July 13, 2022	CEC Meeting	Virtual		
Wednesday, July 27, 2022	General Membership Meeting	Virtual	Energy Leadership with an EDGE; Explore, Dream, Grow & Excite	1.00
Wednesday, August 10, 2022	CEC Meeting	Virtual		
Wednesday, August 24, 2022	General Membership Meeting	Virtual	A.B.C.'s of Behavioral Forensics: Applying Psychology to Financial Fraud Prevention and Detection	1.00
Wednesday, September 14, 2022	CEC Meeting	In-Person		
Wednesday, September 21, 2022	General Membership Meeting	In-Person	GASB 87	2.00
Wednesday, October 12, 2022	CEC Meeting	Virtual		
Thursday, October 27, 2022	General Membership Meeting	Virtual	Tips & Tricks in MS Excel when dealing with number - Working Smart Not Hard	1.00
Wednesday, November 9, 2022	CEC Meeting	Virtual		
Wednesday, November 23, 2022	General Membership Meeting	Virtual	Financial Modeling and Valuation Techniques	1.00
Wednesday, December 14, 2022	CEC Meeting	In-Person		
Wednesday, December 28, 2022	General Membership Meeting	In-Person	AGA Christmas Party	
Wednesday, January 11, 2023	CEC Meeting	Virtual		
Wednesday, January 25, 2023	Guam Professional Development Conference (GPDC)	In-Person	TBA (Tentative Dates)	8.00
Thursday, January 26, 2023	Guam Professional Development Conference (GPDC)	In-Person	TBA (Tentative Dates)	8.00
Friday, January 27, 2023	Guam Professional Development Conference (GPDC)	In-Person	TBA (Tentative Dates)	8.00
Wednesday, February 8, 2023	CEC Meeting	Virtual		
Wednesday, February 22, 2023	General Membership Meeting	Virtual	Tax Topics	1.00
Wednesday, March 8, 2023	CEC Meeting	In-Person		
Wednesday, March 22, 2023	General Membership Meeting	In-Person	CGFM Month - Ethics Training, Govt. Accounting, Personal Help	4.00
Wednesday, April 12, 2023	CEC Meeting	Virtual		
Wednesday, April 26, 2023	General Membership Meeting	Virtual	Self-Help; Work Life Balance (Panel)	1.00
Wednesday, May 10, 2023	CEC Meeting	Virtual		
Wednesday, May 24, 2023	General Membership Meeting	Virtual	Procurement Best Practices and Common Pitfalls	1.00
Wednesday, June 14, 2023	CEC Meeting	In-Person		
Wednesday, June 28, 2023	General Membership Meeting	In-Person	Project Management	2.00

The National Council of Chapter Representative will provide monthly updates of information affecting the chapter and its members from the national offices. The NCC Rep is also tasked to assist for this program year to monitor and track ACE Awards points.

SECTION II: LEADERSHIP DEVELOPMENT / NOMINATING COMMITTEE PLAN

Director: Ms. Taling M Taitano, CPA, CGFM
Co-Director: Mr. Rizalito Gino F. Paglingayen, CPA

Goal 1. Advance and Grow Members. Encourage members to consider running for office, join a committee or project.

- A. Work with communications and program committees to communicate with members about opportunities to serve.
- B. Work with others in leadership team to design opportunities to develop leaders / leadership skills among members.
- C. Encourage officers and committee heads to include members who may have not previously participated.
- D. Encourage officers to be inclusive and build a diverse leadership team.

Goal 2. Open Nominations as called for in bylaws

- A. Ensure Nominating Committee is in place by September 1.
- B. Work with communications and program committees to announce the opening of nominations on November 1 and closing on January 1.
- C. Include announcement in CEC / membership meetings.
- D. Work with others in the leadership team to encourage members to consider running for office or serving on CEC.
- E. Present the slate to Secretary as soon as possible after the nominations are close.
- F. Announce to members that independent nominations are due by February 15

Goal 3. Hold timely elections and timely report results

- A. Work with communications and program committees to announce elections no later than April 30 and report election results.
- B. Work with outgoing/incoming president to report results to national AGA by June 15.
- C. Encourage the incoming president to select diverse CEC.

