



Minutes for Executive Committee Meeting

February 24, 2026

Name	Present Y N	Name	Present Y N	Name	Present Y N
Kelly Berger-Davis	<input checked="" type="checkbox"/> <input type="checkbox"/>	Jordan Hayes	<input checked="" type="checkbox"/> <input type="checkbox"/>	Danny Sklenicka	<input checked="" type="checkbox"/> <input type="checkbox"/>
Bryan Cottrill	<input checked="" type="checkbox"/> <input type="checkbox"/>	Erin Hill	<input checked="" type="checkbox"/> <input type="checkbox"/>	Amanda Stidham	<input checked="" type="checkbox"/> <input type="checkbox"/>
Richard Cunningham	<input type="checkbox"/> <input checked="" type="checkbox"/>	Meghan Jenkins	<input checked="" type="checkbox"/> <input type="checkbox"/>	Tony Tertuliani	<input checked="" type="checkbox"/> <input type="checkbox"/>
Julie Didinger	<input checked="" type="checkbox"/> <input type="checkbox"/>	Kevin O'Connor	<input checked="" type="checkbox"/> <input type="checkbox"/>	Isaac Ulery	<input checked="" type="checkbox"/> <input type="checkbox"/>
Derek Farwick	<input type="checkbox"/> <input checked="" type="checkbox"/>	Tiffany Ridenbaugh	<input checked="" type="checkbox"/> <input type="checkbox"/>	Jason Ward	<input type="checkbox"/> <input checked="" type="checkbox"/>
Lindsey Gorning	<input checked="" type="checkbox"/> <input type="checkbox"/>	David Shook	<input checked="" type="checkbox"/> <input type="checkbox"/>	Kristen Wheeler	<input checked="" type="checkbox"/> <input type="checkbox"/>

Executive meeting was called to order at 11:30 a.m.

Minutes from the January 27, 2026 meeting were approved. Lindsey Gorning motioned for approval; Tony Tertuliani seconded.

Agenda

- Education Committee (Kevin/Rich/Amanda)
 - PDT –
 - Contract signed with Bennett Association Management on 2/2/26, for PDT production services
 - COAGA applied for, and was approved as a CPE sponsor through 5/31/27, by the Ohio Accountancy Board. Need to ensure we are following NASBA requirements, and will see if anyone on Education Committee is interested being over such.
 - Updated speaker benefit package – will send to CEC for approval.
 - Monthly Sessions –
 - January – June 2026 schedule
 - 3/3/26 – OCS Update
 - 4/7/26 – GASB 103
 - 5/5/26 – Cybersecurity
 - 6/2/26 – Leadership - Organizational Culture
 - GoTo back up & running
- Treasurer (Danny)
 - Monthly financial packet e-mailed to Board, and presented at meeting:
 - January 2026 e-mailed on 2/22/26 with net assets of \$60,079
 - GoTo needs Stripe, so will now keep Stripe
 - Received BWC payment from PDT in February.
 - 1099's - 5 filed timely
 - Conferences IO – we are not on autorenewal.
- Chair Reports/Discussions
 - President (Kelly)
 - CEC voted & approved the following via e-mail on 2/12/26:
 - Scholarship/Awards co-chair – David Shook, OBM



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- Create a Meetings/Events co-chair position, filled by Julie Diding from Julian & Grube
- LEAD –
 - Kelly & Lindsey attended 2/10/26 LEAD info session townhall.
 - National AGA travel policies provided (which involve chapter treasurers), but e-mail said stipend details are still under review.
- Chapter reimbursement policy – discussed old policy on COAGA Google Drive & potential edits
- Reminder to renew AGA memberships by 3/31/26.
- Consider migrating to CentralOhiochp@agacgfm.org google drive as COAGA's main account – easier for everyone to access.

President-Elect/ACE Reporting (Bryan)

- Pulse check submitted on time – due date was extended to 2/13/26

National Council of Chapters Representative (Derek)

- 2/3/26 National NCC meeting recap:
 - Our area has an upcoming opening for area director if anyone is interested.
 - Discussions on chapter collaboration with other organizations:
 - National is partnering with Beta Alpha Psi (BAP) chapters across the nation to try and co-host events, a connection that could be used by local chapters in future
 - chapters: <https://www.bap.org/active-chapters>
 - Suggestions on getting agreements/MOU when collaborating that will spell out who is responsible for what: monetary, job functions, hosting, CPE issuances etc.
 - AGA has on demand training: <https://www.agacgfm.org/events-training/trainings/webinars/>
 - Discussed changes to LEAD, moving to the same location and days leading up to National PDT - 7/19/26 - 7/20/26.
 - New to LEAD this year is Pre-LEAD Webinar series:
 - Held every other Tuesday beginning in April
 - Covers foundational information prior to LEAD
 - Live sessions with recordings available
 - Reminder to submit nominations for Volunteer of the Year and Chapter Communications Award.

Accountability (Isaac)

- No update

Community Service (Tiffany)

- Mid-Ohio Food Bank – National approved the match on 2/3/26 and said check should be sent same week.
- Potential community service event - Columbus Area Habitat ReStore on a Saturday in March/April.

Membership (Kristen)

- 351 current members; 3 new in February so far.
 - In January of 2025, we had 320 members



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- 1/27/26 Renewals Townhall recap – CGFM’s that miss renewal deadline will have a \$45 fee.
- Satisfaction survey – coming soon.

Communications/Social Media (Derek/Lindsey)

- Communications – Let him know if need anything sent out.
- Social Media –
 - Reminder to copy Lindsey on any content that needs posted on social media – scholarships, social events, education events, flyers about free college memberships, etc.
 - Consider reviving X (Twitter) account.

Communications/Newsletter (Jordan)

- Continue sending Jordan information for next newsletter – all info/articles due by 4/10/26.
- Program Year 2026 newsletters will be sent around the 15th of: 10/2025, 1/2026, 4/2026, 7/2026
- Reminder: drop photos into the CentralOhiochp@agacgfm.org google drive account

Meetings & Events (Bryan/Julie)

- Upcoming event: 5/15/26 - golf at new Albany Links
- Will look into scheduling a spring event.

CGFM/Professional Certification (Erin)

- 3/3/26 CGFM info session following the monthly webinar
- Received CGFM month (March) proclamation from the Governors Office
- 3/10/26 CFGM Month Town Hall

Scholarship & Awards (Jason/David)

- Working on scholarships

Bylaws & Procedures /Sponsorships (Meghan)

- Sponsorships – 2 receivables pending

Webmaster (Tony)

- Reminder to send Tony profile/headshot picture if would like on COAGA leadership page.
- Other Chapter Business/Discussion
 - Next Meeting: 3/24/26 at 11:30 a.m. on Teams.

Meghan Jenkins motioned to adjourn the meeting, at 12:33 p.m., Lindsey Gorning seconded.

Respectfully submitted by Kelly Berger-Davis, Secretary.