



*Advancing  
Government  
Accountability*

**Association  
of Government  
Accountants**

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July 25, 2012

Association of Government Accountants  
2208 Mount Vernon Avenue  
Alexandria, VA 22301

Subject: *AGA Guam Chapter Strategic Plan  
Program Year 2012-2013*

Hafa Adai!


The Guam Chapter of the Association of Government Accountants (AGA) would like to submit the Chapter Strategic Plan for Program Year 2011-2012.

Our theme for this year is "The Future of Accountability" and our submission includes the following:

- Officer Directory
- Meeting Plan
- Education and Professional Development Plan
- Performance and Accountability Plan
- Community Service Plan
- Membership Plan
- CGFM Plan
- Awards Plan
- Scholarship and Resource Fellowship Plan

Should you have any questions or comments on our submission, please do not hesitate to contact me at (671) 649-3700 or via email at [jason.katigbak@gu.ey.com](mailto:jason.katigbak@gu.ey.com).

Sincerely,

  
Jason V. Katigbak  
Chapter President  
AGA Guam Chapter



# AGA Guam Chapter Strategic Plan Program Year 2012-2013

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# Chapter Executive Committee

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# Chapter Executive Committee

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# Chapter Executive Committee

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# Meeting Plan

**Chapter Administration - Jason Katigbak, CFE, CPA, CIA, CGMA, President**  
**Doreen Crisostomo, Ph.D., CGFM, President-Elect**  
**Programs Chairperson – Vincent Duenas, MPA**

The AGA Guam Chapter will hold monthly meetings to provide government accountability professionals a venue and an opportunity to meet with their peers from private and public entities and discuss relevant issues affecting their profession. At each meeting, we will provide officer and committee report updates, i.e. Treasurer's Report, Secretary's Minutes, Education, CGFM, Community Service, etc. A guest speaker will also be invited to address our Chapter membership on topics relevant to the accountability profession or its members. The Chapter Executive Committee will meet monthly to plan and discuss, in detail, the various activities of the Chapter.

## **General Membership Meetings**

Date: Every 4<sup>th</sup> Wednesday of the month  
Location: Outrigger Guam Resort  
Time: 12:00 - 1:00 pm

## **Chapter Executive Committee (CEC) Meetings**

Date: Every 2<sup>nd</sup> Wednesday of the month  
Location: Various Locations  
Time: 12:00 - 1:00 pm

# Educational and Professional Development Plan

**Education Chairperson** – Rodalyn Marquez, CGFM, CPA, CIA, CGAP, CGMA

**Education Co-Chairperson** – Jason V. Katigbak, CFE, CPA, CIA, CGMA

Our focus for the upcoming program year will be to:

**Goal 1** – Continue to provide relevant and affordable training to our members that will encourage them to strive for excellence in their current careers and equip them with the necessary core and specialized skills in the field of financial management:

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

**Goal 2** – Support the CGFM Committee in increasing the number of CGFMs through review classes or study groups:

- Coordinate with the CGFM Committee and support them with their efforts to provide CGFM review courses through study groups.
- Ensure the availability of educational materials (CGFM Guides) to our membership.

**Goal 3** – Support the Performance and Accountability Committee in continuing to provide Citizen-Centric Report Workshops to entities covered under Guam Public Law 30-127, *An act relative to adopting the Association of Government Accountants’ “Citizen-Centric Report” initiative.*

- Coordinate with the Accountability Committee to provide CCR workshops to government entities.

**Goal 4** – 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.

# Educational and Professional Development Plan

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**Goal 5** – Based on feedback and comments to be received during the 2012 Guam Professional Development Conference (GPDC), begin the early planning stages for next conference to be held in 2014. Every other year, the Guam Chapter hosts the GPDC, which offers an average of 24 CPEs in courses such as Ethics, Accounting and Auditing Updates, Leadership, Information Technology, Human Resource Management, and Personal Enrichment.

- Coordinate with the AGA National Office, University of Guam, and other professional organizations to secure guest speakers/instructors.
- Encourage member participation in various committees (venue, speakers, program, registration, sponsorship, etc.)
- Solicit training course input from constituents in both the public and private sectors.
- Coordinate with the Pacific Rim Regional Vice President to host a ½ day Regional Chapter Officers Workshop prior to the GPDC.



# Performance and Accountability Plan

## Performance and Accountability Chairperson – Maripaz N. Perez, CGFM, CGAP

The AGA Guam Chapter will continue its endeavor in promoting the Citizen-Centric Government Reporting Initiative to promote and bridge the gap of communication between the government of Guam and its citizens. The passage of Public Law 30-127 is unprecedented for the AGA community as Guam remains the only government that mandated all of its government agencies, including line agencies, autonomous and semi-autonomous agencies, public corporations, the Courts of the Judiciary of Guam and the Legislature, to prepare Citizen Centric Reports (CCR) after the OPA releases their respective audited financial statements annually.

