

### About Us

The Association of Government Accountants (AGA) Boston Chapter believes that its members first and foremost serve the public interest in accordance with the highest ethical principles. This Code of Ethics is both a standard of behavior to aspire to and a guide for making ethical decisions.

### Who We Are

The Boston Chapter was the fifth AGA chapter, established in 1954, and it has 298 professionals from federal, state and local governments, public accounting firms, colleges and universities, and private firms. The chapter's membership also includes students, those self-employed, and retired. Many members hold advanced degrees as well as professional certifications such as Certified Public Accountant (CPA), Certified Government Financial Manager (CGFM), and Certified Fraud Examiner (CFE).

### Organization of Chapter

The Boston Chapter elects the president-elect, secretary, treasurer, vice president for education and programs, vice president for planning, and vice president for communications. The president selects chapter directors.

### Objectives

Our code of conduct recognizes that the objectives of the government financial management profession are to work at the highest standards of professionalism, attain the highest levels of performance and generally meet the public interest requirement set out above. These objectives require that four basic needs be met:

- **Credibility:** Society needs credibility in government information and information systems.
- **Professionalism:** The public, employers, clients, and other interested parties need to easily identify professionals in the government financial management field.
- **Quality of Services:** The public needs the assurance that all services obtained from a government financial manager are carried out to the highest standards of performance.
- **Confidence:** Users of the services of government financial managers should be able to feel confident that there is a framework of professional ethics that governs the provision of those services.



The logo above recognizes the citizen-centric reporting initiative led by the AGA.

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## Our Mission

*The Association of Government Accountants Boston Chapter serves government accountability professionals by providing quality education, fostering professional development and certification, and supporting standards and research to advance government accountability.*

## Our Vision

*Be a collaborative and innovative organization that is future focused and committed to excellence in the government financial management arena.*

### The Boston Chapter's Social Media Campaign

The chapter hosts a website as well as other social media communications. Members as well as professionals interested in communicating with friends, colleagues, and other professionals can use any of the mediums below:



Twitter



Facebook



LinkedIn

## Leadership Team



*President-Elect:  
William Bell*



*President:  
Eric Berman, CPA*



*Immediate Past President:  
Daniel Bonnette, CPA*

**About this report:** We encourage you to give us feedback. Please send all questions and comments to [craig.hall@state.ma.us](mailto:craig.hall@state.ma.us).

### Key Achievements

With extensive engagement by the chapter's executive committee, the chapter continued to move forward on plans for updating the strategic plan.

Provided comprehensive professional training, education, and development opportunities to meet the changing needs of the chapter members and government financial community.

Emphasized outreach to college students in an effort to increase the student membership in the chapter.

The chapter conducted 10 events with donations of toys, clothing, food, and other items. Services to veterans were also provided on multiple occasions.

INDICATORS	2015-2016 TARGET	GOAL MET
<b>Education</b>	Provide a program that offers Continuing Professional Education credits annually.	YES
<b>Accountability</b>	To promote the accountability programs of the Association of Government Accountants (AGA) to public, private and nonprofit entities.	YES
<b>Certification</b>	Ensure the Certified Government Financial Manager (CGFM) is the government accountability community's preferred professional designation.	YES
<b>Membership</b>	Sustain chapter membership by implementing a plan to achieve a 90% retention rate of current chapter members.	YES
<b>Communications</b>	Publish monthly newsletters annually, and notify members and other interested parties of every program event during the year.	YES
<b>Community Service</b>	Promote and conduct community service activities that enhance the chapter, assist the national office, and benefit our local communities.	YES

### Membership Matters

The Boston Chapter is a dynamic and professionally diverse organization. During the 2015-2016 program year, the chapter welcomed 37 new members. The total membership is 335.

Total Members	
Employment Members	
City	19
Academia	3
Federal	42
Private	39
Retired	31
State	189
Student	4
N/A	8
<b>Total:</b>	<b>335</b>



### Consistent Achievement

The Boston Chapter has achieved *Platinum* status 18 years in row since the designation was created in 1998.

