



Trenton Chapter

ADVANCE, GROW, ACCELERATE!

HISTORY REPORT FOR PROGRAM YEAR 2024

**ROSE M. TODARO
HISTORIAN**

CHAPTER EXECUTIVE COMMITTEE

The Trenton Chapter holds annual elections in April for the following Chapter Officers (see Attachment A for 2023-2024 Officers):

President
President-Elect/Vice President of Education
Vice Presidents (2)
Treasurer
Secretary

During program year 2023-2024, thirteen directors, appointed by the President, were active within the Chapter (see Attachment A for 2023-2024 Officers and Directors).

EXECUTIVE BOARD MEETING DATES

The full Executive Board met twice during the 2023-2024 program year. The Board held a reorganization meeting via Zoom on August 2, 2023. An additional in-person mid-year Board meeting was held on January 31, 2024.

EDUCATIONAL EVENTS

WEBINARS HELD

- | | |
|--------------------|---|
| September 27, 2023 | Webinar conference topic was <i>Communications</i> - 13 individuals (12 members, and 1 non-member) attended this webinar using the Trenton Chapter's voucher access code. The session offered 2 CPE credits. |
| December 13, 2023 | Webinar conference topic was <i>Risk Management</i> - 1 member attended this webinar using the Trenton Chapter's voucher access code. The session offered 2 CPE credits. |
| January 17, 2024 | Webinar conference topic was <i>Uniform Guidance and Grant Accounting</i> - 22 individuals (21 members, and 1 non-member) attended this webinar using the Trenton Chapter's voucher access code. The session offered 2 CPE credits. |
| March 6, 2024 | Webinar conference topic was <i>RPA/AI</i> - 19 individuals (18 members, 1 non-member) attended this webinar using the Trenton Chapter's voucher access code. This session offered 2 CPE credits. |
| March 27, 2024 | Webinar conference topic was <i>Cybersecurity/ERM</i> - 9 individuals (8 members and 1 non-member) attended this webinar using the Trenton Chapter's voucher access code. This session offered 2 CPE credits. |
| April 10, 2024 | Webinar conference topic was <i>Ethics</i> - 15 individuals (14 members, 1 non-member) attended this webinar using the Trenton Chapter's voucher access code. This session offered 2 CPE credits. |
| May 8, 2024 | Webinar conference topic was <i>Fraud and Data Analytics</i> - 16 individuals (15 members and 1 non-member) attended this webinar using the Trenton Chapter's voucher access code. This session offered 2 CPE credits. |
| May 22, 2024 | Webinar conference topic was <i>Leadership</i> - 13 individuals (12 members and 1 non-member) attended this webinar using the Trenton Chapter's voucher access code. This session offered 2 CPE credits. |

These training sessions were offered to AGA members free. Non-members were charged a small fee.

FULL DAY TRAINING EVENTS

<p style="text-align: center;">AGA Trenton Chapter 2023 Virtual Fall Professional Development Training Thursday, October 26, 2023</p>
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Opening Remarks	8:00am to 8:10am	Michael Salberta, AGA Trenton Chapter President
Session 1	8:10am to 9:00am	Jeffrey Baresciano, Mercadien Topic: Forensic Accountant's Role in Internal and External Government Investigations
Break	9:00am to 9:10am	
Session 2	9:10am to 10:00am	Krista Valenzuela, NJCCIC Topic: Current Cyber Threats and Best Practices
Break	10:00am to 10:10am	
Session 3	10:10am to 11:00am	Nancy Hess, NJ Hess Associates Topic: The New Metrics for Employee Retention in Financial Management
Break	11:00am to 11:10am	
Session 4	11:10am to 12:00pm	Dean Michael Mead, Carr, Riggs & Ingram CPAs and Advisors Topic: Implementing GASB Statement 96: Lessons Learned from Statement 87
Lunch	12:00pm to 1:00pm	
Session 5	1:00pm to 1:50pm	Melissa Turitz and Miki Tesija, Financial Industry Regulatory Authority Topic: An Overview of FINRA and Interactions with Accountants
Break	1:50pm to 2:00pm	
Session 6	2:00pm to 2:50pm	Nicole Burkart, Dawn Simpson, & Robert Dacey, GAO Topic: What's New in GAO's FISCAM
Break	2:50pm to 3:00pm	
Session 7	3:00pm to 3:50pm	Arushi Kumar, City of Honolulu Auditor Topic: Honolulu Authority for Rapid Transit Case Study
Closing Remarks	3:50pm to 4:00pm	

Please note the schedule and speakers are subject to change.