CCRs will make governments more accountable to their citizens, and will help citizens become better educated and better able to participate in government activities. It is an integral practical step that governments can take in raising their game in accountability and transparency. The AGA Guam Chapter believes that the CCR advances accountability and transparency of the government's financial information. The CCR's simplicity, clarity, and updated information is an innovative means of ensuring that our government provides more readily available and understandable financial data to the people of Guam. Accordingly, the committee set out the following goals below.

- Goal 1:** 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 automatically be entered in the contest and the winning CCR will be presented no later than September of 2013.
- Goal 2:** Collaborate with the Governor's Office, Department of Administration, University of Guam, and the Office of Public Accountability in providing useful CCR trainings.
- Goal 3:** Work with the Office of Public Accountability in identifying and establishing a potential list of agencies that did not comply with the CCR reporting requirement. The committee will work with these entities in ensuring that they prepare their respective CCR and comply with the legislative mandate. Chapter representatives can schedule a meeting with government representatives and discuss or provide a CCR examples prepared by other government entities.
- Goal 4:** Release and submit at least 25 CCR reports prepared by government of Guam agencies.
- Goal 5:** The AGA Guam Chapter will issue its program year 2011~2012 CCR report no later than July 31, 2011.
- Goal 6:** Enhance the visibility of prepared CCRs by posting on the AGA Guam Chapter website, sending them to various media outlets, and printing them and posting them in high-traffic areas, i.e. public libraries, government office lobbies, etc.

# Early Careers Plan

**Early Careers Chairperson** – Artemio “Ricky” Hernandez, MAcc

**Early Careers Co-Chairperson** – Zeny Asuncion-Nace, CGFM, CPA, CFE

The mission of the Early Careers Committee is to build a bridge between the experienced professionals practicing accounting and the newly minted professionals practicing and students studying accounting. The Early Careers Committee plays a vital role in aggressively pursuing and relaying the importance of the accounting profession through the AGA Guam Chapter to these individuals. Creating a connection between the seasoned professionals as and their counterparts who have recently entered the field as well as students aspiring to enter the field of accounting, is to improve the growth in active membership in the AGA Guam Chapter and to assist in the transition of Early Career members from new employees and students to experienced professionals.

The AGA Guam Chapter will continue its endeavor to assist in developing opportunities for students and Early Career members to participate actively in and develop professionally through attending AGA-sponsored activities. For this year, the AGA Guam Chapter plans to: (1) promote the accounting profession to high school and college students, (2) encourage active participation in chapter activities, and (3) invest in the professional development of its student and Early Career members. The Early Careers Committee hopes to achieve these goals by performing the following tasks:

## **Goal 1 - Promote the Accounting Profession to High School and College Students**

- Conduct presentations at high school “Career Day” events and/or college accounting courses about the significance, roles and benefits of the accounting profession.
- 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.

# Early Careers Plan

*continued*

## **Goal 2 - Encourage Active Participation in Chapter Activities**

- Offer networking opportunities to student and Early Career members with the rest of the AGA members by inviting the student and Early Career members to be part of the various AGA Guam Chapter committees and events. As a form of incentive, waive or provide a subsidized cost of the membership fees and chapter lunch meetings for student and Early Career members who are actively involved with the AGA.
- Work with the UOG Junior Accountant's Society (JAS), Membership, Education and Community Service committees to continue incentive programs for active participation by students and Early Career members.
- Emphasize networking opportunities involved when attending various AGA activities planning/organization conference, community service events, submit newsletter article, etc.

## **Goal 3 - Invest in the Professional Development of its Student and Early Career Members**

- Aid the Scholarship Committee to acquire more sponsors and/or funding for the UOG and GCC accounting program scholarships.
- Advocate to the student and Early Careers members the importance of earning a certification for the accounting profession, especially the Certified Government Financial Manager (CGFM) certification.
- Foster leadership and teamwork with its student and Early Career members by exchanging ideas and sharing responsibilities to achieve this committee's goals.
- Develop a contact list of all student and Early Career members. Reach out to these members by providing a network of support to guide them with their career transitions.
- For the 2012 -2013 Program year, the Early Careers Committee will continue to organize networking opportunities through student and professional "mixers," enhancing the mentoring program, and engaging more fruitfully with the UOG and the GCC students and faculty.

# Community Service Plan

**Chairperson – Ariana Villaverde**

**Co-Chairperson – Josephine “Josie” Villanueva, CPA, CGMA/Lourdes Perez**

The AGA Guam Chapter will continue to be an advocate for community issues. This program year the AGA community service team will focus on increasing our presence with our island community. We will strongly encourage all members to participate in the many events that are planned for this year.

