



The Baltimore Ledger



September 2006

www.aga-balt.com

Baltimore Chapter

September Luncheon Information

Financial Management Implications of Leading a Major Agency

When:

Thursday, September 21, 2006

11:30 - 12:00 pm Registration/Networking
12:00 - 1:00 pm Buffet Lunch
1:00 - 2:00 pm Presentation

Where:

Snyder's Willow Grove Restaurant
841 N. Hammonds Ferry Road
Exit 8 off 695 Beltway
www.snyderswillowgrove.com

Price:

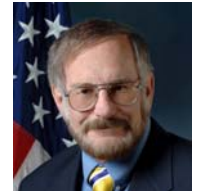
\$25 AGA Members
\$35 Non-Members

Contact:

410-965-9716 (leave a message) or email
agabaltimore@yahoo.com by September 15.

This training is worth **1 CPE**.

President's Message



It is a distinct honor to serve as the President of the AGA Baltimore Chapter during the 2006 -2007 organization year. As a way of introduction, I am the Assistant Inspector General for Audit, Office of the Inspector General (OIG), for the Social Security Administration (SSA). While I consider it an honor to serve in my public capacity, I likewise consider it an honor and pleasure to serve AGA. As a member of AGA since the early 1980s, I have first-hand knowledge of the many benefits of membership.

As I embark on this endeavor, please join me in the many events we have planned. We have confirmed some notable speakers for training sessions, including the SSA Commissioner, Jo Anne B. Barnhart and SSA's Inspector General, Patrick P. O'Carroll, Jr. Scheduled training topics include fraud, ethics, leadership and the new government auditing standards. Our program is designed to support AGA's mission to provide quality education at a reasonable cost. Please plan to attend the training events and invite a guest or two to introduce them to the many benefits of joining this fine organization.

A wise person once said, "A good idea is worth one dollar. A good plan for implementing that idea is worth a million dollars." I want to thank the Officers and Directors who have volunteered to develop great plans to make this a successful year. Based on the board of directors meetings we have had so far, this should be a very rewarding year.

I encourage you to read this newsletter to identify some events to participate in. I also encourage you to write an article to share what is going on in your work and personal life. You never know how you may touch another life by sharing your experiences and knowledge.

Please contact me or any of the directors if you have questions or want to share your ideas for the organization. Remember, your active participation in the AGA will be the driving force in making this year a success.

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September Speaker Bio



As head of the Social Security Administration, Commissioner **Jo Anne Barnhart** has responsibility for administering the Social Security programs (retirement, survivors and disability), as well as the Supplemental Security Income (SSI) program.

Social Security provides financial protection to 160 million workers and their families, and more than 48 million Americans receive monthly Social Security retirement, disability or survivors benefits. The SSI program pays monthly benefits to more than 7 million Americans who have little or no resources and who are aged, blind or disabled.

The Social Security Administration is an independent, federal agency headquartered in suburban Baltimore, with offices in Washington, D.C., and in 1,500 other locations nationwide.

Serving a term of office that will run through January 19, 2007, Commissioner Barnhart was nominated by President George W. Bush on July 17, 2001, and confirmed by the United States Senate on November 2

of that year. She is the third longest serving Commissioner in agency history.

Before her appointment by President Bush, Commissioner Barnhart served for more than four years as a member of the Social Security Advisory Board, an independent body created to advise the Congress on Social Security issues and policies.

A former Social Security employee, Ms. Barnhart worked in the Office of Family Assistance from 1981-1986, first as Deputy Associate Commissioner and then as Associate Commissioner. She served as minority staff director for the Senate Committee on Governmental Affairs from 1986-1990. From 1990-1993, she served as Assistant Secretary for Children and Families at the Department of Health and Human Services, overseeing more than 65 programs, including Aid to Families with Dependent Children.

During her career, Ms. Barnhart has served as Senator William V. Roth, Jr.'s legislative assistant (1977-1981) and as his campaign manager (1988, 1994 and 2000), and managed her own political and public policy consulting firm.

