



Corporate Partner Advisory Group (CPAG)

All Hands Meeting

July 14, 2025

Agenda

- 3:00 pm Welcome and Introductions from our CPAG Chair
- 3:05 pm AGA Remarks
- From the CEO
- 3:15pm The Year in Review
- Committee Reports
 - Committee Leadership Recognition
- 4:05pm The Year Ahead
- New Committee Leadership Announcements
 - CPAG Goals
 - Published Research
 - Get Involved
 - CPAG Calendar
 - Open Discussion – Your Ideas!
- 5pm Networking Hour

Welcome and Introductions

CPAG Chair

Dave Zavada, CPA

Senior Partner, Kearney & Company

CPAG Vice Chair **Congratulations!**

Kerry Canfield, CGFM

Vice President, CGI



Ann Ebberts, MS, PMP, CEO, AGA

Susan Fritzlen, COO, AGA

Welcome and Introductions

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 (Partner, Summit)

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, Concept Plus)

VC: Phil Moore (Partner, Kearney & Company)

CPAG Mission

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

BDO

BNY Mellon

Booz Allen Hamilton

Celonis

CGI

Cherry Bekaert

CohnReznick

Creoal +SMX

Deloitte

Diligent

EY

Federal Management Systems

FI Consulting

Guidehouse

IFAS

J.P. Morgan

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 and Small Level Members

11th Hour Service

2ndWave

Akela

Allmond & Company

Allocore

Alpha Omega

Alvarez & Marsal Federal

Andrew Morgan Consulting

AOC Solutions

Audient Group

BerryDunn

Blake Willson Group

BroadPoint Federal

Castro & Company

cBEYONData+SMX

Centennial Technologies

Crowe

Empirical CPAs

Equinoxys

GovNavigators

Harper, Rains, Knight & Co

HPBS LLC

i360technologies

Immersion Consulting

Lynch Consultants

Management Science & Innovation

MIL Corporation

Paperless Innovations

Premier Group

ProScopeo

Significance

Starry Associates

Summit

Syed & Associates

The Joachim Group

TrackLight

Trilogy Federal

Watkins Government Services

Workiva

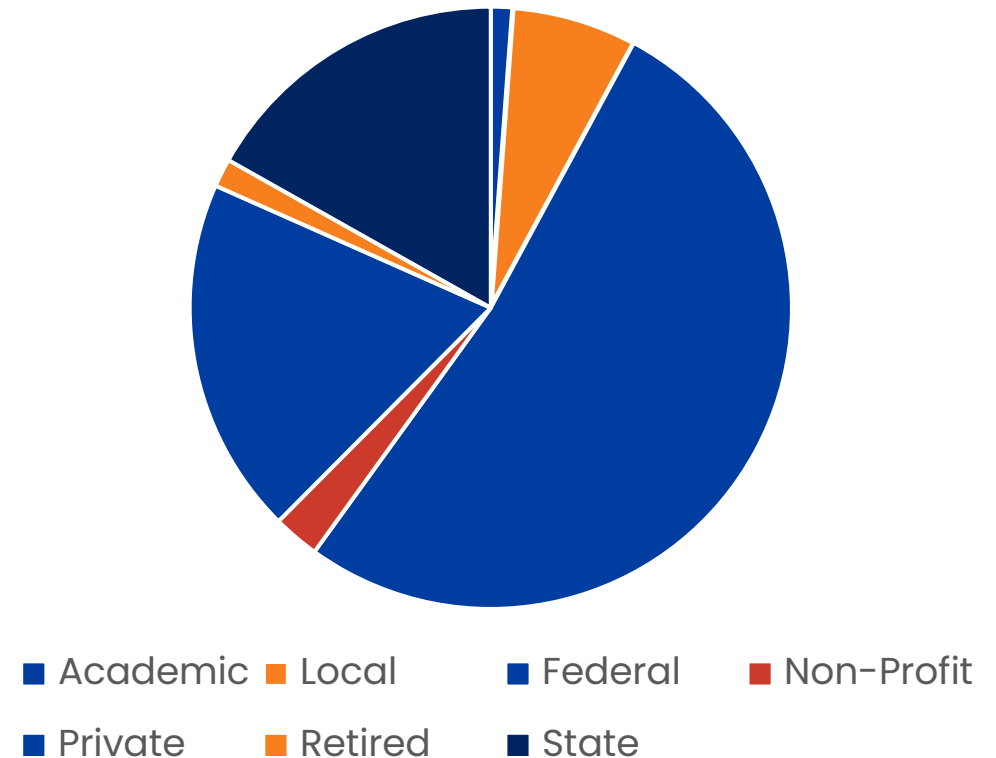
AGA Remarks

Ann Ebberts, MS, PMP
Chief Executive Officer

2025 Virtual PDT

Employer Code	
Academic	24
Local	137
Federal	1064
Non-Profit	51
Private	392
Retired	31
State	<u>344</u>
	2043

Attendee Employers



Committee Reports

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

Accounting & Auditing Committee

2024-2025 Program Year Initiatives

- ERM workshop
- USSGL OMB/Treasury Survey
- Collaboration with other CPAG committees
- Leases Working Group
- Data Sharing and Program Integrity

Accounting & Auditing Committee

The committee held monthly meetings to discuss the status of initiatives, share information about the federal industry financial management, program management and operational landscape. We hosted guest speakers that supported our Program Year initiatives. Our featured guests included the following:

February Meeting

