

**ANNUAL HISTORY REPORT
BALTIMORE CHAPTER
2014-2015**

CHAPTER EXECUTIVE COMMITTEE

Officers

President	Kristina Poist
President-Elect	Kelly Stankus, CPA, CGFM
Secretary	Lori Lee, CPA
Treasurer	John McLain, CISA, CDFM
Immediate Past President	Johnny Ramsey, CPA, CGFM

Directors

* Denotes Chairperson

Accountability	Afonagnon Azondekon, CGFM*
Activities	Milton Wolinski*, CPA MPA, CFE, CGFM
Awards	Mark Silvestri*, CGFM
By-Laws and Procedures	Steven Schaeffer*, Attorney, MS, CPA, CGFM
CGFM	Kristen Schnatterly*, CGFM
Communications	Moyo Oluyinka*
Community Service	Susan DeLabio*
Community Service	Lori Lee, CPA
Early Careers	Jamila Webb, CPA, CGFM*
Early Careers	Geoffrey Luiz, CPA
Early Careers	Jacob McDonald
Early Careers	Allan Kim
Early Careers	Aleks Ivanovski
Editorial	Katie Benson*
Editorial	Andy Matts
Editorial	Tasha Brown

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Education and Programs	JoAnn White Burnett*, CPA
Education and Programs	Paul Geraty
Meetings	Briana Long*
Meetings	Garima Khanna
Meetings	Brian Karpe
Membership	Johnny Ramsey*
Membership	Berhanu Wurseno
Web Master	James Switzer
Web Master	Masoud Najmabadi*
Web Master	Tamekia Davis
Sponsorship	Chante' Brady, CPA, CGFM *

MEMBERSHIP

At the close of the 2014-2015 program year, April 30, 2015, the Baltimore Chapter had 242 current members, with 29 new members added this year.

BOARD MEETINGS

Board meetings were held each month from August 2014 through May 2015. Our usual meeting date was the first Thursday of the month from 1:30 pm to 2:30 pm at the offices of the Social Security Administration in Woodlawn, MD. A conference call number was provided for those who could not attend in person.

EDUCATION

The Baltimore Chapter held a monthly training session during the months of September 2014 through May 2015 totaling 29 CPEs. The majority of the trainings were conducted on the third Wednesday of each month.

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The following provides the details of the monthly training sessions:

September 17, 2014 Afternoon Training

(1) "Citizen Centric Reporting"

Speaker: Evie Barry, National Office, AGA

The training was then split into two tracks, one for federal employees and the other for State and Local employees:

(A) "FASAB Update"

Speaker: Wendy Payne, FASAB Board

(B) "GASB Update"

Speaker: Dean Mead, GASB Board

Both tracks of this training program qualified for three (3) hours of CPE credit.

October 22, 2014 Afternoon Training

(1) "The Power of 8's"

Speaker: Dave Weinberg, Kearney and Co.

(2) "GAO Green Book Update"

Speaker: Scot Janssen, KPMG

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

November 19, 2014 Afternoon Training

(1) "The Importance of Accounting at the Social Security Administration"

Speaker: Pete Spencer, CFO, SSA

(2) "Statistical Sampling in an Audit"

Speaker: Johnny Ramsey, Senior Audit Manager, KPMG

(3) "Federal, State and Local: Contrasts and Commonalities in Government Finance and Administration"

Speaker: William Woodcock, Director, Baltimore City Health Department

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

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December 10, 2014 Afternoon Training

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

(1) "The Risks and Rewards of Social Media and Cloud Computing"

Speakers: Greg Wallig and Cal Bassford, Grant Thornton

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

January 15, 2015 Afternoon Training

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

(1) "Update on the Do Not Pay Business Center"

Speaker: Jenny Rone, Director, Do No Pay Business Center

(2) "DoD-Wide Managers' Internal Control Program"

Speaker: Steven Silverstein, Department of Defense

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

February 18, 2015 Afternoon Training

(1) "Improper Payments"

Speaker: Gale Stone, SSA OIG

(2) "Keys to Leadership"

Speaker: Nathaniel Alston, Horizon Group

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

March 18, 2015 Afternoon Training - Early Careers Luncheon

(1) "100-year Green Bonds"

Speakers: John Madrid, Controller, DC Water and Gene Malasy, DC Water

(2) "Careers in Government Accounting and Consulting"

Speaker: Jack Reagan, Grant Thornton

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

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April 15, 2015 Afternoon Training - Annual Awards Luncheon

(1) “What if?”

