



*Advancing Government  
Accountability*

**Association of Government  
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August 21, 2018

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

**Subject: AGA Guam Chapter Strategic Plan Program Year 2018 – 2019**

Hafa Adai Louise,

The AGA Guam Chapter is pleased to submit its Strategic Plan for Program Year 2018 – 2019. The Strategic Plan includes the following:

- Chapter Leadership, Planning & Participation
- Education & Professional Development Plan
- Certification Plan
- Communications Plan
- Membership Plan
- Young Professionals 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) 735-2943 6 or by email at [francesdanieli@gmail.com](mailto:francesdanieli@gmail.com).

Best Regards,

Frances Danieli

Chapter President  
Program Year 2018 – 2019



*Advancing Government Accountability*

# **Strategic Plan**

Program Year 2018 - 2019

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## SECTION 1. CHAPTER LEADERSHIP, PLANNING & PARTICIPATION

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### Goal 1. Guam Chapter Leadership

*Chapter Executive Committee (CEC) Program Year 2018 - 2019*

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

#### **OFFICERS:**

President: Frances Danieli, MBA, CB, CGFM

Member #: 92245 E-mail: francesdanieli@gmail.com

President-Elect: Debbie Ngata

Member #: 96010 E-mail: debbie.ngata@gu.ey.com

Treasurer: Mary Grace Edrosa, PMBA

Member #: 43450 E-mail: mgedrosa@yahoo.com

Treasurer-Elect: Shannon Bartonico, CFE

Member #: 136868 E-mail: shannonbartonico@gmail.com

Secretary: Justin Castro, CFE

Member #: 139456 E-mail: justinbcastro@gmail.com **NEW**

Immediate Past President: Clariza Mae Roque, CICA

Member #: 96313 E-mail: croque@guamopa.com

#### **COMMITTEES:**

##### **Accountability**

Director: Barbara Molarte

Member #: 88647 E-mail: bmolarte@triton.uog.edu **NEW**

##### **Awards**

Director: Michelle Santos

Member #: 143161 E-mail: santosm4884@triton.uog.edu **NEW**

##### **By-Laws and Procedures**

Director: Yukari Hechanova, CGFM, CPA, CIA, CGAP, CGMA

Member #: 60087 E-mail: yhechanova@guamopa.com

Co-Director: Llewelyn Terlaje, CGFM, CGAP

Member #: 70753 E-mail: lterlaje@guamopa.com

### **Chapter Recognition Program**

Director: Taling Taitano, CPA, CGFM

Member #: 12754 E-mail: tmtaitano@gmail.com

### **Communications/Website**

Director and Webmaster: Clariza Mae Roque, CICA

Member #: 96313 E-mail: croque@guamopa.com

### **Community Service**

Director: Margie Francisco, CPA

Member #: 138096 E-mail: margie.francisco@gu.ey.com **NEW**

Co-Director: Vanessa Valencia

Member #: Pending E-mail: vvalencia@guamopa.com **NEW**

### **Young Professionals**

Director: Rachel F. Cubacub, MPA

Member #: 94772 E-mail: rachelfcub@gmail.com

Co-Director: Jerricho Garcia

Member #: 148550 E-mail: jerrichogarcia@gmail.com **NEW**

### **Education**

Director: Rodalyn May A. Gerardo, CGFM, CIA, CPA, CGAP

Member #: 65248 E-mail:  
rgerardo@guamopa.com

Co-Director: Clariza Mae Roque

Member #: 96313 E-mail: croque@guamopa.com

### **Historian**

Director: Jose Guevara, PMBA, CGFM

Member #: 44115 E-mail: jojo\_guevara@hotmail.com

### **Membership**

Director: Debbie Ngata

Member #: 96010 E-mail: debbie.ngata@gu.ey.com

### **Newsletter**

Editor: Clariza Mae Roque, CICA

Member #: 96313 E-mail: croque@guamopa.com

**Professional Certification**

Director: Maripaz N. Perez, CGFM, CGAP, CICA, CIA, CFE  
Member #: 67833 E-mail: mnperez@gpagwa.com

