AGA Education Handbook

for National, Regional & Chapter Leaders

March 2007

INTRODUCTION

Education is a central focus of AGA, provided as a service to our members and to the government accountability profession. AGA provides opportunities for professional development, facilitates the exchange of ideas; promotes quality financial management; and brings together governmental financial managers and other professionals in the accountability community. AGA members also value the networking that accompanies educational events sponsored by the Association.

AGA provides education and training activities at several levels. Local chapters sponsor educational and training events based on the needs of local chapter members and/or the local professional community. Chapters within a geographic region may join together to provide more comprehensive educational programming and wider professional development opportunities for members. The National Office also sponsors several large theme-based conferences each year around the country. These include the Annual Professional Development Conference & Exposition, the National Leadership Conference, the Internal Control & Fraud Conference and the Performance Management Conference.

This manual is designed to help chapters develop and present meaningful educational events that will achieve the objectives of our Association and serve the educational needs of our membership and the government financial community. Educational events also contribute financial resources to support the operation of other chapter and National Office activities.

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Chapter One: Choosing the Program Topic

The topic of an educational event is the main "drawing card" for most of the participants. The topic, therefore, must appeal to the participants and meet their professional and educational needs.

Target the Audience

One of the first steps in determining a program topic is to identify the audience the chapter wants to attract. Participants can come from federal, state and/or local government; from private firms, nonprofit associations, or other public entities. They may work in different specialties, such as auditing, accounting, budget analysis or financial management and may have different levels of knowledge and experience in these areas.

Determine Educational Needs

To determine the educational needs of the audience, research the level of expertise the audience has in the different specialties.

- Form a committee to compile a list of suggested topics.
- Develop a needs survey that allows the potential audience to rate the items on a scale from very high to very low interest, as well as space for suggestions of alternative topics. The survey should then be circulated to chapter members, directors of targeted organizations and private firms. The results of such a survey would provide conference planners with a range of topics most likely to attract participants and give the planners a clearer idea of their areas of interest. The survey could also serve to guide the chapter's educational programs over the short and intermediate terms. (An example of a needs survey concludes this chapter.)
- Consider using an online survey. The National Office has set up an account with SurveyMonkey. This tool makes it quick and easy to survey chapters or regional members but should be limited to AGA business only. It is also imperative that the privacy of other chapters/regions be protected by limiting the use ONLY to those surveys that directly affect specific chapters or regions. The survey tool can provide better information about members' professional goals and needs. It can also be used to gain feedback from participants attending chapter conferences, meetings and related events. Contact AGA's webmaster at *agawebmaster@agacgfm.org* to learn more about the survey tool.

Review Past Evaluations

Evaluation instruments from previous educational events can also provide useful information on successful and timely topics, formats and speakers.

Topic Formats

Educational programs can take many forms including:

Single Topic/Single Speaker

This approach works best for an in-depth presentation when the educational program has a single focus or theme. The targeted audience must share a common interest in the topic and have similar levels of expertise. The format is fairly formal—this type of presentation is usually arranged classroom style. The length of the presentation will depend upon the depth with which the topic is explored. For example, revisions of government auditing standards may be adequately covered in several hours while a study of the design and evaluation of internal controls might be a multiday program.

Single Topic/Multiple Speakers

This style permits a comparison of viewpoints and highlights multiple facets of a topic. Participants still need to share a common interest in the subject, but this type of format allows for more diversity of expertise among those attending. Using multiple speakers permits a greater variety of perspectives and presentation styles.

Thematic Event

The objective of this type of event is to focus on a group of related topics. The targeted audience will need to have a direct connection with the area of focus but varying specialties within public financial management can be appropriately included. For example, a conference on advancing computer technology could include sessions on security concerns, training and retraining, data acquisition and storage, hardware advances and new audit software, thereby attracting auditors, data processing managers, purchasing agents and personnel managers.

Multiple Topics/Multiple Speakers

This type of event will draw an audience with varied interests and differing levels of expertise. Its logical focus is on keeping abreast of changes occurring in the profession. A multi-topic conference can feature concurrent sessions to allow participants to select sessions that meet their educational needs.

A topic should not be selected for presentation unless a good speaker is available. The speaker can make a very technical topic interesting or a pertinent and timely topic boring.

In summary, selecting topics for an educational event must be based on several criteria. The first, and perhaps most important, is the targeted audience. Next, determine the educational needs of potential participants, and design the program to satisfy those needs.

SAMPLE NEEDS SURVEY

Please check a column for each of the following suggestions for topics for future educational events. If you would prefer not to have this type of speaker, leave the line blank.

	I would attend	Interests Me	Greatly Interests Me
AUDITING			
Internal Controls			
Exit Audit Conference			
GAGAS			
SAS Review			
Peer Reviews			
Single Audit			
Fraud Detection			
Performance Auditing			
RFP of Audit Services			
Audit Sampling			
Workpapers			
Analytical Review			
Presenting Audit Findings			
IT Audit			
ACCOUNTING/BUDGETING			
GASB			
Indirect Cost Allocation			
Fixed Asset Accounting			
State Revenue Estimating			
Cost Accounting Standards			
Material Management and Accounting Systems			
Financial Reporting			
Infrastructure Accounting			
Uniform Accounting System			
Grant Accounting			
FINANCIAL MANAGEMENT			
Privitization			
Cash Management			
State Lottery			
Financial management Systems			
Prompt Payment Act			
Repurchase Agreements			
Advance Refunding of LTD			
Procuring Banking Services			
Internal Control Management			
OMB Circular A-123			

Chapter One: Choosing the Program Topic

	I would attend	Interests Me	Greatly Interests Me
COMPUTER/ADP SKILLS			
Expert Systems			
Electronic Imaging			
Desktop Publishing			
Artificial Intelligence			
Viruses			
Disaster Recovery			
Office Automation			
Microcomputers			
Computer Security			
Data Base Systems			
CONTRACT AUDITING			
CRAG			
Overhead			
Fraud & Abuse in Contracts			
Defective Pricing			
Access to Records			
Current Court Cases			
Working with Consultants			
MANAGEMENT SKILLS			
Negotiations			
Coaching New Employees			
Effective Change Management			
Sexual Harassment			
Employee Benefits			
Wellness Programs			
Team Building			
Employee Performance Evaluations			
Delegation			
Scheduling			
The Hiring Interview			
PERSONAL DEVELOPMENT			
Ethics			
Time Management			
Oral Communication			
Stress Management			
Self Image/Self Worth			
Dealing with Difficult People			
Pre-retirement Planning			
Organizational Communication			
The Power of Listening			

	I would attend	Interests Me	Greatly Interests Me
OTHER			
Tax Update	______	______	______
Chapter Administration	______	______	______
Legal Liability	______	______	______
Effects of Government on Local Economy	______	______	______
Leadership Development	______	______	______

Are there any specific speakers you would like to hear? ______________________________

____

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Chapter Two: Selecting Speakers

This chapter provides practical guidance in identifying the best available speaker for any given topic.

Planning Considerations

When scheduling a speaker, allow for sufficient lead time. Nationally recognized speakers should be contacted approximately 12 months before the planned event; less lead time will be required for most other speakers. The speaker should be confirmed at least two to three months before the event. This confirmation date is dependent upon deadlines for printing the program brochure, signing the facility contract, finalizing the program budget, and marketing the event.

When identifying potential speakers, one of the most important planning considerations is to define the program objectives. A clear statement of the objectives includes defining what the participants should expect to learn and/or the skills they can develop. For example, if participants anticipate leaving the program with an understanding of the reporting requirements relating to the internal control structure, the list of potential presenters may be quite different from those considered for discussing the study and evaluation of the internal control structure. It is all too easy to fall into the trap of thinking that everyone knows the objectives of an event, based solely on the program title. However, titles can be misleading and certainly do not tell the whole story.

When selecting a presenter, consider various program formats. The format best suited for an event and for the speaker will depend on the objectives of the program, the targeted audience's expected knowledge of the subject matter, and the anticipated number of participants.

The lecture format is ideal if the targeted audience is a large number of comptrollers or accounting managers and the primary objective of the program is to present one person's view of the impact proposed legislation or changes in accounting principles will have on the profession. For other programs, group discussions and/or classroom exercises may be more effective. For example, a program designed to teach entry-level government accountants and technicians the preferred accounting methods applicable to enterprise or capital projects funds may include practical exercises, group discussions, audio-visuals and a lecture. (The chapter on Alternative Methods of Instruction provides a more in-depth discussion of program formats.)

Other matters that should be considered when selecting a presenter include the date of the event, the amount of time allotted for the presentation, and the time of day the program is to be presented (before or after lunch). Some speakers can be effective throughout a six-hour presentation but others may not be effective after two hours. Generally, an after-lunch speaker should be very energetic. A monotone presentation after lunch will generally fail to maintain the interest of the participants or to achieve the objectives of the program.

If the event is intended to meet continuing professional education (CPE) requirements for certified public accountants and other professionals, it may be necessary to identify the state or regional requirements for providing CPE hours to the various professions. Ensure that this information and any special requirements are communicated to the presenter. For example, the state board of accountancy may require an outline of the program to be submitted and approved before the date of the event. In this situation, it may be necessary to obtain the board's approval of the program before printing the program brochure. Certificates of completion are a common means of documenting CPEs.

