

**ANNUAL HISTORY REPORT
BALTIMORE CHAPTER
2008 – 2009**

CHAPTER EXECUTIVE COMMITTEE

OFFICERS

President	Stephanie Bosworth, CGFM
President-Elect	Deborah Kinsey, CPA
Secretary	Johnny Ramsey, CPA, CGFM
Treasurer	John Selby, CPA
Immediate Past President	Paul Geraty, CPA, CGFM

DIRECTORS

Activities	Milton Wolinski, CPA
Awards	Evangeline Labador
Awards	Azmah Ahmad
By-Laws and Procedures	Clinton Yoho
CGFM Coordinator	Sue Delabio
Community Service	Mark Silvestri, CGFM
Community Service	Rick Berlinrut, CGFM, CFE
Community Service	Karen Huelskamp
Early Careers	Rashad Holloway
Early Careers	James Payton
Early Careers	Kelly Stankus, CPA
Early Careers	Tonia Hill
Editorial	Kristina Poist
Editorial	Christina Lilly, CGFM
Editorial	Shannon Wittman
Early Careers	Florence Wolford, CGFM, CPA
Education and Programs	JoAnn White Burnett, CPA
Education and Programs	Monica Holliday-Ali
Meetings	Letha Holliday
Meetings	Michele Murrill
Meetings	Matthew Bilenki
Meetings	Junghee Gogue
Meetings	Keith Lewis
Membership	DeGloria Hall
Membership	Elaine Wallace
Membership	Dellareese Morton-Smith
Membership	Ed Koontz
Web Page	Brandon Phillips
Web Page	Garima Khanna
Web Page	Briana Yoho

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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 2008 through May 2009 totaling 30 CPEs. Most sessions were held on the third Thursday of each month.

Additionally, the Chapter provided its members with two additional CPE opportunities during its 50th Anniversary Celebration held at **The Olive Branch Restaurant** in Pikesville, MD 21208 on Thursday, November 20, 2008, 11:30 a.m. – 3:00 p.m. See the complete anniversary program at the end of this document. The speakers and their topics are listed below:

The following lists the details of the monthly training sessions:

September 2008 Afternoon Training

(1) “Creating a Culture of Accountability”

Speaker: Joe Biondi, Peak Life Habits

(2) “OMB Update”

Speaker: Danny Werfel, Deputy Controller, Office of Federal Financial Management

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

October 2008 Afternoon Training

(1) “Creativity and Innovation”

Speakers: Flip Fillipi, Management Concepts

(2) “AICPA Professional and Regulatory Update”

Speaker: Tom Hood, Business Learning Institute

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

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November 2008

Afternoon Training

(1) "Many Faces of Leadership"

Speakers: Everett and Antigoni Ladd, Tigrett Corporation

(2) "FASAB Update"

Speaker: Wendy Payne, Executive Director FASAB

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

December 2008

Afternoon Training

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

"Internet Technology"

Speaker: Scott Klososky

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

January 2009

Afternoon Training

(1) "Dealing with Difficult People – Leadership Lessons from Lincoln"

Speakers: Everett and Antigoni Ladd and James Getty, Tigrett Corporation

(2) "Taking Care of People"

Speaker: Dave Weinberg, Booz, Allen, Hamilton

(3) "GASB Update"

Speaker: Chris Yother, Ernst and Young

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

February 2009

Afternoon Training

"Caesar's Wife – Tipping the Delicate Balance of Leadership and Ethics"

Speaker: Greg Conderacci, Business Learning Institute

This program qualified for four (4) hours of CPE credit.

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March 2009

Afternoon Training - Early Career Luncheon

"Tomorrow's Professional and Technology"

Speaker: Mario Armstrong, media personality and motivational speaker

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

April 2009

All-day Training

Annual Fraud Conference

Topic/Speakers:

(1) "Ethics, Nobody Needs It...Until They Get Caught"

Speaker: Dr. Dale Henry, author, speaker and trainer

(2) "Saving the Accountability Profession – Why Auditors Don't Find Fraud"

Speaker: Dave Hancox, Director, Division of State Government Accountability in the NYS Comptroller's Office

(3) "SAS 99, Does It Help Auditors Find Fraud?"