**Programs/Technical Meetings**

Director: Vincent Duenas, MPA  
Member #: 67025 E-mail: vjgduenas@hotmail.com

**Research/Standards**

Director: Fierce Catoc  
Member #: 147203 E-mail: fcatoc@deloitte.com **NEW**

**Scholarship**

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

**Student Representative**

Jerricho Garcia  
Member #: 148550 E-mail: jerrichogarcia@gmail.com **NEW**

## Goal 2. Planning and Preparation

### Chapter Administration:

Frances Danieli, MBA, CB, CGFM, President

Debbie Ngata, President-Elect

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

The AGA Guam Chapter will hold monthly meetings to provide government accountability professionals an avenue and an opportunity to meet with their peers from private and public entities and discuss relevant issues affecting their profession. At each meeting, we will provide committee report updates and invite a guest speaker to address our members and non-members about topics relevant to the accountability profession. Continuing professional education credits will be offered for a minimum of four general membership meetings.

The Chapter Executive Committee (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 may be welcome to attend CEC meetings. For effective CEC meetings, it will:

- Have a purpose;
- Provide enough notice and appropriate materials for members to be prepared;
- Follow proper meeting procedures and respect the time of board members;
- Have clear supporting documents such as an agenda, minutes and other reports;
- Ensure all participants have a voice and are respected;
- Include some social interaction and networking time;
- Accomplish results and/or have action items; and
- Documented with minutes.

#### Chapter Executive Committee

Meetings Date: Every 2<sup>nd</sup>

Wednesday of the month Location:

TBA

Time: 12:00 p.m. – 1:00 p.m.

#### General Membership Meetings

Date: Every 4<sup>th</sup> Wednesday of the month

Location: Hilton Guam Resort & SPA

Time: 12:00 p.m. – 1:00 p.m.

DATE	SPEAKER	TOPIC
June 20, 2018	General Membership Meeting	Oath of Office/Leadership
July 11, 2018	CEC Meeting and Strategic Planning	
July 25, 2018	17 <sup>th</sup> Annual Always Growing Accountability 5K Appreciation Luncheon	Recognition of 5K Sponsors
August 8, 2018	CEC Meeting	
August 22, 2018	General Membership Meeting	
September 12, 2018	CEC Meeting	
September 26, 2018	General Membership Meeting	
October 10, 2018	CEC Meeting	
October 24, 2018	General Membership Meeting	
November 14, 2018	CEC Meeting	
November 28, 2018	General Membership Meeting	
December 12, 2018	CEC Meeting	
December 19, 2018	General Membership Meeting	AGA Christmas Party
January 9, 2019	CEC Meeting	
January 23, 2019	General Membership Meeting	
February 13, 2019	CEC Meeting	
February 27, 2019	General Membership Meeting	
March 13, 2019	CEC Meeting	
March 27, 2019	General Membership Meeting	
April 10, 2019	CEC Meeting	
April 24, 2019	General Membership Meeting	
May 8, 2019	CEC Meeting	
May 22, 2019	General Membership Meeting	Program Year 2019 – 2020 Strategic Planning
June 12, 2019	CEC Meeting	
June 26, 2019	General Membership Meeting	Oath of Office



### **Goal 3. Regional, Sectional and National AGA Participation**

- ❖ Chapter member serving as regional officer for the Pacific Rim region:
  - Pamela Young, Regional Vice President (term expires June 30, 2019)  
Member #: Pending      E-mail: [pyoung1@honolulu.gov](mailto:pyoung1@honolulu.gov)

## **SECTION II. EDUCATION & PROFESSIONAL DEVELOPMENT PLAN**

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*Education Director: 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, other professional organizations (example: Guam Society of CPAs, American Society of Military Comptrollers, etc.), and/or CPA firms (e.g., Deloitte and Touché, Ernst & Young, 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 (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 (OPA); University of Guam (UOG); Guam Community College (GCC); and the Federal Bureau of Investigation (FBI) for other training opportunities.

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

- Support the Director of Professional Certification in increasing the number of CGFMs through review classes via study groups.
- Coordinate with the Director of Professional Certification and support efforts to provide CGFM review courses.
- 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, UOG, GCC, 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 webinars (a cost efficient way of providing training) and other web-based training through corporate sponsors (e.g., Becker).
- Coordinate with the UOG and GCC, through their Academe on training opportunities.
- Encourage member participation in various committees (venue, speakers, program, registration, sponsorship, etc.).
- Market educational events to members and nonmembers within the government accountability professional community.
- Publish/distribute a training calendar for/to members (including on the chapter's website).