Erica Gaddy, Deputy Chief Financial Officer and Chief Risk Officer, US Department of Treasury, Bureau of Fiscal Service; “Optimizing Enterprise Risk Management principles and activities”

March Meeting

Ricky “Alan” Perry, Jr., Assistant Director, Federal Accounting Standards Advisory Board “Implementation of the SFFAS 54: Leases (Update)”

Accounting & Auditing Committee

Status of Program Year Initiatives

- **ERM Workshop** – Delayed until January 2026 (virtual workshop)
- **USSGL OMB/Treasury Survey** - Currently under review with an ` anticipated Fall 2025 publication
- **Collaboration with other CPAG committees** - Successful collaboration with Performance Improvement Committee on topics at the AGA National Leadership Training held in February 2025 and Performance Counts Summit held in May 2025

Accounting & Auditing Committee

Status of Program Year Initiatives

- **Leases Working Group** – A working group of CPAG industry professionals has been established to develop a questionnaire for CPAG Partners. This questionnaire aims to gather feedback on client experiences with the implementation of SFFAS 54 – Leases, focusing specifically on the embedded lease portion. Finalization of survey is expected early part 2025-2026 program year and results be used in communication with FASAB
- **Data Sharing and Program Integrity** – Whitepaper project delayed until program year 2025-2026

Defense Committee

Efforts for FY25:

- **G-Invoicing (deferred)**
 - Planning two half day hybrid sessions with Oracle and SAP
 - Sponsored by Deloitte
 - **Training Paper**
 - Mark Reger and John Cherbini are finalizing this effort
 - **Speakers**
 - Greg Koval, USMC/DON
 - Stephen Herrera, KPMG, USAF (ret)
 - **Automation at Marine Corps**
 - Review of planning, approval, prioritization, development and management of RPA and other dashboard use cases
 - Draft under USMC review
 - Coordinate with Tech Committee
 - **Other projects considered**
 - PPBE Implementation
 - Audit acceleration
- Open slots for Wake-Up-Wednesday coffee chats**

Defense Committee

- **SECDEF Audit Priorities for FY25/FY26:**

- ADVANA as a program of record
- Downgrade FBWT MW
- Intragovernmental transactions
- Property held by third party
- Migrate all significant systems to one of two Identity, Credential and Access Management solutions
- Expand scope of SOC examinations

- **SECDEF Audit Priorities for FY27:**

- Beginning balances for assets
- Support for CY asset activity
- Complete support for obligations
- AI and automation for audit response

- **PPBE Implementation Plan (Jan 25):**

- Objectives – Simplify Strategy to Budget to Capability, Information Sharing, and Business Systems and Invest in Workforce

Performance Improvement Committee

Focus for this past program year has been on building community across levels of government and incorporating budgeting.