## **Goals:**

- Encourage each member to participate in at least one community service event for the program year.
- Increase awareness and member participation at each community service event AGA participates in.
- 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. (Salvation Army, GAIN, Habitat for Humanity, Big Brothers Big Sister, Island Girl power, etc.)

## **Indicators:**

- 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 (85 AGA members).

## **Categories of Community Service:**

- Education Outreach (Accounting and Auditing)
- Civic Community Services
- Environmental Awareness

# Membership Plan

**Chairperson – Rachel Field**

**Co-Chairperson – Garry Yeoh**

The AGA Guam Chapter recognizes that an organization is only as strong as its members. We will strive to maintain our member base as well as increase our membership. A large and diverse membership will ensure a strong network of professionals as well as active participation in our training courses and our community service activities. With a large member base, we will be able to promote awareness of the CGFM.

## **Goal 1: Base Growth**

Increase membership by 10% or 16 members by the end of the program year.

### **Strategies**

- Contact attendees of our monthly AGA Chapter meetings and training seminars via email.
- Contact professional acquaintances.
- Meet with University of Guam's (UOG) Junior Accountant Society (JAS) members.
- Offer discount for luncheon at monthly Chapter meeting to JAS members.
- Collaborate with Early Careers and CGFM committees to hold joint events with UOG JAS and GCC accounting students.
- Encourage membership with AGA upon graduation or earlier as student members.
- Encourage non-members to join AGA by offering member discounts for training courses.
- Ensure that membership applications and brochures on the value of AGA membership are available at the monthly AGA Chapter meetings and other AGA related events.
- Continue with updates through our AGA website and Facebook page.
- Provide a prize to the member who has recruited the most new members per quarter.
- Dollar amount of prize is pending budget request.

## **Goal 2: Retention**

- Retain 95% of current membership.
- Communicate via email with members on a timely basis notifying them of monthly Chapter meetings and encourage participation in other Chapter activities.
- Provide monthly updates of membership listing and changes.
- Continue with our free lunch raffle program for attendees at our monthly AGA Chapter meetings and encourage non-members to join AGA for additional benefits.
- Continue with our raffle program for members to win airfare, accommodations and registration fee and earn CPEs at the AGA National PDC and Guam PDC based on availability of funds.
- Continue to provide discounts for the luncheon during the monthly chapter meetings and training courses to members.
- Recognize members' anniversary join date and years of membership in our newsletter and on our website.
- Recognize CGFMs in our newsletter and on our website.
- Contact past members whose membership has expired.

# Certified Government Financial Manager (CGFM) Plan

**Chairperson – Jose “Jojo” Guevara III, CGFM**

**Co-Chairperson – Frances Danieli, CGFM**

The AGA Guam Chapter recognizes the importance and benefits of the Certified Government Financial Manager (CGFM) certification and has committed into regularly offering the CGFM training courses on Guam. The certification will equip government financial managers – federal, state, and local – with a wide range of knowledge of skills to succeed in the government financial environment and meet the challenges of today’s local financial managers.

## **Goal 1: Advance the awareness, knowledge and value of the CGFM designation.**

- 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: Assist members in attaining CGFM 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.

# Certified Government Financial Manager (CGFM) Plan

*continued*

## **Goal 3: Promote public awareness and confidence in the integrity, competence and professionalism of CGFMs.**

- Use the Core Values of Service, Accountability, Integrity, Leadership (SAIL) to promote these values in the local government. Encourage the use of the SAIL acronym in publications and notices.
- Emphasize to the highest elected officials and government directors that the CGFM designation denotes excellence, performance and accountability.
- Submit a bill to the Guam Legislature recognizing CGFM certification
- Promote the CGFM certification to be recognized officially by the Government of Guam.
- Communicate with members at least on a quarterly basis on the advantages of being CGFM certified using the member newsletter, website or email.

# Awards Plan

**Awards Chairperson – Taling M. Taitano, CGFM, CPA**

**Awards Co-chairperson – Clariza Roque**

The AGA Guam Chapter has developed an Awards Plan to recognize and celebrate the contributions and accomplishments of members and nonmembers. This year, we will celebrate our AGA membership by recognizing outstanding contributions from our members and individuals in the community that have exhibited their commitment to advancing government accountability.

