

**ANNUAL HISTORY REPORT
BALTIMORE CHAPTER
2011-2012**

CHAPTER EXECUTIVE COMMITTEE

OFFICERS

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

DIRECTORS

** Denotes Chairperson*

Accountability	Johnny Ramsey, MBA, CPA, CGFM
Activities	Milton Wolinski*, CPA MPA, CFE, CGFM
Awards	Mark Silvestri, CGFM*
Awards	Joanne Gasparini, CPA, CGFM
By-Laws and Procedures	Steven Schaeffer*, Attorney, MS, CPA, CGFM
CGFM Coordinator	Shelvon Skinner*, MBA
CGFM Coordinator	Gary Hatcher, CPA, CGFM
CGFM Coordinator	Jennifer Pendleton
Community Service	Susan DeLabio*
Community Service	Mark Silvestri, CGFM
Early Careers	Tonia Hill*
Early Careers	Rashad Holloway
Early Careers	Charron Allen
Early Careers	Tasha Austin, CFE
Early Careers	Geoffrey Luiz, CPA
Early Careers	Upeksha van der Merwe
Early Careers	Nick Wieroniey
Editorial	Kristina Poist*
Editorial	Christina Lilly, CGFM
Editorial	Florence Wolford, CGFM, CPA
Editorial	Omar Kuyateh, CGFM, CDFM, CFE
Editorial	Kali Biagioli, CPA
Editorial	Yvasne Simmons, CGFM

Baltimore Chapter History
2011 - 2012

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	Karen Ajayi*, CPA, CGFM, MST
Meetings	Letha Holliday
Meetings	Shelley Joseph, CGFM
Membership	Monica Morgan*, CGFM
Web Master	Cheryl Dailey*
Web Master	Masoud Najmabadi
Web Master	Casey Cochran
Sponsorship	Lisa Lally*, CPA, CISA
	Jessica Martin
AGA Mid-Atlantic Outreach Coordinator	Dellareese Morton-Smith

MEMBERSHIP

As of the close of the 2011-2012 program year, April 30, 2012, the Baltimore Chapter has 308 current members, adding 35 new members this program year.

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 2011 through May 2012 totaling 26 CPEs. Most sessions were held on the third Thursday of each month.

Baltimore Chapter History
2011 - 2012

The following lists the details of the monthly training sessions:

September 22, 2011 Afternoon Training

- (1) "Accounting Standards Update"

Speaker: Chuck Kozlik, KPMG

- (2) "Yellow Book Update"

Speaker: Eric Holbrook, Government Accountability Office

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

October 13, 2011 Afternoon Training

- (1) "Data Mining to Detect Contract Fraud at the USPS OIG"

Speakers: Gerhard Pilcher and Isaiah Goodall, Elder Research

- (2) "Seven Management Imperatives"

Speaker: Jonathan D. Bruel, IBM Center for the Business of Government

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

November 17, 2011 Afternoon Training

- (1) "At a Time of Fiscal Challenge – Using the Full Potential of Enterprise Risk Management"

Speakers: Jeff Steinhoff, Executive Director, KPMG Government Institute

- (2) "Current State of Social Insurance"

Speaker: Steve Goss, Chief Actuary, and Alice Wade, Deputy Chief Actuary
Social Security Administration

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

December 7, 2011 Afternoon Training

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

"Information Technology Governance"

Speaker: Scott Higgins, Carefirst Blue Cross/Blue Shield

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

Baltimore Chapter History
2011 - 2012

January 19, 2012 Afternoon Training

(1) “Self Pay Federal Lending”

Speaker: J. Anthony Curcio, Summit Consulting, LLC

(2) “The Current State of the Economy”

Speaker: Anirban Basu, Sage Policy Group, Inc.

