



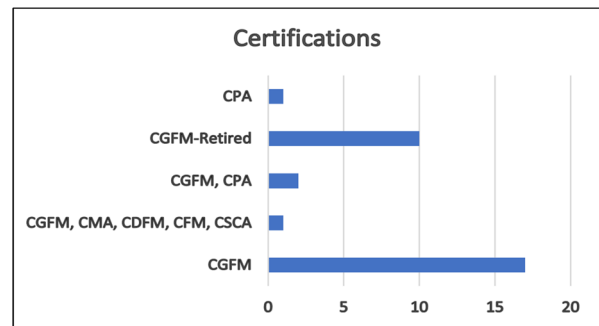
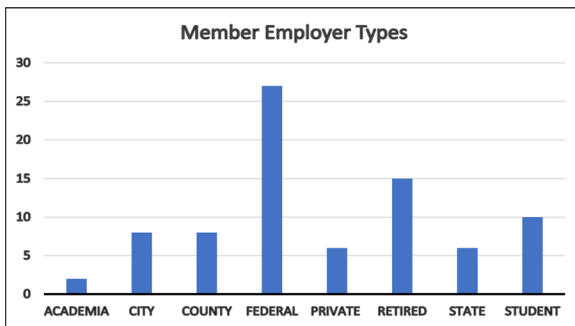
## 2025-2026 Citizen Centric Report

### Advancing Government Accountability Since 1954

The **AGA Cleveland Chapter**, established in 1954, brings together a diverse community of professionals committed to advancing government accountability. We currently have 82 members. Our members represent a broad range of employers, including:

- Federal, state, county, and city government agencies across Ohio
- Libraries
- Academic institutions
- Private industry
- Students
- Retirees

Current membership consists primarily of federal government employees, although we do have significant numbers of private, state/local, student and retired members. Chapter members' certifications include: CGFM(18), CGFM-Retired(10), CPA(2), CMA(1), CDFM(2), CFM(1), and CSCA(1) certifications.



### Chapter Vision

- **Advance** – Promote transparency, accountability, and effective financial management across all levels of government.
- **Grow** – Foster a culture of continuous learning and professional development, empowering members to expand their skills and expertise.
- **Accelerate** – Provide meaningful networking opportunities and valuable resources that support career advancement in government accountability.

### Chapter Mission

The **AGA Cleveland Chapter** is committed to serving professionals in the government financial management community by:

- **Providing Quality Educational Opportunities**  
Delivering a variety of programs and resources designed to enhance members' knowledge, skills, and competencies.
- **Fostering Professional Development and Certification**  
Supporting members in achieving professional certifications and advancing their careers through continuous learning.
- **Advancing High Standards of Government Accountability**  
Promoting best practices and ethical standards to ensure transparency, integrity, and efficiency in financial management.
- **Contributing to Our Communities**  
Participating in outreach and charitable initiatives that create a positive impact within our local and regional communities.

Together, we strive to elevate the profession and strengthen public trust in government through education, leadership, and service.

## Member Events & Community Outreach

The AGA Cleveland Chapter is dedicated to giving back to both our members and the community through engaging events and charitable donations. During the 2025-2026 program year, we participated in the following events:

- **Job Fair Event**  
We participated in a job fair on September 19, 2025 at Cuyahoga Community College(Tri-C) and on September 15, 2025 at Kent State University.
- **Professional Development Training (PDT)**  
We anticipate offering an 8-hour professional development training in May 2026 in collaboration with the Society of Defense Financial Management to help members enhance their skills.
- **Luncheon Speaker Events**  
We hosted and will continue to host monthly luncheon meetings designed to foster networking, provide chapter updates, and offer informal learning opportunities. These regular gatherings ensure continuous membership and helped maintain an active chapter presence.
- **Annual Member Appreciation Picnic**  
The Annual Member Appreciation Picnic on August 16, 2025 was a highlight of the year, offering a casual, family-friendly environment for members to connect. This well-attended event promoted chapter unity, demonstrated appreciation for our members, and enhanced member retention.
- **Holiday Dinner and Bowling**  
Our Holiday Dinner serves as both a celebration and recognition event. Members gather to reflect on the year's accomplishments, recognize outstanding volunteers, celebrate member contributions, and strengthen relationships within the chapter.
- **Cleveland Cavaliers Basketball Game**  
The chapter will organize a group outing to a Cleveland Cavaliers Basketball game, providing members with a fun and informal setting for social engagement. This event will serve as an excellent opportunity to build camaraderie, engage current members, and attract potential recruits.



