



# **Corporate Partner Advisory Group (CPAG)**

## **All Hands Meeting**

December 11, 2024

# Agenda

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|---------|---|
| 3:00 pm | Welcome and Introductions from our CPAG Chair   |
| 3:05 pm | AGA Remarks <ul style="list-style-type: none"><li>• From the CEO</li></ul>  |
| 3:15pm  | Committee Reports   |
| 4:05pm  | CPAG Updates <ul style="list-style-type: none"><li>• CPAG Goals</li><li>• Published Research</li><li>• Involvement</li><li>• CPAG Communications &amp; Calendar</li><li>• Open Discussion</li></ul> |
| 5pm     | Networking Hour   |

# Welcome and Introductions

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## **CPAG Chair**

**Dave Zavada, CPA**

Senior Partner, Kearney & Company

## **CPAG Vice Chair**

Vacant

**Ann Ebberts, MS, PMP, CEO, AGA**

**Susan Fritzlen, COO, AGA**

# Welcome and Introductions

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## **Accounting & Auditing Committee**

Chair: Marlon Perry, CPA (Partner, KPMG)

VC: Bobbi-Jo Pankaj, CGFM (Director, Guidehouse)

## **Defense Committee**

Chair: Roger Von Elm, CGFM, CPA (Managing Director, KPMG)

VC: Reza Mahbod, CGFM, CDFM, CDPSE, CFE (President, RMA)

## **Performance Improvement Committee**

Chair: Sarah Cunningham, CGFM (Director, Summit Consulting)

VC: Robert Shea (CEO, GovNavigators)

## **Small Business Committee**

Chair: Susan Miller, CPA (Managing Member, Watkins Government Services LLC)

VC: Curtis Joachim, CGFM, CPA (President, The Joachim Group)

## **Technology Committee**

Chair: Michael Huffman (Senior Vice President, cBEYONData)

VC: Fola Ojumu, CPA, CGMA, CISA, CSM (Partner, Kearney & Company)

# CPAG Mission

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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

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Accenture

BDO

BNY Mellon

Booz Allen Hamilton

Celonis

CGI

Cherry Bekaert

CohnReznick

Creoal +SMX

Deloitte

EY

Federal Management Systems

FI Consulting

Forvis Mazars

Guidehouse

IFAS

Kearney & Company

KPMG

Lodestar Consulting

ManTech

OneStream Software

Oracle

PNC Bank N.A.

RMA

RSM

SAP

ServiceNow

Sikich

TFC Consulting

Unison

VISA

Williams Adley

# Sustaining Level Members

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11<sup>th</sup> Hour Service

2ndWave

Aeyon

Akela - **NEW**

Allmond & Company

Allocore - **NEW**

Alvarez & Marsal Federal

Andrew Morgan Consulting

AOC Solutions

Audient Group

BerryDunn

Blake Willson Group

Castro & Company

cBEYONData

Centennial Technologies

Crowe

Empirical CPAs

Equinoxys

Fed Choice Federal Credit Union

Federal Consulting Alliance

GovNavigators

Harper, Rains, Knight & Co

HPBS LLC

i360technologies

Immersion Consulting

Lynch Consultants

Macro Solutions

Management Science & Innovation

MIL Corporation

Paperless Innovations

Premier Group

ProScopeo

RSI

Significance

Starry Associates

Summit Consulting

Syed & Associates - **NEW**

The Joachim Group

TrackLight - **NEW**

Trilogy Federal

Watkins Government Services

Workiva

# AGA Remarks

**Ann Ebberts, MS, PMP**  
Chief Executive Officer



# Committee Reports

- Accounting & Auditing
- Defense
- Performance Improvement
- Small Business
- Technology

# Accounting & Auditing Committee

- Topics for 24-25 program year – Survey results are in!
- ERM Workshop with AFERM
  - The 2024 ERMW Summary Report was released in November.
  - The 2025 ERMW will be held on June 4, 2025, at the Grand Hyatt in DC.
- USSGL OMB/Treasury Survey
  - Finalization of report is tentatively planned for February 2025.
- Continued collaboration with Performance Improvement, Technology & Defense Committees. Current platforms for delivery in discussion (e.g., webcasts, panels at AGA National Training events, CPAG committee meetings, podcasts, etc.).



# Accounting & Auditing Committee

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- Data Sharing & Program Integrity Forum
  - White paper is in draft, aiming to complete first quarter of 2025.
- Input to AGA's suggested changes to the CFO Act of 1990 (There could be impacts to the requested legislative considerations based on the new Administration change).

