

**ANNUAL HISTORY REPORT  
BALTIMORE CHAPTER  
2010-2011**

**CHAPTER EXECUTIVE COMMITTEE**

**OFFICERS**

President	Bonnie Kind, CPA, GGFM, CDFM, CAP
President-Elect	Walt Fennell, CPA
Secretary	Kristen Schnatterly, CGFM
Treasurer	John Selby, CPA
Immediate Past President	Deborah Kinsey, CPA, CGFM, CDFM

**DIRECTORS**

*\* Denotes Chairperson*

Activities	Milton Wolinski*, CPA MPA, CFE, CGFM
Awards	Mark Silvestri, CGFM*
Awards	Steve Nicewarner, CDFM
Awards	Joanne Gasparini, CPA, CGFM
Awards	Jared Martin
By-Laws and Procedures	Steven Schaeffer*, Attorney, MS, CPA, CGFM
CGFM Coordinator	Gary Hatcher*, CPA, CGFM
CGFM Coordinator	Chris Jankiewicz, CGFM
CGFM Coordinator	Evangeline Labador
CGFM Coordinator	Shelvon Skinner, MBA
Community Service	Susan DeLabio*
Community Service	Johnny Ramsey, CPA, CGFM
Community Service	Mark Silvestri, CGFM
Community Service	Rick Berlinrut, CGFM, CFE
Community Service	Karen Huelskamp
Early Careers	Rashad Holloway*
Early Careers	Charron Allen
Early Careers	Leroy Chester
Early Careers	Tasha Austin, CFE
Early Careers	Geoffrey Luiz, CPA
Early Careers	Upeksha Peramune
Early Careers	Kelly Stankus, CPA
Early Careers	Tonia Hill
Editorial	Kristina Poist*
Editorial	Christina Lilly, CGFM
Editorial	Florence Wolford, CGFM, CPA
Editorial	Omar Kuyateh, CGFM, CDFM, CFE

Baltimore Chapter History  
2010- 2011

Education and Programs	JoAnn White Burnett*, CPA
Education and Programs	DeGloria Hall
Education and Programs	Yvasne Simmons
Education and Programs	Elise Heusser, CPA
Education and Programs	Paul Geraty
Education and Programs	Dave Sites, CPA, CISA, CITP
Education and Programs	John McLain, CISA, CDFM
Education and Programs	Michael Tracht, CPA
Meetings	Letha Holliday*
Meetings	Michele Murrill
Meetings	Brenda Ramos-Jones
Meetings	Keith Lewis
Membership	Dellareese Morton-Smith*
Membership	Ed Koontz
Membership	Elaine Wallace
Web Master	Katie Beach*
Web Master	Briana Yoho
Web Master	Garima Khanna
Sponsorship	Lisa Lally*, CPA, CISA
AGA Mid-Atlantic Outreach Coordinator	Dellareese Morton-Smith

**MEMBERSHIP**

As of the close of the 2010-2011 program year, April 30, 2011, the Baltimore Chapter has 308 current members, adding 35 new members this program year.

**CHAPTER THEME**

The theme for the AGA Baltimore Chapter's 2010-2011 program year was *Excellence in Financial Management and Accountability*.

**BOARD MEETINGS**

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

**EDUCATION**

The Baltimore Chapter held a monthly training session during the months of September 2010 through May 2011 totaling 30 CPEs. Most sessions were held on the third Thursday of each month.

Baltimore Chapter History  
2010- 2011

The following lists the details of the monthly training sessions:

September 23, 2010 Afternoon Training

- (1) “Financial Innovation and Transformation at the Treasury Department”  
Speaker: Adam Goldberg, Department of Treasury
- (2) “Update on US Economy and Tax Policy Reform Options”  
Speaker: Dr. Jason Fichtner, SSA

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

October 21, 2010 Afternoon Training

- (1) “Economic Trends in the Baltimore Washington Area”  
Speakers: Anirban Basu, Sage Policy Group
- (2) “AICPA Auditing Standards and Single Audit Quality”  
Speaker: Mary Foelster

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

November 18, 2010 Afternoon Training

- (1) “AGA Family Feud – Pros vs. Joes”  
Speakers: Joanne Gasparini and Panel of Speakers
- (2) “Diversity”  
Speaker: Cherrie McCoy, PricewaterhouseCoopers

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

December 8, 2010 Afternoon Training

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

“EDiscovery”

Speaker: Brian Wilkinson

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

Baltimore Chapter History  
2010- 2011

January 20, 2011      Afternoon Training

“Current Priorities and Issues at OMB”

Speakers: Debra Bond

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

February 24, 2011      Afternoon Training

(1) “State Reaction to Fiscal Crisis”

