Association of Government Accountants – Boston Chapter  
Annual History Report 2009 – 2010

Chapter Executive Committee

Officers

President...........................................Joseph Valchu is, CFE, CFS
President-Elect..................................William Kilmartin, CGFM
Immediate Past President............. Kimberly Rapoza, CGFM, CPA
Secretary........................................... Scott Lennon
Treasurer .......................................... Charles McCarthy
Vice President for Education
   and Programs.................................Julia P. Burns, CGFM
Vice President for Planning.......... Kimberly Rapoza, CGFM, CPA
Vice President for Communication....David A. LeBlanc, CGFM, CFS

Directors

Bylaws and Procedures .....................Nicholas Dahl, CGFM
Community Service............................Jane Gustowski, CPA
Membership & Early Careers .......... Mary Beth Farrelly, CFE, CFS
Registration....................................Howard Olsher, CGFM, CFE
Scholarships and Awards...............William Muench, CGFM, CPA
Professional Certifications ............Martin Benison, CGFM

Chairs

Newsletter......................................David A. LeBlanc, CGFM, CFS
Career Day.....................................Mary T. Leyden, CGFM
Webmaster....................................David A. LeBlanc, CGFM, CFS

Special Meetings

December 3, 2009

Special Business Meeting and Annual Holiday Luncheon and Charity Fundraiser at Maggiano’s Little Italy Restaurant, Boston, MA

June 10, 2010

Special Business Meeting and Annual Awards and Chapter Appreciation Dinner at The Daily Catch, Boston MA
Chapter Meetings with Guest Speaker
Chapter meetings, seminars and conferences include a special guest speaker(s) discussing a timely topic. The dates and speakers were as follows:

Seminars

June 4, 2009   ARRA Stimulus Funds (co-sponsored with NEIAF)  7 CPE hours
               Stan Czerwinski, GAO
               Jeffrey Simon, Mass A&F
               Nancy Valley, KPMG
               Lucy Garliauskas, US Federal Highway Administration
               Louise Eldridge, US HHS
               Volpe Federal Transportation Bldg., Cambridge, MA

September 24, 2009  The Many Faces of Fraud  7 CPE hours
                    Dennis E. Lambert, Special Agent, NCIS
                    Joseph Connaughton, Public Employee Retirement Administration Commission
                    Michael Armstrong, Regional IG, HHS
                    Susan J. Waddell, Special Agent in Charge, HHS OIG
                    Joshua Grinspoon, Investor Assistance Attorney, Securities and Exchange Commission
                    Lombardo’s Randolph, MA

October 22, 2009    ARRA Reporting  6 CPE hours
                    Jeffrey Simon, Mass A&F
                    Nancy Valley, KPMG
                    Sharon Scott-Chandler, ABCD
                    Rebecca Kaplan, US Department of Labor
                    Volpe Federal Transportation Bldg., Cambridge, MA

January 21, 2009    IT Security Management  7 CPE hours
                    Christopher Kelly, Mass Attorney General’s Office,
                    Fred Howell, BOSE Corp.
                    Stuart Lecky, MA Information Technology Division
                    John Beveridge, Mass State Auditor’s Office
Jose Arroyo, MA Information Technology Division
Ernie Sanborn, MA Information Technology Division
Curt Dalton, MA Information Technology Division
Ben Jackson, MA Information Technology Division

JFK Federal Bldg., Boston, MA

April 15, 2010
Spring Seminar w/ NEIAF
A-133 Update
Tammie Brown, U.S. Dept of Health and Human Services
Ethics
Bobby Derrick, former AGA National President
Dealing with Difficult Interviewees
Carole Buncher, Carole Buncher and Associates

Conference
March 9, 2010
Regional Professional Development Conference
8 CPE hours
Bentley College, Waltham, MA

Keynote Speakers
William Morehead, CGFM - AGA National President
Gerry Leone, Middlesex District Attorney

Concurrent Sessions:

Track 1 – Ethics
William Morehead, CGFM - AGA National President
and Relmond Van Daniker, Ph.D., AGA National Exec Dir

Track 2 – Social Engineering
Douglas Fries and Jon Alvarez, KPMG LLP

Track 3 – Impact of Federal Stimulus Funds on State and Local Governments
Shawn Warren, KPMG

Track 4 – Mortgage Fraud
Neil Power, Matt Gallas and John Kelan, FBI

Track 5 – Responding to Public Health Emergencies
Suzanne Condon, Mass Department of Public Health

Track 6 – IT Auditing
John Beveridge, CGFM, Mass State Auditor’s Office
Regional Intergovernmental Dialogue

On September 1, 2009, the AGA-Boston Chapter in conjunction with the National Office held an AGA Regional Intergovernmental Dialogue on the American Recovery and Reinvestment Act of 2009. Attendees earned 4 CPE hours.