# Defense Committee

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**The committee holds monthly Meetings and is developing its plans for FY2025:**

- **G-Invoicing**
  - Planning two half day hybrid sessions with Oracle and SAP
  - Sponsored by Deloitte
- **Training Paper**
  - Mark Reger and John Cherbini are leading this effort
- **Open slots for quarterly Wake-Up-Wednesday coffee chats**
- **Financial Data Analytics**
  - Review of infrastructure, data structure, dashboards, and user cases across large Departments
  - Currently researching POCs
- **Other Projects Under Consideration**
- **Planning to Collaborate with other CPAG committees**

# Performance Improvement Committee

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## 2024-25 Program year Goals

- **Grow.** Grateful to folks who are joining in—it's been great to have a small party every second Thursday!
- **Collaborate.** Engaging with other committees, parts of AGA to support an interdisciplinary approach to evidence building and performance.
- **Amplify.** Continue community building through content, with a focus on connecting the dots vs. recreating the wheel.
- **Measure.** Goal to have sessions at NLT, PDT and another webinar this year

# Performance Improvement Committee

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- **Performance Counts Summit! May 13**
  - Mark your calendars & reach out
- **Roadshow: Performance Counts Primer (NLT kick off)**
- **Amplify**
  - Field guide for state, local, Tribal governments can leverage OMB guidance to build evidence/data infrastructure and capacity
  - Presentation to NYS Office of Accountability
- **Collaborations**
  - Building data infrastructure for stronger programs, program integrity
  - Evidence to fight fraud

# Small Business Committee

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- September 2024: Virtual Meeting
- October 2024: Virtual Meeting
- November 2024: Virtual Meeting
- December 2024: In Person Free CPE Breakfast & Learn: *Smart Start Session 1: Challenges of the Fiscal Responsibility Act of 2023 (FRA)*
  - Moderator: Joe Hungate, Director, RMA
  - Panelists: Ann M. Tipton, Director, Budget Division, Office of the Chief Financial Officer, U.S. Department of Homeland Security, Headquarter



# Small Business Committee

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- December 2024: In Person Free CPE Breakfast & Learn: *Smart Start Session2: Advancing Financial Operations with Robotic Process Automation and Artificial Intelligence*
  - Moderator: Justice Sakyi, Partner, HPBS, LLC
  - Panelists: Chris Bowsher, PMF/Management and Program Analyst, Department of Housing and Urban Development, Andrea Brandon, Deputy Assistant Secretary, Budget, Finance, Grants and Acquisition, Department of the Interior, Justin Marsico, Assistant Commissioner and Chief Data Officer, Bureau of the Fiscal Service

Sponsors: 11<sup>th</sup> Hour Service, HPBS LLC, Premier Group, RMA Associates, The Joachim Group, TFC Consulting, Watkins Government Services



# Small Business Committee

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- December 2024: Virtual Meeting – “CMMC Certification” by Les Buday, SecureIT
- January 2025: Virtual Meeting – “SBA Proposed Rules Changes” by Brad Reaves, Reaves GovCon Group
- February 2025 NLT: 5 Sponsors, 2 Sessions: HPBS, 2<sup>nd</sup> Wave, Lodestar, FCA, The Joachim Group
- March 2025: Virtual Meeting
- April 2025: Virtual Meeting
- May 2025: In Person Meeting – Location TBD
- July 2025 PDT: 9 Sponsors, 6 sessions: Castro & Company, Premier Group, Blake Wilson Group, Allmond & Company, Watkins Government Services, 2nd Wave, The Joachim Group, HPBS, Lodestar

# Small Business Committee

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## 2024-2025 Goals

- Hold monthly committee meetings.
- Participate in AGA National Events at least once a quarter.
- One member firm showcases their firm each month.
- Have speakers on various topics during monthly meetings.
- Provide roster of SBC firms to members firms.
- Encourage members to support local AGA chapters and events.

