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 31st – 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

Who Is Missing!

- 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
Sustaining Level Members

11th 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
Sehlke 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 – 1st *Innovation Challenge!*
• Technology Topic speakers on monthly calls – opened to government participants!
• 2020 RPA Workshop co-sponsored with AFFIRM – 1st 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, Creoal
- 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?
  o Panelists included Directors from USAID, Office of Inspector General and the National Labor Relations Board
  o 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

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 – 1st 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  sfritzlen@agacgfm.org

Online CPAG Directory and CPAG Listing
Thank you!
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