



## **2013-2014 CHAPTER HISTORY REPORT**

During the 2013-2014 Program Year, which ended on June 30, 2014, the New Orleans Chapter of Association of Government Accountants reached the goals of continued scholarship opportunities, provided affordable continuing professional education (CPE) hours, increased membership, and participated in community service projects. To reach these and other goals, Chapter Executive Committee (CEC) members worked together to find affordable high quality speakers and encouraged chapter participation. The CEC met on a regular basis August 2013 through June 2014 to discuss and vote on chapter business. CEC meetings were held at various locations, such as Picadilly Cafeteria, coffee shops, etc. CEC members who could not attend in person were provided with the meeting results and allowed to provide comments on any items as necessary. The CEC members were as follows:

| <b>Office/Committee</b>                 | <b>Name</b>       |
|---|-------------------|
| <b>President</b>                        | Tracey Carney     |
| <b>President- Elect</b>                 | Osby Mosley       |
| <b>Immediate Past President</b>         | Knica M. Lloyd    |
| <b>Treasurer</b>                        | FitzPatrick Nedd  |
| <b>Secretary</b>                        | Ida Holmes        |
| <b>CGFM</b>                             | Faye W. Martin    |
| <b>Membership/Early Career Co-Chair</b> | Jullin Renthrope  |
| <b>Membership/Early Career Co-Chair</b> | Clyde McShan      |
| <b>Education</b>                        | Amanda Green      |
| <b>Newsletter Co-Editor</b>             | Gary A. Millet    |
| <b>Newsletter Co-Editor</b>             | Lindsey Millet    |
| <b>Awards</b>                           | Griselda Taylor   |
| <b>Webmaster</b>                        | Marcie A. Tureaud |
| <b>Meetings/Publicity</b>               | Gloria Samuels    |

In addition, New Orleans Chapter Members, Pamela Lincoln served as the Regional Vice President for the Gulf Region, Amanda Green served as the Education Coordinator for the Gulf Region, and Marcie Tureaud served as the Regional Officer for Chapter Development and Assistance.

Several different resources were used to communicate with Chapter members. Upcoming events were announced through monthly newsletters, the Chapter website, and various email blasts throughout the year. Members had an opportunity to earn CPE's through dinner meetings, audio conferences and the Spring PDT. We had some great speakers who covered some very relevant topics. Reflecting back on the activities from fiscal year 2013-2014 we highlight the following:

### ***Recap of monthly meetings***

***September 2013 Meeting*** – This CPE event was our first event for this new fiscal year. We received loads of great information about retirement from our speakers Howard Rodgers and Renee Holt who are financial advisors with Raymond James Financial.

***October 2013 Meeting*** – The federal government shutdown affected many of us in our personal and business affairs, including me. Unfortunately, due to the events surrounding the federal government shutdown, we were unable to secure and put into motion concrete plans for the October meeting. Therefore, we regrettably had to cancel the meeting.

***November 2013 Meeting*** – This CPE event was held at the University of New Orleans TRAC Center. Our speaker, Robert Brown, Managing Director of the Business Council of New Orleans and the River Region, spoke on the subject Economic Landscape in New Orleans and South Louisiana.

***January 2014 Meeting*** – This CPE event was held at the National Finance Center. Our speaker was Ms. Earline Brown Stennis of the Internal Revenue Service, who provided a Tax Update.

***February 2014 Meeting*** – This CPE event was held at Parran's Restaurant, 3939 Veterans Blvd, Metairie, LA. Our speaker was Ms. Gloria Weber from the U. S. Army Corps of Engineers New Orleans District who spoke on the U. S. Army Corps of Engineers Cost of Doing Business.

***March 2014 Meeting*** – This CPE event was a joint meeting with the AFWA. Ed Quatrevaux, Inspector General for the City of New Orleans, was our speaker, which was held at Five Happiness

Restaurant in New Orleans, LA. Mr. Quatrevaux shared many of the accomplishments, as well as obstacles experienced in the New Orleans Inspector General's office. There have been many improvements in the City of New Orleans because of the dedicated work by his office.

***April 2014 Meeting*** – This CPE event was held at Trey Yuen Restaurant, in Hammond, LA 70401, in conjunction with our AGA Baton Rouge chapter. We were pleased to have as our speaker, Mary Peterman, AGA National President.

### ***The Spring PDT (April 29, 2014)***

This event was a huge success. This was the first 8 hour full day professional development training event held by the New Orleans Chapter in a number of years. We had approximately 95 in attendance which included 7 outstanding speakers, 12 student volunteers - 2 from SUNO and 10 from Our Lady of Holy Cross College, AGA National President Mary Peterman, and 3 Past National Presidents: Billy Morehead, Jullin Renthrope and Clyde McShan, Gulf RVP Pam Lincoln and Gulf RVP-Elect Keren Deal. The event was marketed on the AGA National Calendar, information was sent to all Gulf Region Chapters (Baton Rouge, West Central Mississippi, Jackson, Montgomery, Tallahassee and Naples Paradise, as well through e-mail blasts to our members, on our Chapter website, our Chapter newsletter, and fliers at the USDA National Finance Center. All CEC members were asked to reach out to their fellow employees and organizations; Amanda Green personally sent 10 e-mails to individuals at LSUHSC, the University of New Orleans Foundation, East Jefferson Medical Center, fellow UNO employees and former employees. We marketed to 8 "affiliate" groups offering them the member rate -- AFWA, LCPA, ASMC, IIA, ACFE, NABA, FEB and GFOA.

We also raised over \$1,000, through a silent auction which benefitted our scholarship awards fund. We awarded the scholarship to Mr. Darius Cosse who attends Our Lady of Holy Cross College. Special thanks were given to Karen Whitaker from Becker Professional Education for (1) manning the silent auction table and (2) donating \$500 and a half Becker CPA review course for auctioning at the training. We also thanked KPMG as one of our sponsors for the event.

### ***Habitat for Humanity Community Service Event (April 15-17, 2014)***

The organization continued its tradition of hosting its annual volunteer event to benefit residents in New Orleans and the surrounding parishes. This year, volunteers made repairs to a

residence in New Orleans east. There were 6 AGA volunteers from Washington D.C and the Colorado areas. They included: Several Past National Presidents Jeff Hart, Virginia “Ginnie” Robinson, Evelyn Brown and SVPRS Doreen Schute, along with Patrick Kennedy and Jeff’s wife Roxie. Restaurants that donated delicious food to feed our volunteers for lunch included Old Gentilly Spicy Kitchen, Five Happiness, and Smilie’s. We really appreciate our volunteers and the local restaurants that continue to support the event.

### ***Membership***

We had 8 new members, 2 of which are serving on the CEC for 2014-2015! Other new members represented the New Orleans Chapter by making presentations to accounting students at Xavier University.

### ***Recognition Points***

We earned Silver status through our recognition points reporting and received an award at the AGA national training event in July.

To thank our Chapter members we held one social event. This was the New Orleans Chapter Annual Zephyrs Baseball Game and Tailgate Party, held on Friday, June 20, 2014. The New Orleans Zephyrs took on the Fresno Grizzlies and there will be a postgame fireworks show. Family and friends were all invited. In conclusion, the collaboration of CEC members helped set the necessary goals, but the hard work of all chapter membership helped the Chapter to reach its goals for the program year to maintain a successful chapter.