Speaker Fees

Some nationally recognized speakers may be available at no cost to the chapter; some speakers may charge an honorarium; others may only require that travel expenses be reimbursed; and others may charge a substantial fee. The chapter may or may not have funds available for these costs, so it may be necessary to negotiate the speaker's fees.

If the chapter needs to generate the funds to pay a speaker's fee, a budget designating actual expenses and proposed revenues should indicate if the event could cover its costs. Negotiating a speaker's fee is one step in controlling expenses, and it is not uncommon for proposed speakers to waive their fee after being contacted by a chapter leader. Remember that most speakers are honored to be asked to speak at an educational event, and you never know whether a fee can be negotiated unless a counterproposal is made.

- Some speakers will make first-time presentations, hoping to obtain other education contracts in the future.
- Presenters may waive a standard fee if given the opportunity to offer tapes, books or other materials for sale at the conclusion of the program.
- A speaker's fee may also be waived if the chapter agrees to adequately publicize the speaker's firm as a participant in the program.

Thus, it is necessary to budget sufficient funds to pay these costs even though a smaller fee may be negotiated. It is important to remember that the speaker's fee, although an important consideration, is not the primary concern when planning an educational event. Rather, an education event should be designed to provide quality education that satisfies participants' needs at the lowest possible cost.

Also, chapters that plan to hold several educational events during the year should prepare an annual educational budget with the overall goal of making a sufficient profit to underwrite other chapter activities. Hence, there may be times when a single education event does not make a profit in part because of the speaker fees but the planned event is considered vital to the chapter's membership and the loss has already been factored into the annual budget.

Identifying Presenters

One of the most reliable sources for identifying effective speakers on specific topics is your network of peer groups, colleagues and other professional organizations. Your associates are generally very candid when discussing a particular speaker's effectiveness. In addition, they can identify other program planners who may provide speakers' names. Participation in professional organizations, forums, meetings and conferences provides the opportunity to interact with others with the same educational interest and becomes a means of identifying those who might speak at a session you are planning.

The National Office's Director of Education maintains a computer database of speakers who have been recommended by members. The education director is a useful resource to contact when you are considering speakers on various topics. In addition, a chapter's past educational committee chairs, regional education coordinators, and other leaders as well as those of other chapters in the region can provide guidance and assistance in selecting presenters for an educational event.

A frequently used method of identifying presenters is "calling for papers" in your chapter newsletter and in other chapter newsletters in the region. This method provides an opportunity for members and/or membership contacts to develop a written presentation that will be reviewed and evaluated to determine its potential for inclusion in an educational event and to identify those individuals interested in presenting a program. This method also allows the organizers of an educational event to review the substance of proposals before selecting speakers. A call for papers may request that proposals address a specific theme or may allow potential speakers to develop a program of their choice.

Presenters in governmental accounting and related subjects can be found at local colleges and universities and within various government entities. Central financial management and larger state and local government agencies typically have formal training organizations. In addition, many federal agencies offer outstanding training programs and will sometimes provide speakers without charge.

Many professional groups have formed speaker bureaus. They can provide the names of people who speak on various educational topics—frequently at no charge. The following groups have proven to be good resources as well:

- American Institute of Certified Public Accountants
- State Society of Certified Public Accountants
- National and local CPA firms
- Management/training consultants
- National speakers' associations
- Government Finance Officers Association
- Governmental Accounting Standards Board
- National Association of State Auditors, Comptrollers and Treasurers
- Interagency Training Committee
- Other professional associations

Evaluating Presenters

Public speaking is one area in which people earn reputations quickly. Word of mouth is one of the best sources of information about a speaker's ability to communicate effectively, convey knowledge of the subject and maintain enthusiasm throughout the presentation. If a written presentation is provided in advance, the substance of the proposal may be evaluated to assess the presenter's communication techniques. If the speaker provides references, they should be contacted.

Speaking ability is extremely important, but so is reliability. Everyone fears that a presenter will not be able to fulfill a commitment and will not provide a substitute speaker. Substitute speakers, generally associates who are willing on short notice to speak on a timely topic of general interest, should be identified. However, it is not wise to impose on these individuals too often.

Formalizing the Commitment

The commitment to speak at an educational event should be confirmed in writing. When honorarium is involved, a Letter of Agreement is customary. If no fee is involved or if only the presenter's travel expenses will be reimbursed, a confirmation letter is generally sufficient. In all other instances, a written Letter of Agreement should be executed. The written document, whether evidenced by a confirmation letter or Letter of Agreement, should address the following matters where applicable:

- The objectives, date, time, place and format of the educational event;
- The specific time of the speaker's planned presentation;
- The decision to provide the presenter with a complimentary registration to attend the entire program;
- Request for a short biographical sketch to introduce the speaker and for inclusion in the program brochure or to other advertisement;
- A short summary of the topic to include in the program brochure or other advertisement;
- The presenter's audio-visual needs;
- The expenses to be reimbursed such as mileage or air fare, lodging and meals;
- The type of required documentation such as mileage or airline ticket stub, receipts or invoice if a fee is to be paid;
- The method and timing of reimbursement or other payment;
- The type of transportation that will be provided from the airport to the conference site and a map;
- The type of handout materials and who will produce/copy them;
- The PowerPoint slides, if used;
- The layout of the conference room, including whether a podium is needed and whether participants will need space to complete case studies or other writing exercises;
- The need for a facilitator or any special assistance.

Formalizing the details of the event in writing and follow-up telephone calls are key elements to a successful program. It is important that presenters know their needs are being considered. Soon after the confirmation letter or Letter of Agreement is transmitted, speakers should be contacted to determine if additional matters need to be addressed. If the speakers have been confirmed several months in advance of the program, it might be wise to contact them to ensure that the program was entered on their calendars. In addition, each speaker should be contacted a week or so before the educational event to review preparations and the program's agenda to make adjustments where necessary.

Chapter Three: Presentation Options

In preparing for an educational event, sponsoring chapters have the option of using a variety of instructional techniques. Among these are lectures, panel discussions, discussion groups, demonstrations, case studies and hands-on exercises. This chapter will briefly discuss these alternate methods of instruction and provide suggestions for making a selection, based on the nature of the topic to be presented and on the appropriate learning method for the audience.

Lectures

A lecture is generally most useful for a specific topic that can be covered in a relatively short time. The lecture format becomes less effective after an hour or two; therefore, a lecture presentation might best be considered for a keynote address in a multiday program or as part of a luncheon program, or other similar short event.

Because the lecture format essentially involves a one-way presentation—lecturer to audience—how the speaker engages the audience's attention should be considered. The presenter must be considered an expert on the topic.

Panel Discussions

The panel discussion format is excellent for several speakers to discuss a subject from varying points of view. This is the approach most often used at the AGA Professional Development Conference & Exposition. As with the lecture format, the presenters should be experts on the subject. However, try to obtain speakers who have different, even conflicting, perspectives. This not only increases the participants' interest, but also provides an opportunity to compare multiple opinions.

A panel discussion is really a series of short lectures, and is well suited for topics that can be covered in three to four hours. As with the lecture format, the length of the panel discussion should be determined by each speaker's presentation and how well they interact with each other and the audience.

Discussion Groups

A discussion group encourages participants to share their views on a subject. This technique is best suited to objectives that include the open exchange of ideas to identify and solve a problem, express diverse opinions and/or decide on a course of action. Because there are no "right" answers, a group discussion could, for example, be used to compare financial and management systems or techniques to improve managerial skills. The use of a discussion group requires a strong person as moderator to direct the group to a consensus or to clearly summarize the viewpoints held by members of the group.

Demonstration

Demonstrations provide hands-on instructional guidance in performing new procedures or clarifying complex procedures. The instructor needs to know how much experience the participants have had with the subject so they are prepared for questions on specific details. The demonstration technique is helpful for training on a specific software program, for example. The size of an audience that can be reached with a demonstration is usually small; limited by the availability of equipment and the instructor's ability to give individualized attention.

Case Studies

Case studies are most effective in combination with short lecture sessions to present technical subjects, such as statistical sampling, auditing electronic data processing controls, flowcharting, detecting fraud, and understanding and evaluating the internal control structure. With these types of topics, a short lecture could be used to present the concept and a case study could then be used to reinforce that concept and demonstrate its application in a real-world situation. Substantial planning is necessary to develop meaningful case studies: Those that effectively demonstrate the concept being taught must be timely and difficult enough to be challenging without being frustrating. Educational events making significant use of case studies can take from one day to a full week, depending on the complexity of the subject matter.

Question-and-Answer Opportunities

Educational events should always provide the opportunity for participants to interact with the speakers. In events based on discussion groups, case studies and hands-on techniques, the interaction is ongoing. Set aside time for questions at lectures, panel discussions and demonstrations.