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

February 23, 2012 Afternoon Training

(1) “Cloud Computing”

Speaker: David Lucas, Global Computer Enterprises

(2) “Internal Controls”

Speaker: Roger Von Elm, CliftonLarsonAllen

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

March 22, 2012 Afternoon Training - Early Careers Luncheon

Successful Keys in Financial Management

Speakers: Joseph Kull, PwC

Wendy Morton-Huddleston, GrantThornton

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

April 19, 2012 Afternoon Training

Annual Awards Luncheon

“Citizen Centric Reporting

Speaker: Relmond Van Daniker, AGA National Executive Director

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

Baltimore Chapter History
2011 - 2012

May 9, 2012 Annual Fraud Training – All Day Training

Speakers on Issues Related to Fraud:

Dennis Dycus, Director, Division of Municipal Audit, Office of the
Comptroller General of the Treasury, State of Tennessee

Sam McCall, City Auditor, City of Tallahassee

Steve Yarmolyk, Chief, Contracting Policy, Department of Defense

Evelyn Brown, Chief Financial Officer, Office of Personnel
Management (retired)

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

CHAPTER AWARDS

PRESIDENT’S SPECIAL ACHIEVEMENT AWARDS

PRESIDENT’S EXCELLENCE IN LEADERSHIP – KRISTINA POIST AND CHRISTINA LILLY, SSA

Awarded to Kristina and Christina for continually doing a great job on the newsletter and anything above and beyond that is asked of them.

FUTURE LEADERSHIP AWARD – TONIA HILL SSA

Awarded to Tonia for keeping the Early Careers group moving in the right direction.

EXCELLENCE IN CONTRIBUTION – SUSAN DELABIO AND LORI LEE, SSA

Awarded to Susan for all of her hard work on the Community Service events and to Lori for stepping into the role as Secretary while Kelly Stankus was on maternity leave.

**PDC SCHOLARSHIP – KRISTEN SCHNATTERLY – SOCIAL SECURITY ADMINISTRATION,
OFFICE OF THE INSPECTOR GENERAL**

The chapter awarded the PDC Scholarship to Ms. Schnatterly as an appreciation for all she does for our chapter. She has served on the Board for numerous years and routinely filled in for the Chapter President during the year.

Baltimore Chapter History
2011 - 2012

CHAPTER SERVICE AWARDS

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

President-Elect

Kristen Schnatterly

Secretary

Kelly Stankus

Lori Lee

Treasurer

John Selby

Immediate Past

President

Bonnie Kind

Accountability

Johnny Ramsey

Activities

Milton Wolinski

Awards

Mark Silvestri

Geoffrey Luiz

Joanne Gasparini

CGFM

Shelvon Skinner

Community Service

Susan DeLabio

Early Careers

Tonia Hill

Tasha Austin

Editorial

Kristina Poist

Christina Lilly

Omar Kuyateh

Florence Wolford

Kali Biagioli

Education and Programs

JoAnn White Burnett

David Sites

John McLain

Michael Tracht

Paul Geraty

Meetings

Karen Ajayi

Letha Holliday

Shelly Joseph

Membership

Monica Morgan

Webmaster

Cheryl Dailey

Masoud Najmabadi

Casey Cochran

By-Laws and Procedures

Steven Schaeffer

Sponsorship

Lisa Lally

Jessica Martin

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

Moyosore Oluyinka - \$1,000 Scholarship - Morgan State University

Jason Linthicum - \$1,000 Scholarship - Towson State University

Abbey Degitz - \$1,000 Scholarship - Stevenson University

NATIONAL RECOGNITION

For the 2011-2012 program year, the Baltimore Chapter received:

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

Baltimore Chapter History
2011 - 2012

PUBLICATIONS

Newsletters

The Committee prepared a comprehensive newsletter on a bi-monthly basis from September 2011 through May 2012. The bi-monthly newsletter includes chapter activities, training opportunities, technical articles, Board meeting minutes, training recaps, and both CGFM and Community Service activities. For the months where a full newsletter was not sent out (i.e., bi-monthly for September and October was sent out in September), a 'mini-newsletter' was provided to inform the membership about the current month's training (i.e.: October) and any other chapter activities that occurred that month. The chapter participated in the newsletter competition sponsored by National AGA and won 1st Place for Category B.

Website

The chapter maintains a website that is routinely updated with current information. The objective of the website is to provide members and the community with information regarding the Baltimore Chapter of AGA. This information includes chapter contacts, upcoming training events, online event registration, monthly newsletters, and other recognition achieved by the chapter. The website also publishes new CGFM opportunities available.

Citizen Centric Report

In May 2012, the Accountability Committee prepared a 2011-2012 Citizen Centric Report that discusses chapter demographics, membership, program year accomplishments and financial statements, and the chapter's challenges moving forward. The report can be viewed at <http://www.agabaltimore.org/>.

