

Calendar of Events

Boston Chapter

September 15, 2005

Chapter Lunch Meeting with Program

October 20, 2005

Fall Seminar at Lombardo's in Randolph

November 10, 2005

Fall Workshop

December 8, 2005

Annual Holiday Charity Luncheon

January 19, 2006

Winter Seminar at Volpe Center in Cambridge

February 16, 2006

Winter Workshop

March 14, 2006

Regional Professional Development Conference at Bentley College, Waltham

April 13, 2006

Chapter Lunch Meeting with Program

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President's Message

The chapter is over fifty years old and doing fine. We're just starting the program year but your Executive Committee has already had a number of meetings to plan for the upcoming year.

You may have noticed that I said "your Executive Committee". The members are the Boston Chapter. Those of us who are fortunate enough to be in elected or committee positions are working with and for you to meet the educational and professional needs of the chapter. If you would like to work with one of the committees or have any ideas, thoughts or suggestions please contact any of the people listed on the back page of the newsletter. We are always looking for new insights and people to be involved.

Depending on the theme of the President's Message in each upcoming newsletter, we will be mentioning one or more committee members. The reason is twofold. Partly to let everyone know who is doing what for the chapter but also to give them the recognition they are due. There are too many hard working people involved in the chapter to mention them all at once and I know during the year I will possibly miss mentioning some people.

However, one person that we need to recognize specially is the person I am succeeding, our past president, Julie Burns. Due to an unexpected mid-year vacancy Julie for all intent and purpose filled the President's job for three consecutive years. She worked above and beyond what we could expect and the chapter is very grateful for all of her efforts. I personally am very happy that she is performing the job of Newsletter Editor this year.

For this program year we just finished our first community service event. Seven people represented the chapter taking bids at the WGBH auction. An article and photo of our volunteers is in the newsletter.

Looking forward the education committee is making plans for many events for the year. More details will be communicated in the newsletter and on the web site in upcoming months.

Some of our members are attending the National PDC in Orlando later this month. The Chapter is being recognized during the conference with a Platinum Chapter Recognition Award and an award for our website. Kudos to our web master Dan Simmons of US HHS. Also, Howie Olsher of the Mass State Auditor's Office is receiving special recognition and is being awarded a National Chapter Service Award. This is very well deserved as Howie has probably held more jobs in the Boston Chapter over the years than anyone.

Since we seem to have jumped from winter to summer by skipping spring, hopefully this July newsletter finds you comfortable in the early summer heat and planning or taking some vacation time. It's time to cheer on the Red Sox, kick up the grill for cookouts and check out the beach.

Till next month, thanks for your support.

- DAVE



TRIVIA QUESTION!

New England: Who was the last Governor of Massachusetts that was not a Democrat or a Republican?

Answer found elsewhere in the newsletter.

Membership Update

The Boston Chapter membership includes:

- 217 Active Members
- 3 New Members
- 0 Members Transferred In
- 0 Members Transferred Out
- 29 Suspended Members

Electronic Notification



To add your name to the *Boston's Beacon* electronic distribution / chapter update list, please send an e-mail to JuliaB@osc.state.ma.us. Thanks!

Member News

Congratulations to **Mary Ellen Kelly**, a member of the Boston Chapter, who was one of three people to win a prize in a national drawing for membership recruiting. She won a dinner at an "ultra exclusive restaurant" in Orlando during the PDC.

Mary Ellen recruited 8 new members during the 2004-2005 program year. In addition to her recruitment efforts, she serves on the Chapter's training committee.



Please join the Membership Committee in welcoming new member(s) to the Boston Chapter:

William Chalko
RI State Auditor's Office

Therese Lusignan
RI State Auditor's Office

Scott Warnetski
KPMG LLP

From the Editor...

Do you know someone in the Boston Chapter who has recently received promotion, accepted a new position, retired or won an award? Would you like to share your good news with fellow AGA members?

Or maybe you're interested in writing a technical article for an upcoming issue of *Boston's Beacon*.