Goal 4. Update AGA Guam Policies and Procedures related to elections

- A. Recommend to the Bylaws Committee updates to the Policies and Procedures to clarify and resolve any inconsistencies.
- B. Recommend procedures to elect/select the National Council of Chapters Representative to include selection criteria

SECTION III. ACHIEVEMENT IN CHAPTER EXCELLENCE (ACE) COMMITTEE PLAN

Director: *Ms. Taling M Taitano, CPA, CGFM*
Co-Director: *Ms. Pilar O. Pangelinan*

Goal 1. Achieve ACE Key Performance Indicators (KPIs)

- A. Provide information and resources about ACE to incoming Officers and Committees.
- B. Regularly remind Officers and Committees of deadlines and goals.

Goal 2. Timely submit PULSE checks

- A. Update ACE KPIs monthly and submit PULSE checks by the deadline.
- B. Work with communication and program committees to announce results.

SECTION IV. ACCOUNTABILITY OUTREACH COMMITTEE

Director: *Dr. Doreen T. Crisostomo-Muña, Ph.D., CGFM, CFE, CICA*
Co: Director: *Ms. Shannaleen Braiel*

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

- A. Complete and release the Chapter's Citizen-Centric Report (CCR) for Program Year 2021-2022 no later than September 30, 2022 and post it to the Chapter's website.
- B. Submit the Chapter's CCR to AGA's Certificate of Excellence in CCR Program.

Goal 2. Establish a chapter accountability outreach plan

- A. Issue reminder notices to government agencies about Public Law 30-127, which requires GovGuam agencies to prepare their CCRs no later than sixty (60) calendar days after their independent audit reports have been released by OPA.
- B. Provide agencies the guidelines to prepare their CCR for FY2022.
- C. Coordinate with OPA to monitor GovGuam agencies' compliance with Public Law 30-127 to issue their CCRs after their respective financial audits are issued.
- D. Coordinate with Chapter members or AGA National to review and provide agencies with suggestions for improvements to enhance the quality of the CCRs.

Goal 3. Promote accountability in chapter events

- A. Present the Chapter's program year 2022 CCR to the membership during a General Membership meeting.
- B. 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 meeting the three key requirements before their CCR due dates: (1) posted on their website; (2) posted on OPA's website; and (3) sent to the Guam Legislature -- will be automatically entered in the contest and the winning CCRs will be presented during a General Membership meeting.
- C. Encourage agency officials to submit at least five CCRs prepared by GovGuam agencies to AGA's Certificate of Excellence in CCR program.

SECTION V. AWARDS & CHAPTER RECOGNITION COMMITTEE PLAN

Director: Mr. Vincent Jon G. Duenas

Co-Director: Ms. Maria C. Lizama

Goal 1. Continue Local Awards Program

Recognize the association and the people who make it up.

- A. 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.
- B. PDT Award – minimum of one (1) scholarship, subject to availability of funds.
- C. Local Training – minimum of two (2) scholarships, subject to availability of funds.
- D. Chapter President's Award.
- E. CCR Awards (See Accountability Committee Plan).

Goal 2. Participate in National Awards Program

Encourage applications to AGA National Awards through announcements in meetings, newsletter, emails, and website as it is applicable.

- Chapter Education Award
- Chapter Accountability and Transparency Award
- Community Service Award
- Chapter CGFM Award
- Excellence in Government Leadership Award
- Distinguished Local Government Leadership Award
- Emerging Leader Award of Excellence

- PDT Awards of Distinction
- National Leadership Awards
- Volunteer of the Year Award
- Communications Award
- ACE Award

Goal 3. Recognize Member Accomplishments

Recognize AGA members accomplishments in announcements in meetings, newsletter, emails, and website. Also see Communications Committee Plan.