Recovery Impact  Danny Werfel, U.S. Office on Management and Budget

State and Local Experiences with the Recovery Act
  Jeffrey Simon, Commonwealth of Massachusetts
  Sally Gloria, City Auditor, City of Boston
  Wayne Hannon, State of Rhode Island

Update on Recovery Act Oversight
  Carol Patey, Government Accountability Office
  Rick Skinner, Inspector General, Department of Homeland Security

Breakout Sessions by Federal Agencies:
  U.S. Department of Health and Human Services
    Paul Jacobsen, Carol Maloof & Mary Ann Higgins,
  U.S. Department of Education
    Philip A. Maestri
  U.S. Department of Transportation and the Department of Commerce
    Kristine Leiphart, Department of Transportation
    Todd Zinser, US Department of Commerce Inspector General

Boston Federal Reserve Bank Building
Accountability and Transparency Workshop
On March 10, 2010, the AGA-Boston Chapter in conjunction with the National Office held an AGA Accountability and Transparency Workshop. There were 30 attendees from state and local governments, accounting and audit firms, public policy research organizations, etc. Attendees earned 3.0 CPE hours.

The agenda included presentations and interactive discussions with the following speakers:

- Relmond Van Daniker, Ph.D., AGA National Executive Director
- William Kilmartin, CGFM, Accenture and Boston Chapter President – Elect
- Craig Hall, Commonwealth of Massachusetts, Developmental Disabilities Office; MA Developmental Disabilities Office has prepared several Citizen-Centric Reports
- Eric S. Berman, CPA, Deputy Comptroller, Commonwealth of Massachusetts and Boston Chapter President – Elect Designate
- Orlando Pacheco, Lancaster Town Manager; the Town of Lancaster recently published its first Citizen-Centric Report

Audio Conferences – AGA National (held at Federal Reserve Building, Boston, MA)

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<th>Date</th>
<th>Topic</th>
<th>Speaker(s)</th>
<th>CPE Hours</th>
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<tbody>
<tr>
<td>August 12, 2009</td>
<td>Stimulus Spending Controls</td>
<td>Doug Rice, Mass A&amp;F</td>
<td>2 CPE Hours</td>
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<td></td>
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<td></td>
<td>1 CPE Hour</td>
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<tr>
<td>September 1, 2009</td>
<td>Grants Management</td>
<td>Dan Bonnette, Deloitte &amp; Touche</td>
<td>2 CPE Hours</td>
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<td></td>
<td></td>
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<td>1 CPE Hour</td>
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<tr>
<td>October 7, 2009</td>
<td>Internal Controls</td>
<td>Mary Maloney &amp; Peter Scavotto, Mass Office of the Comptroller</td>
<td>2 CPE Hours</td>
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<td>1 CPE Hour</td>
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<tr>
<td>December 16, 2009</td>
<td>Occupational Fraud</td>
<td>Bill Rose, FBI</td>
<td>2 CPE Hours</td>
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<td>1 CPE Hour</td>
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<tr>
<td>May 19, 2010</td>
<td>Ethics</td>
<td>John Sullivan, Boston University</td>
<td>2 CPE Hours</td>
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During the program year the chapter provided a total of 5,688 CPE hours to 879 attendees.

AGA National PDC – New Orleans
The Boston Chapter was represented by eleven (11) members at the PDC.

The chapter won four (4) awards at the PDC:
Julia P. Burns, CGFM National Chapter Service Award.
Kimberly Rapoza, CGFM, CPA received the Chapter Recognition Award Platinum Level as Chapter President.
David A. LeBlanc, CGFM, CFS received the Regional Vice President Award Gold Level Boston Chapter - National Chapter Community Service Award (Group B).

**AGA SLM – Baltimore**
The Boston Chapter was represented by seven (7) members at the SLM. These individuals hold national, regional and chapter leadership positions.

**Community Service**
The Boston Chapter actively participated in a variety of community service projects throughout the program year.

- **July 2009**  
  Bay State Games

- **Sept. 22, 2009**  
  N.E. Shelter for Homeless Veterans serving dinner.

- **Sept. 24, 2009**  
  Animal Shelter Donations collected.

- **November 11, 2009**  
  Served meals at the New England Shelter for Homeless Veterans

- **December 3, 2009**  
  Gift drive and raffles for the benefit of Christmas in the City

- **February 2, 2010**  
  National Groundhog Job Shadow Day.

- **March 9, 2010**  

In addition, the Chapter has recommended to and encouraged that its members use their unique skills to work in many youth organizations and to serve on their boards or as financial managers of many non-profit and volunteer organizations. A number of the members serve as volunteer financial professionals in organizations such as local Boys and Girls Clubs, YMCA’s and YWCA’s, New England Swimming and as treasurers of local youth sports organizations.