Please forward submissions for the next issue of *Boston's Beacon* to JuliaB@osc.state.ma.us.



Thanks!

Chapter Recognition Program

The Chapter Recognition Program is designed to support, encourage, and promote the accomplishment of AGA's mission and to provide flexible noncompetitive guidelines for a well-rounded chapter. The Chapter Recognition Program year begins on May 1st and concludes on April 30th.

Boston Chapter credits as of June 30, 2005 are:

Categories	Maximum Credits	Credits Earned	Credits Allowed	
Leadership, Planning & Participation	3,000	1,000	1,000	33%
Education & Professional Development	4,000	0	0	0%
Certification	4,000	250	250	6%
Communications	3,000	1,367	1,367	46%
Membership	3,000	200	200	7%
Community Service	2,000	500	500	25%
Awards	1,000	2,050	1,000	205%
Total	20,000	5,367	4,317	

**Boston Chapter Balance Sheet
May 31, 2005**

Assets

Cash	
Checking Account	\$ 6,360
Savings Account	9,603
Certificates of Deposit	<u>12,612</u>
Total Cash	\$28,575
Accounts Receivable	
Awards Dinner - May 12, 2005	\$ <u>24</u>
Total Accounts Receivable	\$ <u>24</u>
Total Assets	<u>\$28,599</u>

Liabilities and Fund Balance

Accounts Payable	\$ 0
Current Fund Balance	<u>28,599</u>
Total Liabilities and Fund Balance	<u>\$28,599</u>

(Calendar Continued from page 1)

May 2006

Annual Awards Dinner

New England Region

July 8, 2005

Hartford Chapter business meeting and social mixer at the Marco Polo Restaurant, East Hartford, CT

National

July 10-13, 2005

National Professional Development Conference at Orlando World Center Marriott, Orlando, FL

November 14-15, 2005

National Performance Management Conference at the Portland Marriott Downtown, Portland, OR

June 18-21, 2006

National Professional Development Conference at San Diego Marriott Hotel & Marina, San Diego, CA

Speaker Database

The AGA-Boston Chapter is building a speaker database. Do you know a dynamic speaker who you would like to see at an upcoming educational event? Are you a speaker who would like to be included in the database? Please send the speaker's name, address, phone number, e-mail address and potential topics to Howard Olsher, CGFM at Howard.Olsher@sao.state.ma.us.

Thank you, in advance, for your assistance.

Chapter Survey

Don't forget to complete a Chapter Survey! It is located on the home page of our website at www.aga-boston-chapter.org.

Thank you to everyone who has already taken a moment to complete the survey!



Have an
enjoyable,
safe & happy
Independence Day!

Attention CGFMs: Are You Keeping Proper Backup Documentation on Your CPE Activities?



CGFMs need to maintain documentation to substantiate their statements of completed CPE for a minimum of three years. This documentation may be requested by AGA as part of a CPE audit or a reaction process.

The proper backup documentation must clearly state your attendance or completion of the CPE activity. Examples of such documentation include: a certificate of attendance or completion, a certificate of CPE hours earned a grade report or an official letter from the event sponsor or your employer stating that you have attended the event.

The information must include the following information:

- sponsoring organization,
- location of the activity,
- title of the program,
- your name,
- completion date (or date attended), and
- number of CPE hours earned.

*I've gotten so far behind, I now
think I'm leading the pack.*

- Source Anonymous

Chapter History

We are documenting our chapter's history. Any assistance you can offer is greatly appreciated. If you have information such as past newsletters, photos, names of chapter award winners and scholarship recipients, please contact Julia Burns, CGFM at JuliaB@osc.state.ma.us.

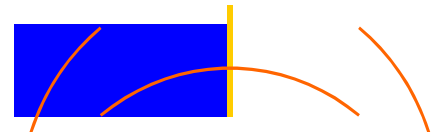
Update Your Member Contact Information

Please take a moment or two to review and, if necessary, update your contact information. Your contact information is important because it allows us to keep in touch with you throughout the year!