- Certificate of Appreciation/Participation (various Committees)
- Membership Longevity Award (10, 15, 20, 25 years, etc.)
- Professional Accomplishments
- New CGFMs (Certification Committee)

Goal 4. Communicate Awards and Member Accomplishments

- Member meetings
- Various websites & social media (Facebook, Instagram, Chat groups)
- Blast emails & newsletters
- Press releases

Goal 5. Record Accomplishments in Annual Report

Work with the President and committee leaders in the compilation of activities and accomplishments achieved and executed for the program year to be reported in the Annual Report.

SECTION VI. AUDIT COMMITTEE AND BUDGET & FINANCE COMMITTEE PLAN

Audit Committee Director: Ms. Mary Grace V. Edrosa, CGFM

Audit Committee Co-Director: Ms. Evangeline C. Albis

Budget & Finance Committee Director: Ms. Llewelyn Restuvog Terlaje, CGFM, CGAP

Goal 1. Review the chapter bylaws and submit them as needed to government and national.

Goal 2. Review and update relative chapter SOPs and develop new ones as applicable.

Goal 3. Oversee the audit or independent financial review of the chapter.

Goal 4. Ensure annual filings are submitted in a timely manner.

SECTION VII. CGFM/PROFESSIONAL CERTIFICATION COMMITTEE PLAN

Director: Ms. Maripaz N. Perez, CGFM, CICA, CFE

Co-Director: Ms. Maria Thyrza DC Bagana, CGFM

Co-Director: Ms. Royelle Mae Carter

Goal 1. Support Current CGFMs

- A. The Chapter strives to achieve all three (3) tiers of *Achievement in Chapter Excellence* (ACE) program provided below.
 - i. Candidate Support
 - 1) Tier 1: Chapter Executes its plan for supporting CGFM Candidates.
 - 2) Tier 2: Chapter provides virtual or electronic support.
 - 3) Tier 3: Chapter provides in-person support.
 - ii. CGFM Support
 - 1) Tier 1: Chapter executes its plan for supporting CGFMs.
 - 2) Tier 2: Chapter meets its retention goal for CGFMs of 80%.
 - 3) Tier 3: Chapter exceeds its retention goal for CGFMs of more than 80%.
- B. Support and assist current CGFMs in attaining the 80 hours of CPEs every two years by identifying CPE opportunities provided by AGA-Guam, AGA-National, other AGA chapters, Association of Pacific Islands Public Auditors, and professional accountability organizations' training opportunities (including local seminars, self-study, and online courses) via email notifications, chapter newsletter and chapter website.
- C. Obtain executive proclamation and legislative resolution declaring March as CGFM Month and publicize the proclamations and resolutions at the Chapter and/or National level.
- D. Participate in the annual "March is CGFM Month" awareness campaign and recognize the Chapter's CGFMs on the Chapter's social media accounts, newsletter, and General Membership Meetings.
- E. Recognize CGFMs during the March General Membership Meeting. In honor of CGFM Month, recognize CGFM members with a free CPE training during "CGFM Month" or offer a door prize or gift cards for those that attend the March General Membership Meeting.
- F. Promote CGFM's achievements in the Chapter's newsletter, website, email communication, or in the local newspaper.

- G. Promote awareness of the CGFM CPE requirements by publishing them in the Chapter newsletter, email communication, or on the Chapter website.
- H. Market Chapter-sponsored educational events that meet the CGFM CPE requirements to members and non-members.
- I. Encourage members' CGFM renewals through emails, letters, newsletters and/or websites.
- J. Use the CGFM designation appropriately in chapter publications, on nametags, etc.
- K. Publicize and recognize new CGFMs in Chapter, email distribution, social media, website and local publications.
- L. CPES for Continuing Education. Provide information on CPE opportunities through newsletters, email communication and/or other types of communication. This includes partnering with other professional organizations to provide training.
- M. Play the CGFM video at chapter meetings, presentations, or trainings.
- N. Provide relevant CGFM information and announcements to the monthly newsletter. This includes CGFM recognition, study suggestions, coffee klatch meeting announcements, technical requirements, FAQs, etc.
- O. Organize get together events for all CGFM's and discuss opportunities to mentor and encourage other AGA members to take CGFM exam and be a part of the growing number of individuals who hold certification in Guam. Event can be done through virtual platform or in-person.