The time allotted for questions and answers should be based on the complexity of the subject, the interest it generates, and the audience's familiarity with the subject and speaker. For lectures and panel discussions of about two hours, approximately 15 minutes should be allowed for questions. For longer events, it might be preferable to allow questions during the presentation or at appropriate intervals. Ask speakers about their preferences. It is often wise to identify three or four people to initiate questions. And remind speakers to repeat the question for the benefit of the entire audience.

Role Playing

This technique allows participants to reenact job situations they may face or to play out certain events likely to occur in their careers (such as performance appraisals and audit exit conferences). Role playing can also be used to model new behaviors or modify old ones. It is best to provide a short script or description of the players' roles to set the stage.

Whether the role plays are simply acted out without equipment or props or videotaped and replayed, everyone will feel some anxiety. Multiple, simultaneous role plays in small groups throughout the room—rather than two people "on stage" before the group—can reduce the anxiety level.

Be sure to reinforce the players for their efforts, especially by offering them the first chance to critique their performance or comment on what went well or what needed to be improved. It also helps if the facilitator balances the more "honest" or critical comments from the audience with some positive words.

Audio-Visuals

Audio-visuals can clarify a concept by illustrating how it has been applied. If carefully prepared and presented, audio-visuals can enhance a lecture or group discussion and increase the understanding of the audience.

PowerPoint slides are the most common form of audio-visual presentation. Some speakers still use transparencies and slides that are usually created by the instructor. A videotape or film could work for small chapters that may have less money for training or whose members may not yet have developed a wide professional network. When using such materials, always check out the equipment and become totally familiar with all of its various controls. In addition, watch the videotape or film several times before presenting it to a group.

Be prepared with good "lead-off" questions and verbal "bridges" to use when applying the concepts to members' situations.

Summary

The matrix on the following page provides some general guidelines to help determine which instructional method would be best under specific circumstances. Frequently the decision is not an either-or matter but blending methods. Instructors may wish to enhance traditional instructional methods with "live" practice opportunities or more focused discussion formats. How well these fit into the event's schedule will depend on the size of the audience, the topic and the skill of the instructor or facilitator.

Thorough preparation is the most important ingredient in carrying out a successful educational event. It is always best to test or preview creative additions with several willing colleagues before using any supplemental methods with a group.

Training magazine (*www.trainingmag.com*) is available in most government, business, and public libraries. It is an excellent source for suggestions, models and guidance to improve training events. The American Society for Training and Development (*www.astd.org*) is also a useful resource.

MATRIX OF METHODS OF INSTRUCTION AT EDUCATIONAL EVENTS

	Lectures	Panel Discussions	Discussion Groups	Demonstrations	Case Studies	Role Plays Audio-Visuals
A. PRIMARY OBJECTIVE						
1. Dissemination of specific information	X			X	X	X
2. Presentation of varying viewpoints		X				
3. Exchange of ideas			X			
B. TYPE OF SUBJECT MATTER						
1. Single nontechnical topic	X					
2. Varying views on a single topic		X	X			
3. Complex or technical topic				X	X	X
C. SIZE OF AUDIENCE						
1. Small (Less than 20)			X		X	X
2. Medium (20 to 50)				X		
3. Large (More than 50)	X	X				
D. LENGTH OF EVENT						
1. 1 to 2 hours	X		X			
2. 2 to 4 hours		X		X		
3. 1 Day						
4. Multi-day					X	X

Chapter Four: Setting the Budget and Fee Structure

Establishing a budget and determining participant fees are important aspect of planning an educational event. This chapter focuses on how to develop a budget to identify expenses and revenue and to establish a fee structure for attendees.

Keep in mind that many chapters offer several education and training events during the year. Thus, an annual education budget should be prepared at the beginning of the chapter's program year and tracked throughout the year to determine each event's success against the budget. Knowing where the chapter stands during the year may influence how much to charge for specific events.

Expenses

Determining the type and amount of anticipated expenses associated with sponsoring an educational event is crucial to the budget process. Expenses can be classified as fixed or variable. Fixed expenses are those that would be incurred regardless of the number of participants while variable expenses can change based on the number of registered participants.

Typical fixed expenses include the cost of speakers' travel costs, honoraria and/or gift; printing, promotion and postage; telephone and computer services; and presentation-related costs. Variable expenses can include participant food and beverages, printing/purchase of handout material, and contingencies.

Break-Even Point

The break-even point is that point at which all fixed expenses are recovered and no net revenue is realized. This point needs to be determined to assist program organizers in setting the registration fee that will be charged, based upon the anticipated number of participants. The break-even point is calculated in two steps.

- First, determine the difference between the expected fee per participant and the variable cost per participant. This difference represents the amount each participant's registration fee that is available to cover fixed costs.
- Second, divide total fixed costs by the amount available to cover these costs; the result represents the number of participants who must register if the program is to be financially self-supporting.

Setting the Fee

Calculating the registration fee to be charged for an educational event is based on several factors. One factor is whether to charge a higher fee for participants who are not chapter members. Generally, the registration fee for nonmembers is higher than the members' fee—some chapters make the difference equal to the cost of membership dues to encourage participants to become members. Establishing the member/nonmember fees too close can discourage membership since they may feel that they are not getting value from their membership. Of course, this generally applies to half- and full-day seminars and not to luncheon-type CPE meetings that may discourage nonmembers from attending if the fee is too high. The following factors should be considered when determining the registration fee:

- **How many participants does the chapter want to attract?**

  Generally, the lower the registration fee, the more participants will be attracted to the program. Thus, if the primary goal is to provide education, a low registration fee may be established. However, many people tend not to value something that is underpriced. Also, be cognizant of what other associations charge for similar events and whether participants are paying "out of pocket" or if their employers paying for them. Further, if you are trying to attract students as members you may have to offer a reduced fee for them. Again, this should be factored into the budget.

- **How much net revenue does the chapter want to generate?**

  If the chapter depends on the revenue generated from its educational events to support other chapter activities, the event needs to generate a profit. If, however, the only goal is to provide a quality educational program at the lowest possible cost to participants, the event can break even. Some chapters generate considerable revenue from annual seminars so that they can not only offer other inexpensive training to members, but also can offer free training as a way of "giving something back" to their membership.

- **How much risk can the chapter assume?**

  A chapter with limited financial resources can assume less financial risk than a chapter with strong resources. Thus, if the chapter does not have sufficient funds to cover a loss, calculating the registration fee must recognize this fact. However, a well-designed, low-cost event that is priced reasonably can help a chapter with minimal resources generate a fair profit. This is best suited for a popular topic, such as fraud, with a known speaker who agrees not to charge an honorarium.

Other factors to be considered when determining the registration fee include the number of complimentary registrations to be offered and the time frame for paying the related expenses and receiving the registration fees.

Early-bird registration fees should also be offered as an incentive to register early or to those requiring prepayment as opposed to those that have to be billed. Some chapters accept and can process personal and government purchasing credit cards that ensures payment at the time of registration. This reduces the number of subsequent billing, accounts receivable and uncollectible accounts.

Chapter Five: Using Contributed Support and Sponsors

Many professional organizations, including AGA, use contributed support to present educational events. Contributed support includes the resources, such as staff time, facilities, supplies and promotional efforts, for which the contributing organization does not expect reimbursement. Using contributed support to defray the cost of a program helps chapters provide quality educational programs at the lowest possible cost. Since the chapter's members are the primary source of contributed support, a successful educational event depends upon their becoming highly involved in planning, organizing and conducting the event.

During the early planning stages of an educational program, the types of contributed support needed should be mentioned in the chapter newsletter. Members will then have enough information and lead time to determine the type of assistance they can provide and to ask their employers for staff support.

Staff Support

An essential form of contributed support, and the most common, is staff support. This consists of assistance in preparing speakers' confirmation letters and contracts; developing and mailing program brochures and other advertisements; receiving and accounting for mail registrations; preparing handouts and name badges; staffing the registration and information desk before and during the program; identifying target audiences and their educational needs; and suggesting program topics, formats and speakers. It is helpful if those primarily responsible for major portions of the program are strategically placed in their organization so as to have at their disposal administrative and other support services.

Presenters

Another source of contributed support is providing presenters at no charge to the chapter. As discussed in Chapter 2, professional organizations, private firms and government entities are excellent sources for speakers. Quite often, these speakers will be available at little or no cost. In addition, private firms and other organizations may sponsor a luncheon or dinner in exchange for the goodwill they receive as a result. All types of contributed support should be explored when planning any educational program.

Facilities

Although employers of the chapter's membership may offer their training facility to a chapter, educational facilities are frequently provided by hotels and convention bureaus in exchange for a luncheon or dinner with a guaranteed attendance. Of course, public and academic facilities may be available to the chapter at no charge, and this possibility should be explored first.

Speakers' Gifts

Vendors may contribute speakers' gifts in exchange for recognition in the program brochure and other advertisements. The vendor should then be provided with copies of the brochure and advertisement. Although it is not necessary to describe the specific items contributed, the company should be identified as a local supporter. This recognition will encourage vendors to support other programs and activities hosted by the chapter.