Your office may have recently updated its e-mail system and you now have a new e-mail address. Or, you may have moved to a new location within the same organization. Even if there were no changes in the past year, please check your information for spelling, etc.

You can make any updates online at the 'Members Only' page of National's website at www.agacgfm.org.

Thank you!



Boston's Beacon is published by the Association of Government Accountants—Boston Chapter.

Comments should be forwarded to editor@aga-boston-chapter.org.



Meet the Chapter Executive Committee...

For 26 years, **David A. LeBlanc**, CGFM has served the citizens of the Commonwealth of Massachusetts. He worked 14 years at the Office of the Comptroller and 9 years at the Massachusetts Department of Education. He also worked at Salem State College and the Massachusetts Department of Employment and Training.

As Director of Audit and Compliance for the Massachusetts Department of Education, Dave manages and coordinates all financial audit and compliance functions for the state and federal grant programs. He serves as audit liaison for the department with state, federal and independent auditors that review all of the Department's state appropriations and approximately ninety federally funded programs. He manages and designs specific external on-site reviews of grantee funds.

Dave helped create the review process for audits of Massachusetts school district's "End of Year" reporting process. He manages the master service agreement of independent audit functions within the department and coordinates reviews for the agreed upon procedures of programs managed by individual department clusters.

Dave has been a member of AGA for a number of years and has served the Boston Chapter in a number of capacities including training committee member, Director of Community Service, Vice President of Education and, now, Chapter President. He also serves on the Executive Board of the New England Intergovernmental Audit Forum.

Dave was awarded the Boston Chapter's 1996 President's Award. He was also awarded the Chapter's 2004 Annual Achievement Award in recognition of his efforts to ensure the financial and statistical integrity of the Massachusetts Department of Education School Districts Annual Reports. And at the recent Annual Awards Dinner, Dave was awarded the Chapter's 2005 First Annual Community Service Award in recognition of his outstanding commitment to community service.

On a personal note, Dave and his wife, Anne, live in Salem, MA. Their daughter, Karen, got married last year and is a special education teacher in the Hartford School System and their son, Andrew, is in his final year as a biology major at Seton Hall University.

Both Dave and Anne are committed to community service. Dave, for example, is a member of the Board of Directors, Vice Chairman of Finance and Co-Chair Officials Committee for New England Swimming. He is also a Certified National Championship Level Official for United States Swimming.

And, Dave and Anne are well-known Disney fans!

John W. Beveridge, CGFM, CISA, CFE, COA has a professional career that spans over twenty-five years in government and private industry in the United States and England, including over twenty years in information systems auditing. He is Deputy Auditor and responsible for the Information Technology Audit Division for the Massachusetts Office of the State Auditor. He has served as a member of the Governor's Commission on Computer Crime, Governor's Commission on Computer Technology and Law, Governor's Task Force on E-Commerce, the Commonwealth's Year 2000 Coordinating Council, and the Governor's IT Commission. In addition to state government, John's public service includes five years on the Town of Hamilton's Finance & Advisory Committee and one year on City of Beverly's Cash Management & Advisory Committee.

John has made presentations on "Control Objectives for Information and Related Technology" (CobiT), IT auditing, audit management, audit standards, and other topics at conferences and seminars in North America, Europe and Asia. He has taught courses in economics, IT auditing, financial auditing, E-Commerce Assurance Services, Business Processes and Systems Assessment and accounting information systems at Boston area colleges and is currently on the adjunct faculty of Bentley College. And he serves on an advisory board to Tabor Academy in Marian, MA.

John has been a member of the Association of Government Accountants for more than 20 years and is the Boston Chapter's current President-Elect. He regularly serves as a presenter for the Boston Chapter. In addition, he was a founding board member and first president of the Greater Boston Area Chapter of Certified Fraud Examiners and is a past president of the New England Chapter of ISACA. John served as the 1993-1994 Vice President for Standards and the 1994-1995 International President of the Information Systems Audit and Control Association and Foundation (ISACA). On the local level, he has served on the local chapter boards for ISACA, Institute of Internal Auditors (IIA), and the Association of Certified Fraud Examiners (ACFE).