### Boston Chapter-Platinum Status 2015-2016

The Boston Chapter earned *Platinum* status. Again exceeding *Earned Credits*, through the national recognition program, which is designed to support, encourage, and promote the accomplishment of AGA's mission and to provide flexible noncompetitive guidelines for a well-rounded chapter.

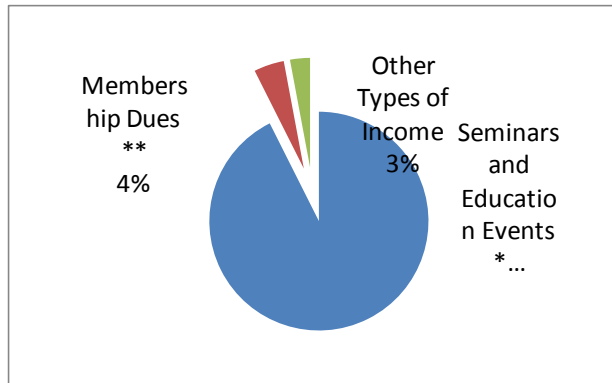
Categories	Maximum Credits	Earned Credits	Credits Allowed	% of Available
Leadership, Planning, and Participation	3,000.00	3,500.00	3,000.00	100%
Education and Professional Development	4,000.00	5,975.00	4,000.00	100%
Certification	4,000.00	4,875.00	4,000.00	100%
Communications	3,000.00	7,646.00	3,000.00	100%
Membership	4,000.00	8,150.00	4,000.00	100%
Accountability	2,000.00	2,450.00	2,000.00	100%
Community Service	2,000.00	7,925.00	2,000.00	100%
Awards	1,000.00	2,000.00	1,000.00	100%
<b>Total:</b>	<b>23,000.00</b>	<b>42,521.00</b>	<b>23,000.00</b>	<b>100%</b>

# The AGA Boston Chapter

## Fiscal Report

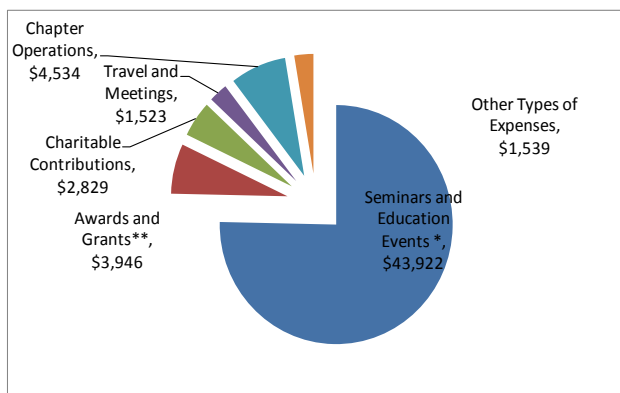
### Ordinary Income 2015-2016

Sources of Income	Amount of Income
Seminars and Education Events*	\$50,675.00
Membership Dues**	\$2,444.00
Other Types of Income	\$1,610.00
<b>Total Income</b>	<b>\$54,729.00</b>



### Expenses 2015-2016

Expenses by Area	Amount of Expense
Seminars and Education Events	\$43,922.00
Awards and Grants***	\$3,946.00
Charitable Contributions	\$2,829.00
Chapter Operations	\$4,534.00
Travel and Meetings	\$1,523.00
Other Types of Expenses	\$1,539.00
<b>Total Expenses</b>	<b>\$58,293.00</b>



