

**ANNUAL HISTORY REPORT
BALTIMORE CHAPTER
2007 – 2008**

CHAPTER EXECUTIVE COMMITTEE

OFFICERS

President	Paul Geraty, CPA, CGFM
President-Elect	Stephanie Bosworth, CGFM
Secretary	Johnny Ramsey, CPA, CGFM
Treasurer	Rick Berlinrut, CGFM, CFE
Immediate Past President	Steven Schaeffer, CPA, CGFM, Atty MD Bar

DIRECTORS

Activities	Milton Wolinski, CPA
Awards	Evangeline Labador
Awards	Azmah Ahmad
Awards	John Selby
By-Laws and Procedures	Clinton Yoho
By-Laws and Procedures	Florence Wolford
CGFM Coordinator	Chasity Crawley, CGFM
CGFM Coordinator	Jean Adkins-Blasey
Community Service	Mark Silvestri, CGFM
Community Service	Rick Berlinrut, CGFM, CFE
Early Careers	Chasity Crawley, CGFM
Early Careers	Rashad Holloway
Early Careers	Jean Adkins-Blasey
Editorial	Kristina Poist
Editorial	Christina Lilly, CGFM
Editorial	Shannon Wittman
Education and Programs	JoAnn White Burnett, CPA
Education and Programs	DeGloria Hall
Education and Programs	Deborah Kinsey, CPA
Education and Programs	Monica Holliday-Ali
Meetings	Michele Murrill
Meetings	Tanisha Pryce
Meetings	Junghee Gogue
Meetings	Susie Griffin
Meetings	Letha Holliday
Membership	Dellareese Morton-Smith
Membership	Ed Koontz
Publicity	Brandon Phillips
Web Page	Briana Yoho
Web Page	Garima Khanna
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 Wednesday of the month from 1:30 to 2:30 pm in the offices at the Social Security Administration 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 2007 through May 2008 totaling 26 CPEs. Most sessions were held on the third Thursday of each month.

Additionally, the Chapter provided its members with two additional CPE opportunities through participation in the AGA Audio Conference series. The first, *The Anatomy of Ethical Slips in Government*, was held on May 14, 2008 from 2:00pm to 3:50pm at the Local Government Insurance Trust's (LGIT) offices in Elkridge, Maryland. The second, *Integrating Cost and Performance in a New Financial Reporting Model*, was held on June 18, 2008 from 2:00pm to 3:50pm at LGIT's offices. Both sessions were sponsored by KPMG and provided 2 CPEs each.

The following lists the details of the monthly training sessions:

September 2007 Afternoon Training

“Strategic Planning in an Age of Accountability”

Speaker: Carole Buncher, Carole Buncher and Associates

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

October 2007 Afternoon Training

“Updates on FASAB, GASB and SAS”

Speakers: Wendolyn Comes, FASAB

Al Warfield, Maryland-National Capital Park and
Planning Commission

Sherif Ettifa, KPMG

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

November 2007 Afternoon Training

Technology Wisdom for Today's Leaders

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Speaker: Scott Kolosky

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

December 2007

Afternoon Training

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

“Disaster Recovery and FISMA”

Speaker: Sam Bower

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

January 2008

Afternoon Training

(1) “Achieving Excellence through Human Capital Development”

Speaker: Reginald Wells, SSA Chief Human Capital Officer

(2) "Becoming a More Effective Leader"

Speaker: Tina Sung, President, Synergy Works LLC

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

February 2008

Afternoon Training

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

(1) “Defense Contract Audit Agency (DCAA) Audits”

Speaker: Jacque Hlavin, DCAA Branch Manager

(2) "Construction Auditing"

Dan Dreilbelbis and Jack Greenberg, Clifton Gunderson

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

March 2008

All-day Training

Annual Fraud Conference

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Topic/Speakers:

Dave Hancox, CIA, CGFM, Director, Division of New York State Government Accountability - “Internal Controls, Does Anyone Get It?” and “The Hunt for Fraud, The Devil Is In The Details”

David Gebler, President, Working Values, Ltd. - “Is Your Culture A Fraud Risk?” (Ethics Topic)

Hilton Green, CFE, CIA, CIG, Inspector General, City of Baltimore - “Auditors and Investigators, Working Together”

Dan Dreilbelbis and Jack Greenberg, Clifton Gunderson - “Interviewing Techniques”

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

April 2008

Afternoon Training - Early Career Luncheon

"Career Development"

Speakers: Bill Broadus, Consultant

Mary Lechner, Chief Internal Control Branch, US Coast Guard

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

May 2008

Afternoon Training - Annual Awards Luncheon and Scholarship Ceremony

“AGA National Initiatives”

Speaker: Sam Mok, President-Elect, AGA

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

CHAPTER AWARDS

President’s Special Achievement Awards

Excellence in Advancing Government Accountability Award: **Carla Krabbe**
In recognition of sustained and significant contribution to the Baltimore Chapter of the AGA and for commitment and dedication to continuous learning and training.