John has been the recipient of various awards including the Eugene M. Frank Award for Meritorious Service, ISACA International, 1997; Service Award, Boston Chapter of CFE, 1999; Lifetime Achievement Award, Boston Chapter of CFE, 2000; and the establishment of the John W. Beveridge Achievement Award in 1996 by the New England Chapter of ISACA.

John holds an undergraduate degree from the University of Massachusetts and a master's degree from Suffolk University. He is a certified government financial manager, information systems auditor, fraud examiner, and quality assurance specialist.

Professional Development Opportunities

AGA Hartford Chapter July 8, 2005

The Association of Government Accountants, Hartford Chapter is holding a business meeting / social mixer on Friday evening, July 8th. It will be held at the Marco Polo Restaurant, 1250 Burnside Avenue, East Hartford, CT. The social hour will begin at approximately 5:30 p.m. followed by the presentation. There is no charge to either members or guests to attend.

All members of AGA, along with their guests, are invited to the meeting which will consist of a social hour made up of pizza, beer or soda that will be followed by a presentation / discussion of a relevant issue involving consumer fraud being investigated by the Connecticut Department of Banking. This presentation and discussion will be lead by two bank examiners and chapter members will be able to earn one hour of CPE for this portion of the meeting.

Please direct any questions to Percy Cave at 860-240-8121 or perstein.cave@po.state.ct.us.

New England States GFOA September 22-25, 2005

The Maine Government Finance Officers Association is excited to be hosting the 58th NESGFOA Annual Conference at the beautiful Colony Hotel. They invite you to discover the beauty and charm of this grand ocean front resort hotel splendidly situated in a glorious garden setting above the shimmering Atlantic which promises to offer you a unique experience that you'll never forget.

The local conference committee has put together a great educational program with a wide range of topics. Also offered this year are concurrent sessions to expand the choices available to you during the conference. They are especially pleased to bring David Bean, Director of Research for the Governmental Accounting Standards Board to Maine. He will be speaking at the Thursday afternoon session. They are also pleased to have Gregg Allison from the University of North Carolina's School of Government coming to Maine to do two sessions on Friday morning. Attendees are eligible for approximately 15 CPE credits.

The conference is at the Colony Hotel, Kennebunkport, ME. Early registration (by July 22nd) is \$225 for a regular session and \$150 for 1 day only registration and after June 22nd regular registration is \$275 and 1 day only registration is \$200.

For additional information, please contact Lisa Parker at 202-283-3303.

IIA's Northeastern Regional Conference—*Bridging Past and Future...for the Internal Audit Revolution* August 28 - 31, 2005

The Boston IIA Chapter, Ocean State Chapter and the Southern New England Chapter of the Institute of Internal Auditors invite you to join them for an Audit Revolution in Boston, MA on August 28-31, 2005.

The auditing profession is on the verge of a revolution. Driven by increased regulation and corporate scandals, auditing practices are predicted to change dramatically in the years ahead. At the 2005 IIA Conference in Boston, a dynamic lineup of speakers will explore key issues and address topics that will shape the future of auditing. The conference is an opportunity to gain insight, meet with peers, and discover new perspectives that can give your practice a competitive edge. And what better place to meet than historic Boston—a vibrant and exciting city that is no stranger to revolutions.

The 2-1/2 day conference will include the best programs available in 2005, covering five tracks: Risk Management, Governance Issues, Emerging Trends and Best Practices, Fraud and Technology, and Auditing Skills and Professional Growth. The conference incorporates world class speakers like Cynthia Cooper, Tom Wurga, Ed Robinson, and Dr. Chuck Ward, with great speakers from local and national audit shops.