- **Student and Member Recruitment**

The Cleveland Chapter is committed to growing our membership base. This quarter, we continued our efforts to engage students and early-career professionals. We recently gained three additional student members and one additional professional member.

- **Coffee and Donuts Initiative**

In an effort to enhance recruitment and visibility, the Cleveland Chapter continues the Coffee and Donuts initiative. This series of informal gatherings offered prospective members a chance to learn more about AGA in a relaxed, welcoming setting.

- **Support for Charities/ Cleveland**

Our chapter is committed to community involvement with volunteer hours and donations made to charitable organizations:

- St. Jude Children's Research Hospital
- Toys for Tots
- Cleveland Food Bank
- Ronald McDonald House
- Cleveland Animal Protective League
- Cuyahoga Valley National Park

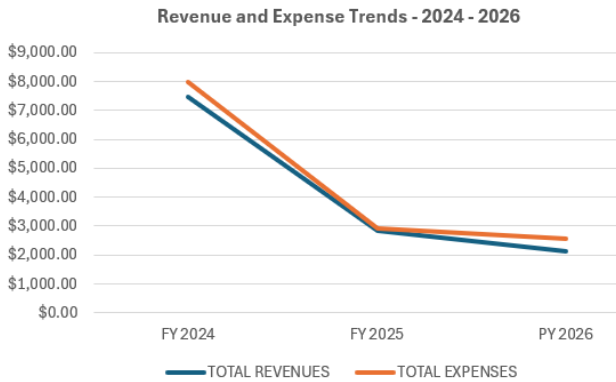
## Chapter Accomplishments

- **Silver Award – AGA Chapter Recognition Program (2019)**  
Honored for excellence in government financial management.
- **Certificate of Excellence – Citizen-Centric Reporting (2023–2025)**  
Recognized for transparency and quality in public reporting.
- **CGFM Proclamation – City of Cleveland**  
Commended for promoting the CGFM designation and professional excellence.
- **Approved CPE Sponsor – Ohio Board of Accountancy**  
Authorized to offer quality Continuing Professional Education to support certification and development.
- **Gold Star Award for 2025** for achievement in chapter excellence.



## AGA Cleveland Chapter Finances

Our spring 2025 PDT was cancelled. Therefore, membership dues, interest and reimbursement for LEAD represented. In January 2025, we transferred \$1,500 from a CD to our checking account to maintain sufficient balances. We reduced our charitable giving in response to budget constraints and have recommended no charitable giving for the 2025 – 2026 program year due to decreased revenues. Due to budget cuts, our Spring 2025 PDT was cancelled. While we received payments from members for the Cleveland Monsters tickets, these payments were collected after the end of fiscal year 2025.



### AGA CLEVELAND CHAPTER STATEMENT OF ASSETS, LIABILITIES AND FUND BALANCE AS OF FISCAL YEAR ENDING JUNE 30, 2025

ASSETS	
Checking account Balance	\$2,869.40
Savings Account Balance	
CD Balance	\$12,998.40
<b>TOTAL ASSETS</b>	<b>\$15,867.80</b>
<b>LIABILITIES</b>	
	\$-
FUND BALANCE	
Fund Balance 7/1/2025	\$15,964.79
Net Deficit for Fiscal Year	(\$96.99)
<b>FUND BALANCE 6/30/2025</b>	<b>\$15,867.80</b>
TOTAL LIABILITIES AND FUND BALANCE	
	\$15,867.80

AGA CLEVELAND CHAPTER CHAPTER FINANCES FOR PROGRAM YEARS 2024 - 2026				
REVENUES	FY 2024	FY 2025	PY 2026	NOTES
Annual Spring PDT 2023	\$6,466.10	-	-	
Annual Spring PDT 2024	-	\$1,352.58	-	
Annual Spring PDT 2025	-	-	-	Spring PDT 2025 Cancelled
Annual Spring PDT 2026	-	-	\$500.00	Virtual
Membership Dues	\$563.75	\$530.42	\$550.00	
Dividends/Interest	\$341.53	\$344.78	\$345.00	
Special Events	-	\$538.00	\$525.00	Cavaliers Social
Donations	-	\$84.00	-	
LEAD Reimbursements	\$100.00	-	\$200.00	
<b>TOTAL REVENUES</b>	<b>\$7,471.38</b>	<b>\$2,849.78</b>	<b>\$2,120.00</b>	
EXPENSES				
Annual Spring PDT 2023	\$5,796.67	-	-	
Annual Spring PDT 2024	\$121.00	\$111.97	-	
Annual Spring PDT 2025	-	-	-	Spring PDT 2025 Cancelled
Annual Spring PDT 2026	-	-	-	Virtual
Charity Giving	\$1,450.00	\$1,200.00	\$500.00	
Fall Picnic	\$151.50	-	\$415.00	
Chapter Website	\$156.22	\$181.00	\$215.00	
PO Box	\$96.00	\$102.00	\$124.50	
Winter Social	\$226.50	\$574.09	\$500.00	
Speical Events	-	\$567.00	\$600.00	
LEAD Travel Expenses	-	\$200.00	\$200.00	
<b>TOTAL EXPENSES</b>	<b>\$7,997.89</b>	<b>\$2,936.06</b>	<b>\$2,554.50</b>	
<b>NET SURPLUS (DEFICIT)</b>	<b>-\$526.51</b>	<b>-\$86.28</b>	<b>-\$434.50</b>	