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Professional Accomplishment Award: **Thomas Bianco**
In recognition of professional accomplishment in achieving excellence with SSA's financial management system.

Chapter Service Award

Chapter Service Awards:

Milton Wolinski (Activities Director), *For outstanding contribution to the Baltimore Chapter of AGA in serving as the Activities Director for over fifteen years.*

Clinton Yoho, Florence Wolfort (Bylaws & Procedures), *In recognition of outstanding service to the Baltimore Chapter of AGA in reviewing and revising the Bylaws and Procedures of the organization.*

Chasity Crawley, Jean Adkins-Blasy (CGFM), *In recognition of outstanding service to the Baltimore Chapter of AGA in promoting and scheduling CGFM training classes.*

Rashad Holloway (Early Careers), *To recognize the dedication in promoting a career in government to financial management young leaders of the future.*

Kristina Poist, Christina Lilly, Shannon Wittman (Editorial), *In recognition of outstanding contributions to the editorial preparation of the monthly newsletter and for hard work in improving the entire newsletter format.*

Deborah Kinsey, JoAnne White-Burnett, DeGloria Hall (Education & Programs), *In recognition of outstanding service to the Baltimore Chapter of AGA in providing outstanding speakers for each of the monthly meetings.*

Junghée Gogue, Letha Holliday, Michelle Murrill (Meetings), *Dedication and service to the Baltimore Chapter of AGA in scheduling our monthly meetings and ensuring that each meeting ran smoothly.*

Briana Yoho, Garima Khanna (Webmaster), *In recognition of outstanding work in further developing and enhancing the Baltimore Chapter's website.*

Evangeline Labador, John Selby, Azmah Ahmad (Awards), *In recognition of dedication in promoting the AGA Baltimore Chapter scholarships and providing worthy scholarship recipients.*

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

Noura Antar - \$1,000 Scholarship
Morgan State University
GPA: Overall 4.0

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Micheal Feehly Jr. - \$1,000 Scholarship

Villa Julie College

GPA Overall: 3.96

Kelly Lesagonicz - \$1,000 Scholarship

Mount St. Mary's University

GPA: Overall 3.97

NATIONAL RECOGNITION

The chapter received the Platinum Chapter Recognition Award and runner up in the Newsletter Contest for the 2007-2008 Program Year.

PUBLICATIONS

The Baltimore Chapter published a monthly newsletter from September 2007 through May 2008. The chapter participated in the newsletter competition sponsored by National AGA. The chapter also has a website that is routinely updated with current information. The Chapter worked hard this year to change the look of both the newsletter and the website.

COMMUNITY SERVICE ACTIVITIES

July Fourth Celebration

July 4, 2007 - 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 30, 2007 - The chapter co-sponsored a Halloween Party for children at a local public library. The party featured a magic show, refreshments and treats following the entertainment. Over 50 kids attended the event. This was the AGA's 12th year being involved in this project.

Food Drive

December 13, 2007 - 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

February 23, 2008 - Ten Baltimore Chapter members and family members volunteered at Our Daily Bread, which is a soup kitchen located in downtown Baltimore. The

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volunteers helped serve hot meals to the over 700 patrons to Our Daily Bread on that day. The chapter also presented a \$350 donation to the organization.

Easter Egg Hunt

March 29, 2008 - The chapter was among the sponsors for an Easter Egg Hunt held for area children on the grounds of a local high school.

Avon Walk for Breast Cancer

May 3-4, 2008 - The Baltimore Chapter sponsored member Briana Yoho who walked 39.3 miles. The chapter also donated \$200.

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 2007 and with the Institute of Internal Auditors (IIA) in February 2008.

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 April 2008. 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 *Career Development*. This is an annual event for the Baltimore Chapter.

CGFM Activities

CGFM Training

The Baltimore Chapter, in conjunction with AGA National, sponsored the CGFM training series in Baltimore exclusively for chapter members. The training was held throughout March and April 2008. The biggest benefit of this was having members avoid traveling to Washington, DC for courses. It was also an incentive for more members to strive for the CGFM certification.

CGFM Scholarships

The Chapter awarded two CGFM exam scholarships to students who attended the CGFM training session cited above. The two winners were Evangeline Labador from SSA and Darius Hall from Treasury. These students have one year to successfully complete all three exams in order for the chapter to reimburse them for the cost of the exams.