



August 1, 2019

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**Subject: AGA Guam Chapter Strategic Plan Program Year  
2019–2020**

Hafa Adai Louise,

The AGA Guam Chapter is pleased to submit its Strategic Plan for Program Year 2019–2020. 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) 488-1211 or by email at [debngata@gmail.com](mailto:debngata@gmail.com).

Best Regards,

Debbie Ngata  
Chapter President  
Program Year 2019–2020



*Advancing Government  
Accountability*

# **Strategic Plan**

Program Year 2019-2020



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# SECTION I. CHAPTER LEADERSHIP, PLANNING AND PARTICIPATION

## Goal 1. Guam Chapter Leadership

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 (Vice-Chair of the CEC), Immediate Past Chapter President, Chapter Secretary, Chapter Treasurer, and Chapter Directors.

The Guam Chapter By-Laws are located on the website at <https://www.aga.guam.net/chapterbylaws>.

Title	Name	Member No.	Email
<b>OFFICERS</b>			
President	Debbie Ngata	96010	<a href="mailto:debngata@gmail.com">debngata@gmail.com</a>
President-Elect	Pilar Pangelinan	99790	<a href="mailto:pangelipc638@yahoo.com">pangelipc638@yahoo.com</a> <b>NEW</b>
Treasurer	Shannon Bartonico, CFE	136868	<a href="mailto:shannonbartonico@gmail.com">shannonbartonico@gmail.com</a>
Treasurer-Elect	Fierce Catoc, CPA	147203	<a href="mailto:fcatoc@deloitte.com">fcatoc@deloitte.com</a> <b>NEW</b>
Secretary	Llewelyn Terlaje, CGFM, CGAP	70753	<a href="mailto:lrlterlaje@gmail.com">lrlterlaje@gmail.com</a> <b>NEW</b>
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National Council of Chapters Representative	Artemio "Ricky" Hernandez, Ph.D., CGFM	100504	<a href="mailto:artemiorh@gmail.com">artemiorh@gmail.com</a>
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Programs/ Technical Meetings	Doreen T. Crisostomo, Ph.D, CGFM, CFE, CICA	23737	<a href="mailto:doreentc@triton.upg.edu">doreentc@triton.upg.edu</a>
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Scholarship	Pamela Aguigui, CM	71197	<a href="mailto:paguigui@gpagwa.com">paguigui@gpagwa.com</a>
Student Representatives	Michelle Puno, <i>University of Guam Junior Accountants Society President</i>	Pending	<a href="mailto:michelle.puno@gmail.com">michelle.puno@gmail.com</a> <b>NEW</b>
	Pending, <i>Guam Community College Association of Junior Accountants President</i>	Pending	Pending  *Students will resume classes in the fall – we will confirm with them once school resumes.

## Goal 2. Planning and Preparation

Chapter Administration: *Debbie Ngata, President*  
*Pilar Pangelinan, President-Elect*

Director of Programs/Technical Meetings: *Doreen T. Crisostomo,*

The AGA Guam Chapter (the Chapter) will hold monthly meetings to provide government accountability professionals an avenue 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. Provide continuing professional education (CPE) credits to members and non-members at no less than six (6) general membership meetings.

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. 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 the Directors;
- 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
- Be documented with minutes.

**Chapter Executive Committee Meetings** will be held every second (2<sup>nd</sup>) Wednesday of the month from 12:00pm to 1:00pm, with the location to be announced prior to the meeting dates.

**General Membership Meetings** will be held every fourth (4<sup>th</sup>) Wednesday of the month, from 12:00pm to 1:00pm at the Hilton Guam Resort and SPA.

