Policy No. 4
Awarding CPE Certificates at Luncheon Business Meetings to Members with Applicable Certifications

Approved by CEC 3/22/2007

Purpose: To ensure one hour (50 minutes = 1.0 CPE hour) of continuing professional education (CPE) on relevant government financial management topics approved for CGFM CPE is provided during designated luncheon business meetings to all members with applicable certifications (e.g., CPA, CGFM, CISA, CFE, CIA, etc.) and to ensure that appropriate documentation is maintained.

In general, the Education Committee has the flexibility to determine the best approaches to utilize during all steps in the CPE process (including expediting the certificate issuance process). The objective should be to use the most effective and efficient practices in offering and awarding CPE opportunities to members with applicable certifications. The Education Committee should coordinate with other Chapter committees when appropriate.

Our program year includes eight meetings with a guest speaker. This results in the potential for 8.0 CPE hours during the program year. The Program Committee must, at a minimum, provide 4.0 CPE hours of training for which the topics qualify under the CGFM CPE requirements posted on the AGA National website. This gives the Program Committee flexibility in determining the total number of CPE hours it wishes to provide.

According to the CGFM CPE requirements **(138),** the technical program must be a minimum of 50 minutes. The Education Committee will categorize the type of CPE offered (e.g., AU = auditing; ACC = accounting; FIN = finance, etc.). Extending or restructuring the business luncheon meeting agenda to ensure 1.0 hour of CPE is offered should be unnecessary because the current meeting agenda is sufficient to accommodate a 50 minute program.

The CPE reporting requirements **(127)** require that an agenda or outline be prepared in advance and retained by the program sponsor that indicates the name(s) of the instructor(s); the subject(s)/topic(s) covered; the date(s) and length of the program; and, when appropriate, the program's learning objectives and any prerequisites. The Program Committee should ask the speaker for an outline of the presentation to include with the agenda currently being prepared by the Meetings and Attendance Committee. If an outline is unavailable, the current agenda should be revised to include the approximate times each agenda item starts and ends, the speaker's name and title, and the presentation name. The Program Committee should give this information to the Meetings and Attendance Committee at least one week prior to the luncheon. The Program Committee should also ask the speaker for the presentation in electronic format, if available, to put on the chapter's website after the luncheon.

Although the Treasurer already maintains an attendance record of those attending the meetings, the Education Committee Chair or Co-Chair will be responsible for obtaining and maintaining attendees' signatures as verification of attendance (e.g., two-part CPE form, sign-in sheet, etc.). CPE certificates will only be issued to attendees for whom documented signatures were obtained.

The Webmaster, in conjunction with the Education Committee Chair, would then request that attendees complete an on-line evaluation.