

**Association of Government Accountants – Boston Chapter  
Annual History Report 2007 – 2008**

**Chapter Executive Committee**

Officers

President..... Wallace Alan Franklin, CGFM  
President-Elect..... Kimberly Rapoza, CGFM, CPA  
Immediate Past President..... John W. Beveridge, CGFM, CFE  
Secretary..... Joseph Valchuis, CFE  
Treasurer ..... Kelly Lanier  
Vice President for Education  
and Programs ..... Julia P. Burns, CGFM  
Vice President for Planning..... Christine Donohoe  
Vice President for Communication.... David A. LeBlanc, CGFM

Directors

Bylaws and Procedures ..... Nicholas Dahl, CGFM  
Community Service ..... Kathleen Cushing, CGFM  
Membership & Early Careers ..... Susan Weeks, CGFM, CPA  
Registration..... Howard Olsher, CGFM, CFE  
Scholarships and Awards..... William Muench, CGFM, CPA  
Professional Certifications ..... Joseph Valchuis, CFE

Chairs

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

**Special Meetings**

December 13, 2007	Special Business Meeting and Annual Holiday Luncheon and Charity Fundraiser at Maggiano's Little Italy Restaurant, Boston, MA
May 29, 2008	Special Business Meeting and Annual Awards and Chapter Appreciation Dinner at Vinalia 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:

**Lunch Meeting**

September 20, 2007	<i>VA Fraud – Case Study</i> Tim Bond – US VA OIG Nick Dahl, CGFM US VA OIG	1 CPE hour
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The Harp Restaurant, Boston, MA

**Seminars**

October 11, 2007

Faces of Fraud 7 CPE hours

Ruthann Heselbarth  
Securities and Exchange Commission  
Investment Fraud

Eugene Ferris  
Massachusetts State Lottery  
Lottery Fraud.

Peter Clark  
Mass. Attorney General's Office  
Medicaid Fraud

Lance N. Okamoto  
IRS  
Criminal Investigations and Financial Crimes  
Lombardo's Restaurant, Randolph, MA

November 8, 2007

*Identity Fraud* 4 CPE hours

William Rose, Special Agent Federal Bureau of Investigation,  
Boston Office  
Matthew Quinn, Compliance Manager, Bank of America  
JFK Federal Building, Boston, MA

February, 14, 2008

*Homeland Security Issues* 4 CPE Hours

Scott Lennon, Massachusetts Office of the State Auditor  
Mary Yebba, US Food and Drug Administration  
Michael Dinning, US Transportation Systems  
Federal Reserve Building, Boston, MA

April 10, 2008

*Immigration, Customs Enforcement  
& Secret Service Investigations* 4 CPE Hours

Michael Pickett, Special Agent, US Secret Service  
Todd Donnelly, Senior Special Agent, US ICE  
JFK Federal Building, Cambridge, MA

**Conference**

March 11, 2008

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

*Keynote Speakers*

William Fair, CGFM, CPA - AGA National President  
Gregory W. Sullivan, MA Inspector General

Concurrent Sessions:

*State Auditor Panel*

Richard L. Fair, CGFM, New Jersey State Auditor  
Ken Marchurs, Massachusetts State Auditor's Office  
Thomas M. Salmon, CPA, Vermont State Auditor

*GASB Update*

Eric S. Berman, CPA, Massachusetts Comptroller's Office

*Computer Security*

Jim Laky, VA OIG ISO  
Jim O'Neill, VA OIG

*Performance Auditing*

Beth L. Ashcroft, CIA, ME Office of Program Evaluation  
& Government Accountability

*Finding Fraud*

David R. Hancox, CGFM, CIA, NY Office of the Comptroller

*Ethics Panel*

Ed Lukey, Dept. of Veterans Affairs  
Jenny Hedderman, Massachusetts Comptroller's Office  
Gary Mathison, KPMG

*Managing Multiple Generations*

Jeffrey H. Davis, M.Ed.

*e-Commerce*

Robert Buchanan, MA Office of the State Auditor  
Sean Carter, NEACH  
Patricia Davis, MA Office of the Comptroller

During the program year the chapter provided a total of 3,028 CPE hours to 552 attendees.

**Audio Conferences – AGA National**

August 8, 2007	Performance Management & Reporting	2 CPE Hours
November 14, 2007	Tools for Performance Audit Efficiency	2 CPE Hours
December 12, 2007	Anatomy of a Fraud	2 CPE Hours
February 6, 2008	<i>Internal Controls</i>	2 CPE Hours
March 5, 2008	<i>Environmental Fraud</i>	2 CPE Hours

May 14, 20078

*Ethics*  
Federal Reserve Building, Boston, MA

2 CPE Hours

### **AGA National PDC – Nashville**

The Boston Chapter was represented by eleven (11) members at the PDC. One of the chapter's members (Julia Burns, CGFM) was a featured speaker.

