

# Corporate Partner Advisory Group (CPAG)

## All Hands Meeting

**June 4, 2020**



# Agenda

- Welcome and Introductions from our Chair
- AGA Update
  - From the National President
  - From the CEO
- The CPAG Year in Review and Looking Ahead
  - Committee and Working Group Reports
  - Committee Leadership Recognition
  - Get Involved!
  - CPAG Communications & Calendar

Post Meeting Networking/Social



# Welcome and Introductions

## **CPAG Chair**

- **Kevin Greer, CGFM, CPA, CDFM, PMP**  
Vice President, CGI Federal

## **CPAG Vice Chair**

- **Dave Fitz, CGFM, CPA, PMP**  
Partner, KPMG LLP

**Ann Ebberts, MS, PMP, CEO – AGA**

**Susan Fritzlen, COO - AGA**



# Welcome and Introductions

## **Accounting & Auditing**

- Chair: Eric Rasmussen – KPMG LLP
- VC: Jed Stancato – TFC Consulting
- Retired VC: Steve Watson retired Dec 31<sup>st</sup> – TFC Consulting
- YP Chair: Charles Moka – Grant Thornton

## **Defense Working Group**

- Co-Chair: Deb Delmar – Vanguard Advisors
- Co-Chair: Dave Zavada – Kearney & Company
- AGA Rep: Mark Reger, CPA

## **Technology**

- Chair: Todd Barber - CGI
- VC: Angela Rey – Trilogy Federal
- YP Chair: Alex Ng - CohnReznick

## **Performance Improvement**

- Chair: Robert Shea – Grant Thornton LLP
- VC: Mary Goldsmith – RSM US LLP

## **Small Business**

- Chair: Reza Mahbod – RMA Associates
- VC: Thomas Castro – Castro & Company



# Reminder! Networking/Social (BYOB!)

## **Please Zoom with us After the Business Meeting!**

- AGA Rebranding
- We've Gone Virtual - Sponsor Value
- Ideas for Research Studies
- Fun time – Share What's Been Happening in your Socially Distanced World





The CPAG mission...

... is to bring industry and government executives together to exchange information, support professional development, improve communications and understanding, solve issues and build partnership and trust, thereby enhancing AGA's focus on advancing government accountability.

# Professional Level Members



Accenture  
Automation Anywhere  
Bank of America  
BNY Mellon  
CACI  
CGI Federal  
CLA  
CohnReznick  
Cotton & Company  
Deloitte  
EY  
Federal Management Systems Inc  
FI Consulting  
Graduate School USA  
Grant Thornton LLP  
Guidehouse  
IBM

Infor  
JP Morgan  
Kearney & Company  
KPMG LLP  
Management Concepts  
ManTech  
MorganFranklin Consulting  
Oracle  
PNC Bank N.A.  
RMA Associates LLC  
RSM US LLP  
SAP  
VISA  
Williams Adley & Co LLP

**Who Is Missing!**

# Sustaining Level Members



**Who Is Missing!**

11<sup>th</sup> Hour Service  
2ndWave LLC  
Allmond and Company  
AOC Solutions  
Apptio  
Becker  
Blake Wilson Group LLC  
Castro & Company  
cBEYONData  
Centennial Technologies  
Creoal Consulting  
Crowe  
Deva & Associates, P.C.  
DP George & Company  
Empirical Concepts  
Harper, Rains, Knight & Co  
i360technologies  
IFAS  
iFOS

Immersion Consulting  
Intelipath Group  
Joachim Group CPAs  
Macro Solutions  
MIL Corporation  
MLINQS  
One Stream Software  
RM Advisory Services LLC  
Savantage  
Sehlike Consulting  
Significance  
Software AG Government Solutions  
Starry Associates  
The Craddock Group  
TCG Inc  
TFC Consulting  
Trilogy Federal LLC  
Watkins Government Services  
Workiva



# AGA Update

**Ernie Almonte, CGFM, CPA, CFE**

AGA National President and Partner, RSM

**Ann Ebberts, MS, PMP**

AGA Chief Executive Officer



# 2019-2020 Committee Reports

- **Accounting & Auditing**
  - **Defense Working Group**
- **Technology**
- **Performance Improvement**
- **Small Business**

# Accounting & Auditing Committee

## Accomplishments

### National Grant and Cooperative Agreement Recipient Uniform Guidance Implementation Survey

- Published in mid 2019
- 399 respondents – 48% State Gov., 22% Local Gov., 11% Educational, 19% Other
- PDT session where results were discussed
  - Additional guidance and training needed
  - Organizations do not have well documented processes and controls
  - Encourages a government-wide grants management certification program
- Held small group discussion with OMB grants leaders to discuss the survey results, OMB activities, and AGA/CPAG next steps to support grant process improvement efforts