## **SECTION III. CERTIFICATION PLAN**

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*Certification Director: Maripaz N. Perez, CGFM, CGAP, CICA, CIA, CFE*

### **Goal 1. Support current CGFMs**

- Support 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 accountability organizations in the Pacific Region through training opportunities and notifications.
- Promote CGFM's achievements in the Chapter's newsletter, website or in the local newspaper.
- Annually participate in the "March is CGFM Month" awareness campaign and recognize Guam Chapter CGFMs.
- Contribute items to the RVP for inclusion in the Pacific Rim's accomplishment and awareness of this certification.
- 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.
- Recognize and provide a free CPE training during "CGFM Month".
- Use the CGFM designation appropriately in chapter publications, on nametags, etc.

### **Goal 2. Market CGFM service mark locally**

- Use the Core Values of Service, Accountability, Integrity, and Leadership (SAIL) to promote these values in the local government. Encourage the use of the SAIL acronym in publications and notices.
- Emphasize to the highest elected officials and government directors that the CGFM designation denotes excellence, performance and accountability.
- Promote Guam Public Law 33-18, which provides pay incentives to CGFM designation holders working in the Government of Guam (GovGuam).
- Communicate with members at least on a quarterly basis on the advantages of being CGFM certified through the membership's newsletter, website, email, and pamphlets.
- Promote and present the CGFM designation and its benefits to GovGuam agencies and students from the University of Guam and Guam Community College.

### **Goal 3. Assist potential new CGFMs in attaining certification**

- Offer CGFM scholarship by providing registration and test fee reimbursements to members who pass the CGFM examination in accordance with the scholarship requirements.
- Offer CGFM Exam Questions Reimbursements where members actively pursuing their designation can be reimbursed for the cost of the review exams they purchase.
- Provide CGFM Mentorship Program to encourage and support members in the attainment of their CGFM designation. A CGFM will be partnered with an individual pursuing their CGFM to mentor and provide inspiration and continuous motivation.
- Provide opportunities for members to review the chapter's CGFM study guides to prepare for exams.
- Promote study groups or CGFM outreach awareness programs.
- Explore partnership opportunities with the Pacific Rim chapters to promote and bring CGFM preparation courses to the region.

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

- Ensure the availability of educational materials (CGFM Study Guides and practice exams) to our membership.
- Coordinate with Director of Education to provide training necessary to meet CGFM continuing education requirements.
- Team up with other chapter CGFMs to promote CGFM and provide presentations in CGFM Study groups.

## **SECTION IV. COMMUNICATIONS PLAN**

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*Communications Director, Webmaster, and Newsletter Editor: Clariza Mae Roque, CICA*

### **Goal 1. Chapter meetings and member participation**

- Announce through website, newsletter, social media and email chapter monthly meeting, events and conferences to both members and non-members.
- Recognize our Annual Accountability 5K sponsors, CGFMs, and Past Presidents during monthly membership meetings.
- Maintain the Guam Chapter's social networking sites (Facebook and Instagram). Consider creating a LinkedIn and Twitter accounts.

### **Goal 2. Communicate chapter business, events and other items of interest to 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 monthly.
- Encourage members and students to submit articles to newsletter.
- Consider transitioning existing website domain to the new AGA site.
- Email weekly "Topics" to let members know what is going on and keeping in touch.
- Prepare public service announcements or press releases through:
  - Newsletter
  - Website
  - Local media outlets
  - Social Networking Sites
  - National AGA

### **Goal 3. Communicate within AGA**

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

## **SECTION V. MEMBERSHIP PLAN**

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*Membership Director: Debbie Ngata*

### **Goal 1. Actively recruit new members**

- Increase membership to 200+ members by the end of the program year.
- Create an incentive program and/or emulate the national Super Recruiter program.
- Mailings or other recruitment of nonmember CGFMs, former members, and/or nonmembers who attended national, regional or local training events in Guam.
- Participate in AGA national recruitment efforts and campaigns.
- Play the AGA video at a chapter meeting.
- Staff a chapter table at each event/meeting and have membership recruitment materials displayed.
- Create and distribute a “New Member Launch Kit”.