Corporate Sponsorship

The AGA has established a Corporate Partner membership program that provides private sector companies with specific benefits. Many of these Corporate Partners have offices throughout the U.S. and should be contacted to determine whether they can provide support for the chapter's activities, sometimes in exchange for exhibiting their products or services at the chapter's educational events. Some chapters have established a fee schedule ($XX to sponsor the conference breaks or lunch, tote bags, coffee mugs, etc.) so that they are consistent with multiple vendors.

Other Contributed Support

Other forms of contributed support include paper, printing services and postage. This type of support may be provided by private organization; however, employers of chapter members contribute a tremendous amount of these types of resources for educational programs designed to serve the particular needs of their staff.

Recognition

Whenever members, employers, private firms or vendors provide support to ensure a successful educational program, the organizers should extend their gratitude, both verbally and in writing. All providers of support, including the employer's staff and chapter members who donated their time and energy to the educational program should be recognized in a printed program, if one is to be produced, and/or at some time during the event. Often, program organizers receive credit for a successful program that could not have been accomplished without their support.

Following the event, a simple thank you letter will let these people know their efforts are appreciated. An example of a thank you letter follows.

Dear (name of person, company or agency):

AGA's XYZ Chapter thanks you for your support of (event). Because of your contribution, we were able to lower our costs, thereby allowing a greater number of people to attend the educational event. We deeply appreciate your support, which contributed significantly to the success of our educational efforts.

Chapter Six: Publicizing and Promoting the Event

Because so many different educational events are offered by public and private sector organizations, it is important that AGA-sponsored events are effectively communicated to heighten members' interest and increase nonmembers' involvement. Some considerations:

- Take advantage of technology. Advertise the event in your chapter's newsletter, website and in e-mail messages. Chapters send text-only e-mail messages, Word attachments, PDF attachments, or HTML newsletters to promote their educational events. Many chapter send e-mail reminders that an educational event is coming up with links to the chapter website, where readers can register online, read the program and get more details about directions or accommodations. Make sure the information is clearly written, accurate and easy to read.
- If the chapter decides to mail a brochure, allow ample time for designing, printing and mailing it. The brochure should reach potential participants approximately five to six weeks before the event. If there are two general mailings, the second should reach potential participants approximately three weeks before the event. A bulk mailing service will generally offer a discount for presorted first class mail. A bulk mailing permit can reduce costs. A minimum of 200 pieces must be mailed to take advantage of bulk mail. Please contact a post office for requirements, cost and time frame information. Be sure to allow several weeks for delivery if you use a bulk mail permit.
- Make the announcement brochure eye-catching and informative. The sponsoring chapter's name and the theme of the seminar, as well as a brief description of the program, should be presented in a prominent part of the brochure. Two-color print, combined with a coordinated paper color, greatly enhances the appearance. The additional cost is minimal and a good investment. AGA's corporate colors are blue (PMS 662) and tan (PMS 4505). An in-depth website has been created to allow chapters and regions to participate in the AGA Corporate Identity Program. Located at *www.agacgfm.org/membership/identity/*, this website includes easy-to-use preformatted templates for letterhead, brochures, business cards, banners and anything else a chapter or region might need to promote their events. In addition, you will find printing instructions and a color palate to aid in your decision-making. Please also take the time to download and use the specially formatted logos that have been created just for your chapter or region. If we all work from the same Corporate Identity, we can fully maximize AGA's brand awareness.
- Secure mailing lists early. Select the target audience, identify the organizations and a key contact person within each organization. The AGA National Office can provide mailing labels for all chapter members, or chapter officers and RVPs can access this information through the Members Only website. State Societies of Certified Public Accountants, as well as local chapters of the National Association of Black Accountants and the Institute of Internal Auditors are excellent resources, as are other associations active in your area.
- Follow up mailings with telephone invitations to key individuals. This will encourage them to assess how the program addresses their educational needs and those of their staff. Subordinates are frequently encouraged to participate in an event if their boss and/or members of top management are attending.
- Include information about the event on the AGA website and on the sponsoring chapter(s) website. The National Office has a free online events form that your chapter can use to advertise your event. Visit www.agacgfm.org/events/EventForm.aspx to post your event online.
- Announce the seminar in newsletters, newspapers, weekly and monthly publications in the region. Professional organizations seek articles for their monthly newsletters. A brief description of the seminar and presenter(s) and a name and phone numbers of a contact person will help gain the attention of a specific audience. The responses to the article will assist you in tracking the publicity to see if it reaches its intended audience. Newspapers will frequently provide an announcement of the event for a minimal cost or at no cost in a calendar section.
- Use public service announcements to advertise the event. Television and radio stations have public service departments that will announce an educational event a few days prior to the program. The name of the sponsoring chapter, the theme of the event, and a name and phone number of a contact person may attract interested individuals who were not mailed a brochure. If your chapter needs a local media listing, contact the Communications Department at the National Office at *agawebmaster@agacgfm.org* for assistance.
- Receive permission to post the announcement brochure on bulletin boards of local educational institutions. Professors and students are frequently overlooked as possible seminar participants. In addition, posting the brochure on bulletin boards in federal, state and local government buildings will help to remind employees about the seminar.

How to Prepare a News Release

Most media outlets prefer to receive press releases in the following format.

1. Chapter Letterhead.

Press releases should always be printed on chapter letterhead. If this is not feasible, adding the chapter logo is essential. The chapter's name, web address, location address and phone number should be printed clearly at the top of the page.

2. Standard Introduction.

The words "FOR IMMEDIATE RELEASE" should appear in all caps in the upper left-hand margin of the page, right under your letterhead. If instead you want the media to hold off on releasing your information until a certain date, write "FOR RELEASE ON (insert date.)"

4. Headline or Title.

It's important to use an active headline to grab the journalist's attention impressing them enough to read on. The headline makes your release stand out so make sure to keep it short, active, and descriptive. Rather than using a headline proclaiming the benefits of your product, use a headline that proclaims its newsworthiness. It should be centered, in all caps, and in bold.

5. Dateline and Location.

This should provide the city you issue your press release from, and the date you're sending your release out and is often begins the first sentence of the lead paragraph for the release.

6. Lead paragraph.

Make sure the first 10 words grab your reader, and that the first paragraph provides enough information about who, what, where, when, and why, to keep him or her reading.

7. Second paragraph and body.

The second paragraph explains in detail: who cares; why you should care; where one can find it; when it will happen. Also, included in the second 'informative' paragraph is generally a quote that gives the release a personal touch and adds credibility to your story. The third and generally final paragraph is a summation of the release Include information about why this event is newsworthy.

8. Final paragraph.

The final paragraph should be one that is titled "About ABC Chapter". This is a good place to communication further information on your chapter so the journalists can understand the business of the Association.

9. Contact information.

Include as much contact information as possible. Skip a line or two after the release statement and put the word "Contact:" indicating your name, title, company name, telephone, fax, and e-mail address here.

10. Conclude with journalistic standards.

Skip two lines at the end of your release and center the symbols "###" or a "-30-" to indicate there is no copy to follow. Journalistic standards have set basic parameters to define the end of a press release: three # symbols, centered directly underneath the last line of the release.

Sample Press Release

FOR IMMEDIATE RELEASE

October 18, 2006
Contact: Jennifer I. Curtin, MPA
Director of Public Affairs, AGA
703.562.0770
jcurtin@agacgfm.org

AGA RESEARCH STUDY DISCUSSES THE USEFULNESS OF PERFORMANCE & ACCOUNTABILITY REPORTS (PARs)

Alexandria, VA – One of the tenets of citizen-centric government is public accountability – providing information so that citizens can judge for themselves just how well their government is performing and managing resources is the subject of a cooperative study, released today by the Association of Government Accountants (AGA).

The study entitled, *PAR: The Report We Hate to Love*, is the sixth in a planned series of studies covering areas of interest to government financial management community. The project was broken into four parts: a survey of current writings on public reporting, a discussion forum, face- to-face interviews and an Internet survey. AGA set forth to determine the usefulness of Performance and Accountability Reports (PARs) for their intended audiences, and how that usefulness can be improved.

PARs evolved out of a series of cascading government management reforms, beginning in the early 1990s with the Chief Financial Officer (CFO) Act. Legislators saw the need to develop sound financial management practices, thus creating the framework for capturing, measuring and reporting performance information necessary to manage for results for state, local and federal governmental entities.

The project's goal was to gain the views of users or preparers of the PAR either through face-to- face interviews or through an online survey. Close to 100 people representing federal, state or local government agencies participated in this process. More than 90 percent of the survey respondents agreed that: different users have different information needs; information at the business level is more useful; highest priority is accountability to the taxpayers; and the report should focus on a few key metrics.

Recommendations for improvement include: focus on performance, not compliance; one size does not fit all; leverage the web and cascade information though links; keep documents succinct and simple; focus on a few metrics and include unit cost metrics; and reach out to a broader audience.

"Accountability and transparency should be the goal for all governmental entities," says Relmond P. Van Daniker, DBA, CPA, Executive Director, AGA. The PAR enables state, local and federal government to tell taxpayers how their money was spent during the past fiscal year. Understanding the business of government is vital."

