

**ANNUAL HISTORY REPORT
BALTIMORE CHAPTER
2012-2013**

CHAPTER EXECUTIVE COMMITTEE

OFFICERS

President	Kristen Schnatterly, CGFM
President-Elect	Johnny Ramsey, CPA, CGFM
Secretary	Kelly Stankus, CPA, CGFM
Treasurer	John Selby, CPA
Immediate Past President	Walt Fennell, CPA, CGFM

DIRECTORS

*** Denotes Chairperson**

Accountability	Johnny Ramsey, MBA, CPA, CGFM
Activities	Milton Wolinski*, CPA MPA, CFE, CGFM
Awards	Mark Silvestri*, CGFM
Awards	Kristina Poist
By-Laws and Procedures	Steven Schaeffer*, Attorney, MS, CPA, CGFM
CGFM	Shelvon Costley*, MBA
CGFM	Gary Hatcher, CPA, CGFM
CGFM	Joanne Gasparini, CPA
CGFM	Jennifer Pendleton
Community Service	Susan DeLabio*
Community Service	Lori Lee, CPA
Early Careers	Jamila Webb*, CPA, CGFM
Early Careers	Tasha Austin, CFE
Early Careers	Geoffrey Luiz, CPA
Early Careers	Nathaniel Moseley
Early Careers	Moyosore Oluyinka
Early Careers	Tonia Hill
Editorial	Christina Lilly*, CGFM
Editorial	Kali Biagioli, CPA
Editorial	Omar Kuyateh, CGFM, CDFM, CFE, CISA
Editorial	Kristina Poist

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Education and Programs	JoAnn White Burnett*, CPA
Education and Programs	John McLain, CISA, CDFM
Education and Programs	Michael Tracht, CPA
Education and Programs	Paul Geraty
Education and Programs	Shereen Campbell
Education and Programs	DeGloria Hall
Meetings	Karen Ajayi*, CPA, CGFM, MST
Meetings	Shelley Joseph, CGFM
Meetings	Monica Morgan
Membership	John McLain
Membership	Phil Rogofsky
Web Master	Masoud Najmabadi*
Web Master	Kelly Stankus, CPA, CGFM
Web Master	Casey Cochran
Sponsorship	Lisa Lally*, CPA, CISA
Sponsorship	Jessica Martin
Sponsorship	LaKisha Gallman

MEMBERSHIP

As of the close of the 2012-2013 program year, April 30, 2013, the Baltimore Chapter has 286 current members, with 45 new members added this year.

BOARD MEETINGS

Board meetings were held each month from August 2012 through May 2013. 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 2012 through May 2013 totaling 29 CPEs. Most sessions were held on the third Thursday of each month.

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The following provides the details of the monthly training sessions:

September 20, 2012 Afternoon Training

- (1) "Audit Sampling"
Speaker: Johnny Ramsey, KPMG
- (2) "FASAB Update"
Speaker: Wendy Payne, FASAB

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

October 18, 2012 Afternoon Training

- (1) "Data Analytics"
Speaker: James Overman, Grant Thornton
- (2) "Improper Payments"
Speaker: Jeff Steinhoff, KPMG

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

November 8, 2012 Afternoon Training

- (1) "The Current State of the Economy"
Speaker: Anirban Basu, Sage Policy Group, Inc.
- (2) "Myers Briggs Personality Test"
Speaker: Pam McHugh, Social Security Administration

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

December 12, 2012 Afternoon Training

This session was a joint meeting with the Baltimore Chapter of the Information Systems Audit and Control Association (ISACA).

"Governance & Risk in Cloud Computing" and "Achieving Data Warehouse Nirvana: The Critical Role of Information Controls"

Speakers: Bobby Koritala and Timothy O'Hara, Infogix, Inc.

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

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January 17, 2013 Afternoon Training

This session was a joint meeting with the Fort Meade Chapter of the American Society of Military Comptrollers (ASMC).

