

**Meeting Notes**  
**AGA Quarterly Education Call for Ohio/Michigan**  
**October 1, 2008**

Attendees:

Kathleen Alexander, Education Chair, Cleveland  
Barbara Bail, Education Chair, Greater Columbus  
Soumaya Habhab, Chapter President, Detroit  
Stephen Blann, Education Chair, Lansing  
Joe Jozefczyk, National Director of Education  
Bekka Gehrmann, Education Manager  
Lori Mikesell, Regional Vice President  
Donna Wolfe, Regional Education Coordinator

1. Welcome – identified participants, reviewed agenda
2. RVP and Regional Coordinators met September 27, 2008 to discuss plans for 2008-2009 program year. Set the following goals for education:
  - Chapter meetings at least quarterly
  - Special education event in March to coincide with CGFM month
3. New Regional website to be announced this week <http://www.agaohiomichigan.org/>
  - “Need a speaker” tab to post a list of exceptional speakers – be sure to have speaker’s permission before posting any contact info
  - Will post notes from quarterly conference calls
4. National website contains a lot of great info:
  - Chapter scholarships for National conferences: (tuition + hotel room for 1 rep from each chapter)  
  
Performance Management Conference  
Oct. 27-28, 2008  
Seattle, WA  
  
National Leadership Conference  
Feb. 19-20, 2009  
Ronald Reagan Building, Washington, D.C.  
  
Professional Development Conference  
June 21-24, 2009  
New Orleans Marriott, New Orleans, LA
  - Audio conferences  
\$249 per phone line for unlimited number of attendees. 100-minute radio talk show that provides two CPEs. Last 20 minutes of the program is devoted to call-in questions from listeners. There is also an option to purchase package of 10 audio conferences - \$ savings.

Upcoming conferences:

- October 15, 2008 – “Results of AGA’s Research on Performance Based Management Reporting”
- November 12, 2008 – “Internal Controls”
- December 10, 2008 – “21<sup>st</sup> Century Financial Managers: New Mix of Skills and Education Levels”

- Another option is to purchase a CD containing the audio file, speaker biographies and PowerPoint presentations from one of AGA's audio conferences. Cost is \$45.95 for audio conference participants or \$95.95 for non-participants, plus shipping. Contact AGA National.
- Online CPE opportunities include AGA's Journal CPE Online Quizzes, CCH , Micromash, and SmartPros.
- Website also has an area where you can post/advertise upcoming training events for national visibility

5. Discussed Chapter Education Plans:

Soumaya (Detroit)

- Monthly luncheons
- Surveyed members to identify topics – speakers from IIA, universities, public accountants
- They do not pay speakers – provide lunch and a small gift
- KPMG (corporate partner) training for City of Detroit - 8 CPEs
- Spring conference – 8 CPEs
- Members are primarily from City/County Government

Barbara (Greater Columbus)

- Monthly luncheons – 1 CPE - different prices for members/non-members
- 3 day PDC held jointly with other Columbus chapter - Oct. 20-22 - \$100 difference for members/non-members
- 1 day PDO (professional development opportunity) with ASMC in March
- Participate in all audio conferences – no charge for members, \$25 for non-members
- Utilize speakers bureau from Franklin University
- Hold CGFM lunchtime study sessions
- Members are primarily Federal Government

Kathleen (Cleveland)

- Monthly luncheons – 1 CPE – different prices for members/non-members
- 1 day Spring Seminar with ASMC – 8 CPEs
- Audio conferences
- CGFM chair may form study group
- Members are primarily Federal Government

Stephen (Lansing)

- Monthly luncheons
- Participate in audio conferences (not under Education program)
- ½ day seminar in fall
- 1 day seminar in spring
- Different prices for members/non-members
- Reaching out to local government with accounting training – (3) 1-day sessions on the basics of accounting theory
- Members are primarily State/Local Government

7. Joe offered the following suggestions:

- Use AGA corporate partners as speakers or to sponsor events
- Use resources available on National website - Education Handbook, template, list of potential speakers
- AGA currently offers 18 courses – 1 day \$3,750 (includes speaker, travel expenses & meals) – will try to reduce rate if chapter purchases a course – brochure on National website
- Receptive to developing additional courses we need
- Bobby Derrick is AGA field rep – available to assist chapters (Dayton)

8. Joe will forward copies of 2008-2009 Chapter Education Plans to Donna

9. Agreed to hold quarterly education calls – 1<sup>st</sup> Wed from 10-11 a.m. – January 7 & April 1