Goal 2. Assist Potential CGFMs to Attain the Certification

- A. Provide Scholarships for the costs of obtaining the CGFM.
 - 1) Outreach to offer CGFM scholarship. Present or email to members and potential members the CGFM scholarship program where registration and test fees are reimbursed to Chapter members who pass the CGFM examination in accordance with the scholarship requirements.
 - 2) Outreach to offer CGFM Exam Questions Reimbursements. Present or email to members and potential members pursuing or who may be interested in the CGFM that Chapter members can be reimbursed for the cost of the review exams they purchase.
 - 3) Outreach to offer CGFM E-text Reimbursements. Present or email to members and potential members who are pursuing or may be interested in the CGFM that Chapter members can be reimbursed for the cost of purchasing subscriptions to E-text study guides in preparation for their exams.

- B. Contact for CGFM Mentorship. Make contact to Chapter members and potential members via the monthly newsletter and General Membership Meetings about the value of the CGFM designation. Once a rapport is established, offer members mentoring and encouragement in the attainment of their CGFM designation.
- C. Promote and sponsor CGFM study groups—this can include online study support groups which covers the three parts of the exams via virtual or in-person.
- D. Explore partnership opportunities with the Pacific Region chapters to promote and bring CGFM preparation courses.
- E. Promote and notify members of CGFM course(s) opportunities offered by AGA National Office. These can be emailed or presented via virtual or in-person.
- F. CGFM Tips. Present and publish relevant CGFM information through the Chapter newsletter or emails. These can include CGFM recognition, study suggestions, encouragement, technical requirements, “tip of the month,” etc.
- G. Prepare a Frequently Asked Questions Pamphlet to include information about eligibility, application process, examinations, education requirements, experience, CPE requirements, etc. The pamphlet will be disseminated via email, chapter newsletters, and chapter website.

Goal 3. Market CGFM Locally

- A. Campaign to Government Officials. Advocate and promote CGFM to government officials by contacting government accountability officials and leaders to support AGA’s initiative to promote the CGFM designation. This includes possible consideration for subsidizing CGFM certification and continued professional education for aspiring CGFM and current CGFM. This can be in person, virtual forum, or email communication.
- B. Contacts for Awareness. Committee and CGFMs to collectively communicate with members, on at least a quarterly basis, the value and advantages of being CGFM certified through the Chapter’s newsletter, website, email, and pamphlets.
- C. Contacts about CGFM. Committee and CGFMs to collectively reach out to GovGuam and private sector employees to promote and present the CGFM designation and its benefits. The presentation can be done through the virtual platform or in person.
- D. Student Outreach. Promote and present CGFM designation and its benefits to students from the UOG and GCC—to include participation in career fairs and sponsored conferences/ trainings. Presentation can be done in a virtual platform or in-person.
- E. Participants CGFM Forum. Hold a CGFM virtual forum where interested participants can ask questions about the CGFM application process, eligibility, study tips, study guide materials, etc.

- F. Recognize and promote CGFM in most events/meetings. This could be done by showing the CGFM video at general membership meetings or other events to members or potential members.
- G. Provide an information session or presentation to government accountability officials and leaders as part of its promotion efforts via virtual or in-person.
- H. Promote Guam Public Law 33-18, which provides pay incentives to CGFM designation holders working with GovGuam.

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

- A. Ensure the availability of educational materials (CGFM Study Guides and practice exams) to our membership.
- B. Coordinate with Director of Education to provide training necessary to meet CGFM continuing education requirements.
- C. Team up with other Chapter CGFMs to promote CGFM and provide presentations in CGFM Study groups. This can be done virtual or in-person.
- D. Meet with CEC members and CGFMs to identify ideas and deliverables to advance the CGFM in our local Chapter. Suggestions to be provided to the Certification Director.