A graduate of the University of Delaware, Commissioner Barnhart was born in Memphis, Tennessee. She lives in Virginia with her husband and son. ❖

Board of Directors Luncheon Recap

A luncheon for the in-coming and out-going Board of Director (BOD) member was held at noon on Thursday, June 29, 2006 at Timbuktu Restaurant in Hanover, Maryland.

JoAnn presented each BOD member with a small appreciation gift for their work over the past year.

JoAnn introduced and relinquished her duties to Steve Schaeffer (President-Elect). Steve presented JoAnn with a pen set from the Officers and Directors of the Board in appreciation for her service this year. ❖

Did You Know?

Several of our members are expecting little bundles of joy in the next several months. For all you parents-to-be, did you know that the Social Security Administration's website contains a list of the most popular baby names (updated annually) and links to other resources? The website can be found at: www.socialsecurity.gov/OACT/babynames. ❖

Member News

Congratulations to **Annette Dushel** and **Joe Poist** of the Social Security Administration. Annette received a promotion to Division Director in the Office of Financial Integrity and Joe received a promotion in the Division of Financial Policy and Reporting. ❖



July Board Minutes

A board meeting of the Baltimore Chapter of the Association of Government Accountants (AGA) was held at the Social Security Administration (SSA) on Thursday, July 20, 2006, from 2:00 p.m. to 3:00 p.m. There were 12 board members in attendance. Steve Schaeffer, President, was the Presiding Officer.

President: Steve Schaeffer stressed the importance of having a successful year by maximizing chapter activities. Mr. Schaeffer has a speaker lined up for November 2006, the SSA Inspector General. He suggested we try to get the Internal Revenue Service to present the newest tax law changes at one of our training sessions. We will contact GAO to provide training on the upcoming Yellow Book changes. The board members were asked to come up with some additional ideas for speakers for the year.

Secretary: Deborah Kinsey, Secretary, read the minutes from the Director's luncheon meeting held on June 29, 2006 at Timbuktu Restaurant. A motion carried to accept the meeting minutes. Ms. Kinsey stated that the budgets for each of the program areas need to be submitted for approval for the year.

Treasurer: Rick Berlinrut, Treasurer, will work with last year's treasurer to ensure that tax returns are filed and accounting reports written. Mr. Berlinrut will also address several outstanding bills and accounts receivable. He reiterated the need for committees to submit budgets for the year.

Meetings: Meetings committee will be working with board members and Education and Programs Committee to coordinate the logistics for the upcoming training sessions.

Activities: Milt Wolinski handed out AGA's Chapter Recognition Program guidance. He requested that directors become familiar with the reporting process for each of their program areas so they can maximize points earned during the year. The first of this year's reports will be for the May, June and July 2006 activities, and is due to National by August 14th. Directors were asked to report activities for those

months to Mr. Wolinski prior to the due date. Plans for 2006-2007 chapter activities are due to the AGA National Office by August 30, 2006. Mr. Wolinski asked directors to report their formal plans before that date.

Community Service: Ana Labador and committee will work to determine opportunities to support various charities.

Certified Government Financial Manager (CGFM): Jean Adkins-Blasy, a new director on the CGFM committee, will work to develop programs to maximize points earned in the CGFM category. Mr. Schaeffer summarized the purpose of the committee and board members referred Ms. Adkins-Blasy to past CGFM directors for additional guidance.

Early Careers: Brenda Rann reported that the committee is already making plans for the year. In accordance with tradition, the committee will invite students to the March 2007 meeting, which will focus on Early Careers. The committee will also work to maximize points to be earned in the Chapter Activities Recognition Program. Ms. Rann would like to earn points by inviting students and potential Early Career members to meetings throughout the year and not just the March meeting. Board members present expressed their agreement with this idea and suggested that Ms. Rann include funding for this idea in her budget proposal.

Newsletter: Christina Lilly, Editor, requested input for the newsletter each month. She asked directors to submit information on promotions, awards, births of babies, etc. She also asked that directors take notes and pictures at events to submit to the newsletter. Kristen Schnatterly noted that she and Kristina Poist would both be on maternity leave beginning in January 2007. Both serve on the Editorial committee.