Speaker: Dave Hancox, Director, Division of State Government Accountability in the NYS Comptroller's Office

(4) "Investigating Misconduct Cases"

Speaker: Hilton Green, Inspector General, City of Baltimore

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

May 2009

Afternoon Training - Annual Awards Luncheon and Scholarship Ceremony

"Staff Recognition and Development"

Speaker: Mary Glenn-Croft, Chief Financial Officer, SSA

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

CHAPTER AWARDS

President's Special Achievement Awards

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

Professional Accomplishment Award: **Kathi Moore**
In recognition of professional accomplishment in leading the effort to modernize and improve accounting operations within SSA's Division of Benefit Certification and Accounting.

Chapter Service Awards

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

Deborah Kinsey (50th Anniversary Celebration Director), *In recognition of your outstanding efforts in coordinating the Baltimore Chapter AGA 50th Anniversary Celebration.*

John Selby (Baltimore Chapter Treasurer), *In recognition of your outstanding service as the Baltimore Chapter AGA Treasurer.*

Susan DeLabio (CGFM Coordinator), *In recognition of your outstanding service to the Baltimore Chapter of AGA in promoting the CGFM program.*

Mark Silvestri, Rick Berlinrut, Karen Huelskamp (Community Services), *For your sustained contribution to the Baltimore Chapter of AGA in organizing AGA-sponsored community service events.*

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

Kristina Poist, Christina Lilly, Shannon Wittman, Florence Wolford (Editorial), *In recognition of your outstanding contributions to the editorial preparation of the monthly newsletter and for your hard work in continually looking for ways to improve upon its format.*

JoAnn White-Burnett, Monica Holliday (Education & Programs), *In recognition of your outstanding service to the Baltimore Chapter of AGA in providing outstanding speakers for each of the monthly meetings.*

Letha Holliday, Junghee Gogue, Keith Lewis, Matthew Bilenki, Michelle Murrill (Meetings), *For your dedication and service to the Baltimore Chapter of AGA in scheduling our monthly meetings and ensuring that each meeting ran smoothly.*

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

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

Special Recognition Award – Baltimore County Executive Citation

Joe Rubin (Past President), *In recognition of your outstanding service to the Baltimore Chapter of AGA and your leadership in government programs related to fiscal management professions. Throughout your tenure as a member of AGA, your expertise has been an invaluable component of this organization's success. In addition, thanks to your efforts as a civic servant, the government has saved taxpayers tens of millions of dollars. On behalf of all its people, Baltimore County is proud to honor your many accomplishments and wishes you many more years of outstanding public service.*

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

Zena-Maria Fletcher - \$1,000 Scholarship
Morgan State University
GPA: Overall 3.8

Benjamin Leatherman. - \$1,000 Scholarship
Stevenson University
GPA Overall: 3.4

Joelle Zeilah - \$500 Scholarship
Howard Community College
GPA: Overall 3.7

NATIONAL RECOGNITION

The chapter received the Platinum Chapter Recognition Award for the 2008-2009 Program Year.

PUBLICATIONS

The Baltimore Chapter published a monthly newsletter from September 2008 through May 2009. The chapter participated in the newsletter competition sponsored by National AGA. The chapter also has a website that is routinely updated with current information.

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COMMUNITY SERVICE ACTIVITIES

July Fourth Celebration

July 4, 2008 - The chapter co-sponsored games and races for young children for the Fourth of July on the grounds of a local high school.

Susan G. Komen Race for the Cure

October 19, 2008 – The Baltimore Chapter sponsored chapter member Kristina Poist in the 3.1 miles Race for the Cure in Hunt Valley, MD. The chapter donated \$200.

Annual Christmas Party for Orphanage

December 4, 2008 – The chapter participated in the annual Christmas Party for the children of the Regional Institute for Children and Adolescent orphanage in Baltimore County, Maryland. Funds for a magic show performance and light refreshments were donated by the AGA.

Food Drive

December 11, 2008 - The chapter held a drive for food and cash donations in conjunction with the December meeting and applied these gifts to support the Catonsville Emergency Food Bank.