**Special Chapter Contributions**
The chapter contributed a $1,000 gift to Christmas in the City; and the chapter also voted and made a $1,000 chapter challenge for the AGA National Community Service Fund. Along with a Boston Themed Gift Basket to the National Auction at the PDC in New Orleans.

**Chapter Elections**
The Chapter held its annual elections on March 9, 2010 at its Regional Professional Development Conference.
Chapter Awards and Scholarships

Mel Partol Award - Kimberly Rapoza, CGFM, CPA
Annual Achievement Award – John Wilkes, CGFM
Chapter Community Service Award – Jane Gustowski, CPA
Chapter Educator Award – Daniel Bonnette, CPA
Agency Chapter Service Award – Massachusetts State Auditor’s Office

President’s Awards – Laurie Allen
Education Committee Members
Chapter Executive Committee

Walter Frese Memorial Scholarship – Timothy J. Casaletto, U Mass Lowell
George E. Brady Memorial Scholarship – Lauren Blodgett, Boston College

National Awards

Chapter Recognition Award, Platinum Level - Joseph Valchuis, CFE, CFS Chapter President
National Chapter Service Award (Group B) – David A. LeBlanc, CGFM, CFS
National Chapter Community Service Award (Group B) – Jane Gustowski, CPA

Kathie Still, CGFM received the Regional Vice President Award Gold Level

Early Careers

• The Chapter awarded two $1000 college scholarships this year and awarded AGA student memberships to our two academic scholarship winners.
• A member of the incoming Chapter Executive Board (VP of Planning) is an Early Career Member.
• The chapter had six (6) new members this year that were Early Career Members.

Membership

The AGA – Boston Chapter welcomed 24 new members and ended the program year with 256 members.
To increase and enhance membership the chapter awarded:
- The Chapter awarded a $1000 college scholarship to a member (or immediate family member).
- The Chapter awarded AGA memberships to our two academic scholarship winners.
- Every new member was given a voucher to use toward the price of a future chapter event.
- All members could attend the Audio Conferences free of charge.
- The Chapter drastically reduced costs for all members for educational events.

Certification
March of 2010 was designated as CGFM month by his Excellency, Governor Deval Patrick of the Commonwealth of Massachusetts. This certificate was sent to AGA National.

The AGA – Boston Chapter supported the CGFM program by sponsoring up to five CGFM scholarships for members of the chapter.

Chapter Committee Members
Auditor..................................................... Maria Fernandez

Bylaws and Procedures ......................... Nick Dahl, CGFM

Communication ........................................ David A. LeBlanc, CGFM, CFS – Newsletter Editor and Webmaster

Community Service.......................... Jane Gustowski, CPA Chair
                                      Julia P. Burns, CGFM
                                      Maryann Costello
                                      Kimberly Rapoza, CGFM, CPA
                                      Maggie Trudel
                                      Joseph Valchuis, CFE, CFS

Early Career............................... Mary Leyden, CGFM, Career Day Chair

Membership...........................................Mary Beth Farrelly, CFE, CFS

Nominations................................. William Kilmartin, CGFM, Chair
                                      Martin Benison, CGFM
                                      John Beveridge, CGFM
                                      Howard N. Olsher, CGFM, CFE
                                      Joseph Valchuis, CFE, CFS

Scholarships and Awards............... William Muench, CGFM, CPA, Chair
                                      Maryann Costello
                                      Nick Dahl, CGFM
                                      Michael Gagan
                                      Diane Ledwell, CGFM
Education ................................................ Julia P. Burns, CGFM, Chair
        John Beveridge, CGFM
        Judith Blodgett
        Jane Gustowski, CPA
        William Kilmartin, CGFM
        David A. LeBlanc, CGFM, CFS
        William Muench, CGFM, CPA
        Howard N. Olsher, CGFM
        Kimberly Rapoza, CGFM, CPA
        Kathie Still, CGFM
        Joseph Valchuis, CFE, CFS
        Scott Warnecki, CPA
        John Wilkes, CGFM

Publications
Boston’s Beacon, the Chapter’s newsletter, is published monthly.
AGA-Boston Chapter Annual History Report is published after the close of the program year.

Balance Sheet
As of May 31, 2009, the chapter had total assets of $30,719

New England Region Committee Members
Regional Vice President ......................... Kathie Still, CGFM
Past Regional Vice President ..................... David A. LeBlanc, CGFM, CFS
Development and Assistance Coordinator ..... Jane Gustowski, CPA
Certification Coordinator ........................ Joseph Valchuis, CFE
Education Coordinator .......................... David A. LeBlanc, CGFM, CFS