Speaker: Nancy Valley

(2) “Handling Ethical Situations in the Workplace”

Speaker: Leon Young

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

March 17, 2011      Afternoon Training - Early Careers Luncheon

(1) “Powers of 8”

(2) “Taking Care of Customers”

Speaker: Dave Weinberg

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

April 27, 2011      Afternoon Training

Annual Awards Luncheon

“Leadership Skills for Financial Professionals”

Betty Mosley Brown

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

Baltimore Chapter History  
2010- 2011

May 11, 2011 Annual Fraud Training – All Day Training

Speakers on Issues Related to Fraud:

Cindy Brown Barnes, GAO Forensic Audits and Special  
Investigations Unit

John McLain, Grant Thornton, Director Government Audit Services

Jeff Steinhoff, KPMG, Director Financial Advisory Services

Renee Frank, National Security Agency

Mike McDonough, Deputy State Prosecutor, Office of the Special  
Prosecutor

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

**CHAPTER AWARDS**

**PRESIDENT’S SPECIAL ACHIEVEMENT AWARDS**

**PRESIDENT’S EXCELLENCE IN LEADERSHIP – KRISTEN SCHNATTERLY, SSA/OIG**

*Ms. Schnatterly is someone who embodies the best in financial management and accountability. Kristen currently serves as the Secretary in the Baltimore Chapter of the Association of Government Accountants, as well as Executive Officer in the Social Security Administration’s Office of the Inspector General, Office of Audit. Kristen has been a member of the Chapter for more than a decade and has served on the Executive Board in several capacities including as co-editor of the newsletter.*

*She has more than 15 years of experience in the accountability field, having started her career as an auditor in the Department of Transportation’s Office of the Inspector General. She has received numerous performance and honor awards recognizing her contributions to the success of the office.*

*Ms. Schnatterly is an avid supporter of the local AGA chapter and is a self-starter who exemplifies integrity and holds both her and her staff to high level of accountability. Her interpersonal skills are exceptional and she is often called upon to represent the OIG at meetings with senior governmental officials and professional organizations.*

**FUTURE LEADERSHIP AWARD – YVASNE SIMMONS, SSA/OIG**

*Ms. Simmons has made several large contributions to the success of the Office of Audit. In FY 2009, the OIG was tasked with completing the annual financial statement audit. In prior years, the OIG employed contract auditors to perform this work. Ms. Simmons’ excellent financial skills and prior audit experience made her a critical member of the financial audit team. With the assistance of Ms. Simmons, the OIG successfully completed the FY 2009 financial statement audit on schedule. Starting in FY 2010, the OIG contracted with Grant Thornton (GT) to complete the annual financial statement audit. Ms. Simmons did an excellent job ensuring GT met all of the applicable auditing standards. She also ensured that all of the deliverables were completed accurately and on time. With the assistance of Ms. Simmons, the FY 2010 financial statement audit was another success.*

Baltimore Chapter History  
2010- 2011

EXCELLENCE IN CONTRIBUTION – LETHA HOLLIDAY, SSA

*Ms. Holliday has helped the chapter continue to get quality locations for our meetings at an affordable price. Working under the constraints of severe agency spending cuts, Ms. Holliday has been able to find quality locations for our meetings; has negotiated for favorable rates for us; and is always willing to do whatever it takes for the chapter. Her “can do” attitude is an asset to our chapter.*

PDC SCHOLARSHIP – JOANNE WHITE-BURNETT, CITY OF BALTIMORE

*The chapter awarded the PDC Scholarship to Ms. White-Burnett as an appreciation for all she does for our chapter. She has served on the Education Committee for numerous years and is instrumental in attaining high caliber speakers for our training session.*

CHAPTER SERVICE AWARDS

*The following Board members received Chapter Service Awards for their hard work and dedication to the Chapter:*