Howard County Community College Career Fair

March 20, 2009 – Two Baltimore Chapter members participated in the HCCC annual career fair, along with other government agencies and local businesses. The chapter members spread the word about the Baltimore chapter training, community events, and scholarship opportunities.

Our Daily Bread

March 28, 2009 - Five 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 \$250 donation to the organization. AGA National matched our donation of \$250, for a total donation of \$500.

Easter Egg Hunt

April 4, 2009 - 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 2-3, 2009 - The Baltimore Chapter sponsored member Briana Yoho who walked 39.3 miles throughout Washington, DC. 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 2008.

Early Careers Activities:

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 2009.

Happy/Social Hour – The EC Committee sponsored a happy hour/social event on Friday November 14 from 4pm-7pm at Champ's Sports Bar in Columbia, Maryland. Hors d'ouvers courtesy of the chapter were served.

Bowling Event - The EC Committee sponsored a bowling event at AMF Lanes in Woodlawn, Maryland on Friday April 17, 2009.

CGFM Activities

CGFM Scholarships - The Chapter awarded two CGFM exam scholarships as a door prize at the April 2009 Fraud Conference. The winners were John Selby and Renee Beil from the Social Security Administration. 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.

Sectional Leadership Meeting – Eight Chapter Executive Board members from the Baltimore Chapter members attended the SLM in Linthicum, Maryland on April 24-25, 2009. The SML is held to bring together incoming AGA Chapter Leaders, Regional Vice Presidents, Sectional Leaders, and AGA National Office Leaders for a structured roundtable discussion to assist chapters and establish effective relationship between all parties.

50th Anniversary Celebration

On Thursday, November 20, 2008, the Baltimore Chapter celebrated its 50th Anniversary with a lunchtime celebration. Over 70 members were in attendance, as well as some special guests including AGA's Mid-Atlantic Regional Vice President, Connie Huber and numerous past presidents and directors. A keynote address was given by Dr. Lenneal J. Henderson, Distinguished Professor of Government and Public Administration, University of Baltimore. A panel discussion on the topic of Government Financial Management was convened, with AGA Past Presidents as the distinguished speakers.

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The chapter received citations from the State of Maryland, City of Baltimore, Baltimore County, and the Baltimore City Comptrollers Office. "Length of Membership" awards were presented to members with ten or more years of membership and travel mugs were given to all who attended.

*** 50th Anniversary Celebration ***
1958 – 2008

Program

Registration and Social Time - 11:30 a.m.

Opening Remarks

*Stephanie Bosworth, President
Baltimore Chapter AGA*

Luncheon Served - Noon

**Welcoming Remarks
Introduction of Keynote Speaker**

*Deborah Kinsey, President-Elect
Chairperson – 50th Anniversary Celebration*

Keynote Address:

*Dr. Lenneal Henderson, Distinguished Professor
of Government and Public Policy,
University of Baltimore*

Topic: *Government Financial Management*

Panel Discussion "It's Accountability"

*Joanne Gasparini, Moderator
Past President*

Distinguished Panelists:

*Steve Schaeffer, SSA
Assistant Inspector General for Audit
Past President*

*Carla Krabbe, SSA
Director Office of Financial Policy and Integrity
Past President*

*Bonnie Kind, SSA
Associate Commissioner for Budget*

*Michael Broache, City of Baltimore
Chief Bureau of Accounting and Payroll*

Presentation of Citations

*JoAnn White Burnett, Education Director & Past
President*

Length of Membership Awards (10+ Years) *Evangeline Labador, Awards Director*

Remarks (Former Presidents, Retired, Current Members, Guests)

Closing Remarks

*Stephanie Bosworth, President
Deborah Kinsey, President-Elect*

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AGA Baltimore Board of Directors and Chairperson, Deborah Kinsey, want to thank everyone for their hard work to make this celebration a success. In addition to those names listed above, we especially thank: Jean Adkins-Blasy, Karen Huelskamp, Kristina Poist, Tim Trockenbrot, Paul Geraty, Susan DeLabio, Azmah Ahmad, John Selby, Elaine Wallace, Shelvon Skinner, Milt Wolinski, Allan Reynolds, Rick Berlinrut, Barbara Ricks, Tonia Hill, the Membership, Meetings, Newsletter, Website and Awards Committees and all others who helped make this event a success.