(1) "Yellow Book Update"

Speaker: Marcia Buchanan, Government Accountability Office

(2) "Standards for Internal Control in the Federal Government"

Speaker: Wayne Kreisel, US Army Corp of Engineers

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

February 21, 2013 Afternoon Training

(1) "GASB Update"

Speaker: Hannah Padilla, KPMG

(2) "Emerging Issues in Federal Financial Management"

Speaker: David Zavada, Kearney and Company

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

March 21, 2013 Afternoon Training - Early Careers Luncheon

(1) "Our Professional Journey"

Speaker: Evelyn Brown, AGA National President

(2) "Four Cornerstones of Your Financial Future"

Speaker: Lenora Hammett, Ameriprise Financial Services

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

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April 18, 2013 Afternoon Training - Annual Awards Luncheon

“Combating Improper Payments”

Speaker: Gale Stallworth Stone, Social Security Administration, Office of the
Inspector General

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

May 8, 2013 Annual Fraud Training – All Day Training

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

Speaker: Steve Schaeffer, Assistant Inspector General for Audit, Social
Security Administration, Office of the Inspector General

Speaker: Chris Bauer, Bauer Ethics

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

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NATIONAL RECOGNITION

For the 2012-2013 program year, the Baltimore Chapter received the Platinum Chapter Recognition Award

NATIONAL AWARDS

Steve Schaeffer received the 2013 Donald L. Scantlebury Memorial Award for his sustained exemplary leadership in making significant financial management improvements at the Social Security Administration and contributions to the Federal CFO and IG communities

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CHAPTER AWARDS

EXCELLENCE IN CONTRIBUTION AWARD– PHIL ROGOFKY, SSA/OIG

FUTURE LEADERSHIP AWARD – JAMILA WEBB, GRANT THORNTON

EXCELLENCE IN LEADERSHIP AWARD – KRISTINA POIST, SSA

CHAPTER SERVICE AWARDS

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

President

Kristen Schnatterly

President-Elect

Johnny Ramsey

Secretary

Kelly Stankus

Treasurer

John Selby

Accountability

Johnny Ramsey

Activities

Milton Wolinski

Awards

Mark Silvestri

Kristina Poist

CGFM

Shelvon Costley

Gary Hatcher

Community Service

Susan DeLabio

Lori Lee

Early Careers

Jamila Webb

Tonia Hill

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Christina Lilly

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Education and Programs

JoAnn White Burnett

Shereen Campbell

Paul Geraty

Michael Tracht

John McLain

DeGloria Hall

Meetings

Karen Ajayi

Shelly Joseph

Monica Morgan

Membership

John McLain

Phil Rogofsky

Webmaster

Masoud Najmabadi

Kelly Stankus

Casey Cochran

By-Laws and Procedures

Steven Schaeffer

Sponsorship

Lisa Lally

Jessica Martin

SCHOLARSHIP AWARDS

Natalie Schwatz - \$1,000 Scholarship

Catherine High - \$1,000 Scholarship

Jorge Ventura - \$1,000 Scholarship

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PUBLICATIONS

Newsletters

The Committee prepared a comprehensive newsletter on a bi-monthly basis from September 2012 through April 2013. The bi-monthly newsletter included 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 during that month. The chapter participated in the newsletter competition sponsored by National AGA.

Website

The Chapter maintains a website that is routinely updated with current 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 December 2012, the Accountability Committee prepared a new 2011-2012 Citizen Centric Report (CCR) that discusses chapter demographics, membership, program year accomplishments and financial statements, and the chapter’s challenges moving forward.

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COMMUNITY SERVICE ACTIVITIES

Our Daily Bread (Early Careers)

September 29, 2012 - The Early Careers committee sponsored its annual day of service at Our Daily Bread. See Early Careers.

Cookout and Kickball Game with Catonsville Children's Home

October 13, 2012 – This was a cookout and kickball game co-sponsored by the Baltimore Chapter and the Catonsville Men's Civic Association for the Catonsville Children's Home and the Regional Institute for Children and Adolescents.

