

CHAPTER NEWS

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SPECIAL POINTS OF INTEREST:

- We achieved platinum status again this year!
- Join us in congratulating our award recipients!
- Thank you everyone who contributed to the PDT food drive!
- The National PDT in Anaheim, California.





PRESIDENT'S MESSAGE

Association of Government Accountants

Chicago Chapter P.O. Box 1744 Chicago, IL 60604-9998 www.agachicago.org

May 2016 was a very busy month for AGA Chicago. We have put another hugely successful Chicago All-Star PDT in the books. There was a full house and a lot of attendees enjoyed the after "mixer" where we raffled-off free CPE certificates. The CEC extends a special thanks to those who volunteered. We also enjoyed participating in the IIA NW Chicago Chapter PDT where we hosted a table. The National PDT is scheduled for July. We are proud to announce that we are now NASBA certified which provides greater CPE reach. The Chicago Chapter welcomes our new members. The Chapter is well on the way to achieving "Platinum" status again this year. Thanks to everyone that has helped to make that happen. Thanks to those of you that participated in our recent survey. Your comments and suggestions are valuable and help keep the Chapter focused on your concerns and interests, Finally, we need your help in filling vital positions available on the CEC as well as volunteering for service on one of our committees. There is an upcoming community service event. Please go to our website to learn more.



Sincerely,

Hugh Smith
President AGA Chicago Chapter 2015-2016

JOIN US ON SOCIAL MEDIA

The AGA Chicago Chapter is on social media. So far, we have a Facebook account and a LinkedIn account. Please follow us on Facebook and LinkedIn for updates on upcoming AGA Chicago Chapter events!



The Wrigley Building, Chicago



Facebook



LinkedIn

CHAPTER RECOGNITION

The Association of Government Accountants, Chicago Chapter earned the following Chapter Recognition Program credits during the 2015-2016 Chapter year:

Chapter Program Area	Credits Earned		
	Last Month	Year to Date	Max
Leadership	425	3,325	3,000
Education	1,800	5,075	4,000
CGFM	1,025	4,425	4,000
Communications	425	4,792	3,000
Membership	1,350	2,450	4,000
Accountability	0	800	2,000
Community Service	250	2,500	2,000
Awards	600	1,000	1,000
Total	5,875	20,250	23,000

AGA’s Chapter Recognition Program has several levels a chapter can meet including bronze (12,000–14,500 credits), silver (14,501–17,000 credits), gold (17,001–19,500 credits), and platinum (19,501–23,000 credits). Each chapter President whose chapter reaches its goals will be recognized during the AGA National PDT with a plaque. For the past three consecutive chapter years, the Chicago Chapter of AGA earned platinum status by achieving 19,501 or more credits.

For the current chapter year, 2015-2016, we have earned 88.04 percent of the maximum points and had a goal for achieving Platinum

status again. We have maxed out on credits three quarters of the recognition categories for the year, and we have met our goal for achieving Platinum status for the 2015-2016 Chapter year. Thank you CEC members for all your great work!

MEMBER PROFILES

The AGA Chicago Chapter would like to ensure we keep you up to date on all of the Chapter events, educational opportunities and career resources. Please take a moment to [verify your professional profile on the AGA website](#). We don’t want you to miss any of the important communications that we share with our members!

COMMUNITY SERVICE UPDATE

During the 2016 PDT, in addition to non-perishable food and personal hygiene items, we collected \$170 in monetary donations which will be matched by the AGA Chicago chapter for a total amount of \$340. All donations will be given to A Just Harvest Food Pantry and Soup Kitchen a local charity located on the south side of Chicago.

I wish to thank all who made donations to assist in our community service effort. Special thanks to Cynthia Leggett, Dr. Kas Henry, Frank Moy, and Sophia Patsios for their monetary donations!

If anyone has interesting ideas for community service events please let us know. The next volunteer event will be announced later this month – stay tuned and please come out and join us!

Community Service Director – Eddie Jones



SCHOLARSHIPS & AWARDS UPDATE

Chapter Service Award

For active members of the Association that have consistently made important contributions to the development and enhancement of the Chicago Chapter during the program year July 1, 2015 to May 15, 2016.