COMMUNITY SERVICE ACTIVITIES

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.

July Fourth Celebration

July 4, 2011 - The chapter co-sponsored games and races for young children for the Fourth of July on the grounds of a local high school.

Virtual Canned Food Drive

November/December 2011 - The chapter held a drive for cash donations at both the November and December training sessions to benefit the Maryland Food Bank. Donations were also sought through Paypal. The Chapter raised \$265 and donated several bags of canned goods to the charity.

Baltimore Chapter History
2011 - 2012

Bethel Outreach Center

December 17, 2011 – Baltimore Chapter members volunteered at Bethel Outreach Center from 9am to 12pm to serve meals to the underserved population in Baltimore City. The two volunteers from the Chapter, Tasha Austin and Tonia Hill, helped serve over 50 meals that day.

Regional Institute for Children and Adolescents (RICA) Party

January 12, 2012 – The Chapter co-sponsored this event with the Catonsville Men’s Civic Association and hosted over 30 children and volunteers from RICA. The kids were served pizza and soda, and then treated to a magic show.

Easter Egg Hunt

March 31, 2012 - 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 to kids from two to 11 years old.

Our Daily Bread

February 4, 2012 - 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 six 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.

EARLY CAREERS ACTIVITIES

Happy/Social Hour

The EC Committee hosted a Happy Hour on October 6, 2011 at Barebones Grill in Ellicott City, Maryland. The event, planned by Upeksha van der Merwe, was a great success and attended by 15 members. The event gave members and guests the opportunity to socialize and network outside the office, and free appetizers and half-priced drinks were served on behalf of the chapter.

Careers in Accounting – Lansdowne Senior High School

On December 16, 2011, the EC Committee held “Careers in Accounting” for students at Lansdowne Senior High School. Tonia Hill and Rashad Holloway spoke on behalf of the AGA Baltimore Chapter about the advantages of pursuing a career as an accounting professional. There were 30 Academy of Finance students in attendance for the event. The presentation educated students about the numerous opportunities available in accounting as a career choice, the role of accountants, and provided information about the AGA Baltimore Chapter.

Howard County Community College Career Fair

On March 16, 2012, the Community Service Committee participated in the Howard County Community College Spring Career Fair from 10 a.m. to 1 p.m. in the Burill Galleria of the Clark Library Building. Nick Gallager, Matt Cannon, and Shaun Elhai represented the chapter at this event.

Baltimore Chapter History
2011 - 2012

CGFM ACTIVITIES

CGFM Happy Hour

The CGFM Committee hosted a Purple Friday Happy Hour on December 9, 2011 at TGI Friday's in Owings Mills, Maryland. The event, planned by Shelvon Skinner, was a great success. The event gave members and guests the opportunity to socialize and network outside the office, and free appetizers and half-priced drinks were served on behalf of the chapter.

CGFM Month in Baltimore and Baltimore County

March 2012 -- The CGFM Committee worked with the City of Baltimore and had Mayor Stephanie Rawlings-Blake declare March 2012 "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 Study Group

The Committee promoted a CGFM study group every Monday and Wednesday from 12-1 at the offices of the Social Security Administration. The study group began on March 5 and ended June 27, 2012.

St Patrick's Day Giveaway

March 16, 2012 -- In honor of CGFM Month and St Patrick's Day, the CGFM Committee hosted a table at SSA's main cafeteria and handed out treats to gather, support, and to promote the CGFM certification.

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 2011.

Sponsorship Program

For the second year in a row, the Baltimore Chapter offered 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 2011-2012 program year, AGA Baltimore obtained five corporate sponsors – KPMG; Grant Thornton; PWC; Thompson, Cobb, Bazilio, and Associates (TCBA); and CliftonLarsonAllen.

Sectional Leadership Meeting

The 2012 Sectional Leadership Meeting (SLM) was held on April 13-14, 2012 in Indianapolis, IN. Six Chapter Executive Board members from the Baltimore Chapter attended –Kristen

Baltimore Chapter History
2011 - 2012

Schnatterly, Johnny Ramsey, John McLain, Tonia Hill, Rashad Holloway, and Dellareese Morton-Smith. The SML brings 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.