- Overall, very successful year for the PIC:
 - Increased attendance and participation – thank you!
 - Sessions well attended, good feedback, and articles well-received.
 - Greater coordination with other committees.

Achievements

- Session for NY State Comptroller's Office, with about 200 attendees on leveraging OMB's grants guidance to drive performance.
- Three sessions for NLT—one on performance, one on strategies to build and leverage integrated data systems (building off of the NAPA playbook), and one on budgeting in transition.
- Three columns for the Journal.

Performance Improvement Committee

Achievements (cont'd)

- Webinar for AABPA.
- Performance Counts Summit wildly successful, over 1,500 attendees!

Looking ahead

- Continued focus on integration of performance and evidence into decision making, budget.
- Welcome Robert Shea to the Chair role; Sarah will return to Vice Chair position.

Small Business Committee

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

- 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)*
Session2: Advancing Financial Operations with Robotic Process Automation and Artificial Intelligence
Sponsors: 11th Hour Service, HPBS LLC, Premier Group, RMA Associates, The Joachim Group, TFC Consulting, Watkins Government Services

Small Business Committee

- 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: Virtual Meeting – “Kearney & Company Overview”, Julie Gallick
 - NLT: 5 Sponsors, 2 Sessions
- March 2025: Virtual Meeting
- April 2025: Virtual Meeting
- May 2025: Virtual Meeting – “Procurement Trends in the New Government Climate” by Shane McCall and Gregory Weber, Koprince McCall Pottroff LLC

Small Business Committee

July 2025: AGA PDT – Gold Sponsor – Moderating 3 Sessions

- *M104: Beyond the Balance Sheet: Exploring the CPA's Role in Mental Health Advocacy (Premier Group Services)*
- *M114: Federal ERM Implementation: Updates, Challenges and Best Practices (Blake Willson Group)*
- *T113: Navigating Change: The Impact of New Quality Management Standards on Stakeholders (Castro & Company)*

Sponsors: 2nd Wave, Allmond & Company, Castro & Company, The Joachim Group, HPBS LLC, Premier Group Services, Blake Willson Group, Watkins Government Services

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



2025 Datathon January 13-31, 2025.

- The top three teams presented in-person at the NLT February 19 where final judging occurred. All participants were invited to the Feb 19 NLT Reception.
- Sponsors: ProScopeo, Kearney & Company, Trilogy Federal, cBEYONData, Macro Solutions.

2026 Datathon January 12-31, 2026.

- Will follow the same format as 2025.
- We will be asking for your help to recruit more student teams.

Technology Committee

White Paper Completed

- ‘Organizational Change Management During an FM Implementation’ research paper with case studies – released in December.
- Dianne Miller, Nick Garrard, Diana Rodriguez, Sarah Taylor, Scott Sadlon



Technology Committee

White Papers in Progress

- AI Governance Project (White Paper) – this project will cover AI governance in the federal government.
 - How is the government controlling AI?
 - What are the most successful use cases?
 - May integrate a survey.
- TBM – IT Spending Transparency and Savings in Government
 - The focus of this committee project will be on conveying the value of TBM and how to implement it correctly.
 - Looking for government stakeholders to interview. Some identified but access has been curtailed by the new administration.
 - May integrate commercial success stories, or SLED.