Eddie Jones: Eddie Jones was nominated for leading the Chapter in community service events. His initiative in this area is an important contribution in engaging Chapter members to donate their time in helping others and meeting people from all walks of life. Because of Eddie's hard work, the Chapter has had a volunteer event once a month as well a successful food drive during this year's PDT.

Chanel Castaneda: Chanel Castaneda was nominated for her creation in the Chapter's Excellence in Accounting or Finance and the Leadership/ Community Involvement Awards. The Excellence in Accounting or Finance Award and the Leadership/ Community Involvement Award are two scholarships offered by the AGA Chicago Chapter to current college students (undergraduate or graduate students) in the field of Accounting and Finance studies. The awards are restricted to students from Illinois or Greater Chicagoland Area institutions of higher education. AGA – Chicago Chapter hopes to offer these scholarships twice a year.

Crystal Currier: Crystal Currier was nominated for the exceptional work that she does on the Chapter's monthly newsletter and the Chapter's website. Crystal took over the Chapter newsletter and website when the Chapter needed someone to fill both positions. As a result of Crystal taking over the Chapter newsletter, the Chapter resumed issuing monthly chapter newsletter, and the newsletters she worked on have been issued in a timely manner. Furthermore, Crystal has made improvements to the template that is used for the newsletter as well as made improvements to the Chapter website. Lastly, Crystal has worked on the Chapter's cloud document retention system.

Frank Moy: Frank Moy was nominated for his notable contributions toward improving government financial management knowledge of his colleagues and Chapter members. Throughout the 2015/2016 program year, Frank has donated many volunteer hours to planning the Chapter's educational program. He spearheaded the NASBA CPE application process by serving as the sole liaison and coordinating submission of the many needed documents. In addition, Frank collaborated with the Education & Program Committee to develop the Chapter's education policy. These efforts led to the Chapter being approved as a NASBA sponsor through April 1, 2017.



SCHOLARSHIPS & AWARDS UPDATE

Special Achievement Award

For notable contributions toward improving government financial management, accounting or auditing in government during July 1, 2015 through May 15, 2016.

CJ Carter: CJ Carter was nominated for the Special Achievement by multiple CEC members for her continuous contribution to the AGA – Chicago Chapter. She has worked tirelessly to attend various events on behalf of the AGA to obtain and secure speakers for the 2016 AGA PDT as well as the monthly educations events. She also volunteered to go multiple events to secure potential speakers and to gain insight on ways to help the AGA prosper.

Dr. Kasthuri Henry: Dr Kasthuri Henry was nominated for the Special Achievement Award for her notable contributions toward improving government financial management through her outstanding leadership roles in government and private sector, and her excellence in teaching. Dr. Henry was featured as a keynote speaker for the 2016 All Star PDT where she shared critical insights on "Leading with Your Soul" as a government manager. Dr. Henry has served as an advisor to the AGA Chicago Chapter providing advice for educational events, collaborating with other associations/professionals and increasing membership. Her efforts have contributed to an increase in the Chapter's membership, which has grown by over 20% since April 2015.

Adriane McCoy: Adriane D. McCoy was nominated for a Special Achievement Award for her contributions toward recruiting new members to the AGA-Chicago Chapter and her notable contributions toward improving government financial management. Her enthusiasm and zeal for AGA's mission is evident in her work product and professional accomplishments. Adriane joined the AGA Chicago Chapter's Executive Committee as the Membership Director in January 2016. In this short time period, her efforts have contributed to the 20% increase in the Chapter's membership.





"The only way forward, if we are going to improve the quality of the environment, is to get everybody involved."

—Richard Rogers

CHICAGO CHAPTER BY-LAWS REVISION

The Association of Governmental Accountant (AGA), Chicago Chapter's current by-laws were adopted in January 1998. This year the AGA National office requested that all chapters review their respective by-laws to ensure compliance with the national by-law prototype, and have chapter bylaws sent to the AGA National office by May 1, 2016. The Chicago Chapter Executive Committee has completed and voted on revisions to the chapter bylaws to ensure compliance with the national by-law prototype.