Credits for Continuing Education: 7 credits in the subject area of

"Auditing/Accounting/ Information Technology/Economics/Personal Development"

CPE's are only available to participants from NJ and PA

CPE certificates will be available via email. In the event of your early departure, the certificate will be adjusted accordingly.

AGA Trenton Chapter NJ Sponsor #20CE00023700, PA Sponsor #PX177258

There were 90 attendees - 51 members and 39 non-members. In addition, two of the 10 speakers each attended 1 to 7 of the above sessions.

<p>AGA Trenton Chapter 2024 Spring Professional Development Training Thursday, April 28, 2024</p>
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7:30am to 8:15am	Registration/Breakfast
8:15am to 8:30am	Opening Remarks - Michael Salberta, AGA Trenton Chapter President
8:30am to 9:30am	Session 1 - <i>Leadership Excellence: Building a Spectacular Team in Government</i> Andrew DeMuth, NJ Division of Criminal Justice
9:30am to 10:30am	Session 2 - <i>The Dirty Business Behind Getting Clean</i> Lisa Cialino, Eric Rennert, & Laura Mercandetti NJ Commission of Investigation
10:30am to 10:45am	BREAK
10:45am to 11:45am	Session 3 - <i>Overview of the Cannabis Regulatory Commission</i> Samuel Delgado, NJ Cannabis Regulatory Commission
11:45am to 12:00pm	Luncheon Speaker - Interfaith Caregivers of Greater Mercer County
12:00pm to 1:00pm	LUNCH
1:00pm to 2:00pm	Session 4 - <i>Business Email Compromise: A Symptom, Not a Cause</i> Niloufer Tamboly, Verizon
2:00pm to 3:00pm	Session 5 - <i>Ransomware Prevention</i> Krista Valenzuela, NJ Cybersecurity & Communications Integration Cell
3:00pm to 3:15pm	BREAK
3:15 to 4:15 pm	Session 6 - <i>Artificial Intelligence and Audit Processes</i> Alex Vorpahl, Deloitte
4:15pm to 4:30pm	Closing Remarks, Awarding of CPE Certificates

Please note the schedule and speakers are subject to change.

Credits for Continuing Education: 7 credits in the subject area of

“Auditing/Accounting/Personal Development/ Human Resources/Taxation”

CPE’s are only available to participants from NJ and PA

CPE certificates will be available via email. In the event of your early departure, the certificate will be adjusted accordingly.

AGA Trenton Chapter NJ Sponsor #20CE00023700, PA Sponsor #PX177258

There were 61 attendees - 49 members and 12 non-members. In addition, two of the 8 speakers attended 4 to 5 of the above sessions.

VIRTUAL PARTNERSHIP WEBINAR TRAINING

October 18, 2023
November 15, 2023

The Chapter partnered with the New Jersey Office of the State Auditor in offering the required four hour New Jersey Law and Ethics 2021-2023 training course. This mandatory CPA course was free to government employees, government retirees and AGA members. Four CPE credits were awarded to 171 individuals who attended.

SOCIAL EVENT

September 14, 2023

The Chapter kicked off the 2023-2024 program year by hosting a Happy Hour at Uno Pizzeria & Grill. The event was free to AGA Trenton Chapter members, \$15 for AGA members from other chapters, and \$30 for non-members who registered by September 6, 2022. There was a premium charge for late registration or at the door. 17 members and 1 non-member attended this event.

March 28, 2024

The Chapter hosted a winter Happy Hour for the 2023-2024 program year at Blend Bar and Bistro. The event was free to AGA Trenton Chapter members, free to potential new members and \$15 for guests of AGA members. The event was attended by 23 members and 2 non-members.

COMMUNITY SERVICE EVENTS

October 29, 2023

Seven Chapter members participated in the Homefront's Halloween Walk/Run fundraiser. The Chapter's team raised \$145 for Homefront.