The following represents our planned meeting dates and topics for the 2019-2010 Program Year:

Date	Meeting	Topic
06/26/19	General Membership Meeting	Oath of Office/Leadership
07/10/19	Chapter Executive Committee Meeting	Strategic Planning
07/31/19	General Membership Meeting	Recognition of 5k Sponsors
08/07/19	Chapter Executive Committee Meeting	Strategic Planning, continued
08/28/19	General Membership Meeting	Robotics Process Automation/ Blockchain
09/11/19	Chapter Executive Committee Meeting	
09/25/19	General Membership Meeting	Pension Liability   Auditing – Governmental   Impact on Pension Liability
10/09/19	Chapter Executive Committee Meeting	
10/23/19	General Membership Meeting	Overview of FY2020 Budget   Specialized Knowledge   How the Budget Was Prioritized for FY2020
11/13/19	Chapter Executive Committee Meeting	
11/27/19	General Membership Meeting	ERP   Computer Software and Application   Overcoming Challenges in Implementing an ERP
12/11/19	Chapter Executive Committee Meeting	
12/18/19	General Membership Meeting	AGA Christmas Party (coordinated by UOG's JAS)
01/08/20	Chapter Executive Committee Meeting	

01/22/20	General Membership Meeting	HR Matters   (details to be determined – to include how legalizing marijuana is considered in rights...)
02/12/20	Chapter Executive Committee Meeting	
02/26/20	General Membership Meeting	Tax Updates   Tax   What You Should Know for Tax Year 2019
03/11/20	Chapter Executive Committee Meeting	
03/25/20	General Membership Meeting	CGFM Month   Professional Development   Why Pursue This Certification and How It Will Advance Your Career. Updates and Tips on Preparing for the CGFM Exams
04/08/20	Chapter Executive Committee Meeting	
04/22/20	General Membership Meeting	Economic Outlook   Economics   State of Our Island's Economy
05/13/20	Chapter Executive Committee Meeting	
05/27/20	General Membership Meeting	Ethics in Government   Ethics   Increasing Trust in Our Government
06/10/20	Chapter Executive Committee Meeting	
06/24/20	General Membership Meeting	Oath of Office Procurement   Finance   Challenges in GovGuam's Procurement

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

The Chapter will have a member serve as one of the National Council of Chapter Representatives in the Pacific Rim. We have identified the following:

- Artemio “Ricky” Hernandez

National Council of Chapter Representatives (term expires June 30, 2020)

Member No.: 100504

Email: [artemiorh@gmail.com](mailto:artemiorh@gmail.com)



## SECTION II. EDUCATION AND PROFESSIONAL DEVELOPMENT PLAN

Education Director: *Rodilyn Gerardo*

### 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 ([ongoing](#)).
- Coordinate with the Government of Guam's (GovGuam's) Governor's Office, key government agencies, other professional organizations (such as the Guam Society of CPA's, American Society of Military Comptrollers, etc.), and/or CPA firms (e.g. Deloitte and EY, 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 Chapter) to provide cost-efficient and cost-effective delivery of training to the members through sharing of resources (e.g. instructor time and travel costs).
- Coordinate with the Department of the Interior Office of the 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 ([ongoing](#)).
- Coordinate with the Director of Professional Certification and support efforts to provide CGFM review courses ([ongoing](#)).
- Ensure the availability of updated educational materials (CGFM Guides) to our membership ([ongoing](#)).

### 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.) (ongoing).
- Market educational events to members and nonmembers within the government accountability professional community (ongoing as events come up, first event will be for August 2019 in conjunction with the Guam Society of CPA's).
- Publish/distribute a training calendar for/to members (including on the Chapter's website).

## SECTION III. CERTIFICATION PLAN

Certification Director: *Maripaz N. Perez*

### 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 professional accountability organizations' training opportunities (including local seminars, self-study, and online courses) via email notifications, chapter newsletter and chapter website.
- Promote CGFM's achievements in the Chapter's newsletter, website or in the local newspaper ([ongoing](#)).
- Promote awareness of the CGFM CPE requirements by publishing them in the Chapter newsletter or on the Chapter website ([ongoing](#)).
- Market Chapter-sponsored educational events that meet the CGFM CPE requirements to members and non-members.
- 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.
- Contribute items to the NCC representative for inclusion in the Pacific Rim's accomplishment and awareness of this certification.
- Recognize and provide a free CPE training during "CGFM Month" ([March 2020](#)).
- Publicize new CGFMs in Chapter and local publications ([ongoing](#)).
- Use the CGFM designation appropriately in chapter publications, on nametags, etc. ([ongoing](#)).
- Encourage members' CGFM renewals through emails, letters, newsletters and/or websites ([ongoing](#)).

