

**Association of Government Accountants – Boston Chapter
Annual History Report 2009 – 2010**

Chapter Executive Committee

Officers

President.....Joseph Valchuis, CFE, CFS
President-Elect..... William Kilmartin, CGFM
Immediate Past President..... Kimberly Rapoza, CGFM, CPA
Secretary..... Scott Lennon
Treasurer Charles McCarthy
Vice President for Education
and Programs Julia P. Burns, CGFM
Vice President for Planning..... Kimberly Rapoza, CGFM, CPA
Vice President for Communication David A. LeBlanc, CGFM, CFS

Directors

Bylaws and Procedures Nicholas Dahl, CGFM
Community Service Jane Gustowski, CPA
Membership & Early Careers Mary Beth Farrelly, CFE, CFS
Registration..... Howard Olsher, CGFM, CFE
Scholarships and Awards..... William Muench, CGFM, CPA
Professional Certifications Martin Benison, CGFM

Chairs

Newsletter..... David A. LeBlanc, CGFM, CFS
Career Day..... Mary T. Leyden, CGFM
Webmaster..... David A. LeBlanc, CGFM, CFS

Special Meetings

December 3, 2009

Special Business Meeting and Annual Holiday Luncheon and
Charity Fundraiser at Maggiano's Little Italy Restaurant, Boston,
MA

June 10, 2010

Special Business Meeting and Annual Awards and Chapter
Appreciation Dinner at The Daily Catch, Boston MA

Chapter Meetings with Guest Speaker

Chapter meetings, seminars and conferences include a special guest speaker(s) discussing a timely topic. The dates and speakers were as follows:

Seminars

June 4, 2009	ARRA Stimulus Funds (co-sponsored with NEIAF) 7 CPE hours Stan Czerwinski, GAO Jeffrey Simon, Mass A&F Nancy Valley, KPMG Lucy Garliauskas, US Federal Highway Administration Louise Eldridge, US HHS Volpe Federal Transportation Bldg., Cambridge, MA
September 24, 2009	The Many Faces of Fraud 7 CPE hours Dennis E. Lambert, Special Agent, NCIS Joseph Connaughton, Public Employee Retirement Administration Commission Michael Armstrong, Regional IG, HHS Susan J. Waddell, Special Agent in Charge, HHS OIG Jeremy Sternbert, Asst. U.S. Attorney, U.S. Dept. of Justice Joshua Grinspoon, Investor Assistance Attorney, Securities and Exchange Commission Lombardo's Randolph, MA
October 22, 2009	ARRA Reporting 6 CPE hours Jeffrey Simon, Mass A&F Nancy Valley, KPMG Sharon Scott-Chandler, ABCD Rebecca Kaplan, US Department of Labor Volpe Federal Transportation Bldg., Cambridge, MA
January 21, 2009	IT Security Management 7 CPE hours Christopher Kelly, Mass Attorney General's Office, Fred Howell, BOSE Corp. Stuart Lecky, MA Information Technology Division John Beveridge, Mass State Auditor's Office

Jose Arroyo, MA Information Technology Division
Ernie Sanborn, MA Information Technology Division
Curt Dalton, MA Information Technology Division
Ben Jackson, MA Information Technology Division

JFK Federal Bldg., Boston, MA

April 15, 2010

Spring Seminar w/ NEIAF 7 CPE Hours
A-133 Update
Tammie Brown, U.S. Dept of Health and Human Services
Ethics
Bobby Derrick, former AGA National President
Dealing with Difficult Interviewees
Carole Buncher, Carole Buncher and Associates

Conference
March 9, 2010

Regional Professional Development Conference 8 CPE hours
Bentley College, Waltham, MA

Keynote Speakers

William Morehead, CGFM - AGA National President
Gerry Leone, Middlesex District Attorney

Concurrent Sessions:

Track 1 – Ethics

William Morehead, CGFM - AGA National President
and Relmond Van Daniker, Ph.D., AGA National Exec Dir

Track 2 – Social Engineering

Douglas Fries and Jon Alvarez, KPMG LLP

Track 3 – Impact of Federal Stimulus Funds on State and Local
Governments

Shawn Warren, KPMG

Track 4 – Mortgage Fraud

Neil Power, Matt Gallas and John Kelan, FBI

Track 5 – Responding to Public Health Emergencies

Suzanne Condon, Mass Department of Public Health

Track 6 – IT Auditing

John Beveridge, CGFM, Mass State Auditor's Office

Track 7 – Talent Management
Paul Dietl, Office of Personnel Management

Track 8 – GASB Update
Eric S. Berman, CPA, Massachusetts Comptroller's
Office

Track 9 – Fraud Risk Assessment
Scott Graham, Robert Sprague and Michael Brodsky,
Deloitte Financial Advisory Services LLP

Track 10 – Auditing in a Hostile Environment
Seay Anne Sheley, DCAA
Dan Bonette, Deloitte & Touche

Regional Intergovernmental Dialogue

On September 1, 2009, the AGA-Boston Chapter in conjunction with the National Office held an AGA Regional Intergovernmental Dialogue on the American Recovery and Reinvestment Act of 2009. Attendees earned 4 CPE hours.

