

**Association of Government Accountants – Boston Chapter
Annual History Report 2011 – 2012**

Chapter Executive Committee

Officers

President..... Shawn Warren, CPA
President-Elect..... Ernest Almonte, CGFM, CPA
Immediate Past President..... William Kilmartin, CGFM
Secretary..... Richard Sullivan, CPA
Treasurer Patricia Rydlak
Vice President for Education
and Programs Julia P. Burns, CGFM
Vice President for Planning..... Judith Reilly, CPA, CFE
Vice President for Communication David A. LeBlanc, CGFM, CFS

Directors

Bylaws and Procedures Nicholas Dahl, CGFM
Community Service Jane Gustowski, CPA
Membership & Early Careers Howard Olsner, CGFM, CFE
..... Shannon Parven
Scholarships and Awards..... William Muench, CGFM, CPA
Professional Certifications Joseph Valchuis, CFE, CFS

Chairs

Newsletter..... David A. LeBlanc, CGFM, CFS
Career Day..... Mary T. Leyden, CGFM
Webmaster..... David A. LeBlanc, CGFM, CFS
Chapter Auditor..... Shana Dorian, CPA

Special Meetings

December 1, 2011 Special Business Meeting and Annual Holiday Luncheon and
Charity Fundraiser at Maggiano's Little Italy Restaurant, 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

October 20, 2011 The Many Faces of Fraud 7 CPE hours
Lombardo's Randolph, MA

Darren Donovan, KPMG, Steven Ricciardi, U S Secret Service
and David A. LeBlanc, CGFM, CFS, Mass. Dept of Secondary

and Elementary Education held a panel discussion on latest audit processes.

Christopher Kelly, Mass AGO presented a session on Computer Fraud.

Neil Cohen, CFS, Mass OIG spoke on Educational Collaboratives and Municipal Light Plants.

Bill Daly, ANF conducted a session on the Anti Fraud Task Force

January 21, 2012

Collecting Testimonial Evidence and
Interviewing Techniques
JFK Federal Bldg., Boston, MA

7 CPE hours

Bob Carnegie
R Carnegie Associates

Workshop

November 17, 2011

Data Analysis
Kim Raposa, CGFM, CPA, HHS OIG

4 CPE Hours

Conference

March 13, 2012

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

Keynote Speakers

Dick Bunce, CGFM - AGA National President
Steven Grossman, Mass State Treasurer
Ernest Almonte, CGFM, CPA

Concurrent Sessions:

Track 1 & 6
Linkedin as an Administrative Tool
David Gowel, Rocktech.com

Track 2 & 7
Ethics
Dick Bunce, CGFM - AGA National President

Track 3 & 8
Writing Techniques for Auditors
Joanne Feierman

Track 4 & 9
CAROI
David A. LeBlanc, CGFM, CFS, Mass. Dept of Secondary
and Elementary Education

Track 5 & 10
IT Controls
Dan Nelson, McGladrey & Pullen

Track 11
GASB Update
Greg Driscoll, KPMG

Track 12
Cloud Computing
Geoff Clarke, KPMG

Track 13
Productive Goal Settings
Robert A. Carnegie, R. Carnegie Associates

Track 14
DOD Procurement Fraud
JoAnne Corvese, DCAA

Track 15
Governmental Accounting 101
Scott Warnetski, KPMG

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

September 28, 2011	Fraud Phil Coyne, HHS OIG	2 CPE Hours 1 CPE Hour
October 5, 2011	Internal Controls Geoff Clarke, KPMG	2 CPE Hours 1 CPE Hour
December 14, 2011	Fraud Richard Sullivan, CPA	2 CPE Hours 1 CPE Hour
February 8, 2012	Financial Management William Bell, Mass DESE	2 CPE Hours 1 CPE Hour
March 7, 2012	Data Mining	2 CPE Hours

	Joseph Valchuis, CFE, CFS Mass DESE	1 CPE Hour
April 18, 2012	Audit Tools	2 CPE Hours
May 23, 2012	Ethics	2 CPE Hours
	Daniel Bonnette, CPA	1 CPE Hour

During the program year the chapter provided a total of 5,162 CPE hours to 881 attendees.

AGA National PDC – Atlanta

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

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

Kathleen Still, CGFM received the National Chapter Service Award.

William Kilmartin, CGFM received the Chapter Recognition Award Platinum Level as Chapter President.

