AGA – New York Capital Chapter
Strategic Plan

Our mission is…
to serve government accountability professionals by providing quality education at a reasonable cost, supporting professional certifications, promoting professional interaction and networking, recognizing professional and academic achievement, and assisting the less fortunate in our local community.

Our vision is to be...
• the best AGA chapter;
• the premiere organization serving the Greater New York Capital Region government accountability
• a model provider of quality and affordable continuing professional education and networking opportunities.

We value…
Integrity ............... Foster the highest professional standards of ethical conduct and behavior.
Excellence ........... Strive for the highest level of professional performance and continuous improvement.
Accountability ....... Maintain and advance sound fiscal and operational practices.
Leadership .......... Be proactive and innovative in directing our activities.
Respect ............... Treat everyone fairly and with dignity.
Service ............... Attend to the needs of our members, the government accountability sector and community.

Our goals address…
• Chapter Governance
• Financial Stability
• Continuing Professional Education
• Membership Growth and Retention
• Early Career Development
• Certification
• Community Service
• Recognition
• Communication

This long-range strategic plan is supported by annual operating plans and budgets for each area. The Chapter Executive Committee is responsible for approving and routinely monitoring these operating plans to ensure that the delivery of services to the members and government accountability community is consistent with the desired outputs and outcomes. Finally, on an annual basis, the Chapter President will report to the membership the operating results to demonstrate accountability and transparency embodied in our mission and vision.

The New York Capital Chapter of the Association of Government Accountants (AGA) serves the government accountability community in the Greater New York Capital Region. This area generally encompasses Albany, Rensselaer, Schenectady, Saratoga and surrounding counties north of New York City and west to Buffalo as well as to the Canadian border. The Chapter is one of the top chapters in the AGA with more than 250 members and is recognized as a national leader in providing continuing professional education and leadership opportunities to its members and the government accountability community.

This Strategic Plan was adopted by the Chapter’s Executive Committee (CEC) for the purpose of defining a clear and compelling mission, vision and values statement. The Plan also defines the goals and related strategies toward their achievement and performance indicators that measure success.

The Plan is aligned with AGA’s Strategic Goals which encompasses over 100 Chapters and some 14,000 members worldwide. It will also be used by the CEC to guide Chapter activities over the course of time towards “Advancing Government Accountability.”

Revised May 2016
**Chapter Governance**

Maintain an effective governance structure.

**Assigned to:** Chapter President/President-Elect

Ensure committees consist of sufficient qualified members to achieve their indicators for success.

Work with the Officers and the Directors to develop and implement annual operational goals, objectives and plans that aligns with the Chapter’s Strategic Plan and the National Chapter Recognition Program.

Evaluate Chapter Governance and Operations and identify improvement opportunities.

Maintain and annually review the policy and procedures manual and revise as necessary.

Conduct orientation to communicate roles and responsibilities to the members of the Chapter Executive Committee (CEC) and other committees.

Coordinate activities with other local associations, National AGA and other chapters.

Maintain a succession plan.

Report to the membership the results achieved for each performance indicator.

Involve high-level government officials for Chapter support.

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<th>Indicators</th>
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<td>• Achieve the maximum points that can be earned in the National Chapter Recognition Program.</td>
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<td>• Encourage CEC members to attend at least 75 percent of all CEC meetings.</td>
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**Financial Stability**

Use and maintain Chapter financial resources in the best interest of our members.

**Assigned to:** Budget and Finance Committee and Treasurer

Prepare an annual budget that defines how Chapter funds will be deployed for the fiscal year.

Ensure that systems of internal control are adequate to protect and safeguard Chapter assets and help ensure compliance with laws and regulations.

Monitor the Chapter’s financial condition by preparing and reviewing fiscal reports.

Provide the CEC with input on the impact of proposed changes to the annual budget.

Prepare the year-end financial statements and submit them for an independent review or audit as required by the CEC. Post on Chapter website.

Work with the audit committee to address any recommendations from the independent review or audit.

**Indicators**

- Publish the Chapter’s annual financial statements in the newsletter and website.
- Maintain a fund balance of at least $20,000.
- Produce monthly financial summary information and analyses for presentation at CEC meetings.
- Address audit or review recommendations within 90 days.

**Continuing Professional Education**

Provide training, education and development opportunities which support the needs of government accountability professionals.

**Assigned to:** Education Committee

Develop and implement an annual plan for continuing education based on topics that are timely and relevant to the government accountability community.

Develop a budget that in the aggregate generates net positive position.

Sponsor and present affordable training, conferences, seminars and workshops.

Provide networking and socialization opportunities.

Partner with other professional associations, government agencies and private firms to strengthen the professional education experience.

Develop and implement continuing education for targeted sectors of the government accountability community.

Develop direct participation opportunities for existing and potential members to present programs in their particular areas of expertise.

**Indicators**

- Provide at least 60 CPE credits annually.
- Achieve revenues in line with the budget.
- Increase attendance over the prior year.
- Achieve a score of 4.0 or better out of a possible 5.0 for all training events.
- Provide at least two opportunities each year for members to make presentations.
### Membership

Attract and retain a diverse and growing membership.