Speaker: Van Brookes, Founder, Safe Alternative Foundation for Education, Inc.

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

May 14, 2015 Annual Fraud Training – All Day Training

(1) “Ethics for People Who Don’t Like Surprises: Why We Don’t See It Coming Until Its Too Darn Late”

Speaker: Greg Conderacci, MACPA - BLI

(2) “Environment for Fraud”

Speaker: William Miller, National President of AGA

(3) “The Impact of Technology and a Struggling Economy on Fraud Risks”

Speaker: Eveka Rodriguez, Grant Thornton

(4) “Accidental Leadership and Ten Top Cases”

Speaker: Isabel M. Cumming, Washington Mass Transit Authority

(5) “Public Corruption”

Speaker: Erwin Burtnick, Retired MD State Prosecutor

This program qualified for (8) hours of CPE credit, including (4) for Ethics.

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NATIONAL RECOGNITION

For the 2014-2015 program year, the Baltimore Chapter received the Platinum Level Chapter Recognition Award

CHAPTER AWARDS

EXCELLENCE IN CONTRIBUTION AWARD– JO ANN WHITE-BURNETT, EDUCATION AND PROGRAMS COMMITTEE, AND KATIE BENSON, EDITORIAL COMMITTEE

FUTURE LEADERSHIP AWARD – JACOB MACDONALD, EARLY CAREERS COMMITTEE

EXCELLENCE IN LEADERSHIP AWARD – BRIANA LONG, MEETINGS COMMITTEE

CHAPTER SERVICE AWARDS

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

President

Kristina Poist

President-Elect

Kelly Stankus

Secretary

Lori Lee

Treasurer

John McLain

Accountability

Afonagnon Azondekon

Activities

Milton Wolinski

Awards

Mark Silvestri

CGFM Kristen

Schnatterly

Scholarship Awards

Mark Silvestri

Community Service

Susan DeLabio

Lori Lee

Early Careers

Jamila Webb

Geoffrey Luiz,

Jacob MacDonald

Allan Kim

Aleks Ivanovski

Editorial

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JoAnn White Burnett

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Briana Long

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Brian Karpe

Membership

Johnny Ramsey

Berhanu Wurseno

Webmaster

Masoud Najmabadi

James Switzer

Tamekia Davis

Sponsorship

Chante' Brady

An Tran (Towson) - \$1,000 Scholarship

John Blee (Catholic University) - \$1,000 Scholarship

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PUBLICATIONS

Newsletters

The Committee prepared a comprehensive newsletter on a bi-monthly basis from September 2014 through May 2015. The bi-monthly newsletter included chapter activities, training opportunities, Board meeting minutes, and CGFM, Early Careers 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.

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 September 2014, the Accountability Committee prepared the Chapter’s second 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

BARCstoberfest 5k and 1 Mile Walk to Benefit the Baltimore Animal Rescue and Care Shelter

October 25, 2014 – Chapter members Lori Lee and Johnny Ramsey participated in this 5k to benefit the local animal shelter.

Virtual Canned Food Drive

November/December 2014 - The Baltimore Chapter held an online drive for cash donations during the month of November and December for the Maryland Food Bank. Members donated \$200 and the Chapter made a \$200 donation, for a total of \$400.