This report was commissioned by AGA's Corporate Partner Advisory Group. It was sponsored by PricewaterhouseCoopers, AOC Solutions, Booz Allen Hamilton, IBM and CSC. Joseph A, Kull, CGFM, Director of Federal Financial Management Services, PricewaterhouseCoopers; Lawrence Dyckman, Booz Allen Hamilton; Frank Sullivan, CGFM, AOC Solutions; Amit Magdieli, IBM; Charles Carrigan, CGFM, CSC; and David Bell, CGFM, Office of the Inspector General, U.S. Department of Health and Human Services led the research effort.

To view the report, visit: *www.agacgfm.org/research/downloads/CPResearchNo6PAR.pdf*.

The Association of Government Accountants is a 14,000-member professional Association devoted to meeting the continuing professional education needs of financial managers at all levels of government, the private sector and academia. For more information about the Corporate Partners Advisory Group (CPAG) Research Program, please contact Anna Miller, AGA Director of Research at 800.AGA.7211, ext. 313, e-mail at *amiller@agacgfm.org*, or visit AGA's website at *www.agacgfm.org*.

###

Most AGA members attending an educational event want to be able to claim continuing professional education (CPE) credits, which not only better serves the members, but will attract attendees beyond the chapter. A wider audience can make the training more economically feasible.

The greatest demand for CPE credits is from CPAs (in most cases, required by the state in which they are licensed), government auditors (required by GAO) and CGFMs. All active CGFMs are required by AGA to complete at least 80 hours of CPE every two years in government financial management topics or related technical subjects. Educational events sponsored by the AGA National Office or individual chapters will satisfy the CGFM CPE requirements.

The content of most AGA educational events meets CPE requirements. However, certain administrative requirements must be met before licensing state boards of accountancy, professional association, and the federal government recognize the training as qualifying for CPE credit.

Each state board of accountancy sets the requirements for credits within that state. Most state boards have adopted, as at least the minimum quality level, the standards of the National Association of State Boards of Accountancy (NASBA) for continuing education programs. Some states also require sponsorship agreements.

CPE requirements are among the generally accepted government auditing standards established by GAO. These standards can be found in GAO's Yellow Book and are listed with other federal CPE requirements later in this chapter.

Any special CPE requirements should be advertised. For example, Georgia requires at least 20 hours of CPE in auditing and accounting. GAO requires at least 24 hours of CPE directly related to government auditing. Thus, a course in government auditing meeting general CPE requirements would also meet both the Georgia and GAO special requirements.

Attendees of an educational event are usually responsible for signing the attendance list at each session. The participant may also be required to obtain certification of attendance from the sponsoring chapter of an education event. An example of a CPE certification is included in this chapter.

NASBA Guidelines

The material presented must relate to topics that will improve an auditor's professional competence and not to strictly administrative policy.

The course should include a handout package containing an outline of the material presented, a statement of objectives, prerequisites, presentation method, designation of the targeted audience and recommended CPE. (Recommended CPE should be measured in terms of 50-minute contact hours.)

The course material should include a biographical sketch of the instructors showing their competence to teach the material.

A sign-in sheet should be prepared and circulated for each course session and maintained on file by the sponsoring organization.

Participants should be provided with certificates showing the course was completed (CPE form).

The program should include some means for evaluating quality.

All course information should be maintained on file by the sponsoring organization for a period of four years.

Continuing Education Requirements by GAO

Generally accepted government auditing standards (GAGAS) require that the staff assigned to conduct an audit or attestation engagement should collectively possess adequate professional competence for the tasks required.

To meet this requirement, auditors performing work under GAGAS, including planning, directing, performing field work or reporting on an audit or attestation engagement, must maintain their professional competence through CPE. Therefore, each auditor performing work under GAGAS should complete, every two years, at least 80 CPE hours that enhance the auditor's professional proficiency to perform audits and/or attestation engagements. Auditors should take subjects directly related to government auditing, the government environment, or the specific or unique environment in which the audited entity operates for at least 24 of the 80 hours of CPE. Auditors should complete at least 20 hours of the 80 in any one year of the two-year period. Auditors who are only involved in performing field work but not involved in planning, directing, or reporting on the audit or attestation engagement and who charge less than 20 percent of their time annually to GAGAS audits and attestation engagements are subject to the 24 hour requirement for government-related CPE in each two-year period but do not have to comply with the remainder of the 80-hour CPE requirement.

CPE programs are structured educational activities with learning objectives designed to maintain or enhance participants' knowledge, skills, and abilities in areas applicable to performing audits or attestation engagements. Determining what subjects are appropriate for individual auditors to satisfy both the 80-hour and the 24-hour requirements is a matter of professional judgment to be exercised by auditors in consultation with appropriate officials within their audit organizations. Among the considerations in exercising that judgment are the auditors' experience, the responsibilities they assume in performing GAGAS audits or attestation engagements, and the operating environment of the audited entity.

Individual auditors have primary responsibility for improving their competencies and for meeting CPE requirements. The audit organization should have quality control procedures to help ensure that auditors meet the continuing education requirements, including documentation of the CPE completed. GAO has developed guidance pertaining to CPE requirements to assist auditors and audit organizations in exercising professional judgment in complying with the CPE requirements. This guidance, Government Auditing Standards: Guidance on GAGAS Requirements for Continuing Professional Education, GAO-05-586G (Washington, D.C.: Apr. 2005), can be found on GAO's Government Auditing

Standards website (*www.gao.gov/gov-aud/ybk01.htm*).

External specialists assisting in performing a GAGAS assignment should be qualified and maintain their professional competence in their area of specialization but are not required to meet the CPE requirements described here. However, auditors who use the work of external specialists should assess the professional qualifications of such specialists and document their findings and conclusions. Internal specialists who are part of the audit organization and perform as a member of the audit team, should comply with GAGAS, including the CPE requirements.

Federal Requirements

Federal legislation required that the federal inspectors general comply with audit standards established by the Comptroller General of the United States for audits of federal organizations, programs, activities, and functions. In addition, the inspectors general must ensure that audit work conducted by nonfederal auditors of federal organizations, programs, activities and functions complies with these standards.

The Office of management and Budget (OMB) has included these standards as basic audit criteria for federal executive departments and agencies.

The Single Audit Act of 1984 requires that these standards be followed by auditors auditing state and local governments that receive federal financial assistance. OMB Circular A-110 requires that these standards be followed in audits of entities receiving federal assistance. Auditors conducting government audits under agreements or contracts may be required to comply with these audit standards under the terms of the agreement or contract.

Several state and local audit organizations, as well as several nations, have officially adopted these standards. The Institute of Internal Auditors and the American Evaluation Association have also issued related standards.

STATE REQUIREMENTS FOR CONTINUING EDUCATION PROGRAMS

STATE	CPE REQUIREMENTS	SPONSOR REQUIREMENTS NEEDED	SPECIAL NOTES
Alabama	YES	NO	
Alaska	YES	NO	
Arizona	YES	NO	
Arkansas	YES	NO	
California	YES	NO	
Colorado	YES	NO	
Connecticut	YES	NO	
Delaware	YES	YES	Special courses must be approved 30 days in advance.
District of Columbia	YES	NO	
Florida	YES	YES	Specific courses must be approved four weeks in advance.
Hawaii	YES	NO	
Georgia	YES	NO	
Idaho	YES	NO	Sponsorship no longer needed as of 3/29/88. Specific courses must be approved.
Illinois	YES	YES	
Indiana	YES	YES	Specific courses must be approved 45 days in advance.
Iowa	YES	NO	
Kansas	YES	NO	
Kentucky	YES	NO	
Louisiana	YES	NO	
Maine	YES	NO	
Maryland	YES	YES	Each program must be approved.
Massachusetts	YES	NO	
Michigan	YES	NO	
Minnesota	YES	NO	

STATE	CPE REQUIREMENTS	SPONSOR REQUIREMENTS NEEDED	SPECIAL NOTES
Mississippi	YES	NO	
Missouri	YES	NO	
Montana	YES	NO	
Nebraska	YES	NO	
Nevada	YES	NO	
New Hampshire	YES	NO	
New Jersey	NO	NO	
New Mexico	YES	YES	Each course must be approved
New York	YES	YES/NO	Sponsor approval is not required for in-house training, but is required if offeredoutside.
North Carolina	YES	NO	
North Dakota	YES	NO	
Ohio	YES	YES	Special requirements
Oklahoma	YES	YES	
Oregon	YES	NO	
Pennsylvania	YES	NO	
Puerto Rico	YES (1/19/90)	NO	
Rhode Island	YES	NO	
South Carolina	YES	NO	
South Dakota	YES	NO	
Texas	YES	YES	A course description must be submitted for each course
Tennessee	YES	NO	
Utah	YES	NO	
Vermont	YES	NO	
Virginia	YES	NO	
Virgin Islands	NO	NO	
Washington	YES	NO	
West Virginia	YES	NO/YES	CPE is state society requirement. No requirement for in-house sponsorship is required if offered outside.
Wisconsin	NO	NO	
Wyoming	YES	NO	

NOTE: State requirements may change year-to-year. Please contact your State Board of Accountancy to verify.