SECTION VIII. COMMUNITY SERVICE & RESOURCE DEVELOPMENT COMMITTEE PLAN

Director: Ms. Vanessa D. Valencia
Co-Director: Mr. Steve Eric S. Terlaje
Co-Director: Mr. Romar P. Tapeceria

Goal 1. Participate in community service

- A. The Chapter strives to achieve all three (3) tiers of Achievement in Chapter Excellence (ACE) Award goals for Community Service:
 - i. Chapter holds at least one community service event concurrent with a chapter event (Tier 1).
 - ii. Achieve Tier 1 and chapter holds at least one stand-alone community service event (i.e. not with another chapter event) (Tier 2).
 - iii. Achieve Tier 2 and support the PDT 2022 and 2023 National Community Service Fund (NCSF) fundraiser in some form (Tier 3).
- B. Conduct at least five (5) community service projects for the program year by partnering with needy organizations or others who are hosting community service events.

- C. Encourage members to participate in at least one community service project for the program year to achieve 10% participation of total the Chapter's membership (estimate 25+/- AGA members).
- D. Encourage members to support the Chapter's community service events that will utilize members' experiences and expertise in their fields such as credit awareness and savings education. In addition, members must participate in at least one community service event to be eligible for the annual PDT raffle.
- E. 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, etc.

Goal 2. Promote community service and AGA

- A. Host and coordinate with student members a fundraiser community event like the AGA Guam Chapter 5k or donation drive to raise funds for scholarship programs.
- B. Partner with other non-profit organizations in community service projects that will foster professional and civic relationships with the AGA such as the Salvation Army, Guma San Jose, Guam Animals in Need (GAIN), DOD Operations Christmas Drop, Island Girl Power, etc.

Goal 3. Explore opportunities for other fundraising events to support community service efforts

This includes efforts on promoting PayPal Donations from member for specific community service efforts, Amazon Smile, eBay for Charity and others etc.

SECTION IX. EDUCATION COMMITTEE PLAN

Director: Dr. Artemio Hernandez, CGFM, IAP, CPPO
Director: Mr. Jason V. Katigbak, CPA, CGMA, CIA, CFE
Co-Director: Ms. Rodalyn May A. Gerardo, CGFM, CIA, CPA, CGAP, CGMA, CICA
Co-Director: Ms. Danica Batac
Co-Director: Mr. Thomas Eladio M. Batung, CFE

Goal 1. Education to help accountability professionals meet CPE requirements

- A. In support of the Guam Chapter's theme "Leveraging Perpetual Learning and Diversity to thrive in today's rapidly changing world", the Education Committee, the Chapter strives to achieve all three *Achievement in Chapter Excellence (ACE)* Award goals for Training Events:
 - 1. Chapter provides or co-sponsors at least 8 CPE hours for member education

2. Chapter presents on a wide breadth of topics including emerging technologies (e.g., cybersecurity, blockchain, robotics process automation, data analytics)
 3. Chapter offers networking and/or social time with at least half of their CPE opportunities via Conferences I/O, polls, or other methods (e.g., networking with seasoned accounting professions and new graduates, mid-level professionals)
- B. 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.
- C. Provide free training to CGFMs during CGFM month.
- D. Provide a free training to the Guam Professional Development Conference based on set requirements on attendance and volunteer activity by members.

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

- A. The Chapter strives to achieve all three ACE Award goals for Educational Meeting Attendance:
1. Chapter maintains their average meeting attendance of 30 members from prior year
 2. Chapter markets events beyond the current members to attract new participants
 3. Chapter exceeds their stated annual meeting attendance goal of 35 members
- B. Support and coordinate with the Director of Professional Certification in increasing the number of CGFMs through review classes via study groups.
- C. Assist the members in locating updated educational materials (i.e., training opportunities, CGFM Guides, etc.) for our membership.
- D. Explore new training methodologies such as using AGA National webinars (a cost-efficient way of providing training) and other web-based training through corporate sponsors (e.g., Becker). Also, to incorporate CGFM relevant topics in the upcoming Guam Professional Development Conference.
- E. Coordinate with the University of Guam, the Guam Community College and the Guam Society of CPAs on training opportunities.
- F. Market educational events to members and nonmembers within the accountability professional community, including an outreach to those in the private sector.