Thanks to all the members of the Chicago Chapter for participating in the Chapter Bylaws review process undertaken by AGA's National Bylaws and Procedures Committee. It is important for our chapter's future success that our govern-

ing documents are current and up-to-date with AGA's national by-laws.

The Chicago Chapter Bylaws have been reviewed and accepted by the National AGA Bylaws and Procedures Committee, as it was determined that they meet the national committee bylaws requirements. This qualified our chapter for 300 credits in Section I Goal 1 A of the 2015-2016 Chapter Recognition Program.

A copy of the updated bylaws has been posted on our Chapter website, www.agachicago.org. If you have any questions, you can contact the Chicago Chapter Secretary and Accountability Director, Janet Kasper, at kasper.janet@epa.gov.



UPCOMING TRAINING AND EVENTS

- [Management and Inspector General Road Rules in Enterprise Risk Management](#)
June 16 | 2-3 p.m. ET | Webinar | 0 CPEs | Complimentary | [Individual registration](#)
- [2016 Professional Development Training](#)
July 17–20 | Anaheim, Calif., or virtual | 24 CPEs | [Register](#)
- [Internal Control & Fraud Prevention Training](#)
Sept. 20–21 | Washington or virtual | 14 CPEs | [Register](#)



CGFM CERTIFICATION

The Certified Government Financial Manager (CGFM®)

The Certified Government Financial Manager (CGFM) certification is awarded by the Association of Government Accountants (AGA). AGA is a national professional association of some 15,000 members who represent every level of government financial management. Since 1950, AGA has been dedicated to serving those who are faced with the challenge of using every government financial resource in the most effective manner possible and has been the vanguard organization addressing the issues and challenges facing government financial managers.

AGA's CGFM program is specially designed to help meet the critical need for greatly increased emphasis on the pro-

fessional qualifications and stature of government financial managers. This professional designation is designed specifically to recognize the unique skills and special knowledge required of professionals who specialize in government financial management.

In addition to meeting the program's education and experience requirements, those awarded the designation agree to abide by AGA's strict Code of Ethics and complete at least 80 hours of continuing professional education in government financial management topics or related technical subjects every two years.

Want more information? Contact the Chapter's CGFM Director, Raul Nieto, at (312) 730-1634 or raul.nieto@ed.gov



"If your actions inspire others to dream more, learn more, do more and become more, you are a leader."

-- John Quincy Adams



Did you know?

The Chicago Chapter of the AGA maintains a copy of the study materials to prepare for the Certified Government Financial Manager (CGFM) exam. These materials are available for check out to members of the AGA Chicago Chapter upon request.

- Study Guide 1: Governmental Environment
- Study Guide 2: Governmental Accounting, Financial Reporting and Budgeting
- Study Guide 3: Governmental Financial Management and Control

Want to request a copy? Want more information? Contact the Chapter's CGFM Director, Raul Nieto, at (312) 730-1634 or raul.nieto@ed.gov.

AGA CHICAGO CHAPTER
CEC MONTHLY Minutes
MAY 5, 2016

1) ROLL CALL (QUORUM 7) – P = present; A = Absent

<u> </u> P <u> </u> Adriane	<u> </u> P <u> </u> Frank	<u> </u> P <u> </u> Matt
<u> </u> P <u> </u> Chanel	<u> </u> P <u> </u> Hugh (N)	<u> </u> P <u> </u> Raul
<u> </u> P <u> </u> CJ	<u> </u> A <u> </u> Janet	<u> </u> P <u> </u> Rick
<u> </u> P <u> </u> Crystal	<u> </u> A <u> </u> Jolanta	<u> </u> A <u> </u> Sandra
<u> </u> P <u> </u> Eddie	<u> </u> A <u> </u> Lorraine	<u> </u> P <u> </u> Sophia
<u> </u> A <u> </u> Elaine (N)		<u> </u> A <u> </u> Thomas
		<u> </u> P <u> </u> Della

Note: Dr. Kas was also present as an advisor, but did not cast any votes.

2) CALL TO ORDER

Hugh called the meeting to order, and declared that a quorum had been met for the meeting.

3) RATIFY/APPROVE PRIOR MEETNG MINUTES

Frank made a motion to approve the April CEC meeting minutes, and Adriane seconded the motion. A vote was taken, and the motion passed, with all those casting a vote voting in favor, and nobody voting against.