### AGA Boston Balance Sheet as of June 30, 2016

ASSETS	
<b>Current Assets</b>	
<b>Checking/Savings</b>	
1100 Checking Account Main	65,802.00
1200 Savings Account	9,984.00
<b>Total Checking/Savings</b>	<b>75,786.00</b>
<b>Accounts Receivable</b>	
1300 Accounts Receivable	
1310 Seminar Receivables	3,241.00
<b>Total 1300 Accounts Receivable</b>	<b>3,241.00</b>
<b>Total Accounts Receivable</b>	<b>3,241.00</b>
<b>Total Other Current Assets</b>	<b>400.00</b>
<b>Total Current Assets</b>	<b>79,427.00</b>
<b>TOTAL ASSETS</b>	<b>79,427.00</b>
<b>LIABILITIES &amp; EQUITY</b>	
<b>Liabilities</b>	
<b>Current Liabilities</b>	
<b>Other Current Liabilities</b>	
2100 Deferred Seminar Revenue	13,884.00
<b>Total Other Current Liabilities</b>	<b>13,884.00</b>
<b>Total Current Liabilities</b>	<b>13,884.00</b>
<b>Total Liabilities</b>	<b>13,884.00</b>
<b>Equity</b>	
3000 Opening Balance Equity	22,063.00
3300 Unrestricted Net Assets	47,044.00
<b>Net Income</b>	<b>-</b>
<b>Total Equity</b>	<b>65,543.00</b>
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<b>79,427.00</b>

### Independent Audit

An independent audit report of the chapter's finances was generated and reviewed by chapter leadership. For monthly fund balances and complete financial information, please visit our chapter website at [www.agaboston.org](http://www.agaboston.org) and select "Newsletter" for a current fiscal status.



### Chapter Executive Committee Emphasis

The chapter leadership and executive committee during the annual transition develop a vision that aligns with the strategic plan. The vision demonstrates the passion, professionalism and dedication of the membership.

- *Host the 2017 PDT in Boston. We want to showcase our Chapter, our City and what it means to serve the public.*
- *Increase young members. We want to reach out to students and young accountability professionals to get them interested in public service and join AGA. We will visit as many Beta Alpha Psi (accounting and auditing honors society) chapters in Massachusetts as possible.*
- *Forge partnerships with other New England chapters. Chapters in Maine and Connecticut, along with members in the rest of New England do not have the educational opportunities we have in Boston. We will offer streaming and webinars to allow regional participation.*
- *Ensure continuity and growth. The Chapter has a robust history of leadership. Like the New England Patriots, our success will continue due to every member doing their part in leading. Coming in January 2017, our new members event at the United States Coast Guard station in Boston's historic North End.*

### Strategic Planning: Highlighting the Community Service Goal Area

The chapter's strategic plan encompasses six goal areas. The chapter takes particular pride in its commitment to community service.

The goal for 2017 is to promote and conduct community service activities that enhance the chapter and AGA's image and reputation. The strategies to accomplish this goal include:

- Develop and implement an annual plan of volunteer service projects that demonstrate the chapter's commitment to "giving something back" to the community.
- Encourage chapter members to volunteer their time and effort to community service projects.
- Increase awareness of members' community service activities.
- Include volunteer opportunities geared toward helping veterans and active military personnel when possible.
- Plan activities that benefit needy children in our service area.

### Leadership Perspective

In addition to the 2017 RPDT, during this year we are focusing on growing our membership, increasing the use of technology through webinars, regionalization in the coming years through regional PDT's instead of chapter PDT's and increasing accountability.

We believe that serving the public, whether as an employee or a contractor truly is honorable.

As we like to say – "Think like a taxpayer because you are one."

That simple maxim increases accountability and reduces the possibility of fraud, waste and abuse. As we know, AGA is the member organization for financial professionals in government.

We are committed to increasing government accountability and transparency at all levels of government by living that simple maxim.

### Regional Professional Development Training

The Boston Chapter's Regional Professional Development Training (RPDT) is a stalwart example of professional development. In 2017, attendees can earn certificates of professional development from exceptional speakers and topics that advance government accountability.

The 2017 RPDT is scheduled for March 9, 2017 at Bentley University. The agenda and professional development tracks will be listed on the chapter website when confirmed. For more information, please visit [www.agaboston.org](http://www.agaboston.org).



**BENTLEY**  
UNIVERSITY

### National Professional Development Training

The 2017 Professional Development Training is scheduled for Boston at the Hynes Convention Center July 9-12, 2017. The Boston Chapter will be seeking volunteers to make it a success. More information in future member communications.