February 14, 2024

Members mailed gender neutral Valentine cards with a general Valentine wish to a local nursing home to be distributed to the 100 plus long term residents.

May 11, 2024

Nine AGA Trenton Chapter members and three non-members participated in a program to honor our veterans by assisting the Mercer County Veterans' Service Office with placing flags on veterans' grave sites at a local cemetery.

April 30, 2024

The Chapter partnered with a local restaurant to raise an additional donation for the Chapter's community service entity, Interfaith Caregivers of Greater Mercer County. The one-day donation was generated based on 10 percent of the dinner orders placed by individuals who showed the Chapter's flyer announcing the event.

June 1, 2024

One Chapter member and one non-member participated in the Interfaith Caregivers of Greater Mercer County 3K Walk for Wellness fundraiser. Through direct donations and walk registration fees, the Chapter raised an additional \$465 for the Interfaith Caregivers of Greater Mercer County.

September 2023 to
June 2024

Various projects were undertaken to raise funds for the Paul M. Vidunas Community Service Memorial. Paul passed away during his term as Chapter President and the Chapter established the fund to recognize Paul's dedication to community service. Annually the Chapter selects a community service entity to receive this award. The 2023-2024 recipient selected was "Interfaith Caregivers of Greater Mercer County". Interfaith Caregivers of Greater Mercer County, an interfaith coalition, is dedicated to promoting the independence, dignity and wellness of homebound elderly and people with disabilities by matching them with supportive and caring volunteers who assist with the tasks of everyday life. A total of \$1,891.65 was donated. The Chapter donated \$1,391.65 and National's matching donation was \$500.

PUBLICATIONS

The Chapter issued six newsletters between July 2023 and June 2024 containing our President's letter, financial status of the Chapter, CGFM information, meeting announcements, speaker's biographies, etc. Each newsletter was posted to the Chapter's website. Three of the six newsletters covered multiple months. (Attachment B)

During the year the Chapter prepared the 2022-2023 Citizen Centric Report which highlighted the demographics of the Chapter's membership by employer and professional certification; educational events offered during the program year; community service activities; the Chapter's financial activities for the 2022-2023 program year; as well as, discussing the Chapter's efforts to enhance its communications with current members; and efforts to expand its membership. The Citizen Centric Report was posted to the Chapter's website. (Attachment C)

The Chapter prepared and submitted its 2022-2023 annual history report to the National Office. The annual history report was posted to the Chapter's website.

CHAPTER HONORARIUMS AND AWARDS

May 9, 2024

The 2023-2024 award recipients were as follows:

Special Assistant Award

Robyn Boyer, New Jersey Office of the State Auditor

Chapter Service Award

Eric Fonseca, New Jersey Office of the State Auditor

Amanda Ireland, New Jersey Office of the State Auditor

James J. Dolan Award

Meghan Ellis, New Jersey Office of Legislative Services

Paul M. Vidunas Community Service Memorial Donation \$1,391.65

Interfaith Caregivers of Greater Mercer County

Thomas J. Kaschak Memorial Scholarship

Grace Fessler

Trenton Chapter Scholarship

Arianna Ng

Jokob Papiez

Education and Training Award

Marie Samson, New Jersey Department of Transportation

Distinguished Leadership Award

Stacy Peterson, New Jersey Board of Public Utilities

President's Award

Meghan Ellis, New Jersey Office of the State Auditor

Past President's Award

Robert Rizzo, New Jersey Office of the State Auditor

LIFETIME MEMBERS

The Chapter has 14 members who have earned their Lifetime membership designation. The Lifetime membership is awarded to members who have been active members in good standing for 40 consecutive years.

MEMBERSHIP MILESTONES

The Chapter has 18 members who have been active members in good standing for either their 20, 25, 30 or 35 consecutive years.

PROFESSIONAL CERTIFICATIONS

During the 2023-2024 program year a non-member passed the Certified Government Financial Manager (CGFM) exam.

NATIONAL LEVEL SERVICE and RECOGNITION

The Chapter's In-Coming President, the Chapter's President-Elect/Vice President of Education, the Chapter's Immediate Past President, the Chapter's Fall PDT Co-chair, and the Chapter's National Council of Chapters Representative attended the PDT in Orlando, Florida in July 2023.