Supported August 5, 2019 AGA/CFOC/CIGIE Forum, ***Impacts of Emerging Technologies on the Workforce***, with facilitators/notetakers



# Accounting & Auditing Committee

## Accomplishments

### **OMB's Proposed Revisions to 2 CFR, Uniform Grant Guidance**

- A subcommittee submitted comments to OMB on their proposed guidance

### **ERM Workshop to be held virtually on June 12, 2020**

- Presenters from OMB and several agencies
- Co-sponsored with AFERM
- Keynote presentation followed by 3 panels addressing:
  - Integrating Risk Management: Harnessing the Power of All Risk Disciplines
  - Implementing an Effective ERM Program: Perspectives of the Inspector General
  - Operationalizing the Risk Appetite Statement to Aid in Decision Making
- Breakout sessions moderated by sponsor representatives – projecting 13 to 20 virtual tables
- White paper summary of discussions will be completed after the workshop



# Accounting & Auditing Committee

## Accomplishments

### CFO Act of the Future Project Discussion

- White paper drafted identifying factors to consider to update requirements
- AGA met with three individuals from the Senate Budget Committee
- Considering COVID-19 effects on timing of legislation
- Currently reviewing committee comments and will compile and redistribute

### Looking Forward

- Brainstorming areas: Grants management, Improper Payments, FASAB statements, DATA Act, Blockchain, FAM, Yellow Book, etc.
- CFO Act Modernization White Paper
- Annual ERM Workshop
- Engaging younger professionals



# Defense Working Group

## Accomplishments

- Discussion paper on how successful agencies interface between their IG, external auditors and CFO staff
- Several DoD PDT sessions planned
  - *Progress Towards a Clean Opinion - Doug Glenn (OUSD), USN (Tom Harker) & Jonathon Moak (USA)*
  - *Learning and Applying New Technologies to Support Government and DoD Mission - Major General Garrett Yee (DISA) \*invited*

## Looking Ahead

- Resume facilitating discussions between DoD and civilian agencies

# Technology Committee

## Accomplishments

- Committee rebranded from Financial Systems
- Supported August 5, 2019 AGA/CFOC/CIGIE Forum, ***Impacts of Emerging Technologies on the Workforce***
- 2019 Shared Services Summit
- 2020 Financial Systems Summit – 1<sup>st</sup> *Innovation Challenge!*
- Technology Topic speakers on monthly calls – opened to government participants!
- 2020 RPA Workshop co-sponsored with AFFIRM – 1<sup>st</sup> one!

## In Progress/Looking Forward

- Resume research study on RPA Success/Failures
- Growing government participation on the monthly Technology Topic presentations
- Hosting the rebranded Technology & Transformation Summit (TTS) – November 18



# Technology Committee

## Monthly Tech Topic Presentations

- September 2019: **IaaS, PaaS, SaaS:** Dianne Miller, Creol
- October 2019: **Software as a Service:** Sean Lublin, Glenn Roth, Bard Woltman, Deloitte
- November 2019: **Digital Identity:** Tracy Hulver, IDEMIA
- December 2019: **Emerging Cyber Impacts on Federal Acquisitions:** Mike Del Giudice, Crowe
- March 2020: **Unlocking Billions with Blockchain:** Reginald Wilkerson, Coral Blockchain, Shawn Syed, Coral Blockchain, and John Stevens, Accenture
- April 2020: **Category Management and Acquisition Innovation:** Bill Zielinski, GSA and Mike Pullen, CGI
- May 2020: **Tools and Technology to Reduce Improper Payments:** Eva Robinson and Steve Bernstein, J.P. Morgan
- June 2020: **DevOps in Principle and in Practice:** Laird Williams, Macro Solutions





# Performance Improvement Committee

## Accomplishments

- Committee rebranded from Performance Management
- Monthly Meeting Guest Speakers
  - **Adam Lipton, Performance Manager, OMB** - Updated us on changes pertaining to performance management found in OMB Circular A-11
  - **Nick Hart, CEO, Data Coalition and Data Foundation** - Updated us on the status of implementation of the Evidence Act that was enacted in Jan 2019
  - **Dan Webb, Senior Analyst, Strategic Issues, GAO**, and his colleagues briefed us on a newly released GAO report entitled ***Evidence-Based Policymaking: Selected Agencies Coordinate Activities, but Could Enhance Collaboration***

# Performance Improvement Committee

## Accomplishments

2020 PIO-CFO Summit (June 11)

- The Drive for Evidence-based Policymaking
- OMB Initiatives to Maximize Results
- Setting the Right Strategy
- Congress' Expectation for Evidence and Results
- Approximately 270 feds and 134 state and locals registered

## Looking Forward

- August planning meeting to brainstorm new project ideas!
- Monitor progress enacting the Evidence Act



# Small Business Committee (SBC)

## About

- SBC has 29 members with individual active participants
- The SBC focus is on increasing value and business growth for small organizations that are a part of CPAG. SBC provides a forum where small businesses can increase their visibility and work with small business in the industry.
- The goal of the SBC is to support AGA by working on issues of importance and collaborating with federal financial managers and stakeholders.

