

**ANNUAL HISTORY REPORT
BALTIMORE CHAPTER
2006 – 2007**

CHAPTER EXECUTIVE COMMITTEE

OFFICERS

President	Steve Schaeffer, CPA, CGFM, Atty MD Bar
President-Elect	Paul Geraty, CPA, CGFM
Secretary	Deborah Kinsey, CPA
Treasurer	Rick Berlinrut, CPA, CFE
Immediate Past President	JoAnn White-Burnett, CPA

DIRECTORS

Activities	Milton Wolinski, CPA
Awards	Evangeline Labador
Awards	Brandon Phillips
Awards	Paul Webster
CGFM Coordinator	Chasity Crawley
CGFM Coordinator	Jean Adkins-Blasey
Community Service	Mark Silvestri, CGFM
Community Service	Ana Labador
Early Careers	Michele Murrill
Early Careers	Stacey Johnson
Early Careers	Tanisha Pryce
Early Careers	Rashad Holloway
Editorial	Kristen Schnatterly, CGFM
Editorial	Kristina Poist
Editorial	Christina Lilly, CGFM
Education and Programs	JoAnn White Burnett, CPA
Education and Programs	DeGloria Hall
Education and Programs	John Selby, CPA
Liaison & Research	Eugene Crist
Meetings	Tara Isaacs
Meetings	Junghee Gogue
Meetings	Susie Griffin
Membership	Dellareese Morton-Smith
Membership	Ed Koontz
Publicity	Carolyn Jackson
Web Page	Christopher Dipple

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REGULAR BOARD MEETING DATES

Board meetings were held each month from August through May. Our usual meeting date was the first Thursday of the month from 2:00 to 3:00 pm in the offices at the Social Security Administration/Office of the Inspector General in Woodlawn, MD. Conference call numbers were provided for those who could not attend in person.

EDUCATION OFFERED BY THE CHAPTER

The Baltimore Chapter held a monthly training session during the months of September 2006 through May 2007 totaling 26 CPEs. Most sessions were held on the third Thursday of each month.

The following lists the details of the training sessions:

- September 2006 Afternoon Training
- “Financial Management Implications of Leading a Major Agency”
- Speaker: Jo Anne Barnhart, Commissioner of Social Security
- This program qualified for one (1) hour of CPE credit.
- October 2006 Afternoon Training
- “Leadership, Teambuilding and Achieving Excellent Results in Government Financial Management through People”
- Speaker: Johnny Parker, professional speaker, certified life coach and relationship counselor
- This program qualified for three (3) hours of CPE credit.
- November 2006 Afternoon Training
- Part 1: “Safeguarding the Social Security Number”
 Speaker: Patrick O'Carroll, Inspector General for Social Security
- Part 2: "The COSO Framework"
 Speaker: Walt Fennell, Partner, KPMG
- This program qualified for two (2) hours of CPE credit.
- December 2006 Afternoon Training

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“IT Update”

Speakers Terry Carnahan, Managing Director KPMG; Gary Austin, Practice Leader, KPMG; and Phillip Moore, KPMG Federal Practice

The afternoon program was a joint meeting with the Baltimore Chapter of the Information Systems Audit and Control Association (ISACA).

This program qualified for three (3) hours of CPE credit.

January 2007

Afternoon Training

“Yellow Book Update”

Speaker: Marcia Buchanan, Assistant Director, Government Auditing Standards, Government Accountability Office

This program qualified for three (3) hours of CPE credit.

February 2007

Afternoon Training

“Forensic Investigations in Governmental Agencies”

Speakers: James Cottrell Jr., Partner, Deloitte and Edward Bishop, Jr., Senior Manager, Deloitte

This program qualified for three (3) hours of CPE credit.

This was a joint meeting with the Baltimore Chapter of the Institute of Internal Auditors (IIA).

March 2007

Afternoon Training

Early Career Luncheon: “Creating Tomorrow's Accounting Executives”

Speakers: Steven Anderson, Deputy Chief Information Officer, Federal Deposit Insurance Corporation (FDIC) and Ann Bromery, Chief Financial Officer, Living Legacy Foundation

This program qualified for two (2) hours of CPE credit.

April 2007

All-day Training

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Fraud Conference

Topic/Speakers:

"Ethics Training" - Kathy Buller, Social Security Administration

"Fraud Happens" - Art Hayes, State of Tennessee

"Tax Gap" - Jackie Benjamin and Timothy Greene, Internal Revenue Service

"Inspector General: Combating Fraud with Tradition, Ingenuity and Innovation" - Johnny Frazier, IG Dept of Commerce

This program qualified for eight (8) hours of CPE credit.

May 2007

Afternoon Training - Annual Awards Luncheon and Scholarship Ceremony

“AGA - Thought Leaders in Government Financial Management”

Speaker: Relmond Van Daniker, Executive Director, AGA

This program qualified for one (1) hour of CPE credit.