Operation Holiday Eagle

November 2014 – Baltimore Chapter members sent 60 holiday cards, candy canes and some other sweet treats to troops overseas through Operation Holiday Eagle. Operation Holiday Eagle sends holiday cheer to troops deployed overseas.

Christmas Wreaths for Fallen Soldiers

November 2014 – The Baltimore Chapter donated \$150 to Wreaths across America, which provided 10 wreaths for placement on the graves of veterans across the country.

Children's Easter Egg Hunt

In cooperation with the Catonsville Men's Civic Association (CMCA), a local community club, we co-sponsored an Easter Egg hunt for children in the community on March 28, 2015.

Movie Night for Children's Home Orphanage

In cooperation with CMCA, we co-sponsored a movie night held on May 4, 2015 at the Children's Home in Catonsville.

Fiesta 5k for ALS

May 2, 2015 – Chapter members Lori Lee, Johnny Ramsey and Kelly Stankus participated in this 5K run to benefit the Robert Packard Center for ALS Research at Johns Hopkins. While the event was cancelled because of unrest in Baltimore City, these members contributed donations to the charity and the chapter also advertised fundraising for this event. The Chapter raised \$350 for the organization.

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EARLY CAREERS ACTIVITIES

Blue Agave Happy Hour

On Saturday October 18, 2014, the AGA Baltimore Chapter hosted a Happy Hour event at Blue Agave restaurant in Fells Point. We used social media and the AGA newsletter to advertise the event and gained additional student network, including 2 Towson University students. This led to our Spring Early Careers event being hosted at Towson University's where we spoke at the Beta Alpha Psi meeting. Thanks to Jacob MacDonald of Grant Thornton for organizing the entire Blue Agave event!

Loyola University

On Thursday, February 12, 2015, the Early Careers Committee was the featured guest at the Beta Alpha Psi meeting at Loyola University. Jack Reagan, Grant Thornton audit partner and AGA member, spoke to the group about careers in government accounting and auditing and highlighted some differences from the commercial sector. The students also enjoyed a pre-meeting networking session with the Early Careers team with pizza and soda provided by AGA. Thanks to the Early Careers team members for leading this event: Andrew Apollony and Jacob MacDonald!

Happy/Social Hour

The Early Careers Committee hosted a Happy Hour on February 19, 2015 at Alonso's restaurant in Baltimore as a follow up to the Loyola University event. We gained a new member from this event who is now an active participant on the Board, Tomi Adebo. Thanks Early Careers team for organizing tis event!

Towson University

The Early Careers Committee spoke to the Beta Alpha Psi membership at Towson University on Tuesday, March 31, 2015. Jamila Webb, Geoffrey Luiz, Andrew Apollony and Jacob MacDonald spoke to the Beta Alpha Psi group about early careers in the public sector and fielded questions from the audience on the topic. The event was well-attended by Towson University Beta Alpha Psi members. The Early Careers committee also provided the students with pizza and soda for a pre-meeting networking session.

CGFM ACTIVITIES

CGFM Interest Table

At nearly every training session for the 2015 program year, the CGFM committee had a table with pamphlets, buttons, notepads, pens, and sometimes water bottles for individuals interested in pursuing the CGFM designation. In addition, Mayor Stephanie Rawlings-Blake designated March 2015 as "Certified Government Financial Manager Month" in Baltimore City.

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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 2014, and with the American Society of Military Comptrollers in January 2015.

Sectional Leadership Meeting

The 2015 Sectional Leadership Meeting (SLM) was held on April 24-25, 2015 in Baltimore, MD. Four Chapter Executive Board members from the Baltimore Chapter attended – Johnny Ramsey, Kelly Stankus, Lori Lee and Jacob MacDonald. 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.

National Association of State Boards of Accountancy (NASBA)

Allan Kim took the lead on researching the necessary steps the chapter would need to take to establish the Baltimore AGA chapter as a NASBA certified provider of continuing education credits. As a result, the Chapter will be reaching out to the Board for approval of this expense in the budget for the 2015/16 year as we pursue this important certification.