### **Goal 2. Retain current members**

- Retain 90% of current membership.
- Develop and implement an annual or biennial Guam Chapter membership satisfaction survey.
- Promote the results of the survey to your membership and include in the Guam Chapter 2019 – 2020 program year plan. In addition, share results with RVP, SVPRS, and [chapters@agacfm.org](mailto:chapters@agacfm.org).
- Contact members during annual renewal season (January 1 – March 31) and encourage them to renew.
- Communicate via email with members on a timely basis notifying them of monthly Chapter meetings and encourage participation in other Chapter activities.
- Invite members who are celebrating membership anniversaries via email to be recognized during the monthly general membership meetings.
- Recognize members’ AGA anniversary date and years of membership in our newsletter and on our website. Provide monthly updates of membership listing and changes.
- Continue with the free lunch raffle program for members who attend our monthly AGA Chapter meetings and encourage non-members to join AGA for additional benefits.
- Continue with the raffle program for members to win airfare, accommodations, and registration fee and earn CPEs at the AGA National PDT 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 CGFMs in our newsletter and on our website. Contact past members whose memberships have expired.
- Host at least one free event this program year for members.

## **SECTION VI. YOUNG PROFESSIONALS AND STUDENTS PLAN**

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*Young Professionals Director: Rachel Cubacub, MPA*

*Co-Director: Jericho Garcia, JAS President*

### **Goal 1. Make young professional and student members a priority**

- Offer student and young professional members opportunities to network with other AGA members by inviting the student and young professional members to be part of the various AGA Guam Chapter committees and events. Incentivize these members by subsidizing cost of membership fees and chapter lunch meetings who are actively involved with AGA.
- Work with the University of Guam (UOG) Junior Accountants Society (JAS), Guam Community College (GCC) Association of Junior Accountants (AJA), and the Directors of Membership, Education and Community Service to continue incentive programs for active participation by students and young professional members. Connect with a UOG and/or GCC professor and ask them to give “extra credit” to students who join, attend and engage with AGA.
- Emphasize networking opportunities to students and young professional members involved in various AGA activities such as assisting in planning/organizing conferences, participating in community service events, and submitting newsletter article, etc.
- Promote the CGFM certification by speaking to UOG JAS and GCC AJA
- Attend their meetings, and present/introduce the CGFM certification to UOG’s accounting classes.

### **Goal 2. Support the growing career of young professional and student members**

- Provide free membership to the student representative (JAS President) on the CEC committee.
- Conduct presentations at high school “Career Day” events and/or college accounting courses about the significance, roles and benefits of the accounting profession and AGA membership.
- Encourage the UOG and GCC accounting students and professors to join the AGA Guam Chapter, by inviting them to attend and participate in chapter meetings, community service activities, and other AGA-sponsored events.
- Improve the AGA mentorship program by providing opportunities for AGA mentors to interact with accounting students through student mixers, meetings, and/or job shadow days.
- Develop other creative means by which current and prospective UOG and GCC accounting students can network with accounting professionals.
- Coordinate with AGA members to facilitate student company tours.
- Include UOG and GCC students in AGA mailing lists to receive email information regarding AGA activities, i.e., newsletters, community service programs, monthly memberships meetings, etc.
- Young professionals will contribute articles to the Chapter newsletter and website.

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

- Provide academic scholarships to UOG and GCC students. See 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 as a professional accountant.

## **SECTION VII. ACCOUNTABILITY PLAN**

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*Accountability Director: Barbara Molarte*

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

- Complete and release program year 2017~2018 Citizen-Centric Report (CCR) no later than September 30, 2018 and post the AGA Guam Chapter CCR to chapter website.
- Submit the AGA Guam Chapter CCR to AGA's Certificate of Excellence in CCR program no later than December 31, 2018.

