

Corporate Partner Advisory Group (CPAG)

All Hands Meeting

June 17, 2021



Agenda

- Welcome and Introductions
- AGA Update
- The CPAG Year in Review and Looking Ahead
 - Committee Reports
 - CPAG Research Studies
 - CPAG Calendar
- Special Recognition
- Roundtable Discussion: Returning Safely to In-Person Events

Social Networking (BYOB!)

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





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



**Who Is
Missing!**

Accenture
Automation Anywhere
Bank of America
BDO USA
BNY Mellon
CACI
Capital Collection Management
CGI Federal
Cherry Bekaert LLP
CLA
CohnReznick
Cotton & Company

Deloitte
eCivis
EY
Federal Management Systems
FI Consulting
Graduate School USA
Grant Thornton
Guidehouse
IBM
Infor
J.P. Morgan
Kearney & Company

KPMG
ManTech
OneStream Software
Oracle
PNC Bank N.A.
Qlik
RMA Associates
RSM
SAP
TFC Consulting
VISA
Williams Adley
Workday

Sustaining Level Members



**Who Is
Missing!**

11th Hour Service

2ndWave LLC

Allmond and Company LLC

AOC Solutions

Becker

Blake Wilson Group

Castro & Company

cBEYONData

Centennial Technologies

Creoal Consulting

Crowe

Decision Lens

Deva & Associates, P.C.

DP George & Company

Empirical Concepts

Galvanize

Harper, Rains, Knight & Co

i360technologies

IFAS

iFOS Managing Consultants

Immersion Consulting

Intelipath Group

Lodestar Consulting – NEW!

Macro Solutions

MIL Corporation

Savantage Solutions

Sehlke Consulting

Significance Inc

Starry Associates

The Craddock Group

**The Joachim Group CPAs &
Consultants**

TCG Inc

Trilogy Federal

Watkins Government Services

Workiva



AGA Update

Ann Ebberts, MS, PMP
Chief Executive Officer



CPAG Committees and Leadership

Accounting & Auditing

Chair: Bert Nuehring - Crowe

VC: Lena Chapeton - CohnReznick

Technology

Chair: Jennie Melchior - Guidehouse

VC: Kerry Canfield - CGI

YP Chair: Alex Ng - CohnReznick

Performance Improvement

Chair: Robert Shea – Grant Thornton

VC: Mary Goldsmith – RSM US LLP

Small Business

Chair: Thomas Castro – Castro & Co

VC: Reza Mahbod – RMA Associates

Defense

Chair: Ginger Bonin - KPMG

CPAG Committee Benefits

All individuals of CPAG organizations are welcome to join committees! Who are your firm's subject matter experts?

Benefits of Committee Involvement



- Access to and opportunities to network with senior government executives on issues that matter to you and your organization
- Work alongside potential teaming partners
- Get recognized throughout the community for your contributions
- Put your expertise to work and broaden your current skill set
- Get more exposure for you and your organization
- Learn what others are doing – share information and best practices with each other and your clients



CPAG Committee Benefits

Committee Projects Can Include

- Developing/writing white papers, surveys and research studies
- 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 calls and email. Committees meet monthly via Zoom.
- Give a little or give a lot. *You will get back so much more than you put in.*

Accounting & Auditing Committee

Accomplishments

Attestation Standards – SSAE 19 Journal Article

- Article authored for Spring 2021 AGA Journal

ERM Workshop 2021 – held April 14

- 13 Sponsors, 230 Attendees
- Event Summary Report in Process

FASAB - Leases

- Presentation by FASAB to Committee
- Responded to FASAB's Lease Implementation Guidance

Accounting & Auditing Committee

Accomplishments (continued)

Treasury Presentation to Committee

- Presentation on Governmentwide Treasury Account Symbol (GTAS) Updates
- Presentation on Business Event Type Codes (BETC) and USSGL changes

Pandemic Response Accountability Committee (PRAC)

- Presentation at Committee meeting by Brien Lorenze, Chief Data Officer
- Presentation on the important role of PRAC and how it will serve the American public.
- Potential research paper on potential solutions to current challenges being considered by the Committee

Accounting & Auditing Committee

Upcoming Topics/Projects

Grants Survey 2.0

- Competency Model for Grants Managers
- Survey nearing deployment
- Please help identify survey recipients
- Upcoming presentation at PDT

CFO Vision Act of 2020

- Tracking legislative activities

Other Potential Topics

- Workforce of the Future for Accounting & Auditing
- Updated - Uniform Grants Guidance

Technology Committee

Accomplishments

- Continued monthly Tech Topic presentations (Join us on the 1st Thursday of each month at 8:30 am ET!)
- Successfully hosted the May 2021 Artificial Intelligence & Advanced Analytics Summit (co-sponsored by AFFIRM)
 - 251 participants and 16 sponsors
- Launched the [2021 Innovation Challenge](#) in preparation for the 2021 Technology & Transformation Summit



In Progress/Upcoming

- Developing a Cybersecurity Whitepaper (coming Fall/Winter 2021)
- Initiating planning for the November 2021 Technology & Transformation Summit
- Continuing monthly Tech Topic presentations (see next slide)

Technology Committee

Monthly Tech Topic Presentations

- May 2021: **Silo Busting: The Challenges and Successes of Intergovernmental Data Sharing**, Jane Wiseman, CEO, Institute for Excellence in Government
- July 2021: **Transforming Your Financial Business Systems**, Don Bennett, Chief of Financial Business Systems, NGA
- September and Beyond: Your Ideas! 20-minute presentation followed by 10-minutes of Q&A

Presentations are archived on the AGA website under **FREE Archived Recordings** (login required)

Performance Improvement Committee

Hosted successful annual PIO-CFO Summit May 19th – Largest One!