SAMPLE OF CPE FORM FOR NATIONAL EVENT

REQUEST FOR CONTINUING PROFESSIONAL EDUCATION CREDIT

____ attended the Association of Government
(NAME – PLEASE PRINT)

Accountants' "Today's analysis – Tomorrow's Reality" research symposium on September 14-15, 2006/

I, ____, participated in thirteen (13) hours of instruction
(SIGNATURE)

and apply for Continuing Education Credit under the statutes of the State of ______________________________.

The Association of Government Accountants subscribes to the Statement of Standards for Formal Group and Formal Self-Study Programs issued by the American Institute of Certified Public Accountants. Complete this form as a record of your attendance and return it to your site facilitator. Your form will be checked against the sign-in sheets and a "verified" copy will be returned to you. Check with your state board of accountancy or CPA society to be sure our procedures will meet their criteria for CPE credits.

Verified by:

____

AGA Education Coordinator

September 14-15, 2006

To ensure prompt receipt, please print your return address below:

Name: ____

Address: ____

City, State, Zip: ______________________________________

SAMPLE OF CPE FORM FOR CHAPTER EVENT

RECORD OF SATISFACTORY COMPLETION OF CONTINUING EDUCATION

Participant Name: ______________________________

Course Title: ______________________________

Date(s): ____________ ____________
FROM TO

Time(s): ____________ ____________
FROM TO

Location: ______________________________

Instructor(s): ______________________________

____

Course Number: ______________________________

Recommended CE Hours: ______________________________

Texas Sponsor ID No: ______________________________

Authorized Signature ______________________________

Title ______________________________

For CPAS and those subject to the Yellow Book CE requirements:
This form should be retained for a period of five (5) years.

Chapter Eight: Developing Materials for Participants

The effectiveness of educational programs can be greatly enhanced by the use of handouts. Therefore, every attempt should be made to make the preparation of handouts a regular part of the planning for professional education in your chapter. The types of handouts, however, can vary greatly depending on the complexity of the topic to be covered. This chapter will provide some pointers on different types of handouts that should be considered when planning for an educational event.

Speaker Biography

Distributing a short biographical sketch of the speaker allows participants to be aware of and evaluate the speaker's background. In addition, participants prefer to "know" the speaker and to be able to identify the speaker with a particular area of expertise and with specific professional affiliations. A summary of the speaker's professional experience facilities the establishment of speaker/participant relationships.

Roster of Participants

A listing of the persons attending the educational program, along with their office affiliation, lets participants know who their counterparts are. This "who's-who" listing is especially useful for contacting attendees after the event. (Sometimes, with a very large audience for a lecture or panel discussion, this type of handout becomes less meaningful.) An early, preregistration deadline is necessary if a list is to be prepared.

Program Agenda

A one- or two-page program agenda is another simple-to-prepare, but quite useful item that should be considered as a handout. An agenda lets participants know before hand what to expect and may be required for CPE certification.

Copies of Slides

PowerPoint slides are easily copied and should be provided to participants. Although the use of overhead transparencies and slides can also add significantly to the effectiveness of any educational program, very rarely can the projected images be read by persons in the back of a large room. Providing copies of the transparencies or slides during the presentation helps participants follow the presentation. Additionally, the handout pages can be used for note taking, thus allowing participants to add related information.

Even if the speaker does not use transparencies and slides during the presentation, it is a good idea to provide handouts summarizing the key points. These summaries, like copies of slides, help participants to follow the discussion—especially if the topic is a complex one—and provide a prestructured format for not taking.

Case Studies and Suggested Solutions

The registration fee should include the cost of giving each participant a description of all case studies and exercises to be covered.

Table of Contents/Manual

If the handout material is voluminous, consider numbering the pages, providing a table of contents, and dividing the sections with tabs. This makes it easier for the speaker to refer to specific pages. Also provide a cover sheet that lists the title, date, place and sponsor of the event.

Published Reference Material

Frequently the subject of an educational event will be based on some type of published material, such as the GAO Yellow Book, the Single Audit Act, or AICPA Statements on Auditing Standards. In such cases, every effort should be made to provide copies of that published material to participants. This possibility will depend upon the type of material and financial resources available to the chapter for acquiring the sufficient number of copies. However, if such information is important, its cost can and should be included in the registration fee.

Course Evaluation

Course evaluation forms are required to be used for educational events when CPEs are offered. These forms should be designed to provide participants the opportunity to evaluate the speakers, course content, handout material, facilities, program administration and overall usefulness of the course. The feedback from evaluation forms will frequently result in suggestions to make the next chapter-sponsored educational event more effective and more successful and provide useful suggestions for future event topics and speakers.

Preparation of Handouts

Make the effort to discuss with the speaker the type of handouts that would be best suited for the method and topic of the presentation. The preparation of handouts is the speaker's responsibility since he or she is most familiar with the subject matter and the specific contents of the presentation. However, the organizing chapter does have a responsibility to provide for and support the speakers' needs. This support might include typing the material for presentation summaries or arranging for the reproduction of a sufficient number of copies of the handouts. Further, certain types of material such as a roster of participants, course evaluation forms, and certificates of completion should be prepared by the sponsoring chapter.

Summary

The usefulness of handouts depends on sound planning. Have a clear understanding of who will be responsible for preparing each type of handout. Make certain that you have more than enough copies of the handouts for the expected number of participants. If you run out, make a list of those who did not receive them so that copies can be sent immediately after the program.

Chapter Nine: Evaluation of Educational Events

Evaluations are very helpful both to committee members who have presented an event and to those who will plan the next event. The challenge is to get the program participants to complete the form. Therefore, keep it quick and simple. Included in this section is an example of the evaluation format recommended by the National Education Committee.

Each chapter may need unique feedback from participants and should include additional questions in the evaluation, if desired. Examples of questions for a single-topic event are shown below:

Statement of seminar objectives:

UNCLEAR 1 2 3 4 5 CLEAR

Attainment of seminar objectives:

POOR 1 2 3 4 5 EXCELLENT

Questions on the quality of the instructor, materials and presentations may be referenced to each speaker in a multitopic format. Evaluation forms in such events may be made at the end of the seminar.

EVALUATION FORM

"Today's Analysis—Tomorrow's Reality" 2006 Research Symposium

September 14-15, 2006

Williamsburg Hilton, Williamsburg, Virginia

We need your input. Your evaluation of the Research Symposium and your suggestions for future educational programming are very important. Please take time to share your thoughts by completing this form and returning it to the session monitor or the registration desk. If you prefer to finalize the form upon your return home, please send the completed form to AGA by September 29, 2006.

Thank you.

1. Employer:

o Federal Government   o Academic   o State Government   o Retired

o Local Government   o Student   o Private Sector   o Other ____________________

2. Position:

o Accountant   o Financial Manager   o Budget Specialist   o Analysis Reporting

o Contract Auditor   o Systems   o Auditor   o Other ____________________

3. What factors influenced you to attend this Research Symposium?

a. ____

b. ____

c. ____

4. Were your expectations of the symposium met? If yes, how? If not, what would have made the difference?

____

____

____

____

5. The highlights or most rewarding aspects of this symposium were:

____

____

____

6. In my opinion, the educational programming at this symposium was: (*consider value of content to your professional needs*)

○ Excellent ○ Good ○ Fair ○ Poor

7. The following session(s) were of most value:

____

____

8. The extent to which the promotional material and other communication from AGA provided adequate information.

____

____

9. Comment on the facility and its location.

____

____

10. Share any suggestions for future research symposiums. What could we do differently?

____

____

____

____

Return this form to the registration desk or send it to:

Association of Government Accountants
2208 Mount Vernon Avenue
Alexandria, VA 22301

Thank you.

ASSOCIATION OF GOVERNMENT ACCOUNTANTS

______________________ CHAPTER

Seminar Evaluation Form

Date : ________________________

1. Organization of Seminar:

   Poor 1 2 3 4 5 Excellent

2. Length of seminar:

   Too short 1 2 3 4 5 Too long

3. Difficulty level:

   Too easy 1 2 3 4 5 Too difficult

4. Amount of material covered:

   Too little 1 2 3 4 5 Too much

5. Seminar is relevant to job duties:

   Irrelevant 1 2 3 4 5 Highly relevant

6. Quality of instruction:

   Poor 1 2 3 4 5 Excellent

7. Quality of instructor:

   Poor 1 2 3 4 5 Excellent

8. Quality of materials and handouts:

   Poor 1 2 3 4 5 Excellent

9. Method of presentation:

   Poor 1 2 3 4 5 Excellent

10. Would you recommend this seminar to others:

    Never 1 2 3 4 5 Definitely

11. Overall evaluation:

    Poor 1 2 3 4 5 Excellent

Other comments or suggestions on this seminar/workshop:

____
____
____
____
____
____
____
____
____
____

What other topics/speakers would you be interested in for possible future seminars/workshops?

____
____
____
____
____
____
____
____
____
____
____

Chapter Recognition Program Program Year 2006-2007

A maximum of 4,000 credits can be acquired by your chapter in the section for Chapter Educational/Training Events. The purpose of the Education and Professional Development section within the CRP is to encourage quality education and foster professional development to enable your members to achieve greater heights in their employment and meet certification requirements. Professional development encompasses many different educational opportunities. The important thing is to have an effective, quality educational program that meets the needs of your members, potential members and employers in your area (and remember to have FUN with it)! Note: Goals 1 through 3 are listed to help you plan your chapter education to meet the needs of your members and the professional accountability community.