### Goal 2. Market CGFM service mark locally

- Advocate CGFM to government leaders by contacting government accountability officials and leaders to support AGA's initiative to promote the CGFM designation ([informal activities are ongoing, to team up with the Membership Committee to determine formal efforts/presentations](#)).
- As part of the promotion, provide a formal presentation to government accountability officials and leaders.
- 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 with GovGuam.
- Annual participation in the “March is CGFM Month” awareness campaign and recognize the Chapter’s CGFMs (March 2020).
- Obtain an executive and legislative government proclamations declaring March as CGFM Month. Publicize the CGFM month proclamations in the Chapter and/or National level (to coordinate in January/February 2020 for presentation in March 2020).
- Promote CGFM Month on the Chapter’s social media accounts – Facebook and Instagram (March 2020).
- Communicate with members at least on a quarterly basis on the advantages of being CGFM certified through the Chapter’s newsletter, website, email and pamphlets (ongoing).
- Promote and present the CGFM designation and its benefits to GovGuam agencies (ongoing with formal efforts to be determined).
- 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 (ongoing, with formal efforts to be determined).
- Present the CGFM video at a local meeting to market CGFM and its benefits.

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

- Offer CGFM scholarship by providing registration and test fee reimbursements to Chapter members who pass the CGFM examination in accordance with the scholarship requirements (ongoing).
- Offer CGFM Exam Questions Reimbursements where Chapter members actively pursuing their designation can be reimbursed for the cost of the review exams they purchase (ongoing).
- Offer opportunities for Chapter members to borrow and review the Chapter’s CGFM study guides in preparation for their exams (ongoing).
- Provide CGFM Mentorship Program to encourage and support Chapter members in the attainment of their CGFM designation (ongoing).
- Promote and sponsor CGFM study groups. This can include online study support groups (first study group was scheduled in July 2019 to August 2019 at UOG, next study group location will be at Guam Department of Education’s conference room).
- 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 ([ongoing](#)).
- 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.
- Present and contribute relevant CGFM information to the Chapter newsletter, emails, or newsletters. These can include CGFM recognition, study suggestions, encouragement, technical requirements, “tip of the month,” etc. ([ongoing – reminders of CGFM Exam changes have been sent out continuously since June 2019](#))
- 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 CGFM Director.

## SECTION IV. COMMUNICATIONS PLAN

Communications Director, Webmaster: *Vanessa Valencia*

Communications Co-Director: *Clariza Mae Roque*

Newsletter Editor: *Clariza Mae Roque*

### 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 (ongoing).
- Recognize our Annual Accountability 5K sponsors, CGFMs, and Past Presidents during monthly membership meetings.
- Maintain the Chapter's social networking sites (Facebook and Instagram) (ongoing). 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 (ongoing).
- Distribute newsletters to members and the public on the Chapter website monthly (ongoing).
- Encourage members and students to submit articles to newsletter (to discuss with Student Representatives once the semester starts and will continue throughout the program year).
- Complete transition of existing website domain to the new AGA site (ongoing, with a target completion by October 2019).
- Email weekly "Topics" to let members know what is going on and keeping in touch (ongoing).
- 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 Chapter's monthly meetings, events and conferences.

## SECTION V. MEMBERSHIP PLAN

Membership Director: *Jose Guevara*

Membership Co-Director: *Mary Grace Edrosa*

Membership Co-Director: *Debbie Ngata*

### Goal 1. Actively recruit new members

- Market AGA membership to various government agencies and other related entities (ongoing, formal efforts/events to be determined).
- Create an incentive program and/or emulate the national Super Recruiter program (plan to be presented in the August 2019 CEC meeting and rolled out by the September 2019 General Membership meeting).
- Mailings or other recruitment of nonmember CGFMs, former members, and/or nonmembers who attended national, regional or local training events in Guam (ongoing).
- Participate in AGA national recruitment efforts and campaigns (to discuss a plan at the August 2019 CEC meeting).
- Play the AGA video at a Chapter meeting (plan to play at every meeting from August 2019 going forward as time permits).
- Staff a Chapter table at each event/meeting and have membership recruitment materials displayed (to start at the August 2019 General Membership meeting onward).
- Create and distribute a “New Member Launch Kit” (to design in August 2019 and launched in September 2019).
- Continue to acknowledge new members by sending a welcome email and include them in the Chapter Newsletters and Chapter General Membership email reminders (ongoing).