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

- A. The Chapter strives to achieve all three ACE Award goals for Educational Meeting Satisfaction:
 - 1. Chapter maintains their meeting satisfaction from the prior year
 - 2. Chapter meets their stated meeting satisfaction goal
 - 3. Chapter exceeds their stated meeting satisfaction goal by 1%
- B. Our goal is to have a higher survey participation rate compared to our March 2023 survey and aim for more than 40% of the survey participants to state that they are very satisfied with the Chapter's educational meeting offerings. The survey will be re-administered in February or March 2023.
- C. Coordinate with the AGA National Office, Guam Society of CPAs, University of Guam, Guam Community College, and other professional organizations to secure guest speakers/instructors throughout the program year.
- D. Solicit training course input from members and constituents in both the public and private sectors.
- E. Focus on emerging technologies with a goal of delivering a Finance 3.0 concept of beyond financial management. This will be front and center in our Guam Professional Development Conference in January/February 2023. This is part of our upskilling goals for the AGA Guam Chapter members and those in the accountability community.

SECTION X. MARKETING & COMMUNICATIONS COMMITTEE PLAN

<i>Newsletter Director</i>	-	<i>Ms. Debbie C.M. Ngata</i>
<i>Newsletter Co-Director</i>	-	<i>Ms. Sandra Angelica M. Doria</i>
<i>Social Media/News Director</i>	-	<i>Ms. Margie Francisco Castro, CPA</i>
<i>Social Media/News Co-Director</i>	-	<i>Ms. Kate V.B. Jeszenszky</i>
<i>Website Director</i>	-	<i>Ms. Clariza Mae G. Roque, CGFM, CGAP, CICA</i>
<i>Website Co-Director</i>	-	<i>Ms. Almira Rosiel B. Balagtas</i>

Goal 1. Chapter meetings and member participation

- A. The Chapter strives to achieve all *Achievement in Chapter Excellence* (ACE) Award goals for Communications:
 - o Chapter appoints a webmaster(s) that regularly updates the website with new content and posts all events to the calendar. At a minimum, content should include accurate leadership roster and calendar of upcoming events.
 - o Chapter consistently issues a newsletter and/or email notifications (at least quarterly).
 - o Chapter adds a social media to its communications strategy.

- B. Announce through website, newsletter, social media and email Chapter monthly meeting, events and conferences to both members and non-members.
- C. Maintain the Chapter's social networking sites (Facebook, Instagram, Twitter, and LinkedIn).
- D. Share General Membership Meeting Minutes and Financial Statements via website and email.

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

- A. Update the Chapter website on a weekly basis or as necessary to reflect Chapter activity updates and maintain historic data.
- B. Distribute newsletters to members and the public on the Chapter website monthly and through email for Chapter members.
- C. Encourage members and students to submit articles to newsletter. Committee to collaborate and work with the Young Professionals Committee in coordinating article submission from students and achievements.
- D. Continue transition of current program year website domain to the new AGA site.
- E. Prepare public service announcements or press releases through:
 - a. Newsletter
 - b. Website
 - c. Local media outlets
 - d. Social networking sites
 - e. AGA National
- F. Assist the Membership Committee with Member Monday's. Prepare features for membership profiles obtained by the Membership Committee. The features will be posted on the Chapter's social media by including their picture, name, designations, place of employment, and length of membership with AGA Guam Chapter. Features may be included in the newsletter.
- G. Assist the Education Committee with Continuing Professional Education Events. Prepare flyers advertising the event. Flyers may be included in the newsletter.
- H. Assist the CGFM Committee with CGFM Month Features. Prepare features for CGFMs and/or advertising CGFM Month activities. Features may be included in the newsletter.
- I. Celebrate Member Achievements. Feature members' achievements on the Chapter's newsletter by including their picture, name, designations, place of employment, and length of membership with AGA Guam Chapter. Features may be included in social media.