Membership: Ed Koontz and the membership committee will work to maximize membership this year.❖

Advancement Opportunity

The **U.S. Department of Transportation (DOT), Office of Inspector General (OIG)** is seeking a **Supervisor Auditor (Project Manager)**, GS-0511-14 or a **Management & Program Analysis Officer**, GS-0343-14 for its Washington, D.C. office. DOT OIG is seeking a dynamic individual with excellent skills in planning, conducting, and communicating results of Federal acquisition program audits. Salary range is \$91,407 to \$118,828. Announcements I-06-71 or I-06-72 may be downloaded at the following Internet website: www.usajobs.opm.gov or at www.oig.dot.gov, or call 202-366-1490 to request a mailed copy. All applications must be received no later than close of business September 14, 2006.❖

Training Opportunities

AGA's Second National Performance Management Conference (PMC) is scheduled for October 30-31, 2006 in Schaumburg, IL. This one-of-a-kind event focuses on state and local government performance reporting. The PMC will bring together state and local government professionals to share in education, networking, and recognition of government entities that have been honored with AGA's Certificate of Achievement in SEA (Service Efforts and Accomplishments) Reporting.

The theme of the conference is "*Integrating Measurement with Management: Making the Connection*" and 14 CPE hours are offered. The list of

speakers features representatives from state and local governments, the Governmental Accounting Standards Board, and academia. Some of the topics for the conference include:

- Using performance information to improve management;
- Engaging citizens to establish goals and measures in the community;
- Assisting officials to integrate performance information; and
- Comparing benchmarks.

For more information, please visit the conference website at: www.agacgfm.org/pmc_2006/index.htm.❖

AGA's First National Internal Control & Fraud Conference is set for September 25-26, 2006 in Atlanta, GA. With the theme, "*Fraud Prevention and Detection: The Newest Tools and Techniques*," the conference will focus on management's responsibility for ensuring a good system of internal controls and the role of accountability professionals in minimizing the risk of fraud, waste and abuse.

The National Internal Control & Fraud Conference features leaders from all levels of government, the

private sector and academia and offers outstanding sessions and ample opportunities to network. Earn 14 CPE hours at dynamic and information education sessions. Learn about the \$67 billion Iraq Oil-for-Food fraud; Medicare/Medicaid fraud; A-123 implementation; internal controls and fraud in not-for-profit organizations; school district fraud in the state of New York; and the use of fraud hotlines in the city of Atlanta.

For more information, please visit the conference website at: www.agacgfm.org/fraud_2006/index.htm.❖

AGA Baltimore 2006-2007 Upcoming Training Schedule

DATE	TOPIC	CPEs
October 19, 2006	Leadership, Teambuilding and Achieving Excellent Results in Government Financial Management through People	3
November 16, 2006	Identity Theft – Protecting Your SSN	2
December 14, 2006	Joint Meeting with ISACA – IT Update	3
January 17, 2007	Yellow Book Update	3
February 21, 2007	Joint Meeting with IIA – Forensic Investigations in Governmental Agencies	3
March 15, 2007	Early Career Focus – Career Development	2
April 5, 2007	Fraud Conference	7
May 17, 2007	Awards Luncheon	1

Member Profile



This month's member profile features our Chapter President, **Steven L. Schaeffer**. As the Assistant Inspector General for Audit, Office of the Inspector General, Social Security Administration (SSA), Mr. Schaeffer is responsible for auditing and evaluating the business and program applications for an entity with income in excess of \$735 billion and outlays of over \$570 billion annually. Mr. Schaeffer was selected to direct the Office of Audit (OA) in January 2000. Under his tenure, OA has issued 530 reports with over \$7.8 billion in monetary findings. Over this time period, productivity in completion time for reports decreased from 550 days to 338 days and the Agency has agreed with 91 percent of OA's recommendations. The quality of OA work has been recognized by the President's Council on Integrity and Efficiency. Since 2000, the Council has recognized OA with 18 Awards for Excellence and with one of their highest awards, the Glenn-Roth Exemplary Service Award.