### Goal 2. Retain current members

- Retain 90% of current membership.
- Develop and implement an annual or biennial Chapter membership satisfaction survey (to roll out in September 2019 and May 2020).
- Promote the results of the survey to the Chapter membership and include it in the Guam Chapter 2019–2020 Program Year plan. In addition, share results with the NCC, Pacific Rim, and National ([chapters@agacgfm.org](mailto:chapters@agacgfm.org)).
- Contact Chapter members during annual renewal season (January 1 – March 31) and encourage them to renew.

- Communicate via email with Chapter members on a timely basis notifying them of monthly Chapter meetings and encourage participation in other Chapter activities ([ongoing - monthly](#)).
- Invite Chapter members who are celebrating membership anniversaries via email to be recognized during the monthly general membership meetings ([ongoing](#)).
- Recognize Chapter members' AGA anniversary dates and years of membership in our newsletter and on our website. Provide monthly updates of membership listing and changes ([ongoing](#)).
- Continue with the free lunch raffle program for Chapter members who attend our monthly Chapter meetings and encourage non-members to join AGA for additional benefits ([ongoing at monthly General Membership meetings](#)).
- Continue with the raffle program for Chapter members to win airfare, accommodations, and registration fee to earn CPEs at the AGA National PDT and Guam PDC based on availability of funds ([to be raffled in May 2020](#)).
- Continue to provide discounts for the luncheon during the monthly chapter meetings and training courses to members ([ongoing](#)).
- Recognize CGFMs in our newsletter and on our website ([ongoing](#)).
- Contact past members whose memberships have expired ([analysis to be completed in August 2019 and first wave contact will be performed in September 2019; we will do a second wave contact in the months prior to membership renewal and again in May 2020 with informal contacts performed throughout the program year](#)).
- Host at least one free event this program year for members ([to be determined](#)).



## SECTION VI. YOUNG PROFESSIONALS AND STUDENTS PLAN

Young Professionals Director: *Rachel F. Cubacub*

Co-Director: *Michelle Puno*

Co-Director: *Pending (AJA President)*

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

- Offer student and young professional members opportunities to network with other Chapter members by inviting the student and young professional members to be part of the various Chapter committees and events. Incentivize these members by subsidizing cost of membership fees and chapter lunch meetings who are actively involved with the Chapter (ongoing).
- Work with the UOG Junior Accountants Society (JAS), 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 (ongoing).
- 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. (ongoing)
- Promote the CGFM certification by speaking to UOG JAS and GCC AJA (to be coordinated once the semester starts).
- Attend their meetings, and present/introduce the CGFM certification to UOG and GCC accounting classes (to be determined).

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

- Provide free membership to the student representatives (UOG JAS and GCC AJA Presidents) on the CEC committee (August 2019).
- 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 (to be determined).
- Encourage the UOG and GCC accounting students and professors to join the Chapter, by inviting them to attend and participate in chapter meetings, community service activities, and other Chapter sponsored events (ongoing, will also work with the Membership Committee).
- 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 (ongoing).

- Develop other creative means by which current and prospective UOG and GCC accounting students can network with accounting professionals.
- Coordinate with Chapter members to facilitate student company tours.
- 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. (ongoing)
- Encourage young professionals to contribute articles to the Chapter newsletter and website (ongoing).

### **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 as a professional accountant (Fall/Spring Semester).

## SECTION VII. ACCOUNTABILITY PLAN

Accountability Director: *Doreen T. Crisostomo*

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

- Complete and release the Chapter's Citizen-Centric Report (CCR) for Program Year 2018-2019 **no later than September 30, 2020** and post it to the Chapter website.
- Submit the Chapter's CCR to AGA's Certificate of Excellence in CCR Program **no later than December 31, 2020**.

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

- Issue reminder notices **no later than July 31** 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 (**August 2019 for this program year**).
- Coordinate with OPA to monitor GovGuam agencies' compliance with Public Law 30-127 to issue their CCRs after their respective financial audits are issued (**ongoing**).
- Coordinate with the UOG and GCC accounting students and/or JAS and AJA to assist GovGuam agencies in the preparation of their CCRs (**ongoing**).
- Continue to coordinate with UOG and GCC accounting students and/or Chapter members to implement a CCR review committee to provide agencies with suggestions for improvements to enhance the quality of the CCRs (**ongoing**).