<i>Walt Fennell</i>	<i>Tasha Austin</i>	<i>DeGloria Hall</i>
<i>Deborah Kinsey</i>	<i>Geoffrey Luiz</i>	<i>Brenda Ramos-Jones</i>
<i>Kristen Schnatterly</i>	<i>Charron Allen</i>	<i>Michele Murrill</i>
<i>John Selby</i>	<i>Upeksha Peramune</i>	<i>Dellareese Morton-Smith</i>
<i>Milt Wolinski</i>	<i>Shanika Solomon</i>	<i>Elaine Wallace</i>
<i>Mark Silvestri</i>	<i>Kelly Stankus</i>	<i>Katie Beach</i>
<i>Joanne Gasparini</i>	<i>Kristina Poist</i>	<i>Garima Khanna</i>
<i>Gary Hatcher</i>	<i>Christina Lilly</i>	<i>Briana Yoho</i>
<i>Christopher Jankiewicz</i>	<i>Omar Kuyateh</i>	<i>Steven Schaeffer</i>
<i>Shelvon Skinner</i>	<i>Florence Wolford</i>	<i>Lisa Lally</i>
<i>Susan DeLabio</i>	<i>JoAnn White-Burnett</i>	<i>Chris Malarkey</i>
<i>Ana Labador</i>	<i>David Sites</i>	<i>Darlene Candle</i>
<i>Rick Berlinrut</i>	<i>John McLain</i>	<i>Michael Tracht</i>
<i>Rashad Holloway</i>	<i>Yvasne Simmons</i>	<i>Ed Koontz</i>
<i>Tonia Hill</i>	<i>Letha Holliday</i>	
<i>Leroy Chester</i>	<i>Keith Lewis</i>	

TIMOTHY L. TROCKENBROT, JR. AND ALLAN L. REYNOLDS SCHOLARSHIP AWARDS

*Kelly Fant-Mayo* - \$1,000 Scholarship - Towson State University

*Nataly Shwartz* - \$1,000 Scholarship - Towson State University

*Timothy Schmidt* - \$1,000 Scholarship - Loyola University

Baltimore Chapter History  
2010- 2011

**PRESIDENT’S EXCELLENCE AWARD**

Occasionally, President Bonnie Kind would bestow a “President’s Excellence Award” which was an ‘on the spot’ award for a particular action Board members undertook to benefit the chapter.

September 2010 Kristina Poist  
Christina Lilly

October 2010 Education Committee - John McLain, Dave Sites, and Joann White-Burnett  
Milt Wolinski  
John Selby  
Kristen Schnatterly

January 2011 Meetings Committee – Letha Holliday, Keith Lewis and Michele Murrill  
Joanne Gasparini

February 2011 Website Team – Katie Beach, Garima Khanna, and Briana Yoho  
Lisa Lally

March 2011 Early Careers Committee - Geoffrey Luiz, Tonia Hill, and Rashad Holloway  
CGFM Committee – Gary Hatcher

**NATIONAL RECOGNITION**

For the 2010-2011 program year, the Baltimore Chapter received:

- Platinum Chapter Recognition Award
- 1<sup>st</sup> Place in Newsletter Competition – Category B competition.

**PUBLICATIONS**

The Baltimore Chapter published a monthly newsletter from September 2010 through May 2011. The chapter participated in the newsletter competition sponsored by National AGA and won 1<sup>st</sup> Place for Category B. The chapter also has a website that is routinely updated with current information.

**COMMUNITY SERVICE ACTIVITIES**

**July Fourth Celebration**

July 4, 2010 - The chapter co-sponsored games and races for young children for the Fourth of July on the grounds of a local high school.

Baltimore Chapter History  
2010- 2011

Believe in Tomorrow

February 10, 2010 - AGA Baltimore participated in the “Believe in Tomorrow” community service event, which entails preparing and serving dinner to 26 people from the Johns Hopkins Hospital Children’s Home.

Race of the Cure

October 3, 2010 - The Chapter made a \$250 donation to the Susan G. Komen Race for the Cure held in Hunt Valley, MD.

Virtual Canned Food Drive

November/December 2010 - The chapter held a drive for cash donations at both the November and December training sessions to benefit the Maryland Food Bank. This year, for the first time, we allowed members to donate on-line via Pay-pal. This event was a **HUGE** success, as the Chapter raised a total of \$1,008 - \$510 in November and \$498 in December. Our donations enriched the lives of 96 Marylanders.

RICA Party

January 20, 2011 – The Chapter co-sponsored this event with the Catonsville Men’s Civic Association and hosted over 60 children from RICA. The kids were served pizza and soda and treated to a magician and guest speaker.

Easter Egg Hunt

April 16, 2010 - The chapter was among the sponsors for an Easter Egg Hunt held for area children on the grounds of a local high school. Over 7,500 eggs stuffed with prizes were given out.

Our Daily Bread

March 12, 2011 - The Early Careers committee sponsored its annual day of service at the Our Daily Bread Soup Kitchen, which is a soup kitchen located in downtown Baltimore. The event was organized by Tonia Hill and 11 members volunteered. 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.

Movie Night for the Children’s Home in Catonsville

May 16, 2011 - The Baltimore Chapter co-sponsored this event with the Catonsville Men’s Civic Association. Forty children from the Children’s Home and their families were invited to a free movie, popcorn, and soda.