An employee of SSA for over 27 years, Mr. Schaeffer held several positions of increasing responsibility in financial management prior to his current position. He developed and issued SSA's first audited financial statement in Fiscal Year (FY) 1987 and led the development and production of the Agency's Performance and Accountability Report

through FY 1998. For his efforts, he has received numerous awards including three Commissioner Citations (the Agency's highest honor award); one of the first recipients of the Chief Financial Officers Council Committee Impact Award; and a Hammer" for developing and issuing the first Accountability Report in the Federal Government. SSA's FY 1998 Accountability Report received one of the two initial Certificates of Excellence in Accountability Reporting awarded to Federal agencies from the Association of Government Accountants.

Prior to working for SSA, Mr. Schaeffer held positions with the Federal Deposit Insurance Corporation; U.S. Army Recruiting Command, Fort Sheridan, Illinois; U.S. Army Transportation Center, Fort Eustis, Virginia; and OW Houts and Sons, State College, Pennsylvania. His educational background includes both Master and Bachelor of Science degrees from the Pennsylvania State University and a Juris Doctorate from the University of Baltimore. Mr. Schaeffer has been a licensed CPA in Maryland since 1979 and a member of the Maryland Bar from 1984.

Outside work, Mr. Schaeffer is an avid runner, skier, and golfer. As a long distance coach for a U.S. Track and Field running club, he has had the opportunity to work with young men and women who have won numerous titles at the State and Regional level. Several of his athletes have placed in the top 10 at National youth championships and have gone on to receive Division 1-A scholarships.❖

Community Service Events - Walk/Run for Crohn's and Colitis Foundation of America

Members of the Baltimore Chapter of the AGA are joining together to support CCFA's 1st annual Guts & Glory Walk in Towson, MD on September 30, 2006. The walk will start at Towson University with a nutritious breakfast followed by a fun 5k walk. Then hang out at Burdick field for a fabulous lunch generously provided by Chartwells and some great entertainment. This event hits close to home, as one of our own AGA Baltimore Chapter members is afflicted with Crohn's disease.

If you'd like to participate in the walk, contact Jeff Broglie at 410-964-2108 or Christina Lilly at 410-965-1263. Registration starts at 8:30 am and the walk begins at 9:30 am. The fee is \$10 to enter the walk. If you'd like to make a donation to the CCFA via credit card, visit the CCFA website at the following URL: <http://ccfa.kintera.org/faf/home/default.asp?ievent=165331>. Choose 'Team Broglie' under the Team Rank box on the right hand side of the screen and choose 'General Donation'.❖

Deadline for CISA Exam Registration is September 27th

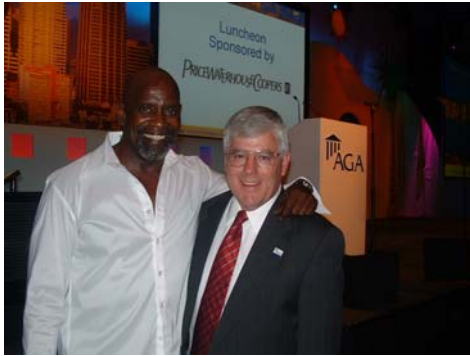
In order to sit for the Certified Information Systems Auditor (CISA) examination on December 9th, you must register by September 27, 2006. Over 48,000 professionals have earned the CISA which is the globally accepted standard of achievement among information systems (IS) audit, control and security professionals. CISA certification signifies commitment to serving an organization and the IS audit, control and security industry with distinction.

For more information on the CISA exam, visit www.isaca.org. ❖

A Look Back at the PDC

In June, 2006 nearly 1,800 financial management professionals gathered in San Diego, California for AGA's 55th annual Professional Development Conference (PDC) and Exposition. The theme for this year's PDC was *"Navigating the Way to Citizen-Centered Government"* and brought together participants from federal, state and local governments, the private sector and academia to discuss issues of common concern. The conference featured an array of speakers such as Peter Harkness, editor and publisher of *Governing* magazine; Christopher Gardner, founder, president and CEO of Gardner Rich & Company, Inc., and author of *"The Pursuit of Happiness"*; Carlos Watson, analyst, columnist, and host of CNN's *Off Topic with Carlos Watson*; and many more. There were also concurrent sessions featuring speakers from various federal agencies, state and local governments, and private organizations.