4) PRESIDENT’S REPORT

a) General Matters

- Hugh announced that the chapter was approved by NASBA, and thanked everyone who was involved with the process of obtaining NASBA approval.
- Hugh announced that the chapter was offering awards, and that the nominations for chapter awards ends May 24th.

. Status of Policies and Procedures Update (Janet)

Hugh mentioned that Janet was not in attendance to speak on the topic. Rick mentioned that the policies and procedures were being worked on and it is in progress.

. Nomination Committee – Board Vacancies

Hugh mentioned that the chapter still needed a president and a president-elect for the next chapter year, and that as he is the Regional Vice President next year, it would be difficult for him to also serve as president again.

. SLM & National PDT Update

Matt, Crystal, Hugh and Eddie spoke about the SLM. Notes from the SLM will be provided to all CEC members. Key points discussed were:

- The National Office will begin hosting websites for all AGA chapters, and it will be required that all chapters use the national office’s service for their chapter website. The reason given for this is to make it easier for all AGA chapters to have a website, as well make transitioning webmasters easier and ensure that each chapter will still have access to the website after a change in webmasters. The change will require that the Chicago chapter move its webpage. Doing this may be labor-intensive. After the move, the Chicago chapter will still own the content on the chapter website. Additionally, there will be templates we can use (ex. for meetings). The new web hosting from the national office will also offer data storage, thus we might be able to get rid of our cloud storage.

- The national office requests that any emails sent out by the chapters contain language that gives the recipient the right to stop receiving emails from the chapter, as well as instructions on how to request an end to such emails. It is important for chapters to do this as there are both federal and state anti-SPAM laws. This request from the national office also applies to emails to chapter members and others who have consented to receiving such emails, as the federal and state anti-SPAM laws still apply in such situations.
- National office spoke on the important of making sure new members are being placed in the correct membership category. There is an early careers membership category offered at a reduced rate.
- Discussion was held and ideas shared at the SLM on recruiting new members.

. By-laws accepted by National AGA

Hugh announced that the national office had approved the chapter's updated bylaws.

. Chapter Recognition ending May 31, 2016

No comments were made

. Chicago PDT and new member recognition

- CJ mentioned that the chapter PDT was 2 weeks away and that registration was running below average. She requested that everyone assist in efforts to advertise the chapter PDT and attract additional attendees.
- Dr. Kas suggested giving out scholarships to attract student members.
- Matt mentioned that a student rate of \$25 was being offered.
- Hugh suggested that we try to fill the room, and proposed giving students free admission to the chapter PDT.
- CJ supported doing something to fill the room.
- Hugh suggested that after the registration period had closed, we determine how much space we have left, and then offer free admission to students and others who would not have otherwise attended to fill the remaining seats.
- Hugh suggested we reach out to the IIA and ACFE, as this would be a good cross-pollenization opportunity.

b) RVP Update

Matt mentioned that Hugh would be our region's next Regional Vice President (RVP) for the upcoming chapter year.

c) Nominations (National PDT)

Hugh mentioned that as someone who had previously sought one of the scholarships for the national PDT is no longer able to attend, the distribution of the scholarships was settled.

d) Co-sponsor (IIA & ACFE)

No comments were made

e) NASBA

Hugh again mentioned that the chapter was recently notified that NASBA had approved the chapter's application for NASBA approval. Thus, the CPEs issued at the chapter PDT will be NASBA, and this should help attract attendees.

5) FINANCE REPORT

Hugh mentioned that as Tom was not in attendance, there was no finance report.