### **AGA SLM – Cleveland**

The Boston Chapter was represented by four (4) members at the SLM. These individuals hold regional offices and chapter president elect and president elect designee positions.

### **Community Service**

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

June 2007	WGBH (public television) Auction
July 2007	Bay State Games
October 11, 2007	Sock Collection for Homeless Shelters
October 2007	Light the Night – Cancer Walk
December 13, 2007	Gift drive and raffles for the benefit of Christmas in the City
February 2, 2008	National Groundhog Job Shadow Day.

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; a cash donation to Light the Night; a \$100 gift certificate to the auction table at the National Professional Development Conference in Nashville. The chapter also voted and made a \$500 chapter challenge for the AGA National Community Service Fund.

### **Chapter Awards and Scholarships**

Chapter Agency Award - Massachusetts State Auditor's Office

Mel Partol Award - Julia P. Burns, CGFM, Office of the Comptroller

Lifetime Achievement Award - Wallace Alan Franklin, CGFM

Annual Achievement Award – Ronald Honesty, Massachusetts Department of Elementary and Secondary Education

Chapter Community Service Award - Kathleen Cushing, CGFM, Massachusetts State Auditors Office

Chapter Educator Award - John W. Beveridge, CGFM, CFE, Massachusetts State Auditors Office

#### President's Awards

John W. Beveridge, CGFM, CFE

Julia P. Burns, CGFM

Kathleen Cushing, CGFM

Nicholas Dahl, CGFM

Christine Donohoe

Michael Gagan

Kelly Lanier

David A. LeBlanc, CGFM

Mary T. Leyden, CGFM

William Muench, CGFM, CPA

Howard Olsher, CGFM, CFE

Kimberly Rapoza, CGFM, CPA

John Reeks

Joseph Valchuis, CFE

Susan Weeks, CGFM, CPA

Walter Frese Memorial Scholarship – Eric A. King, University of Pennsylvania

George E. Brady Memorial Scholarship – Maureen Cushing, Penn State University

#### National Awards

Chapter Recognition Award Platinum Level – Wallace Alan Franklin, CGFM, Chapter President

National Chapter Newsletter Award (Group B Honorable Mention) – David A. LeBlanc, CGFM

National Chapter Website Award (Group B Honorable Mention) – David A. LeBlanc, CGFM

#### 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 Chapter Executive Board (Treasurer) is an Early Career Member.

### Membership

The AGA – Boston Chapter welcomed 27 new members and ended the program year with 251members.

To increase and enhance membership the chapter awarded:

- The chapter randomly awarded an AGA membership to an individual attending the annual awards dinner.
- The Chapter awarded an AGA membership to the top membership recruiter of the year.
- 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.

### Certification

March of 2007 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. Darleen Costa Brown, CGFM, was awarded one of the chapter's annual scholarships.

### Chapter Committee Members

Auditor.....	Stephen Concilio, CPA
Bylaws and Procedures .....	Nick Dahl, CGFM, Chair
Communication .....	David A. LeBlanc, CGFM – Newsletter Editor and Webmaster
Community Service .....	Kathleen Cushing, CGFM, Chair Julia P. Burns, CGFM Christine Donohoe David A. LeBlanc, CGFM Nicholas Maffei
Early Career .....	Mary Leyden, CGFM, Career Day Chair
Membership .....	Susan Weeks, CGFM, CPA, Chair
Nominations.....	Kimberly Rapoza, CGFM, CPA, Chair David A. LeBlanc, CGFM

Howard N. Olsher, CGFM, CFE

Scholarships and Awards..... William Muench, CGFM, CPA, Chair  
Sandra Commerford  
Raymond Fitzgerald, CGFM  
Diane Ledwell, CGFM

Education ..... Julia P. Burns, CGFM, Chair  
Maureen Barry  
Wallace A. Franklin, CGFM  
David A. LeBlanc, CGFM,  
John Mahoney, CGFM  
Howard N. Olsher, CGFM  
Susan Perna-Damon, CGFM, 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, 2008, the chapter had total assets of \$38,866

**New England Region Committee Members**

Regional Past Vice President..... Julia P. Burns, CGFM  
Regional Vice President Elect ..... David A. LeBlanc, CGFM  
Development and Assistance..... Jane Gustowski, CPA  
Certification Coordinator..... Joseph Valchius, CFE