

**Association of Government Accountants – Boston Chapter  
Annual History Report 2008 – 2009**

**Chapter Executive Committee**

Officers

President..... Kimberly Rapoza, CGFM, CPA  
President-Elect..... Joseph Valchuis, CFE  
Immediate Past President..... Wallace Alan Franklin, CGFM  
Secretary..... Scott Lennon  
Treasurer ..... Kelly Lanier  
Vice President for Education  
and Programs ..... Julia P. Burns, CGFM  
Vice President for Planning..... Brenda Delasanta  
Vice President for Communication .... David A. LeBlanc, CGFM

Directors

Bylaws and Procedures ..... Nicholas Dahl, CGFM  
Community Service ..... Maryann Costello, CGFM  
Membership & Early Careers ..... Mary Beth Farrelly, CFE  
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 4, 2008                      Special Business Meeting and Annual Holiday Luncheon and  
Charity Fundraiser at Maggiano's Little Italy Restaurant, Boston,  
MA

June 19, 2009                      Special Business Meeting and Annual Awards and Chapter  
Appreciation Dinner at the Museum of Science, 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 18, 2008                      Transportation Issues                      1 CPE hour  
Michael Dinning, US Transportation Systems  
The Harp Restaurant, Boston, MA

## Seminars

October 23, 2008	Fraud & Ethics David Cotton, CPA Lombardo's Randolph, MA	7 CPE hours
January 15, 2009	Internal Controls John McKeever Volpe Federal Transportation Bldg.	7 CPE hours

## Workshops

November 20, 2008	Auditing in a Hostile Environment Ronald Meldonian, DCAA Ron Cox, DFAS Peter Babachicos, CGFM, US DOT Theodore Doherty, US DOT O'Neill Federal Bldg., Boston, MA	4 CPE hours
April 16, 2009	Forensic Accounting Fred Howell, MBA, CISSP, Bose Corp. JFK Federal Building, Boston, MA	4 CPE Hours

## Conference

March 10, 2009	Regional Professional Development Conference Bentley College, Waltham, MA	8 CPE hours
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### *Keynote Speakers*

Bobby Derrick - AGA Past National President  
Jonathan Blodgett, Essex County District Attorney

### Concurrent Sessions:

Track 1 – Professional Issues Update—Accountability Resources  
in a Bad Economy  
Ernest Almonte, CGFM, Rhode Island State Auditor

Track 2 – GASB Update  
Eric S. Berman, CPA, Massachusetts Comptroller's  
Office

Track 3 – Ethics  
Bobby Derrick, CGFM

Track 4 – Putting and Keeping Professional Relationships on Track  
Bob Carnegie, MBA

Track 5 – State Treasurer Panel – Current Topics for State Treasurers  
Beth Pearce, VT Treasurer's Office  
James MacDonald, Mass. Office of the State Treasurer

Track 6 – Cost of Security and Prevention vs. the Cost of Catastrophe  
Michael Dinning, U.S. Dept. of Transportation, Volpe Center  
Paul MacMillan, MBTA Transit Police Chief  
Lt. Steven West, U.S. Coast Guard

Track 7 - Accounting Standards Boards – *GASB, FASB and IASB*  
Eric Berman, CPA, Deputy Comptroller, Commonwealth of Mass.  
Matthew Jaques, Security and Exchange Commission, Boston Office  
Joseph Valchuis, CFE, MA Office of the State Auditor

Track 8 – Food and Nutrition Decisions for a Healthier and Longer Life  
Joseph M. Carlin, Nutritionist, U.S. Dept. of Health and Human Services

Track 9 – Preventing Procrastination  
Bob Carnegie, MBA

Track 10 – Closing the Loop – Control Evidence / Audit Evidence  
John Beveridge, CGFM, Deputy State Auditor, Commonwealth of Mass.

During the program year the chapter provided a total of 3,058 CPE hours to 615 attendees.