Baltimore Chapter History  
2010- 2011

**EARLY CAREERS ACTIVITIES**

Happy/Social Hour

The EC Committee hosted a Monday Night Football Happy Hour on September 13, 2010 at Champ's Bar and Grill in Catonsville, Maryland. The event, planned by Upesksha Peramun and Shanika Solomon, was a great success and attended by 15 members. Free appetizers and half-priced drinks were served on behalf of the chapter at both events.

Stevenson University Career Fair

On September 30, 2010 the EC Committee attended the Stevenson University Career Fair. Rashad Holloway, Geoffrey Luiz, and Leroy Chester attended to represent the chapter.

Careers in Accounting – Southside Senior High School

On October 8, 2010, the EC Committee held “Careers in Accounting” for students at Southside Senior High School. Rashad Holloway and Leroy Chester presented to 25 students about the different types of accounting jobs, the role of accountants in the real world, selecting professional careers in the future, and of course, the AGA.

Morgan State University Informational Session

On October 19, 2010, the EC Committee held an informational session and presented to 40 students of Morgan State's Beta Alpha Psi, the National Association of Black Accountants, and the Financial Management Association. Rashad Holloway and Tonia Hill presented a PowerPoint titled “Illustrating Teamwork” to the students.

Careers in Accounting – Lansdowne Senior High School

On October 21, 2010, the EC Committee held “Careers in Accounting” for students at Lansdowne Senior High School. Rashad Holloway spoke about the advantages of pursuing a career as an accounting professional to 60 students at Lansdowne's Academy of Finance.

Women's Business Panel

On November 17, 2010, the College of Notre Dame of Maryland hosted a Women's Business Panel to provide their students with advice from current business professionals. Dellareese Morton-Smith attended on behalf of the EC Committee and provided insightful information on herself, and the AGA.

Career Day at Southside Academy

On December 17, 2010, the EC Committee hosted Career Day at Southside Academy. This event was hosted by Grant Thornton, LLP and was attended by 15 students, who learned firsthand the educational background and skills they will need to succeed as future accountants in the workplace.

Job Shadow Day

On April 14, 2011, the EC Committee hosted a Job Shadow Day at the Social Security Administration for Lansdowne High School students. Over 30 students attended from area high

Baltimore Chapter History  
2010- 2011

schools and shadowed SSA employees from 9am-12pm. The Job Shadowing Day provided the students with a light breakfast and lunch. Kelly Stankus organized the event.

**CGFM ACTIVITIES**

CGFM Commercials

The CGFM Committee prepared four humorous commercials that promoted the CGFM program and presented them to the Chapter at the November 2010 training. The commercials, posted to YouTube were so well received, that Gary Hatcher, CGFM Lead Director, gave a brief speech at the National Leadership Conference held February 2011 in Washington, DC.

CGFM Month in Baltimore and Baltimore County

The CGFM Committee worked with the City of Baltimore and had Mayor Stephanie Rawlings-Blake declare March “CGFM Month in Baltimore.” The Mayor’s Office issued the Baltimore Chapter a “CGFM Month” proclamation. This year the CGFM Committee received a proclamation from Baltimore County as well.

CGFM Training

The chapter solicited members for interest in CGFM training to be held in April and May 2011; however there was not enough interest at that time to set up the training. The Chapter will attempt to host CGFM training in the local area in the 2011-2012 program year.

CGFM Study Guides

The Chapter purchased a set of CGFM study guides to allow members to borrow for a limited time, instead of purchasing.

CGFM Designations

Four Baltimore Chapter members earned the CGFM designation.

Yvasne Simmons      Kelly Stankus      Susannah Kiehl      Jonathan Ngah

**OTHER MISCELLANEOUS 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 2010.

AGA Members Bike Ride

May 21, 2011 at 9:00 am- AGA members gathered at Lindale Middle School to ride the BWI bike trail to enjoy a day of bike riding as a social activity for the chapter.

## Baltimore Chapter History 2010- 2011

### Sponsorship Program

For the first time, the Baltimore Chapter sought out corporate sponsorships to help support the Baltimore Chapter's strategic goals and allows our sponsors to attain recognition from the government finance community. Sponsorship includes several benefits for the sponsor, depending upon the level of association purchased (gold, silver, bronze). For the 2010-2011 program year, AGA Baltimore obtained three corporate sponsors – KPMG, Grant Thornton, and PWC.

### Sectional Leadership Meeting

The 2011 Sectional Leadership Meeting (SLM) was held on April 29-30, 2011 in Philadelphia, PA. Six Chapter Executive Board members from the Baltimore Chapter attended – Walt Fennell, Paul Geraty, Shelvon Skinner, Rashad Holloway, and Dellareese Morton-Smith. 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.