The conference is at the Boston Park Plaza Hotel & Towers, 64 Arlington Street, Boston, MA. Early Bird registration (by July 15, 2005) is \$495 for members and \$545 for non-members and after July 15th registration is \$595 for members and 4645 for non-members.

For additional information about the Regional IIA Conference visit www.iiaboston2005.org.

The CPE Store

The CPE Store offers self-study courses on the topics of taxation, accounting and auditing, business and industry, financial planning, computers and software, management and marketing, and personal development. Each of their self-study courses comes complete with the text, an interactive study guide (which meets the new CPE standards), a final exam, and an answer sheet. After studying the course materials, answer the questions on the final exam. Then submit your answer sheet for grading and receive your Certificate of Completion (if you score 70% or better).

The cost and CPE credits earned are based on the individual courses. Discounts are available. For more information, visit www.cpestore.com.

News from National

2005 Professional Development Conference and Exposition



AGA invites you to attend its 54th Annual Professional Development Conference & Exposition, to be held July 10 - 13, 2005, in Orlando, FL.

Leaders refuse to be left behind. They are well educated on the newest developments in the field and eager to learn as much as they can. Leaders want to make a difference. There is no better place to get the knowledge you need than at AGA's Professional Development Conference and Exposition.

No visit to Orlando is complete without experiencing the unparalleled fun and excitement of the Walt Disney World Resort, Universal Orlando Resort and Sea World Orlando. Bring your family to Orlando and enjoy special discounts on admission tickets to major theme parks.

William J. Anderson, Jr., CGFM to Receive 2005 Robert W. King Memorial Award

Bill Anderson's contributions at all levels of AGA will be recognized in July when the Association presents its top honor, the Robert W. King Memorial Award, to Past National President William J. Anderson, Jr., CGFM. Presented annually as a medallion to formally recognize superior service that has enhanced AGA national prestige and stature, the award is named for AGA's founder and first National President.

The Results are In!

Congratulations to the winners of the 2005 Chapter Retention Contest—Los Angeles Civic Center, New Orleans and Greater Columbus Chapters.

The winning chapters may choose one complimentary conference registration to the 2005 Professional Development Conference in Orlando, FL, the First National Performance Conference in Portland, OR, or the 2006 National Leadership Conference in Washington, DC.

Thanks to all who participated in the contest. Due to your efforts we had 1,157 members renew during the month of May.

National Performance Management Conference

As a capstone to this year's SEA Report review process, a Performance Reporting Conference is planned for November 14-15, in Portland, Oregon. This conference is intended to provide insight into how reports could be prepared by having entities who have participated and/or won recognition in AGA's program share how they implemented and operate their performance systems.

Sessions will present how reports can be used to improve operations, build public trust, and be used for outsourcing and budget justification. The conference will have a nationwide perspective. Program participants and award recipients will be prominently displayed. And when possible Certificates will be presented at the conference. However, we anticipate that not all award recipients will be able to attend, so those will be received in their locale. And as available we will display photos of presentations at their locale.

AGA will offer opportunities for vendors to sponsor at the conference, to allow entities visibility as to what products and services are available to support their performance reporting efforts.

For more information about AGA's Service Efforts & Accomplishments Certificate program for state and local government agencies, visit the National Office website at www.agacgfm.org.

Around the New England Region

The New England Region earned Silver Status for the 2004-2005 Program Year. Congratulations to our Regional Vice President, Jody L. Breton, CGFM!

Congratulations to David Lachance, CGFM and the Maine Chapter for earning Platinum Status for the 2004-2005 Program Year. The Maine Chapter won Honorable Mention in the Website Group C category. Special congrats to Kimberly A. Smith, Webmaster. The Maine Chapter was also awarded the Highest Overall Growth Award for Group C. Way to go, Roberta Creamer, Chapter Membership Chair!

Congratulations to Perstein Cave, CGFM and the Hartford Chapter for earning a Chapter Recognition Award for the 2004-2005 Program Year.

TRIVIA ANSWER!

Henry J. Gardner, 1855-1858, Know Nothing Party

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