CHAPTER AWARDS

President's Awards

Dale Sopper - AGA Baltimore Chapter President's Excellence in Advancing Government Accountability Award - In recognition of long-time support in promoting membership and participation in AGA training and other professional development activities

Victoria Vetter - AGA Baltimore Chapter President's Professional Accomplishment Award In recognition of leading a government-wide symposium on the Federal Accounting Standards Advisory Board's Statement of Social Insurance

Chapter Service Awards

Deborah Kinsey - Secretary - For outstanding contributions as the Secretary of the Baltimore Chapter of the AGA for 2006 – 2007

Richard Berlinrut - Treasurer - For outstanding contributions as the Treasurer of the Baltimore Chapter of the AGA for 2006 – 2007

Chasity Crawley - Certification - For excellent contributions in promoting certification and encouraging individuals to sit for the Certified Government Financial Manager exam

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Brandon Philips - Awards Committee - For excellent and dedicated service as a new member of the board of directors of the Baltimore Chapter of the AGA for program year 2006 – 2007

Dellareese Morton-Smith - Membership Committee - For excellent and dedicated service as a Membership Director of the Baltimore Chapter of the AGA for program year 2006 – 2007

Tara Isaacs - Meetings Committee - For excellent contributions as Co-Director of Meetings of the Baltimore Chapter of the AGA for 2006 – 2007

Junghee Gogue - Meetings Committee - For excellent contributions as Co-Director of Meetings of the Baltimore Chapter of the AGA for 2006 – 2007

Susie Griffin - Meetings Committee - For excellent contributions as Co-Director of Meetings of the Baltimore Chapter of the AGA for 2006 – 2007

Rashad Holloway - Early Careers Committee - For excellent and dedicated service as a member of the board of directors of the Baltimore Chapter of the AGA for program year 2006 – 2007

Christina Lilly - Newsletter Committee - For excellent and sustained service as Newsletter Editorial Director for the Baltimore Chapter of the AGA for program year 2006 – 2007

Non Member Chapter Recognition Award

Annette DeRito, SSA/OIG - Non-Member Contributions to Advancing Government Accountability For dedicated editorial support of the 2006-2007 President of the Association of Government Accountants Baltimore Chapter in helping to prepare communications with AGA members and other financial management professionals

Timothy L. Trockenbrot, Jr. and Allan L. Reynolds Scholarship Awards

Casey Elizabeth Smith - \$1,000
Scholarship
University of Maryland Baltimore
County
GPA: Overall 3.86

Faraz Saleem - \$1,000 Scholarship
Towson University
GPA: Overall 3.973

Stephen C. Sobul, Jr. - \$1,000
Scholarship
Villa Julie College
GPA Overall: 3.89

Ritta Zeilah - \$500 Scholarship
Howard Community College
GPA: Overall 3.77

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AGA Book Scholarship Award

Yu-Ling Wei - \$150 Book Scholarship
University of Maryland Baltimore
County

Madiha Rizwan - \$150 Book
Scholarship University of Maryland
Baltimore County

Lauren Hurley - \$150 Book
Scholarship
Towson University

Susanne Hoffman - \$150 Book
Scholarship Towson University

NATIONAL RECOGNITION

The chapter received the Platinum Chapter Recognition Award for 2006-2007 Program Year.

PUBLICATIONS

The Baltimore Chapter published a monthly newsletter from September 2006 through May 2007. The chapter participated in the newsletter competition sponsored by National AGA. The chapter also has a website that is routinely updated with current information.

COMMUNITY SERVICE ACTIVITIES

July Fourth Celebration

July 4, 2006 - The chapter co-sponsored games and races for young children for the Fourth of July on the grounds of a local high school.

Halloween Party

October 26, 2006 - The chapter co-sponsored a Halloween Party for children at a local public library. The party featured a puppet show, refreshments and treats following the entertainment.

Food Drive

December 14, 2006 - The chapter held a drive for food and cash donations in conjunction with the December meeting and applied these gifts to support the *Our Daily Bread* soup kitchen.

Our Daily Bread

March 31, 2007 - Six Baltimore Chapter members volunteered at Our Daily Bread, which is a soup kitchen located in downtown Baltimore. The volunteers helped serve hot meals to the over 700 patrons to Our Daily Bread on that day. The chapter also presented a \$500 donation to the organization.

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Easter Egg Hunt

March 31, 2007 - The chapter was among the sponsors for an Easter Egg Hunt held for area children on the grounds of a local high school.

Movie Day

April 16, 2007 - The Baltimore Chapter sponsored Movie Day for the Bloomsburg Orphanage in Baltimore County. There were 50 Children and Staff who attended to see a movie of their choice at the Hollywood Movie Theatre in Arbutus, MD. Each attendee received a movie ticket, soda, and popcorn.

OTHER CHAPTER ACTIVITIES

Joint Meetings

In keeping with a policy of developing ties with other professional organizations in the Baltimore area, the chapter held a joint meeting with the Information Systems Audit and Control Association (ISACA) in December 2006 and with the Institute of Internal Auditors (IIA) in February 2007.

Early Careers Luncheon

To foster recognition of AGA and to give examples of career opportunities and professional growth, the chapter held an Early Careers Luncheon in March 2007. Government financial personnel in the early stages of their careers and some high school students attended as guests of the chapter and heard from two speakers on *Creating Tomorrow's Accounting Executives*. This is an annual event for the Baltimore Chapter.

Membership Recruitment Drive

The Baltimore Chapter offered an incentive for members to recruit new members for the program year. Six individuals who sponsored the most new members each received a \$100 savings bond.

CGFM Door Prizes

As an incentive to partake in the CGFM program, the Baltimore Chapter held a two door prize drawings at the April meeting. The door prizes will allow the winners to take the CGFM exams for free. The winners were members Chasity Crawley and Barbara Ricks.