- Panels featured substantive conversations with officials from Congress, OMB, Treasury, GAO, the PRAC, CIGIE, Alexandria, Colorado, and Indiana
- More than 600 attended; 50% Feds, 20% State, 8% Local, and 15% Private Sector
- Sponsors included Apptio, Castro & Co, CGI, Galvanize, GEHA, Grant Thornton, Guidehouse, IBM, J.P. Morgan, Kearney & Co, OneStream, PNC, RMA Associates, RSM, Tableau, TFC, and Workiva
- The committee is compiling notes and presentations into a report of the proceedings which should be available for release later this summer.

Small Business Committee (SBC)

Focus and Goals

- How can we increase value and business growth for CPAG small businesses? How can we help each other and how can we help the federal government meet their Small Business goals? We discussed AGA events, working together as teaming partners, writing Journal articles, participating on AGA Podcasts, and NLT and PDT sponsorships.

Signature Event

- The SBC's December Event, **“What You Don't Know Can Hurt You: Essential Tips for Better Financial Statements and Internal Control”**, went very well. AGA congratulated us for hosting a successful event. 681 attendees and 9 sponsors. Thank you to all the sponsors!

AGA Podcasts

- Thomas Castro participated in Accountability Talks [Episode #56](#) discussing the SBC goals and Thomas' journey starting and operating a small business. AGA [Podcasts](#) are a great way to gain exposure for your organization while representing the SBC.



Small Business Committee (SBC)

AGA Conferences

- For the first time, the SBC is a Platinum PDT sponsor with 9 companies participating. Five of the 9 co-sponsors submitted session topics to the AGA for review; 4 topics were selected.

Journal of Government Financial Management

- Publishing articles in the *Journal of Government Financial Management* was discussed as an avenue to promote our organizations. SBC members had the following articles published:
 - Castro & Company - *When Reporting on Federal Property, Think Like A Taxpayer*
 - Castro & Company - *Debt Collection in a Pandemic; Balancing Debtor Leniency with Fiscal Stewardship: An Analysis of Emerging Best Practices*
 - RMA Associates - *Overcoming DoD Site Visit Limitations During the Pandemic*
 - Trilogy Federal - *Telling Citizens Your Story*
 - TFC Consulting - *Changes as a Result of SSAE 19*

Small Business Committee (SBC)

AGA Webinars

- The SBC Chair, Thomas Castro, and his team developed the May 12th webinar, “**Data Analytics: Unlocking the Data to Find Hidden Patterns.**”

Defense Committee

- Productive Quarter – membership continues to grow
- Leverage Monthly Meetings as an Open Platform for DoD Finance Leadership
- Continue to Foster Information Sharing and Collaboration
- Several proposals for PDT Sessions Submitted
- Planning for 2021/2022 Efforts Continue
- New Products and Services
- Projects for Consideration
- Identifying opportunities to collaborate with other AGA Committees, other Organizations

CPAG Research Studies

Underway

- Annual IG Survey – Kearney & Company
- Annual CFO Survey – Grant Thornton
- Government to Constituent Payments – VISA
- Human Capital Management – Workday
- Intelligent Automation and Technology Trends in Fraud Prevention and Detection - Guidehouse
- Grants 2.0 Survey – CPAG Accounting & Auditing Committee
- Cybersecurity – CPAG Technology Committee

Most have a PDT21 session.



AGA Calendar

July 19-21, 2021

- PDT Nashville - Virtual



August 2021

- Committee Planning Meetings

Sept 21-22, 2021

- IC&FP – Hybrid



Nov 2021 (TBD)

- TTS – Hybrid



**Tech Topics –
1st Thursday of
each month -
8:30-9 a.m.**

**Monthly CPAG
Dinners. Get
speaker ideas
to Susan!**



Special Recognition

Kevin Greer, CGFM, CPA, CDFM, PMP

In Recognition of Your Highly
Distinguished Leadership as
Chair of the Corporate Partner Advisory Group
July 2019 - June 2021

Special Recognition

2021-2022 CPAG Chair

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

2021-2022 CPAG Vice Chair

- Dave Zavada, CPA
Senior Partner, Kearney & Company

Roundtable Discussion: Returning Safely to In-Person Events

Key components to our planning include:

- CDC guidance and the safety of our attendees, sponsors, speakers and staff
- Government restrictions
- Corporate restrictions
- Venue capacity and safety protocols (reduced seating, sanitation, distancing, food and beverage, regular cleaning)
- Vaccinated vs. unvaccinated participants
- Participant Expectations (don't attend if you are sick, PPE – mask wearing)
- Onsite pandemic protocols compliance
- Legal guidance - liabilities

Roundtable Discussion: Returning Safely to In-Person Events

Questions for Discussion

- Does your organization have restrictions on travel? On in-person events?
- There will most likely be a mix of vaccinated and unvaccinated attendees. Does this cause safety concerns for you? For your employer?
- In-person events will always include a virtual option. What does this mean for sponsorships? What does the Solutions Hall look like?

**Thank You for
Your Support!**

Stay Connected

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LINK with AGA

@AGACGFM



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Online [CPAG Directory](#) and
[CPAG Listing](#)