## **Goal 1: Participate in AGA National Award Program**

Strategies:

- Encourage nominations of the various awards through announcements in newsletter, website, local media outlets, and social networking sites.
- Discuss nominations at CEC and general membership meetings
- Chairperson to assist with distribution of nomination forms and where appropriate development of application

## **Goal 2: Recognize Entities and Individuals**

Strategies:

- 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 May membership meeting or as appropriate for the following categories
  - Chapter Service Award
  - Agency Chapter Service Award
  - Community Service Award
  - Chapter Educator Award
  - Emerging Leaders Award
  - Certificate of Appreciation/Participation
  - Membership Longevity Award (10, 15, 20, 25 years, etc.)
  - Professional Accomplishments
  - New CGFMs

## **Goal 3: Scholarships**

Strategies: See separate section on Scholarships

## **Goal 4: Awarding Members with Training Opportunities**

Strategies:

- Provide scholarships to PDC and local training to members in recognition of their participation in club activities.
  - PDC - minimum of 2 scholarships, based on availability of funds.
  - GPDC - where appropriate, CEC will establish number of scholarships for members
  - Local training - minimum of 2 scholarships, pending funds availability



# Awards Plan

*continued*

## **Goal 5: Scholarship Awards for Passing the CGFM Exam**

Strategies: Recognize members through monetary award for passing sections of the CGFM test. See separate section on CGFM.

## **Goal 6: Announce Member Accomplishments**

- 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

# Scholarship Plan

**Chairperson – Doris Flores Brooks, CPA, CGFM**

**Advisor – Taling Taitano, Awards Chairperson**

The AGA Guam Chapter recognizes the need to provide a venue to recognize outstanding students who wish to pursue excellence in the study of business, accounting, and auditing by providing a scholarship under these disciplines and consequently help improve the business environment within the Micronesian Islands, and at the same time plan to provide continued quality intellectual infrastructure resource. We will also explore offering scholarships to current members pursuing post-secondary degrees.

The Plan is two folds:

**Level 1. Student Scholarship Program:** This program is already in place but shall be revitalized. We will continue to provide financial assistance to eligible candidates with the Herminia Dierking Scholarship in honor of Ms. Dierking's contribution to the AGA Guam Chapter as a past Chapter President, as a Guam legislator who supported continuing education for governmental employees, and as a long time faculty of the University of Guam, Accounting Department.

**Level 2. Resource Fellowship Fund Program (RFP):** This program is a long range plan that would support the Chapter's commitment (in cooperation with the Early Careers Committee) to partner with the private sector companies and explore ways to continue to build a quality Accounting resource (instructor) program that directly benefits students in attaining excellence in an accounting degree program.

## **LEVEL 1: Student Scholarship**

### **Goal 1 - Revitalize the Student Scholarship Program.**

**Objective:** Fund the Scholarship and Resource Fellowship Fund (RFP)

- Set aside funding from Educational Fund (to be determined by CEC) towards supporting an accounting student in accordance with the AGA Guam Chapter Scholarship Criteria.

### **Goal 2 - Make the Scholarship Program Available to Outstanding Students with Proven Track Record of Academic Excellence**

**Objective:** Publicize the Scholarship Eligibility Requirements.

- Partner with the efforts of the local University/College Scholarship Program under the Office of Student Services that conducts regular dialogue with high school students
- Solicit input from the Dean of local Colleges/University to help identify potential candidate/s of the Scholarship program
- Utilize the websites of the AGA, the public school system, colleges and universities (to include institutions that utilize the Guam Community College and/or University of Guam for its higher education needs). Publicize in local newspapers and distribute flyers to local college/university to publicize the scholarship program

# Scholarship Plan

*continued*

## **Goal 3 - Encourage participation of members and dependents of members**

**Objective:** Make the Scholarship Program information handy to AGA members to include Pacific Rim 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.
- Log on to <http://aga.guam.net> to access scholarship criteria and scholarship application.

## **Goal 4 - Identify Outstanding Student/s with Proven Track Record of Academic Excellence for this Award**

**Objective:** Award Scholarship to deserving student

- Convene Scholarship Committee preferably before the start of each semester and mid- semesters thereafter to ensure smooth implementation of scholarship requirements, the objective being to identify and award the AGA scholarship to the most deserving student.

## **LEVEL 2: Resource Fellowship Fund Program (RFP):**

### **Goal 1 - Explore Ways to develop intellectual infrastructure resource in the Accounting Profession.**

**Objective:** Partner with the University of Guam-School of Business and private sector to gain support the RFP.

- Establish a Resource Fellowship Fund (RFP) to be restricted to fund the development of Intellectual Infrastructure within the University of Guam in the accounting and business discipline.
- Establish an Exploratory Committee to discuss, develop, implement, and monitor a mechanism to accomplish the objective of Level 2 to include identifying a funding source.

### **Goal 2 - Continue a dynamic dialogue with local University/College and private sector to gain support of the RFP Program**

**Objective:** Involve the local University/College and private sector in the RFP Program by conducting meetings to communicate the purpose of the Program

- Solicit involvement of private sector to gain support of the objective of the RFP Program.
- Hold regular meetings to dialogue with the chapter's Exploratory Committee, local University/College and private sector.
- Offer free AGA memberships to donors for each \$1,000 support towards the RFP Program.
- Recognize RFP Program supporters by inviting them as speakers.