GOAL 1. Education to help accountability professionals meet CPE requirements

Chapter members who hold professional certification must comply with CPE requirements. Your chapter can serve these members by providing quality education. Typically a CPE hour is granted for each 50 minutes (one hour) of participation in programs and activities that qualify. At conferences and conventions where individual presentations are less than and/or more than 50 minutes, the sum of the presentations should be considered as one total program (CPE hours equal the total content minutes divided by 50 for each day of the event). The chapter's CPE records should include the following information for each CPE program or activity:

- Sponsoring organization (your AGA chapter)
- List of attendees
- The location at which the program was given
- The title of the program and a brief description of its contents (subject/topics covered)
- The dates and length of the program
- The number of CPE hours granted

In addition, your chapter should retain

- CPE records for a minimum of three years
- Participant evaluations of each program and instructor(s)
- An outline of each program that shows the name of the instructor, learning objectives and subjects and topics covered

Typically, these requirements can be met with a signed CPE form that delineates the topics and times, and a sign-in list for attendees. ***Please contact your state board of accountancy to determing if your educational activities meet the requirements and CPE standards for other certifications.*** See *www.aicpa.org/states/stmap.htm*.

Register your chapter with your state board of accountancy as a sponsor of CPE-qualified events. Identify sponsor number—150 credits.

GOAL 2. Education to help individuals attain the skills to pass the CGFM Exam and maintain their certifications

The Certified Government Financial Manager (CGFM) Program is an integral part of AGA. The CGFM is recognized as the mark of excellence in government financial management, and is another excellent tool in the growth and development of a well-rounded chapter. Provide your members and potential members with the opportunity to gain the skills to meet the examination requirements of the CGFM. Credits are available in Section III - Certification.

GOAL 3. Professional development to help all members and prospective members obtain additional skills

Obtaining additional skills enhances an individual's employment performance. Professional development assists in the goal of advancing government accountability through enhancing the knowledge and skills of accountability professionals. Quality professional development targeted toward the needs of your members and area employers is an important part of the AGA mission and will go far in the promotion, development, growth and foundation of your chapter.

Credits are awarded based upon the CPE credits available for the educational or professional development event. All CPE must at a minimum be in compliance with the CGFM CPE requirements. Many chapters provide CPE that also meets other certifications held by chapter members such as CPA, CIA, CFE, etc.

CPE credits provided or co-sponsored by your chapter (in accordance with CGFM CPE requirements):

- Monthly Meetings with Speaker—150 credits per CPE hour
- Seminars/Training—150 credits per CPE hour
- Conferences—150 credits per CPE hour
- Audio Conferences—150 credits per CPE hour
- GFM Courses—refer to Section III, Goal 3

Note: Although credits are awarded by CPE hour provided, it is the quality of the professional development that matters most. Are your chapter events of a quality that you and AGA can be proud?

Submit contact information to the AGA Education Department of outstanding speakers used at your chapter event—25 credits per speaker

Submit contact information of your chapter member(s) who make presentations at other chapter's educational event—25 credits per chapter member.

GOAL 4. Provide awareness and marketing of educational events

Education and Professional Development is one of the best ways to get the word out about AGA and your chapter. Many people become AGA members due to the high-caliber educational events. Help promote AGA and your chapter by showcasing your educational events and reaching out to potential new members. See Section IV Communications.

- Market AGA and chapter educational events to the government accountability community, members and nonmembers—50 credits each promotion.

- Partner with other AGA chapters, professional organizations or governmental entities on educational events—75 credits each joint event.
- Publish and distribute a training calendar brochure to the membership (and/or post it to the chapter website)—250 credits. Market the brochure to the government accountability community—additional 50 credits.
- Post chapter educational events to the AGA website Events Calendar—25 credits per event.

ASSOCIATION OF GOVERNMENT ACCOUNTANTS EDUCATION PLAN

May 1, 2006 – April 30, 2007

Chapter: ______________________________ ____________

Approved

Region: ______________________________

The following plan for educational events/training sessions of two or more hours is submitted for the allowable points under the CHAPTER EDUCATIONAL/TRAINING EVENTS section.

Title (Include speakers and/or topics)	Days (hours)	Date	Location

______________________ ______________________________

Date Signature and title

NOTE: Your educational event/training session plan must be filed by October 1 to receive full credits; by December 1 for partial credits. The events/sessions listed in the plan must be for two or more training hours. Additional information can be attached. If plans for an event are not complete, please indicate when additional information will be submitted. A template to assist chapters in completing their education plans can be found at *www.agacgfm.org/education/education_plan.*

REPORT ON EDUCATIONAL PROGRAM CONDUCTED

(Date of Event) *(Your Chapter Name)*

To: Chair, Chapter Recognition Committee

From:

2208 Mount Vernon Avenue, Alexandria, Virginia 22301 • 703.684.6931

INSTRUCTION PROVIDED IN:	# Hours	x	# Attendees	=	Total # of hou	7 = total Student Days
Auditing						
1.						
2.						
3.						
Accounting/Budgeting						
1.						
2.						
3.						
Financial Management						
1.						
2.						
3.						
Contract Auditing						
1.						
2.						
3.						
Management Skills						
1.						
2.						
3.						
Computer/ADP Skills						
1.						
2.						
3.						
Personal Development						
1.						
2.						
3.						
Other						
1.						
2.						
3.						

EVALUATION:

______ Report attached ______ Report will be sent to National Office _______ No report will be written for this event

ON THE REVERSE SIDE, PLEASE COMMENT ON THE FOLLOWING:

1. What topics/speakers would you use again; suggest other chapters use?
2. Other comments or suggestions for other chapters to use

PROGRAM ARRANGEMENT CHECKLIST

Prepared for each session

Presenter's Name: ______________________________

Name of Session: ______________________________

Inclusive Date of Session: ______________________________

Facility: ______________________________

Name of Meeting Room: ______________________________

No. of Participants: ______________ No. Meeting Days: ______________

	Day One	Day Two
EQUIPMENT NEEDS:		
Screen	○	○
Overhead Projector	○	○
Easel	○	○
Slide Projector	○	○
Podium	○	○
Microphone	○	○
Other	______________	______________
EQUIPMENT RESERVED BY FACILITY (F); BY CHAPTER (C):		
Screen	○ F C	○ F C
Overhead Projector	○ F C	○ F C
Easel	○ F C	○ F C
Slide Projector	○ F C	○ F C
Podium	○ F C	○ F C
Microphone	○ F C	○ F C
Other	______________ F C	______________ F C
SEATING REQUIREMENTS:		
Panel	○	○
Rounds	○	○
T Formation	○	○
U Formation	○	○
L Formation	○	○
Square Formation (*see attached layouts*)	○	○
ROOMS:		
Hospitality Rm.	○ ______________	○ ______________
Mtg. Rm. name	○ ______________	○ ______________

SUMMARY EVALUATION

Please rate your overall reaction to the educational program:

RATING					
	(Poor) 1	2	3	4	5 (Excellent)
1. Appropriateness of subject matter					
2. Coverage of subject matter					
3. Effectiveness of the presentation					
4. Applicability of instructional materials					
5. Length of presentation					
6. Suitability of facility					

Please report the following information:

1. Number of attendees preregistrered at your site: __________

2. Number of on-site registrations: __________

   Total number of attendees: _____________

3. Did the event qualify for Continuing Professional Education (CPE) credit? o Yes o No

Please comment on the following:

1. What topics/speakers would you use again; suggest other chapters use?

____

____

____

____

2. Other comments or suggestions for other chapters to use.

____

____

____

____

Please attach a copy of the flyer or announcement used to promote this event. Return this form to the National Recognition Committee at AGA's National Office by ___________.

(date)

Chapter 11: Recruitment & Retention at Chapter Events

Membership is the lifeblood of our Association. Serving the needs of our members is the driving force behind our education programs, our certification program, our publications and our advocacy of issues affecting government financial management.

Recruiting new members and retaining current members takes everyone working together, especially at the chapter level. One of our best marketing tools is the positive experience of other members. Remember that the quality of your activities is very much related to membership growth and retention. If your programs are lacking, your membership statistics will also suffer.

Recruiting at Chapter Meetings and Seminars/Workshops

Your President and Membership Director should greet people as they come into the seminar. Be customer-oriented. You are putting on the seminar as a SERVICE to your clientele. If you don't take care of your customers, somebody else will.