Recovery Impact Danny Werfel, U.S. Office on Management and Budget

State and Local Experiences with the Recovery Act

Jeffrey Simon, Commonwealth of Massachusetts

Sally Gloria, City Auditor, City of Boston

Wayne Hannon, State of Rhode Island

Update on Recovery Act Oversight

Carol Patey, Government Accountability Office

Rick Skinner, Inspector General, Department of Homeland Security

Breakout Sessions by Federal Agencies:

U.S. Department of Health and Human Services

Paul Jacobsen, Carol Maloof & Mary Ann Higgins,

U.S. Department of Education

Philip A. Maestri

U.S. Department of Transportation and the Department of Commerce

Kristine Leiphart, Department of Transportation

Todd Zinser, US Department of Commerce Inspector General

Boston Federal Reserve Bank Building

Accountability and Transparency Workshop

On March 10, 2010, the AGA-Boston Chapter in conjunction with the National Office held an AGA Accountability and Transparency Workshop. There were 30 attendees from state and local governments, accounting and audit firms, public policy research organizations, etc. Attendees earned 3.0 CPE hours.

The agenda included presentations and interactive discussions with the following speakers:

Relmond Van Daniker, Ph.D., AGA National Executive Director

William Kilmartin, CGFM, Accenture and Boston Chapter President – Elect

Craig Hall, Commonwealth of Massachusetts, Developmental Disabilities Office; MA Developmental Disabilities Office has prepared several Citizen-Centric Reports

Eric S. Berman, CPA, Deputy Comptroller, Commonwealth of Massachusetts and Boston Chapter President – Elect Designate

Orlando Pacheco, Lancaster Town Manager; the Town of Lancaster recently published its first Citizen-Centric Report

Audio Conferences – AGA National (held at Federal Reserve Building, Boston, MA)

August 12, 2009	Stimulus Spending Controls Doug Rice, Mass A&F	2 CPE Hours 1 CPE Hour
September 1, 2009	Grants Management Dan Bonnette, Deloitte & Touche	2 CPE Hours 1 CPE Hour
October 7, 2009	Internal Controls Mary Maloney & Peter Scavotto, Mass Office of the Comptroller	2 CPE Hours 1 CPE Hour
December 16, 2009	Occupational Fraud Bill Rose, FBI	2 CPE Hours 1 CPE Hour
May 19, 2010	Ethics John Sullivan, Boston University	2 CPE Hours 1 CPE Hour

During the program year the chapter provided a total of 5,688 CPE hours to 879 attendees.

AGA National PDC – New Orleans

The Boston Chapter was represented by eleven (11) members at the PDC.

The chapter won four (4) awards at the PDC:

Julia P. Burns, CGFM National Chapter Service Award.

Kimberly Rapoza, CGFM, CPA received the Chapter Recognition Award Platinum Level as Chapter President.
David A. LeBlanc, CGFM, CFS received the Regional Vice President Award Gold Level Boston Chapter - National Chapter Community Service Award (Group B).

AGA SLM – Baltimore

The Boston Chapter was represented by seven (7) members at the SLM. These individuals hold national, regional and chapter leadership positions.

Community Service

The Boston Chapter actively participated in a variety of community service projects throughout the program year.

July 2009	Bay State Games
Sept. 22, 2009	N.E. Shelter for Homeless Veterans serving dinner.
Sept. 24, 2009	Animal Shelter Donations collected.
November 11, 2009	Served meals at the New England Shelter for Homeless Veterans
December 3, 2009	Gift drive and raffles for the benefit of Christmas in the City
February 2, 2010	National Groundhog Job Shadow Day.
March 9, 2010	Collected personal toiletry items for homeless and transitional shelters. Animal Shelter Donations collected. Eyeglasses collected for the Lions Club. Cell Phone collected for Cell Phones for Soldiers.