The financial statements as of June 30, 2025 have been reviewed by the Cleveland, Ohio Chapter AGA Accountability Chair.

## What's Next — Chapter Goals



- The AGA Cleveland Chapter will focus on strengthening member engagement by expanding outreach to students and early-career professionals, enhancing retention through accessible programming, and encouraging active participation in chapter leadership.
- We will also grow the CGFM program by increasing awareness, supporting certification candidates, and recognizing professional achievement—advancing accountability, transparency, and excellence in government financial management.

### Looking ahead, our key goals include:

- **Enhancing University Engagement**  
We plan to expand our outreach to colleges and universities to engage and energize students—fostering interest in public service and cultivating the next generation of AGA members.
- **Strengthening Member Value**  
We will continue developing programs and events that offer practical value, professional growth, and networking opportunities tailored to the evolving needs of our membership.
- **Increasing Awareness and Visibility**  
Promoting the benefits of AGA membership and certifications like the CGFM will remain a priority, helping us grow our chapter and highlight the value we bring to government accountability.

### Chapters Leaders 2025-2026

1. President: Jeannine Anderson
2. Past President: Dr. Balwinder Beasley
3. President Elect: Laura Restrepo
4. Web Master: Nathaniel Overby
5. Secretary: Tatiana Fonseca
6. Treasurer: Brad Cromes
7. Treasurer: Elect: Raji Welch-Bey
8. NCC Rep: Robert Beasley
9. Education: Balwinder Beasley
10. ACE Reporting: Balwinder Beasley
11. Community Service: George Bermeo
12. Communications: Caroline Halloran
13. Membership: Abisoye Olayinka
14. Sponsorships: Balwinder Beasley
15. CGFM/Professional Certification: Jackie Hall -Carrillo and Louis Ockunzzi

## Challenges

While the AGA Cleveland Chapter remains a successful and vibrant organization, we recognize several key challenges for the current program year:

1. **Membership Growth and Retention**  
Expanding our membership base and retaining current members is a top priority. We also aim to encourage greater participation in chapter leadership roles and committees to strengthen organizational sustainability.
2. **Providing Relevant Training Opportunities**  
Offering high-quality, engaging training events that are directly applicable to members' professional development needs is essential to maintaining interest and value.
3. **Raising Public Awareness**  
Increasing public understanding of AGA's mission and the value of the Certified Government Financial Manager (CGFM) designation is critical to enhancing visibility and attracting new members.
4. **Adapting to Hybrid Formats**  
After the COVID-19 pandemic, we adopted a hybrid approach to our monthly meetings and training events. As organizations shift back to in-person operations, we continue to assess member preferences and adapt our programming to ensure accessibility, engagement, and maximum participation.

### You can find us:



Website: [www.agacgfm.org/Chapters/Cleveland-Chapter/Home.aspx](http://www.agacgfm.org/Chapters/Cleveland-Chapter/Home.aspx)



LinkedIn: [www.linkedin.com/company/aga-cleveland-chapter](http://www.linkedin.com/company/aga-cleveland-chapter)



Instagram: [AGACleveland](https://www.instagram.com/AGACleveland)

### We Want to Hear from You!

We value your feedback. Do you like this report? Is there other information, educational, community service or social events you would like to see? Please let us know your thoughts. You can reach us at [accountability@agacleveland.org](mailto:accountability@agacleveland.org)

Thank you for your input.

Jeannine M. Anderson, MSA, CDFM, Lean 6 Sigma Green Belt  
Cleveland Chapter President [jeannine.m.anderson4.civ@mail.mil](mailto:jeannine.m.anderson4.civ@mail.mil) or [jmanderson30@gmail.com](mailto:jmanderson30@gmail.com)