Goal 3. Communicate within AGA

- A. Share information through our National Council of Chapter representative and AGA National in the newsletter and on the Chapter's website.
- B. Share the agenda from the Chapter Executive Committee meetings on the newsletter with a link to the minutes of the meeting.

SECTION XI. MEMBERSHIP COMMITTEE PLAN

Director: Mr. Jose B. Guevara, III, CGFM
Co-Director: Ms. Amacris V. Legaspi, CGFM
Co-Director: Ms. Pamela R. Aguigui
Co-Director: Ms. Marianne M. Dela Cruz
Co-Director: Ms. Mariah J.C Castro

Goal 1. Actively recruit new members

- A. Personally invite potential members to chapter events
- B. Create an incentive program and/or emulate the national Super Recruiter program
 - i. Incentives can include free monthly meals for sponsoring members, cash rewards, logo merchandise or gift cards.
 - ii. Know what incentivizes your members and apply it in your recruitment initiatives
- C. Mailings or other recruitment of nonmember CGFMs, former members, and/or nonmembers who attended national or local training events in your geographic area
- D. Involve government leaders by sending a special invitation to heads of local financial management disciplines to:
 - i. Setup a meeting to share the value of AGA for their staff,
 - ii. Join,
 - iii. and/or speak at chapter events.
- E. Play the AGA video at chapter meetings
- F. Host a "member appreciation event" i.e. annual picnic, mixer.
- G. Promote to college accountability student organizations the value of AGA membership to their future careers.
- H. The Chapter strives to achieve all three (3) tiers of *Achievement in Chapter Excellence* (ACE) Award goals for Membership Growth:
 - i. Chapter maintains membership base (Tier 1).

- ii. Chapter achieves a 10% annual membership growth % (Tier 2).
- iii. Chapter exceeds a 10% annual membership growth (Tier 3).

Membership Growth: Calculated using the May 1st balance and the ending year April 30th balance from the monthly Chapter Statistical Report

- I. Continue to acknowledge new members by sending a welcome email and include them in the Chapter Newsletters and Chapter General Membership email reminders.

Goal 2. Retain current members

- A. Remind members of why membership in AGA is valuable and beneficial at least monthly in communications (newsletter, specific email).
- B. Conduct a member needs survey, but make sure you're asking for their feedback throughout the year in other ways. Keep the survey short (i.e. "answer this five-question survey").
 - i. Chapter conducts a member satisfaction survey and shares the results with the CEC (Tier 1).
 - ii. Chapter attains an 80%-member satisfaction rate (Tier 2).
 - iii. Chapter exceeds an 80%-member satisfaction rate (Tier 3).

Bonus: Chapter submits an award nomination for NLT and/or PDT awards (including Volunteer of the Year): 25 per nomination (100 maximum)
- C. Develop and implement an annual or biennial chapter membership satisfaction survey
- D. Participate in AGA's national retention campaign
- E. Personally contact members during annual renewal season (January 1 –March 31) and encourage them to renew.
- F. After March 31, make personal calls/emails to suspended members
- G. Recognize Chapter members' AGA anniversary dates and years of membership in our newsletter and on our website.
- H. Host at least one free event this program year for members i.e. Virtual or face to face trainings with CPE's partner with Education committee.
- I. Provide information about current chapter members (especially new members) in chapter publications—people love to see their name in print.