Susan G. Komen Race for the Cure

October 21, 2012 – The Baltimore Chapter donated \$200 to this charity, and there were two Chapter members participating in the race. Team members raised \$140 individually.

Virtual Canned Food Drive

November/December 2012 - The Baltimore Chapter held an online drive for cash donations during the month of November and December for the Maryland Food Bank. Members donated \$228 and the Chapter made a \$200 donation, for a total of \$428.

Operation Holiday Eagle

November 2012 – Baltimore Chapter members sent 54 holiday cards and candy canes to troops overseas through Operation Holiday Eagle. Operation Holiday Eagle sends holiday cheer to troops deployed overseas.

Christmas Wreaths for Fallen Soldiers

November 2012 – The Baltimore Chapter donated \$150 to Wreaths across America, which provided 10 wreaths for placement on the graves of veterans across the country.

Movie Night for the Catonsville Children's Home

January 2013 - The Baltimore Chapter co-sponsored this event with the Catonsville Men's Civic Association. Forty children from the Catonsville Children's Home enjoyed a free movie, popcorn, and soda.

Easter Egg Hunt

March 23, 2013 - 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.

Fiesta 5k for ALS

May 4, 2013 – Chapter member Lori Lee participated in this 5K run to benefit the Robert Packard Center for ALS Research at Johns Hopkins.

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EARLY CAREERS ACTIVITIES

Our Daily Bread Event

On Saturday September 29, 2012, the AGA Baltimore Chapter volunteered at Our Daily Bread soup kitchen from 9am to 1pm to serve meals to the underserved population in Baltimore City. The volunteers were Delvin Seawright, Jo Ann White-Burnett, Tonia Hill, Nathaniel Moseley, Moyosore Oluyinka and a host of friends. The chapter also provided a cash donation in the amount of \$250. The volunteers helped serve several hundred meals.

Morgan State University Presentation – Tools for the Future

On Thursday, October 25, 2012, the Early Careers Committee sponsored an informational session and presentation at Morgan State University. Early Careers Committee member Tonia Hill represented the AGA Baltimore Chapter. Tonia presented a PowerPoint presentation on Tools for the Future to students and members of the Beta Alpha Psi, and the Financial Management Association. There were several students in attendance for the event.

Happy/Social Hour

The EC Committee hosted a Happy Hour on November 08, 2012 at TGI Friday's in Towson, Maryland. The event gave members and guests the opportunity to socialize and network outside the office, and free appetizers and half-priced sodas were served on behalf of the chapter.

CGFM ACTIVITIES

CGFM Study Group

The CGFM Committee organized a weekly online study group. The group began on March 15, 2013. The group now meets on a biweekly basis and has discussion via email and phone, when necessary.

CGFM Interest Table

March 13, 2013 -- In honor of CGFM Month and St Patrick's Day, the CGFM Committee hosted an interest table at SSA's main cafeteria to promote the CGFM certification. The CGFM committee had treats and information pamphlets for interested participants. There were a few people who signed up, inquired about AGA and the benefits of CGFM.

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 2012, and with the American Society of Military Comptrollers in January 2013.

Sponsorship Program

For the third 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 2012-2013 program year, AGA Baltimore obtained seven corporate sponsors – CliftonLarsonAllen; Grant Thornton; PWC; KPMG; Kearney & Company; Thompson, Cobb, Bazilio, and Associates (TCBA); and Franklin & Turner.

Sectional Leadership Meeting

The 2013 Sectional Leadership Meeting (SLM) was held on May 17-18, 2013 in Louisville, KY. Seven Chapter Executive Board members from the Baltimore Chapter attended –Kristen Schnatterly, Johnny Ramsey, Rashad Holloway, Jamila Webb, Delvin Seawright, JoAnn White Burnett, Dellareese Morton-Smith, and Katherine Hayek. The SLM 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.