6) COMMITTEE REPORTS

a) By-laws, Nominating & Accountability (Janet, Rick, Sandra & Tom)

Hugh made reference to a prior comment made about the policies and procedures manual being worked on. He also mentioned that Janet, Sandra and Tom were not in attendance.

b) Membership (Adriane)

Adriane mentioned that the chapter currently has 121 members. Additionally, the chapter is working on recruiting college students and state and local government employees. She also said that all CEC members

must be chapter members, and that we have a few CEC members who have yet to renew their AGA membership.

c) Scholarship & Awards (Chanel & CJ)

- Chanel was not in attendance, but sent out an email to the CEC members regarding the status of chapter awards. The chapter is issuing chapter awards, with a deadline for nominations being May 24th. In the email, she asked for authorization to purchase plaques for the award winners.
- Discussion was held. Hugh and CJ believed that last year the chapter purchased multiple plaques, and thus may have unused plaques in inventory. CJ mentioned she would contact Chanel to find out whether there were plaques in inventory. Hugh proposed holding off on granting approval to purchase more plaques until we find out if we have any plaques in inventory.
- Chanel also sought authorization in her email to establish a scholarship program for the next chapter year.
- Discussion was held. As Chanel was not in attendance to share her ideas, and as it was unknown what she had in mind in terms of scholarships such as how many scholarships, types of scholarships, who would qualify for the scholarships, dollar amount, etc., Hugh proposed that further discussion regarding scholarships be tabled until the next CEC meeting.

d) Education & Program (CJ & Frank)

Frank mentioned that NASBA had approved our application, and thus our chapter PDT will be NASBA CPEs.

e) Chapter Recognition (Rick)

Rick mentioned that the chapter is in good shape to earn platinum chapter recognition status this chapter year. We maxed out in many categories such as leadership, education, communication and community service. Points that the chapter still needs to obtain to earn platinum chapter recognition status include:

- CGFM – we need to do at least 1 CGFM presentation
- Membership – if we have growth in chapter membership, we get these points. As of present, it looks like we will have membership growth.
- Member survey
- Chapter awards

Discussion was held. Raul mentioned that he might be able to do a CGFM presentation to his office, but the person he was going to give the presentation to is gone until the end of the month. Matt mentioned that he was doing the chapter survey and if anyone had suggested survey questions to let him know, but SurveyMonkey limits the chapter to a maximum of 10 questions. Hugh asked how the chapter awards worked. Rick responded by saying that there was something in the old bylaws about awards categories, but the national office will give points if we give awards to CEC members, chapter members, and anyone in the government accountability community.

f) Community Service & Early Careers (Eddie)

- Eddie mentioned that a food drive will be held during the chapter PDT.
- Eddie mentioned that at the food drive last year, some attendees donated money instead of food, and that the chapter matched the monetary donations collected. Eddie asked if the chapter would match monetary donations received this year?
- Hugh mentioned that he was in favor of matching the monetary donations received, and Eddie agreed that he too was in favor of matching. Hugh stated the chapter would match the monetary donations received during the food drive.
- Eddie mentioned that at the SLM, it was mentioned that a committee should consist of at least two people, and that he currently is on the Community Service committee by himself. Thus, he is seeking one or more assistants to join him on the Community Service committee.
- Eddie asked that seeing that he is receiving the member distribution list via email, does that mean that he should be sending out communications to our members, or will Lorraine do that on his behalf?
- Hugh responded by saying that seeing Lorraine isn't in attendance, we will table this discussion to the next CEC meeting, but in the meantime everyone should take the initiative to send out emails to our members and not wait for Lorraine.

g) CGFM (Raul)

No comments were made

h) By-Laws & Governance (Janet/Rick/Tom)

No comments were made

i) Meetings (Matt/Sophia)

- Matt mentioned that other than the chapter PDT, no additional educational meetings or social events were planned through the end of the chapter year. Matt did mention that he had a conference call line and room reserved for Thursday June 2nd for a CEC meeting if needed. He mentioned that historically, the chapter does not have a June CEC meeting, the May CEC meeting is the last meeting of the chapter year, and the chapter does not have another CEC meeting until August. After some discussion, it was decided to have a June CEC meeting on June 2nd.
- CJ mentioned that the April CES meeting did not go well, as due to a recent change in the Railroad Retirement Board's (RRB) security settings, the website to view the webinar was blocked. Furthermore, the AGA national office did not make the presentation slides available until after the webinar was over. The RRB IT staff was not able to unblock the website before the end of the webinar. Thus, the webinar participants only got the audio portion of the webinar, and the telephone line transmitting the audio cut out resulting in about 3 minutes of the webinar being missed. CJ claimed that she obtained unfavorable feedback regarding the webinar, and in the interest of maintaining a good reputation, proposed that all participants of the April webinar be given free admission to a future chapter event. CJ mentioned she was not in favor of refunding money, and said it is important we maintain a good reputation because reputation is everything.
- Hugh mentioned that he was in favor of CJ's proposal that the chapter give all April webinar participants free admission to a future chapter event.
- Matt asked if a vote was needed to approve this proposal. Hugh responded that a vote was not needed because it is an administrative matter.