National Chapter CGFM Award (Group B) – Joseph Valchuis, CFS, CFE

David A. LeBlanc, CGFM, CFS received the National Website Award (Honorable Mention, Group B).

AGA SLM – Indianapolis

The Boston Chapter was represented by three (3) 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 2011	Bay State Games
Aug 2011	Volunteer for Massachusetts Stand Down for Boston area Homeless Veterans
Oct 2011	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.
Nov 2011	Served meals at the New England Shelter for Homeless Veterans
Dec 2011	Gift drive and raffles for the benefit of Christmas in the City
Feb 2012	National Groundhog Job Shadow Day.

- Mar 2012 Collected personal toiletry items for homeless and transitional shelters. Animal Shelter Donations collected. Eyeglasses collected for the Lions Club.
- Apr 2012 Served meals at the New England Shelter for Homeless Veterans

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 Atlanta.

Chapter Elections

The Chapter held it's annual elections on March 13, 2012 at the Regional Professional Development Conference

Chapter Awards and Scholarships

Lifetime Achievement Award - Howard Olsher, CGFM, CFE

Annual Achievement Award – Kenneth Woodland, CGFM

Chapter Community Service Award – Daniel Bonnette, CPA

Chapter Educator Award – Robert A. Carnegie

Agency Chapter Service Award – Massachusetts Office of the State Auditor

President's Awards – Julia P. Burns, CGFM

David A. LeBlanc, CGFM, CFS

Joseph Valchuis, CFE, CFS

George E. Brady Memorial Scholarship – Patrick Souza, Providence College

Walter Frese Memorial Scholarship – Nichlas Romano, Boston College

2012 National Awards Reported – San Diego PDC

Chapter Recognition Award, Platinum Level – Shawn Warren, CPA, Chapter President

RVP Recognition Award, Gold Level – Jane Gustowski, CPA, New England Regional Vice President

Highest Membership Growth in Group A (27% growth)

Early Careers

- The Chapter awarded two \$1000 college scholarships this year and awarded AGA student memberships to our academic scholarship winners.
- The chapter had five (5) new members this year that were Early Career Members.

Membership

The AGA – Boston Chapter welcomed 88 new members and ended the program year with 320 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 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.

Certification

March of 2012 was designated as CGFM month by his Excellency, Governor Deval Patrick of the Commonwealth of Massachusetts and by Mayor Thomas Menino of the City of Boston. These certificates were sent to AGA National.

The Commonwealth of Massachusetts certified the CGFM as a preferred qualification for promotion and hiring purposes.

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

Chapter Committee Members

Auditor..... Shana Dorian, CPA

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
Frances Dynan
William Kilmartin, CGFM
William Muench, CGFM, CPA
Kimberly Rapoza, CGFM, CPA
Maggie Trudel
Joseph Valchuis, CFE, CFS
Catherine Warren
Shawn Warren, CPA

Early Career Mary Leyden, CGFM, Career Day Chair

Membership.....Howard N. Olsher, CGFM, CFE, Co-Chair
Shannon Parven, Co-Chair

Nominations..... Shawn Warren, CPA, Chair
Ernest Almonte, CGFM, CPA
David A. LeBlanc, CGFM, CFS
Howard N. Olsher, CGFM, CFE
Joseph Valchuis, CFE, CFS

Scholarships and Awards..... William Muench, CGFM, CPA, Chair
Nick Dahl, CGFM
Michael Gagan
Diane Ledwell, CGFM
Dante Zamora

Education Julia P. Burns, CGFM, Chair
Barry Ahearn
Ernie Almonte, CGFM, CPA
Judith Blodgett
Stephen Bracci
Bob Carnegie
Jane Gustowski, CPA
David A. LeBlanc, CGFM, CFS
William Muench, CGFM, CPA
Lisa Mayes

Howard N. Olsher, CGFM
Judith Reilly, CPA, CFE
Debbie Semensi, CFS
Joseph Valchuis, CFE, CFS
Scott Warnecki, CPA
Shawn Warren, 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, 2011, the chapter had total assets of \$43,037

New England Regional Committee Members

Regional Vice President.....Jane Gustowski, CPA
Certification Coordinator.....Joseph Valchius, CFE, CFS
Education Coordinator David A. LeBlanc, CGFM, CFS

AGA National Executive Committee Members

Senior RVP, Region I..... Wallace A. Franklin, CGFM
National Treasurer Elect Designee (ex-officio) David A. LeBlanc, CGFM, CFS