## Accomplishments

- Participated/Moderated CPAG dinners
- Collaborated internally on federal financial management issues



# Small Business Committee (SBC)

## Accomplishments

- Hosted a December event - **Telework, Workplace of the Future?**
  - Panelists included Directors from USAID, Office of Inspector General and the National Labor Relations Board
  - Financial leaders discussed the pros and cons as well as how to implement a telework policy to ensure maximum efficiency and remain successful
- Published an article in the Spring volume of the *Journal of Government Financial Management* which discussed the key takeaways and best practices from the event
- PDT sessions include **Telework, Workplace of the Future?** and **Before, During and After System Modernization – Tools to Refine and Augment Financial Data**

# Committee Leadership Recognition

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# Get Involved!

All individuals of CPAG organizations are welcome to join committees!

## Benefits of Committee Involvement

- Access to and opportunities to network with senior government executives on issues that matter to you and your organization **(solidify current relationships and get new clients!)**
- Work alongside potential teaming partners **(other Corporate Partners!)**
- Get recognized throughout the community for your contributions **(your name/organization gets out there!)**
- Put your expertise to work and broaden your current skill set **(showcase your capabilities!)**
- Get more exposure for you and your organization **(see and be seen!)**
- Learn what others are doing **(get the scoop)** – share information and best practices with each other and your clients

# Get Involved!

## Committee Projects Can Include

- Developing/writing white papers, surveys and research studies (**you'll get published!**)
- Conducting forums and webinars by developing content, securing speakers, moderating – interacting with government executives and speaking!
- Identifying topics and speakers to deliver presentations at AGA events (agenda input/securing speakers/moderating sessions – again, interacting with government executives and speaking)
- Participating in forums at the request of government agencies/executives
- Responding to RFIs where AGA, consolidating your input, can serve as a neutral voice with no conflicts of interest

Opportunities  
to do things  
you may  
have never  
done!

## Time Commitment?

- Most 'legwork' for projects is accomplished via conference calls and email. Committees meet monthly via the phone.
- Give a little or give a lot. *You will get back so much more than you put in.*

# CPAG Communications & Calendar

## Monthly Corporate Partner Update email

### 2019-2020 Monthly Dinners

- Tonya Johnson – DCFO - Interior
- Jeff Mounts - Deputy Comptroller - State
- Tom Harker - Assistant Secretary of the Navy (FM and Comptroller)
- Stacy Marcott – Acting CFO – DHS
- Randall Hendrickson – DCFO – Energy
- Gerard Badorrek – CFO - GSA

### 2020-2021 Monthly Dinners

- June & January - no dinner)
- **July!** Mike Peckham, ReInvent Grants Management Lead, HHS
- **Your Recommendations Here!**
- Aug? –6-8:30pm – 1<sup>st</sup> Tuesday of the month
- Networking time before Q&A starts

Dinners to  
Incorporate  
Social  
Distancing  
Seating

Invite a guest  
and  
moderate the  
dinner!



# CPAG Calendar

**June 11, 2020**

PIO-CFO Summit - Virtual

**June 12, 2020**

ERM Workshop – Virtual

**June 25, 2020**

RPA Workshop – Virtual

**July 20-22, 2020**

PDT Dallas - Virtual

**August 2020**

Committee planning meetings

**August 6, 2020**

CEAR Awards Dinner

**September 23-24, 2020**

Internal Control & Fraud Prevention Training

**November 18, 2020**

Technology & Transformation Summit

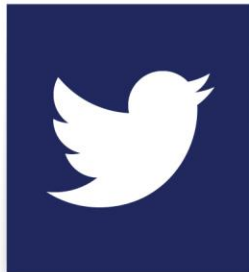
# Stay Connected

703.684.6931



LINK with AGA

@AGACGFM



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[Online CPAG  
Directory and  
CPAG Listing](#)

# Thank you!

# Networking/Social (BYOB!)

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- Ideas for Research Studies
- Fun time – Share What's Been Happening in your Socially Distanced World