j) Marketing (Lorraine)

No comments were made as Lorraine was not in attendance.

k) Communications/Newsletter/Website/Historian (Crystal & Jolanta)

- Crystal mentioned that in order to have a high-quality newsletter, we need certain parts such as a president's message, list of future events, etc. She asked that if any CEC members have anything to communicate to the chapter for their respective areas, that they should email it to her to put in the newsletter. Crystal also mentioned that she cannot write an entire newsletter by herself, and that content should come from other CEC members. She requested a deadline of the 1st of the month to provide content in order for such content to be included in that month's newsletter.
- Crystal asked about CEC nominations, whether we received any CEC nominations, and what we were going to do about the upcoming chapter year.
- Hugh mentioned that he was not aware of having received any nominations for CEC positions for the next chapter year.
- Hugh mentioned that with the new bylaws we have a nominating committee and must follow that structure. He said that the nominating committee is responsible for bringing nominees forward.
- Regarding who is on the nominating committee, Hugh believes that the bylaws mention which people/positions comprise the nominating committee.
- Hugh requested that the CEC members who are on the nominating committee meet so that we can resolve the issue of next year's CEC.

7) OLD BUSINESS/NEW BUSINESS

None

8) ADJOURN

Frank made a motion to adjourn. Crystal seconded the motion. All votes cast were in favor of adjourning the meeting, with no votes being cast against.

AGA NATIONAL NEWS

2016 Professional Development Training: July 17–20 | Anaheim, CA or virtual | 24 CPEs | [Learn more and register](#)

The DATA Act: What recipients need to know

AGA has established several key work groups to gather information, express concerns, offer suggestions and share ideas with the U.S. Office of Management and Budget (OMB) and the U.S. Departments of Treasury (Treasury), and Health and Human Services — the three agencies tasked with implementation and pilot development. Managed and overseen by our Intergovernmental Partnership, AGA's work groups include our members, industry colleagues, corporate partners, several non-profit associations and academia. [Learn more](#)

Save the Date!

AGA Chicago Chapter has already selected the dates for the 2017 Professional Development Training, May 17, 2017 and May 18, 2017. Mark your calendars!

Complimentary exams for CGFM® candidates

Participate in our July 2016 Intensive Review Course and your exams are on us! Space is limited—register today! [Learn more](#)

Help us Reach 5,000!

AGA's LinkedIn group continues to grow. Make sure you're part of the community and the conversation. [Build your network!](#)



AGA's Journal Online CPE Quizzes



The *Journal of Government Financial Management* provides valuable, in-depth information to decision-makers at all levels of government. By reading the *Journal* and passing an online quiz, you can earn 3 continuing professional education (CPE) credits. [Click here to learn more.](#)

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AGA CHICAGO CHAPTER

Interested in becoming a sponsor? Please contact us!

Post Office Box 1744

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Check us out on the web!

agachicago.org

AGA supports the careers and professional development of government finance professionals working in federal, state and local governments as well as the private sector and academia. Founded in 1950, AGA enjoys a long history as the thought leader for the government accountability profession. Through education, research, publications, certification and conferences, AGA reaches thousands of professionals and offers more than 100,000 continuing professional education (CPE) hours annually.

For information on the AGA Chicago Chapter's financial condition, please see the [Financial Statements](#) posted to the website.

Pictures used throughout the newsletter are courtesy of: www.city-data.com/album/album-Chicago-Illinois.html

CHICAGO CHAPTER MISSION STATEMENT

The mission of the AGA Chicago Chapter is to carry out an educational responsibility of enhancing public financial management and accountability.

AGA through its chapters is a leading advocate for improving the quality and effective-

ness of financial managers and auditors from local, state and federal governments from the Chicago area.

The chapter provides an opportunity for accountants and auditors to meet on a regular basis for training and networking.