In Addition, the Chapter has recommended to and encouraged that its members use their unique skills to work in many youth organizations and to serve on their boards or as financial managers of many non-profit and volunteer organizations. A number of the members serve as volunteer financial professionals in organizations such as local Boys and Girls Clubs, YMCA's and YWCA's, New England Swimming and as treasurers of local youth sports organizations.

Special Chapter Contributions

The chapter contributed a \$1,000 gift to Christmas in the City; and the chapter also voted and made a \$1,000 chapter challenge for the AGA National Community Service Fund. Along with a Boston Themed Gift Basket to the National Auction at the PDC in New Orleans.

Chapter Elections

The Chapter held it's annual elections on March 9, 2010 at it's Regional Professional Development Conference

Chapter Awards and Scholarships

Mel Partol Award - Kimberly Rapoza, CGFM, CPA

Annual Achievement Award – John Wilkes, CGFM

Chapter Community Service Award – Jane Gustowski, CPA

Chapter Educator Award – Daniel Bonnette, CPA

Agency Chapter Service Award – Massachusetts State Auditor's Office

President's Awards – Laurie Allen

Education Committee Members

Chapter Executive Committee

Walter Frese Memorial Scholarship – Timothy J. Casaletto, U Mass Lowell

George E. Brady Memorial Scholarship – Lauren Blodgett, Boston College

National Awards

Chapter Recognition Award, Platinum Level - Joseph Valchuis, CFE, CFS Chapter President

National Chapter Service Award (Group B) – David A. LeBlanc, CGFM, CFS

National Chapter Community Service Award (Group B) – Jane Gustowski, CPA

Kathie Still, CGFM received the Regional Vice President Award Gold Level

Early Careers

- The Chapter awarded two \$1000 college scholarships this year and awarded AGA student memberships to our two academic scholarship winners.
- A member of the incoming Chapter Executive Board (VP of Planning) is an Early Career Member.
- The chapter had six (6) new members this year that were Early Career Members.

Membership

The AGA – Boston Chapter welcomed 24 new members and ended the program year with 256 members.

To increase and enhance membership the chapter awarded:

- The Chapter awarded a \$1000 college scholarship to a member (or immediate family member).
- The Chapter awarded AGA memberships to our two academic scholarship winners.
- Every new member was given a voucher to use toward the price of a future chapter event.
- All members could attend the Audio Conferences free of charge.
- The Chapter drastically reduced costs for all members for educational events.

Certification

March of 2010 was designated as CGFM month by his Excellency, Governor Deval Patrick of the Commonwealth of Massachusetts. This certificate was sent to AGA National.

The AGA – Boston Chapter supported the CGFM program by sponsoring up to five CGFM scholarships for members of the chapter.

Chapter Committee Members

Auditor.....	Maria Fernandez
Bylaws and Procedures	Nick Dahl, CGFM
Communication	David A. LeBlanc, CGFM, CFS – Newsletter Editor and Webmaster
Community Service	Jane Gustowski, CPA Chair Julia P. Burns, CGFM Maryann Costello Kimberly Rapoza, CGFM, CPA Maggie Trudel Joseph Valchuis, CFE, CFS
Early Career	Mary Leyden, CGFM, Career Day Chair
Membership.....	Mary Beth Farrelly, CFE, CFS
Nominations.....	William Kilmartin, CGFM, Chair Martin Benison, CGFM John Beveridge, CGFM Howard N. Olsher, CGFM, CFE Joseph Valchuis, CFE, CFS
Scholarships and Awards.....	William Muench, CGFM, CPA, Chair Maryann Costello Nick Dahl, CGFM Michael Gagan Diane Ledwell, CGFM

Education Julia P. Burns, CGFM, Chair
John Beveridge, CGFM
Judith Blodgett
Jane Gustowski, CPA
William Kilmartin, CGFM
David A. LeBlanc, CGFM, CFS
William Muench, CGFM, CPA
Howard N. Olsher, CGFM
Kimberly Rapoza, CGFM, CPA
Kathie Still, CGFM
Joseph Valchuis, CFE, CFS
Scott Warnecki, CPA
John Wilkes, CGFM

Publications

Boston's Beacon, the Chapter's newsletter, is published monthly.
AGA-Boston Chapter Annual History Report is published after the close of the program year.

Balance Sheet

As of May 31, 2009, the chapter had total assets of \$30,719

New England Region Committee Members

Regional Vice President Kathie Still, CGFM
Past Regional Vice President..... David A. LeBlanc, CGFM, CFS
Development and Assistance Coordinator Jane Gustowski, CPA
Certification Coordinator..... Joseph Valchuis, CFE
Education Coordinator David A. LeBlanc, CGFM, CFS