1. Set the registration fee for nonmembers higher than the member rate and equal to the cost of membership to encourage participants to become members.
2. Ask each member in your chapter, through your newsletter or a letter, to name someone they feel would benefit from the meeting, send these prospects a special letter of invitation from your president, and don't forget to enclose a membership application.
3. Request all chapter function attendees to sign an attendance sheet, indicate whether they are a member, and provide their business phone number. A Membership Committee member should then follow up with a phone call to the nonmembers.
4. Keep a supply of membership applications and promotional brochures listing membership benefits available at the registration desk of all chapter functions. Make sure all guests, visiting nonmembers, and potential sponsors receive an application and a copy of the brochure or letter. A Membership Committee member stationed at the registration desk can answer and recruit prospective members.
5. Hold joint meetings with other local professional societies such as the American Society of Military Comptrollers (ASMC), the Institute of Internal Auditors (IIA) and/or the state CPA society.
6. Provide a financial incentive to new members by providing them with a free or discounted meal at their first meeting.
7. Offer a registration discount to every member who brings in one or more nonmember registrants to a chapter event.
8. Hold a special "invitation only" reception for nonmembers (and new members) at your meeting. Use this opportunity to have a special speaker. It is important to also have your committee chairs there to make a pitch for the different activities that they might be interested in getting involved in.
9. Ensure that meetings and programs qualify for Continuing Professional Education (CPE) credit and publicize it. This could attract CGFMs, CPAs and individuals that hold other certifications.
10. Most important, make sure that all of your conference promotion materials contain membership information. List not only the costs, but also the BENEFITS!

Appendix I: AGA National Education Policy

Education is a central focus of AGA. The Association has five stated objectives, four of which specifically focus on education. Education is a service to our members and to the government financial management profession and provides opportunities for professional development, facilitates the interchange of ideas, promotes quality financial management and brings together financial managers in government with others in the community.

Education is provided by the Association on a multilevel basis. Local chapters offer educational and training events to respond to the needs of local chapter members and/or the local professional community. Chapters within a specific area can join together to hold more extensive educational events and make available wider professional development opportunities for members. Some educational programs require significant financial resources as well as assistance/development by the National Office. The purpose of these statements is to clarify national, regional and chapter roles related to association education and training programs.

National Organization National Executive Committee (NEC)

The National Executive Committee (NEC) establishes the structure for the educational events offered by the AGA national organization. This includes forecasting a three- to five-year direction for AGA's education efforts from which events can be scheduled for the current 12- to 18-month cycle. The NEC takes the lead in setting education policy, overseeing policy execution, and evaluating national educational events.

National Office Staff

Under the direction of the NEC, the Association's paid staff administers events sponsored by the national organization for members and the broader government financial management community. The array of programs include the Professional Development Conference & Exposition, the National Leadership Conference, the Internal Control & Fraud Conference, the Performance Management Conference, workshops, seminars in national and regional locations, and other large-scale programs and events.

In addition, the National Office develops and conducts specialized education and training events for program managers who are interested in learning more about governmental financial procedures and programs. Special publication series or other salable products that result from the educational program are coordinated, promoted and marketed by the National Office.

National Educational Programs

The National Office works with local chapters and encourages local participation in all national events. Chapter involvement will be determined on a case-by-case basis with tasks and finances agreed upon to the extent of the chapter's interest or ability to assist. However, the National Office recognizes that there will be events for which chapters may not have the resources or interest in becoming involved.

National educational events, in addition to fulfilling the educational needs of members, should carry their share of the Association's revenue stream. The National Office determines when and where events will take place, assuring that there is no direct conflict with local and regional chapter events.

Local chapters involved with national educational programs shall be reimbursed for any direct costs (such as printing, hotel fees, etc.) incurred. Local chapters can also be compensated for other participation (depending upon the degree of their involvement in the national education program) once the break-even point is reached. It is anticipated that local chapter involvement will vary and that any compensation above direct cost reimbursement shall be in the form of an incentive for increased attendance.

Local Chapters

Chapter Events

Current authority and decision-making responsibility for conducting educational and training programs on a local level is held by the individual chapters. Simply stated, chapters decide what local events to conduct, when to conduct them and what registration fee to charge. It is the responsibility of the chapters to seek the assistance of the National Office when deemed appropriate. Revenue generated from conducting local educational programs generally remain with the chapter.

Coordination with National

The NEC and National Office staff work to provide services for the benefit of chapters and members and chapters are encouraged to participate in all national events. Should national educational programs not meet local chapter needs, it is the chapter's responsibility, through the regional vice president, to make alternatives known to the NEC.

The National Office staff can provide assistance and advice to local chapters in various ways including:

- Assisting in the conceptual development of program content, selection of location, preparation of budget and scheduling of programs.
- Suggesting educational course presenters and speakers.
- Recommending sources for program materials.
- Supplying samples of formats and ways to monitor programs.
- Providing input in evaluating programs.

Direct expenses incurred by the National Office in support of chapter events (e.g., printing, travel, etc.) shall be reimbursed by the chapters on a fee schedule developed by the executive director and approved by the NEC. Any assistance (beyond the advice and assistance role) requested by local chapters from the National Office involving a product or extensive use of staff time must have the prior approval of the executive director and shall be reimbursed by the local chapter.

Regional Events

The management of regional events can be led by the National Office or by the local chapters. Involvement of the National Office in the conduct of regional events is at the discretion of the participating chapters. However, the conduct of a regional event by the National Office will normally be done under a contractual arrangement. Revenue distribution will be decided on a project-by-project basis. The philosophy of the Association is that chapters should share fairly in revenues to the degree they are involved in the event.

APPENDIX II: CHAPTER EDUCATIONAL EVENT TIMELINE

Nine Months Prior to Event

Establish schedule, sequence and scope of program committee's responsibilities. Committee reviews proposals for event theme, researches potential sponsors, and prepares and develops a budget.

Eight Months Prior

Confirm themes and prepare first draft of proposed program with topics. Identify audiences for flyer mailing and sources for mailing lists.

Finalize written descriptions of program sessions. Establish goals of sponsorship programs (if applicable). Complete full listing of proposed speakers and presenters.

Seven Months Prior

Telephone calls to invite speakers with explanation of program's theme, policies for speakers at chapter AGA programs, and steps to be taken for presenting at the event (i.e., if speakers will be preparing a paper, they need to know timelines for submission, the review process and printing procedures).

Six Months Prior

Confirmation letters sent to session speakers with requests for audio-visual needs, biography, and outline of presentation.

Five Months Prior

Collect mailing lists from National Office and committee contact person. Suggestions for lists are:

- Member & suspended members
- Nonmembers who attended previous audio conferences
- State CPA Society
- Local area chief financial officers
- Chapter's nonmember prospect list
- Agency head list from chapter's region
- Private organizations
- Academic departments at colleges/universities

Four Months Prior

- Chapter contact person researches appropriate locations, gathering costs/contact name and telephone number.
- Coordinator signs contract with designated facility confirming costs of renting space (if applicable), audio-visual needs, meal menu, overnight rooms, layout and need for meeting rooms, and registration table.
- Create mailing labels.
- Contract with mailing house to process and post on timely basis.

Three Months Prior

Write copy for flyer, chapter newsletter, TOPICS, AGA Event Calendar and media release. Include title of program, names and titles, session descriptions, hotel logistics, time schedule and CPE credit. Design registration form and layout for flyer. Schedule printing to correspond with mailing. Proof final copy before printing. Determine total number to be printed (mailing lists plus stock for late inquiries, file copies, and chapter/regional committee meetings).

Two and one-half Months Prior

- MAIL FLYER THIRD CLASS
- Establish registration procedures for preregistration, onsite, and invoicing.
- Select onsite personnel; assign responsibilities and establish procedures.

Two Months Prior

E-mail and/or telephone prospective attendees. Compile audio-visual needs of speakers. Confirm program, audio-visual needs, space and food arrangements with facility.

One and one-half Months Prior

Process registrations:

- Place attendees into registration listing system.
- Produce listing of attendees for each site.

Prepare and mail attendee confirmation letter to include:

- Fee paid/to be paid
- Directions and phone number for site
- Chapter contact person's name and telephone number
- Description of program and speakers

Produce name tags (optional)

One Month prior

Prepare and duplicate CPE and evaluation form, handouts, notes.

Collect AGA membership and chapter information.

One Week in Advance

Confirm event arrangements with facility and provide guaranteed attendance number for room layout. (Meal guarantee is usually set up.)

Day of Event

Onsite registration

- Registered attendee to initial name on computer printout or manually prepared registration list and place full signature on sign-in roster.
- Nonregistered attendees processed onsite.
- Membership information available.
- Name tags distributed (optional)
- Distribution of CPE and evaluation forms.

On-site logistics (monitored by chapter contact person)

- Check audio-visual equipment.
- Introduce speakers or see that this is done; announce changes in program.
- Oversee luncheon arrangements.
- Collect CPE, evaluation event forms, and sign-in rosters.

After the Program

Wrap-up

- Prepare final financial statement indicating number of attendees, fee paid, facility expenses, speakers' expenses and net revenue.
- Verify CPE requests with signatures on sign-in rosters, mail validated requests to attendees, and indicate request processed on sign-in roster.
- Summarize evaluation forms; send summary to speakers.
- Send thank you letters to speakers, volunteers and facility's host.
- Pay facility and speakers' expenses as soon as invoices are received and payable.
- Invoice unpaid attendees and follow-up with receivables.
- Prepare financial statements updating revenue and expenses

CHAPTER EDUCATION COMMITTEE EVALUATES EVENT.

AGA®

Advancing Government Accountability

Association
of Government
Accountants

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