### **Goal 2. Establish a chapter accountability outreach plan**

- Issue reminder notices no later than July 31, 2018 to all 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.
- Coordinate with OPA to monitor GovGuam agencies' compliance with Public Law 30-127 to issue their CCRs after their respective financial audits are issued.
- Coordinate with the UOG accounting students and/or JAS to assist GovGuam agencies in the preparation of their CCRs.
- Coordinate with GCC accounting students and/or the AJA to assist GovGuam agencies in the preparation of their CCRs.
- Continue to coordinate with UOG and GCC accounting students and/or AGA members to implement a CCR review committee to provide agencies with suggestions for improvements to enhance the quality of the CCRs.

### **Goal 3. Promote accountability in chapter events**

- Present the 2017~2018 Chapter CCR to the membership during a General Membership meeting no later than December 31, 2018.
- Secure officials from government agencies to present their CCRs during a regularly scheduled membership meeting. The presentations will also include sharing their experiences of preparing their respective CCRs.
- Issue a "Best Citizen-Centric Report Award" to recognize an outstanding CCR that meets the design elements cited in Public Law 30-127 and the AGA national guidelines. CCRs posted on the OPA's website will be automatically entered in the contest and the winning CCR will be presented no later than February 2019.
- Recognize GovGuam entities who have complied with the mandates of P.L. 30-127 for the last seven years since the law's inception in FY 2008.
- Submit at least five CCRs prepared by GovGuam agencies to AGA's Certificate of Excellence in CCR program.

### **Goal 4. Participation in AGA's performance accountability programs**

- Encourage chapter members to participate as a Certificate of Excellence in Accountability Reporting (CEAR) and/or CCR reviewer.
- Encourage GovGuam agencies to submit their CCR to National to conduct its Certificate of Excellence review.



## **SECTION VIII. COMMUNITY SERVICE PLAN**

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*Community Service Director: Margie Francisco, CPA*

*Co-Director: Vanessa Valencia*

### **Goal 1. Participate in community service**

- Conduct at least six (6) community service projects for the program year by partnering with needy organizations or others who are hosting community service events.
- Encourage members to participate in at least one community service project for the program year to achieve 50% participation of total AGA membership (estimate 90 to 100 AGA members).
- Encourage members to support AGA community service events that will utilize members' experiences and expertise in their fields such as credit awareness and savings education. In addition, members must participate in at least one community service or training event to be eligible for the annual PDT raffle.
- 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**

- Host and coordinate the annual AGA Guam Chapter 5K Run to raise funds for scholarship programs.
- Partner with other non-profit organizations in community service projects that will foster professional and civic relationships with the AGA such as the Salvation Army, Guma San Jose, Guam Animals in Need (GAIN), etc.
- Provide monetary community service donations.

## **SECTION IX. SCHOLARSHIP PLAN**

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*Scholarship Director: Pamela Aguigui, CM*

### **Goal 1. Offer academic scholarships**

- Set aside funds from the Educational Fund (to be determined by CEC) to support accounting and business student(s) in accordance with the AGA Guam Chapter Scholarship Criteria. Programs include but not limited to the Herminia Dierking scholarship, AGA Guam Chapter scholarship and graduate-level scholarships.
- Solicit involvement of the private sector to gain support of AGA Guam Chapter's scholarship programs. Offer free AGA membership to donors for each \$1,000 support.
- Recognize donors by inviting them as speakers.

### **Goal 2. Encourage participation of members and dependents of members**

- Distribute the Scholarship Program requirements during the general membership meetings and encourage members' involvement in the recruitment of potential candidates to the Scholarship Program. Announce regularly in the AGA membership meetings.
- Encourage application to AGA National Academic Scholarships (due during the month of April) including:
  - Rising College Freshman
  - Current Undergraduates
  - Graduate Students
  - Community Service

## **SECTION X. AWARDS PLAN**

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*Awards Director: Michelle Santos*

*Chapter Recognition Program Director: Taling Taitano, CPA, CGFM*

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

- Continue the John Phillips Excellence in Accountability Award, which will recognize individuals for superior dedicated service and outstanding achievement in enhancing government transparency and accountability in Guam.
- AGA Guam Chapter President to present awards during the September general 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 one (1) scholarship, based on availability of funds.
  - Local training – minimum of two (2) scholarships, pending availability of funds.
- Encourage application to AGA National Awards (due during the month of March 2019)
- 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.