SECTION XII. SCHOLARSHIP COMMITTEE PLAN

Director: Ms. Jorizaira R. Borja
Co-Director: Mr. Ritzmar C. Erni

Advisor: *Dr. Zeny T. Asuncion-Nace, CGFM, CPA, CFE*

Goal 1. Offer academic scholarships

- A. Set aside funds from the Community Service Fund (to be determined by CEC) to support accounting and business student(s) in accordance with the Chapter Scholarship Criteria. Programs include but not limited to the Herminia Dierking Scholarship, AGA Guam Chapter scholarship and graduate-level scholarships.
- B. Present the scholarship programs to various business and public administration student organizations during their monthly meetings, to be scheduled and determined by the student organization's president or representative. Membership and CGFM committees will be invited to present to help increase student membership and interest to take the CGFM examination.
- C. Coordinate with UOG's Financial Aid Office in visiting the graduating seniors to introduce and offer AGA National's scholarship programs for graduate students and other National Training Scholarships. Membership and CGFM Committees will be invited to present to help increase membership and interest to take the CGFM examination.
- D. Coordinate with GCC and UOG to place AGA's scholarship programs' information in the school's official website.

Goal 2. Encourage participation of members and dependents of members

- A. 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 Chapter membership meetings.
- B. Encourage application to AGA National Academic and Training Scholarships including:
 - Rising College Freshman
 - Current Undergraduates
 - Graduate Students
 - Community Service
 - National Collegiate Leadership Program
 - Young Professional PDT Scholarship

The Scholarship Committee advisor, Ms. Asuncion-Nace is not part of the CEC. Having the institutional knowledge on past leadership, her role will be to assist and mentor the Committee Chair and Co-Director to improve and develop the standard operating procedures for the Scholarship Committee and explore opportunities for other resources and grants to be made available for the program.

SECTION XIII. YOUNG PROFESSIONALS AND STUDENTS COMMITTEE PLAN

Young Professionals Director: Ms. Rachel F. Cubacub
Co-Director: Ms. Tiera Nicole B. Santos (JAS President)
Co-Director: Pending (AJA President)

Goal 1. Make young professional and student members a priority

- The Chapter strives to achieve all three (3) tiers of *Achievement in Chapter Excellence* (ACE) Award goals for Students:
 - Chapter promotes and encourages students and Young Professionals to join and participate in AGA programs. (Tier 1)
 - Chapter participates in college/university fairs and / or speaks to students about careers in government and / or invites instructors / students to educational events (Tier 2)
 - Chapter develops and maintains relationships with college / university professors and signs them up as AGA electronic professor members (or dues paying members). (Tier 3)
- Work with the UOG Junior Accountants Society (JAS), GCC Association of Junior Accountants (AJA), and the Directors of Membership, Education and Community Service to recruit 10 new student members this program year.
- Emphasize networking opportunities to students and young professional members involved in various Chapter activities such as assisting in planning/organizing conferences, participating in community service events, and submitting newsletter articles, etc.
- Promote the CGFM certification by speaking to UOG JAS and GCC AJA.
- Attend their meetings, and present/introduce the CGFM certification and AGA member benefits to UOG and GCC accounting students.

Goal 2. Support the growing careers of young professionals and student members

- 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 GCC accounting students to join the Chapter as student members, by inviting them to attend and participate in chapter meetings, community service activities, and other Chapter sponsored events.

- Improve the Chapter mentorship program by providing opportunities for Chapter mentors to interact with accounting students through student mixers, meetings, and/or job shadow days.
- Facilitate student company tours through coordination with Chapter members.
- Include UOG and GCC students in the Chapter mailing lists to receive email information regarding AGA activities, i.e., newsletters, community service programs, monthly memberships meetings, etc.
- Encourage young professionals to contribute articles to the Chapter newsletter and website.
- Increase engagement with young professional memberships to learn more about this demographic of our membership.

Goal 3. Offer educational opportunities for young professional and student members.

- Provide academic scholarships to UOG and GCC students. See section on Scholarship Plan.
- Continue to support the GCC Accounting Pathways Conference as a sponsor and/or provide speakers. The objective of the conference is to provide students with insights into the accountancy profession and to equip them with the knowledge of the requirements of a professional accountant.
- Encourage young professionals to participate in national opportunities such as the Young Professional scholarship for the annual Professional Development Training.