**Audio Conferences – AGA National**

September 8, 2008	Fraud Prevention and Detecting	2 CPE Hours
November 12, 2008	Internal Controls	2 CPE Hours
February 11, 2009	Fraud	2 CPE Hours
	Bill Rose, FBI	1 CPE Hour
April 8, 2009	Auditing	2 CPE Hours
May 13, 2009	Ethics	2 CPE Hours

Federal Reserve Building, Boston, MA

### **AGA National PDC – Atlanta**

The Boston Chapter was represented by eleven (11) members at the PDC. One of the chapter's members Ernest Almonte, CGFM, CPA was a keynote speaker. Two members, Martin Benison, CGFM and Robert Carneige were breakout session speakers.

The chapter won five (5) awards at the PDC. Martin Benison, CGFM and Eric Berman, CPA were winners of the President's Award. Wallace A. Franklin, CGFM received the Chapter Recognition Award Platinum Level as Chapter President. David A. LeBlanc, CGFM received the National Chapter Newsletter Award (Group B Honorable Mention) and the National Chapter Website Award (Group B Honorable Mention).

### **AGA SLM – Baltimore**

The Boston Chapter was represented by six (6) 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 2008	Bay State Games
October 23, 2008	Clothing Collection for Veterans Homeless Shelters
October 2008	Light the Night – Leukemia & Lymphoma Cancer Walk
November 11, 2008	Served meals at the New England Shelter for Homeless Veterans
December 4, 2008	Gift drive and raffles for the benefit of Christmas in the City
February 2, 2009	National Groundhog Job Shadow Day.
March 10, 2009	Collected personal toiletry items for homeless and transitional shelters.

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; and the chapter also voted and made a \$1,000 chapter challenge for the AGA National Community

Service Fund. Along with a set of four Red Sox tickets to the National Auction at the PDC in Atlanta. The chapter also donated \$500 to the Aroostook County Chapter.

### **Chapter Elections**

The Chapter held it's annual elections on March 10, 2009 at it's Regional Professional Development Conference

### **Chapter Awards and Scholarships**

Chapter Agency Award – US HHS – Office of the Inspector General

Mel Partol Award - Nicholas Dahl, CGFM – US Veterans Affairs, OIG

Annual Achievement Award – Francis Cordima, Mass Department of Mental Health

Chapter Community Service Award – Maggie Trudel, Mass Office of the Comptroller

Chapter Educator Award – Robert Carnegie

President's Awards - Julia P. Burns, CGFM, Kelly Lanier, David A. LeBlanc, CGFM,

William Muench, CGFM, CPA, Howard Olsher, CGFM, CFE,

Joseph Valchuis, CFE

Walter Frese Memorial Scholarship – Eric King

George E. Brady Memorial Scholarship – Maureen Cushing

### **National Awards**

Chapter Recognition Award, Platinum Level – Kimberly, Rapoza, CGFM, CPA,  
Chapter President

Regional Vice President Recognition Award, Gold Level – David A. LeBlanc, CGFM

National Chapter Service Award (Group B) – Julia P. Burns, CGFM

National Chapter Community Service Award (Group B)

### **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.

The chapter had seven (7) new members this year that were Early Career Members.

## Membership

The AGA – Boston Chapter welcomed 37 new members and ended the program year with 257members.

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.
- The Chapter drastically reduced costs for all members for educational events.

## Certification

March of 2009 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, Chair
Communication .....	David A. LeBlanc, CGFM – Newsletter Editor and Webmaster
Community Service.....	Maryann Costello, Chair Julia P. Burns, CGFM Kimberly Rapoza, CGFM, CPA Maggie Trudel
Early Career .....	Mary Leyden, CGFM, Career Day Chair
Membership.....	Mary Beth Farrelly, CFE
Nominations.....	Joseph Valchuis, CFE, Chair Julia P. Burns, CGFM 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  
Judith Blodgett  
Wallace A. Franklin, CGFM  
David A. LeBlanc, CGFM,  
John Mahoney, CGFM  
Howard N. Olsher, CGFM  
Susan Perna-Damon, CGFM, CPA,  
Kathie Still, CGFM  
Joseph Valchuis, CFE  
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, 2009, the chapter had total assets of \$22,326

#### **New England Region Committee Members**

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