# Small Business Committee

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## 2024-2025 Participation

- Technology & Transformation Summit (November 6)
- SBC Breakfast (December 11)
- NLT Sponsorship (February 19-20)
- PDT Sponsorship (July 27-30)
- CPAG Quarterly All Hands Meeting

# Technology Committee

## November 6, 2024, Technology and Transformation Summit

- 958 participants (170 in-person) (36% federal, 23% private, 33% state and local, 8% non-profit and academic).
- **First use of the CPAG table!**
- Innovation Challenge
  - HUD's Single Audit Analytic Tool – **WINNER!**
  - USDA National Agricultural Statistics Service and Summit Consulting's Imputation, Deterministic Edits, And Logic (IDEAL)
  - Equinoxys Inc.'s Automated UDO Management Application



# Technology Committee

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## 2025 Datathon

- The Datathon will occur January 13-31, 2025.
  - The top three teams will present in-person at the NLT February 19 where final judging will occur. All participants will be invited to the Feb 19 NLT Reception.
  - Team registration is open. Please reach to Susan if you have college/university contacts to share.
  - Consider sponsorship as it is a great way to interact with students (potential interns and employees).

# Technology Committee

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## Other Activities

- ‘Organizational Change Management During an FM Implementation’ research paper with case studies – released this week!
  - Dianne Miller, Nick Garrard, Diana Rodriguez, Sarah Taylor, Scott Sadlon
- AI Governance Project (White Paper) - this project will surround AI governance in the federal government.
  - How is the government controlling AI?
  - Target completion date is PDT 2025.



# Technology Committee

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## Other Activities

- TBM Project
  - 2024 PDT Session – “What Happened to TBM?”
  - New White Paper – the focus of a committee project will be on conveying the value of TBM and how to implement it correctly.
  - Target completion date is PDT 2025.

# CPAG Updates

**CPAG Chair**  
**Dave Zavada, CPA**  
Senior Partner  
Kearney & Company



# Future CPAG Members

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## GOAL: 5 New Members



**Reach to Susan  
if you have a  
contact!**

## NEW Since PDT:

- Akela, Allocore, Syed & Associates, TrackLight

## Prospects:

- Blackline, Amazon Business, Gartner, Groundswell, Datasnipper, Ascella Technologies, Cybermedia Technologies LLC, Savantage Solutions, Diligent

# Chapter Support (GOAL: Support 8 Chapters)

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## GOAL: Support 8 Chapters

- Support Areas: New Members, Board Positions, Agendas, Speakers, Sponsorship
- Chapters Needing Major Revitalization:
  - Montana, Houston, Detroit, Tampa Bay, Naples Paradise, NY, Los Angeles, Central PA, West Central Mississippi

## Progress

- Merged San Francisco into Sacramento
- Organized agenda/speakers for Sacramento event
- Organized agenda/speakers for Baltimore event
- Discussions with Los Angeles volunteers

# AGA Chapters

**CO**- Denver  
**ID**- Idaho Centennial  
**MT**- Montana  
**NV**- Northern Nevada  
**OR**-Portland  
**UT**-Northern Utah  
**WA**-Olympia  
**WA**-Seattle

**AZ**- Phoenix  
**CA**- Central Coast of CA  
**CA**- Inland Empire of CA  
**CA**- Los Angeles  
**CA**- Sacramento  
**CA**- San Diego  
**CA**- Silicon Valley  
**Guam**- Guam  
**HI**- Hawaii  
**NM**- Albuquerque  
**NM**- New Mexico

**IA**- Des Moines  
**KS**- Topeka  
**MO**- Mid-Missouri  
**MO**- Kansas City  
**MO**- Ozarks  
**MO**- St. Louis  
**NE**- Lincoln  
**OK**- Oklahoma City  
**TX**- Austin **TX**- El Paso  
**TX**- Dallas **TX**- Houston  
**TX**- San Antonio  
**SD**- South Dakota