The Year Ahead

CPAG Chair
Dave Zavada, CPA
Senior Partner
Kearney & Company

2025-2026 Committee Leadership

Accounting & Auditing Committee

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

Defense Committee

Chair: TBA

VC: TBA

Performance Improvement Committee

Chair: Robert Shea (CEO, GovNavigators)

VC: Sarah Cunningham, CGFM (Partner, Summit)

Small Business Committee

Chair: Lloyd Farmer (Director – Federal CFO Services, 2ndWave LLC)

VC: Nick Garrard (Business Growth Manager, TFC Consulting)

Technology Committee

Chair: Michael Huffman (Senior Vice President, Concept Plus)

VC: Phil Moore (Partner, Kearney & Company)



Future CPAG Members

GOAL: 5 New Members



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

Prospects:

- Eskaton Consulting, Gartner, Groundswell, Ascella Technologies, Savantage Solutions

Chapter Support (GOAL: Support 6 Chapters)

GOAL: Support 6 Chapters

- Support Areas: New Members, Board Positions, Agendas, Speakers, Sponsorship
- Chapters Needing Major Revitalization:
 - Montana, Houston, Tampa Bay, New York, Los Angeles, Central PA

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

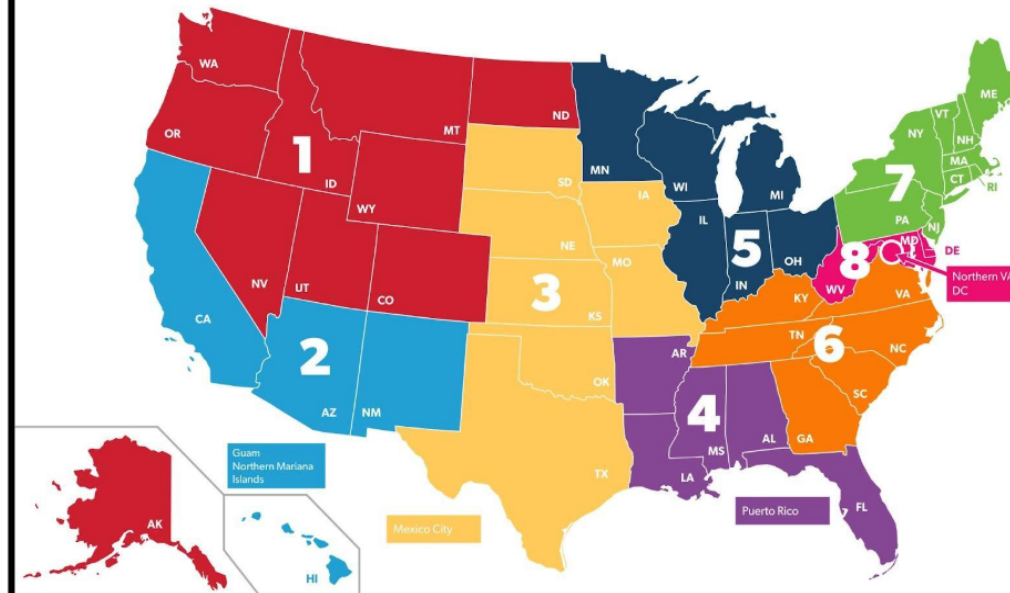
IN-Indianapolis
IN- Central Indiana
IN- Indiana Univ
IL- Chicago

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!



- 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

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

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

Current Sponsored Research

- Annual CFO Survey: Guidehouse
- Annual IG Survey: Kearney & Company
- **YOUR IDEA HERE!**



Posted to AGA's website under Research and Publications

2025-2026 National Training Events

Monthly C-Suite Dinners - Fall

September 24-25, 2025

Internal Control & Fraud Prevention
Training Event

- 75th Anniversary Reception!

November 6, 2025

Virtual Technology &
Transformation Summit

January 14, 2026

Virtual ERM Workshop

January to February 2026

Datathon

February 18-19, 2026

National Leadership Training Event

May 2026 TBA

Performance Counts Summit

July 26-29, 2026

PDT

Open Discussion