Below are a few snapshots of some of the Baltimore Chapter members who attended the conference. ❖



Speaker Christopher Gardner with AGA National President Sam McCall



Leroy Chester and Dellareese Morton-Smith (left) with AGA members from California



Former Chapter President Lance Chilcoat and wife Linda enjoy the Baja Beach Bash



Deborah Kinsey enjoying herself at the Beach Bash



Past National President Jullin Renthrope with current President Sam McCall and his wife



Chapter President JoAnn W. Burnett and Kelly Stefanko, Regional VP are all smiles

CGFM Corner

New Leadership

The Baltimore Chapter's 2006-2007 program year brings new leadership for the Certified Government Financial Manager (CGFM) Program. Feel free to contact either Jean Adkins-Blasy (410-965-8464) or Chasity Crawley (410-966-7694) with any questions, comments, and/or accomplishments regarding your progress in obtaining and/or retaining your CGFM. We want to hear from you.

Kudos

As of March 1, 2006, the CGFM Program has increased tremendously. Since last year, there has been a 50 percent increase in applications, 73 percent increase in new CGFMs and 96 percent retention

rate of current CGFMs! The CGFM Program is growing and the credential is becoming more valuable and recognized. Will you be apart of its success?

(Excerpt taken from AGA National's March 1, 2006, Special Issue for CGFMs)

Seeking Study Group Participants

To assist you in obtaining your CGFM credentials, we would like to offer you help in establishing local study groups. If you are interested in participating in a CGFM study group, please call or email Chasity, 410-966-7694 or chasity.crawley@ssa.gov. ❖

CGFM Training Opportunities

Management Concepts is offering CGFM courses in Washington, DC in October 2006.

The courses are:

Course 1: *The Governmental Environment*: October 18th

Course 2: *Governmental Accounting, Financial Reporting and Budgeting*: October 23rd – 25th

Course 3: *Governmental Financial Management and Control*: October 19th – 20th



To register contact Management Concepts at 703-790-9595 or visit www.managementconcepts.com. ❖

Changes to Tax Deductions for Charitable Contributions

On August 17, 2006, President Bush signed the Pension Protection Act of 2006 into law. Hailed by the White House as the most sweeping reform of America's pension laws in over 30 years, the Act makes other changes you may not have heard about. Below are excerpts from the PRWeb Press Release Newswire for August 14, 2006.

In addition to sweeping changes to the pension plan rules, this Act also makes a few major changes to the tax deduction people can claim for their charitable donations. One big change applies to donations of clothing and household items. As of the enactment date of this new law, taxpayers can only claim a deduction for donated goods that are in good condition or better.

As always, people who make donations of goods should list each item donated, including each item's fair market value, and file that list along with their other tax documents. Keep in mind that unless an item is brand new or in excellent condition, it is probably worth no more than one-third of its original cost.

Taxpayers who claim a deduction in excess of \$500 for donated goods need to complete and attach a Form 8283 to their tax returns. And anyone looking to claim a deduction in excess of \$5,000 generally needs to attach a written appraisal to their tax form as well. More information about non-cash contributions can be found in IRS Publication 526, Charitable Contributions, available at www.irs.gov. Give the IRS time to update this publication to reflect the new rules, however.

This Act also increases the documentation required for people claiming an itemized deduction for their donations of money to a charitable organization. Effective as of the Act's enactment date, taxpayers must maintain a cancelled check, bank record, or receipt from the charity substantiating the date and amount of the donation.

Excepts taken from "Donate Your Clothing and Household Items to a Charity Before the 'Pension Protection Act of 2006' is Enacted Into Law" from the PRWeb Press Release Newswire website:

www.prweb.com/releases/2006/8/prweb424126.htm. ❖

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To all of the members who submit articles for the monthly Newsletter, we say Thank you! For **October**, please make any submissions by **September 22, 2006** by contacting the Editorial Committee. ❖

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