### Goal 3. Promote accountability in chapter events

- Present the 2018-2019 Chapter CCR to the membership during a General Membership meeting **no later than December 31, 2019**.
- 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 (**meeting date to be determined**).
- 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, subject to PL 30-127 requirements, in the contest and the winning CCR will be presented **no later than February 2020 (coordination to start in December 2019)**.
- Recognize GovGuam entities who have complied with the mandates of P.L. 30-127 for the last 11 years since the law's inception in FY2008 (**meeting date to be determined**).

- 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 ([ongoing](#)).
- Encourage GovGuam agencies to submit their CCR to National to conduct its Certificate of Excellence review ([ongoing](#)).

## SECTION VIII. COMMUNITY SERVICE PLAN

Community Service Director: *Margie Francisco*

Community Service 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 (ongoing, refer to planned events in the Chapter Reporting Form).
- Encourage members to participate in at least one community service project for the program year to achieve 50% participation of total the Chapter's membership (estimate 90 to 100 AGA members) (ongoing).
- 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 or training event to be eligible for the annual PDT raffle (ongoing).
- 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. (ongoing)

### Goal 2. Promote community service and AGA

- Host and coordinate the annual AGA Guam Chapter 5K Run to raise funds for scholarship programs (June 2019).
- 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. (ongoing)
- Provide monetary community service donations (ongoing).

## SECTION IX. SCHOLARSHIP PLAN

Scholarship Director: *Pamela Aguigui*

### Goal 1. Offer academic scholarships

- Set aside funds from the Educational Fund (to be determined by CEC) to support accounting and business student(s) in accordance with the Chapter Scholarship Criteria. Programs include but not limited to the Herminia Dierking scholarship, AGA Guam Chapter scholarship and graduate-level scholarships (planning to be done in August 2019 for release during the Fall semester).
- Solicit involvement of the private sector to gain support of the Chapter's scholarship programs. Offer free AGA membership to donors for each \$1,000 support (ongoing).
- Recognize donors by inviting them as speakers (ongoing).

### 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 Chapter membership meetings (ongoing).
- 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

Awards Director: *Justin Castro*

Chapter Recognition Program Director: *Taling Taitano*

### 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. (Nominations open in August 2019 for awarding in September 2019.)
- 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. Membership to update the SOP by September 2019. Qualified members to be notified by April 2020, with the drawing to be done during the May 2020 general membership meeting.
  - Local training – minimum of two (2) scholarships, based on availability of funds. Details to be determined in conjunction with the Education Committee.
- Encourage application to AGA National Awards (due during the month of March 2020) 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
  - Volunteer of the Year Award

### 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 (ongoing):
  - Newsletter
  - Website

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



## SECTION XI. CHAPTER ANALYSIS

A brief look at our Chapter and what we do well and how we can improve:

- The Chapter has been able to maintain a good attendance at general membership meetings. We would like to work better on tracking the statistics of member attendance to (1) work on improving the number of active members, (2) to better assess the financial impact of the lunch subsidies provided to members for attending lunches, and (3) to see the trends in attendance during the year to determine which months have fewer attendees due to busy seasons in both the government and private sector (CPA firms) and to see what alternatives can be done.
- The CGFM program has been successful in encouraging and supporting candidates gain interest and pass the CGFM exams. The Chapter will continue to support interested members and will work on spreading interest among government accountability personnel.
- The Chapter continues to work well with local business and government entities in their outreach efforts, both financially and for betterment of the community. The Chapter will continue to support community service events and will update the community service requirements for the PDT scholarship offered to its members as an incentive for being an active member with the Chapter.
- The Chapter has strong membership numbers and has recently incorporated the Saipan members as part of the Guam Chapter. We will work on determining ways to be more active in sharing Chapter events/resources with our partner islands (including the FSM and Palau), so they may be able to virtually attend meetings and/or training events.
- The Chapter looks to improve on the newsletter to provide relevant and timely information for its members.
- The Chapter is also looking encourage more members to be more active by either taking leadership roles or chairing events. We will also work on encouraging young professionals to join the CEC and take on more active, leading roles.