**Assigned to:** Membership Committee

- Develop and implement an annual membership recruitment and retention plan.
- Seek input from both Chapter members and the government accountability community to enhance the value of Chapter membership.
- Research recruitment and retention best practices used by other chapters, professional associations, and others to increase membership.
- Establish a diversity initiative to broaden the base of membership and better reflect the composition of the government accountability community.
- Maximize the use of recruitment and retention tools (brochures, announcements, etc.).
- Identify and recruit individuals with particular expertise for participation in Chapter activities.
- Develop and use a standard new member welcoming communication.
- Recruit members in government agencies and private firms to participate in the Chapter’s Captains Program.

**Indicators**

- Increase members’ participation in Chapter activities.
- Increase the number of entities participating in the Chapter Advantage Group Membership Program annually.
- Increase members in all categories.

### Early Career Development

Promote early career membership and participation in Chapter activities and leadership.

**Assigned to:** Membership Committee

- Prepare and implement an annual recruitment and retention plan to grow early career members.
- Determine the interests of current and potential early career members related to the Chapter’s activities.
- Promote education, community service and social activities targeted toward early career members and potential members.
- Encourage supervisors and co-workers to personally engage early career and potential early career members to participate in Chapter activities and leadership roles.
- Use electronic media to target communication with early career members and potential members.
- Foster mentoring and networking opportunities to involve and develop early career members.
- Utilize tools provided by National AGA to recruit and retain early career members and tomorrow’s professionals (i.e., students).

**Indicators**

- Increase early career membership 10% over the prior year.
- Increase rate of early career member participation from the prior year.
- Identify two early career members for the Chapter Executive Committee.

### Certification

Promote and retain Certified Government Financial Managers (CGFM).

**Assigned to:** Certification Committee

- Develop and implement an annual plan for aggressively marketing the value of the CGFM designation.
- Encourage employers to include the CGFM credential among qualifications when hiring and promoting for financial positions.
- Explore opportunities that encourage financial support toward successful completion of the CGFM examination.
- Work with employers and the Department of Civil Service to award credit for successful completion of the CGFM examination in connection with Civil Service examinations held for selected positions.
- Publicly recognize those individuals who achieved excellence in government financial management by attaining the CGFM designation.
- Coordinate the access to or provision of Government Financial Management courses to the membership.
- Obtain proclamations from State and other entities recognizing March as CGFM month.

**Indicators**

- Increase the number of individuals that pass the CGFM examination annually.
- Increase the number of employers accepting CGFM as promotion or hiring criteria.
- Ensure that 95% of all CGFMs retain their certification.
- Obtain two or more proclamations recognizing March as CGFM month.
Community Service

Promote and conduct community service activities that enhance the Chapter and the AGA’s image and reputation.

Assigned to: Community Service Committee

Develop and implement an annual plan of volunteer service projects that demonstrate the Chapter’s commitment to “giving something back” to the community.

Encourage Chapter members to volunteer their time and effort to community service projects.

Increase awareness of members’ community service activities.

Conduct raffles and participate in other events to raise funds for the support of community organizations.

Recognition

Acknowledge contributions made by members and nonmembers that enhance Chapter activities and the government accountability community.

Assigned to: Awards Committee

Develop and implement an annual plan that recognizes contributions to Chapter activities and to the government accountability community.

Explore new ways of recognizing individual achievement in the government accountability community.

Nominate individuals for National awards given by the AGA.

Publicize the recognition of members and awardees in the media.

Communication

Promote name recognition and Chapter Events.

Communicate effectively with Chapter members, customers and stakeholders in an integrated and timely manner.

Assigned to: Marketing/Communication Committee

Develop and implement an annual plan for marketing and communication.

Provide current information of interest to the government accountability community.

Increase the use of electronic communication and personal contact. Expand market reach through various Internet postings (e.g., Facebook, Linked-In and local professional websites).

Use multiple methods to communicate, such as the Chapter newsletter, website, and e-mail.

Expand corporate sponsorship to enhance revenues.

Use multiple methods to communicate, such as the Chapter website and email.

Ensure that all communications are clear, concise and timely.

Produce an annual report to members and AGA National (membership centric) based on input from the CEC. Help government entities prepare CCRs. Post to website.

Maintain a relevant and up-to-date website.

Work with local media to publicize Chapter events.

Indicators

- Participate in or conduct at least 10 community service projects.
- Achieve a 5% increase in total participation in at least one community service project.
- Increase total funds raised to support the community service activities/events.

Indicators

- Submit at least four nominations for National awards.
- Present a local Outstanding Achievements in Government Accountability Award each year.
- Celebrate Chapter contributions at least on an annual basis.

Indicators

- Issue broadcast e-mails announcing upcoming events and other important communications.
- Prepare a annual Chapter Centric Report.
- Assist in preparing a Citizen Centric Report for at least two government entities.
- Issue press releases routinely.
- Increase revenue from sponsors.