**OH**- Central Ohio  
**OH**- Cincinnati  
**OH**-Cleveland  
**OH**-Greater Columbus  
**WI**- Southern Wisconsin

**MI**-Greater Lansing  
**MI**- West Michigan  
**MI**- Detroit

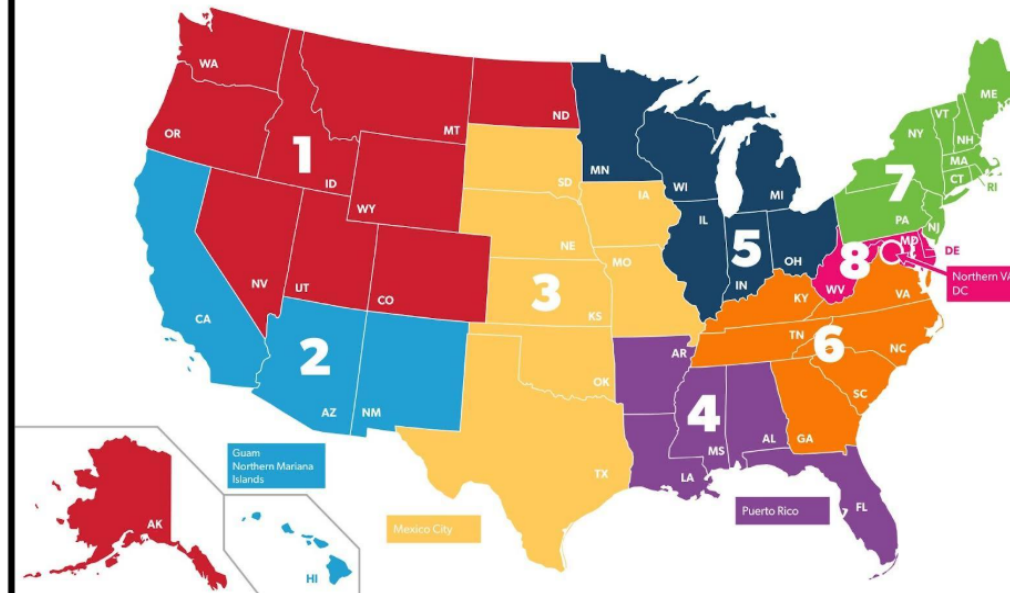
**IN**-Indianapolis  
**IN**- Central Indiana  
**IN**- Indiana Univ  
**IL**- Chicago

**ME**- Maine  
**MA**- Boston  
**NY**- Albany  
**NY**- New York  
**NJ**- Northern New Jersey  
**NJ**- Trenton  
**PA**- Philadelphia  
**PA**- Central Pennsylvania

**DC**- Washington DC  
**DE**- Delaware  
**MD**- Baltimore  
**MD**- Montgomery/P.G. County  
**MD**- Univ. of Baltimore  
**VA**- Northern Virginia  
**VA**- Shenandoah Valley  
**WV**- Charleston WV  
**WV**- Mid-Ohio Valley WV

**GA**- Atlanta  
**KY**- Central Kentucky  
**NC**- Charlotte Metro  
**NC**- North Carolina Triangle  
**SC**- Charleston SC  
**TN**- Chattanooga  
**TN**- East Tennessee  
**TN**- Nashville  
**VA**- Old Dominion Univ.  
**VA**- Greater Richmond  
**VA**- Southwest Virginia  
**VA**- Virginia Peninsula

## AGA National Council of Chapters Geographic Areas



**AL**- Montgomery  
**AR**- Central Arkansas  
**FL**- Tampa Bay  
**FL**- Tallahassee  
**FL**- Naples Paradise

**LA**- Baton Rouge  
**LA**- New Orleans  
**MS**- Jackson  
**MS**- West Central Mississippi

# Get Involved!

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- Join a CPAG Committee
- Write a Journal article
- Get Your CGFM
- Record an AGA Podcast
- Volunteer with your Chapter
- Recruit New Members
- Bring Training to Your Office (GFM and More)
- Post Positions to AGA's Job Board
- Engage w/AGA via LinkedIn, Instagram and Facebook
- Sponsor a Research Project
- Be a CEAR Reviewer
- Nominate Others for AGA Awards
- Talk to Students About Careers in Government

# Published Research Opportunities

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**Numerous opportunities are available to contribute meaningfully to the greater government community – events, in print, and online!**

- Focused on a specific community such as the IG Survey, CFO Survey, etc.
- Focused on the topic of your choice.
- National post-event summaries - a collaborative effort with multiple event sponsors participating to document and summarize event results.
- Surveys and white papers initiated by CPAG committees to highlight government challenges and provide possible solutions.

# Current Sponsored Research

- Annual CFO Survey: Guidehouse
  - Released in December
- AI Maturity in Government: RMA
  - Released in November
- Annual IG Survey: Kearney & Company
  - 2025 Release



Posted to AGA's website under Research and Publications

# CPAG Communications & Calendar

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## **2025 Monthly Dinners**

Feb 3, March 4, April 1, May 6, June 3

## **Mid-January to NLT 2025**

Datathon

## **February 19-20, 2025**

National Leadership Training

## **May 13, 2025**

Performance Counts Summit

## **June 4, 2025**

ERM Workshop

## **July 27-30, 2025**

PDT Nashville

# Open Discussion