The Chapter's President-Elect/Vice President of Education and the Chapter's In-Coming National Council of Chapters Representative/Director of Social Media/Spring PDT Co-Chair attended National's LEAD! 24 Conference in Baltimore, Maryland. The meeting was held April 11-13, 2024. The focus of the Conference was to bring AGA National office staff and volunteers together to help attendees develop as leaders and to cover topics such as AGA National's direction and initiatives; expectations of national and chapter leaders; ways to improve services so current members will stay and recruit new members and leaders; and ways to access information for more effective leadership.

The Chapter's 2019-2020 Past-President continues to be the Chapter's Representative on the National Council of Chapter (NCC). The NCC is National's modification of the regional vice president governance. AGA National revised the chapter representation from one individual for a region of chapters to a NCC representative from each of the 101 active chapters, thus allowing each active chapter to have a voice in the overall governance of AGA.

The success of National's annual Professional Development Training (PDT) is not only dependent on offering high quality educational sessions and being well attended, but also having the support and services of volunteers. The Chapter's Fall PDT Co-chair answered National's request for volunteers and served on the Welcoming Committee for the 2023 PDT held in Orlando, Florida.

The Chapter's President-Elect/Vice President of Education/ACE Director and the Chapter's Fall PDT Co-chair participated in a panel presentation on Forensic Auditing at the 2023 PDT held in Orlando, Florida.

NATIONAL AWARDS and CERTIFICATE OF EXCELLENCE

The Trenton Chapter earned the Achievement in Chapter Excellence (ACE) Platinum Award from National for 2023-2024 program year. In order to earn the Platinum Level Award, the Chapter earned over 4,400 points. Points are awarded by the National Association for fulfilling the Chapter goals established by the Chapter's current year President and President-Elect, and completed during the ACE year which began on June 1st and ended on May 31st.

The Chapter was awarded the Certificate of Excellence for its 2022-2023 Citizen Centric Report.

AGA National will match the Chapter's donation to the local community service entity chosen by the Chapter. The Chapter's President completed and submitted the ***Matching of Donations*** request to National. National approved the Chapter's request, and the Chapter's charity Interfaith Caregivers of Greater Mercer County received a check totaling \$500.00 from National, which included an award notice explaining the reason and the source of the donation.

The Chapter's President nominated the Chapter's In-Coming National Council of Chapters Representative/Director of Social Media/Spring PDT Co-Chair for the National Volunteer of the Year Award. The award was approved since the nominee embodies the spirit of volunteerism, and has made distinguished contributions to the development and enhancement of the Trenton Chapter of AGA.

CHAPTER OFFICERS AND DIRECTORS 2023-2024

OFFICERS

President - Michael J. Salberta
President-Elect/Vice President of Education ACE Director - Douglass MacArthur
Vice President of Membership - Morgan E. Stec
Vice President of Finance/Administration/Programs - Stephanie Rybak
Immediate Past President/ Nominating Committee Chair - Robert Rizzo
Secretary - Joseph Pica
Treasurer - Amanda Ireland
National Council of Chapters Representative - Nikki Farrell

DIRECTORS

Webinar Conferences - Rene Gervasoni and Jennifer Dougherty
Accountability Outreach - Kiersten Marie Zadworney
CGFM Chairperson - Margarita Stanislavskaya
Community Service - Christopher J. Fuccello
Young Professionals/Early Career - Morgan E. Stec
Meeting Chair - Joseph Pica, Backup Rene Gervasoni
Awards Director - Stephanie Rybak
Historian - Rose M. Todaro
Social Media Director - Meghan Ellis
Budget Director - Eric Carter
Bylaws & Procedures - David J. Kaschak
Chapter Recognition - Michael J. Salberta and Douglass MacArthur
Newsletter Editor - Marie E. Samson
Sponsorships - Guy L. Tassi
Paul Vidunas Coordinator - Nat Jackson
Webmaster/Communications - Michelle Blatt, Backup Jennifer Dougherty
Email Blasts - Eric Carter, Dillon Washington, and Miller Kahill

Fall PDT/Technical Coordinator - Co-chairs: Michael Salberta and Eric Fonceca, and Fall PDT Committee

Spring PDT/Technical Coordinator - Co-chairs Michael Salberta and Meghan Ellis, and the Spring PDT Committee