Corporate Partner Advisory Group (CPAG)

All Hands Meeting

July 19, 2022
<table>
<thead>
<tr>
<th>Time</th>
<th>Agenda Item</th>
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<tbody>
<tr>
<td>5:00 pm</td>
<td>Welcome and Introductions from our 2021-2022 Chair</td>
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<tr>
<td>5:05 pm</td>
<td>AGA Remarks</td>
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<td></td>
<td>• From the National President</td>
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<td>• From the CEO</td>
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<tr>
<td>5:15 pm</td>
<td>The Year in Review</td>
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<td>• Committee Reports</td>
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<td>• Committee Leadership Recognition</td>
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<tr>
<td>5:40 pm</td>
<td>The Year Ahead</td>
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<td>• New Committee Leadership Announcements</td>
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<td>• Get involved!</td>
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<td>• CPAG Communications &amp; Calendar</td>
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<td></td>
<td>• Open Discussion - Your Ideas!</td>
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<tr>
<td>6 pm</td>
<td>Adjourn</td>
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Welcome and Introductions

2021-2022 CPAG Chair
• Dave Fitz, CGFM, CPA, PMP
  CEO, Proscopeo

2021-2022 CPAG Vice Chair
• Dave Zavada, CPA
  Senior Partner, Kearney & Company

Ann Ebberts, MS, PMP, CEO – AGA

Susan Fritzlen, COO - AGA
Welcome and Introductions

Accounting & Auditing Committee
Chair: Bert Nuehring, CPA (Partner, Crowe)
VC: Lena Chapeton, CGFM, CFE, PMP, CICA,
    (Senior Manager, CohnReznick)

Defense Committee
Chair: Ginger Bonin, CPA (Managing Director,
    KPMG)

Performance Improvement Committee
Chair: Robert Shea (National Managing
    Principal, Grant Thornton)
VC: Mary Goldsmith (National Federal Sector
    Director, RSM US)

Small Business Committee
Chair: Thomas Castro, CPA (Managing Partner,
    Castro & Company)
VC: Reza Mahbod, CGFM, CDFM, CDPSE, CFE
    (President/CEO, RMA Associates)

Technology Committee
Chair: Jennie Melchior, CGFM (Director,
    Guidehouse)
VC: Kerry Canfield, CGFM (Vice President, CGI)
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  
Bank of America  
BDO USA  
BNY Mellon  
CACI  
CGI Federal  
Cherry Bekaert  
CLA  
CohnReznick  
Cotton  
Deloitte  
eCIVIS  
EY  
Federal Management Systems  
FI Consulting  
Fiserv  
Graduate School USA  
Grant Thornton  
Guidehouse  
IBM  
J.P. Morgan  
Kearney & Company  
KPMG  
OneStream Software  
Oracle  
PNC Bank N.A.  
RMA Associates  
RSM  
SAP  
TaxBit  
TFC Consulting  
VISA  
Williams Adley  
Workday
## Sustaining Level Members

<table>
<thead>
<tr>
<th>11th Hour Service</th>
<th>Decision Lens</th>
<th>ProScopeo</th>
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<tbody>
<tr>
<td>2ndWave</td>
<td>Deva &amp; Associates, P.C.</td>
<td>Savantage</td>
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<td>Aeyon</td>
<td>Diligent</td>
<td>Significance</td>
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<td>Allmond and Company</td>
<td>Empirical Concepts</td>
<td>Starry Associates</td>
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<td>AOC Solutions</td>
<td>Harper, Rains, Knight &amp; Co</td>
<td>Summit Consulting</td>
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<td>Becker</td>
<td>i360technologies</td>
<td>TCG</td>
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<tr>
<td>Blake Willson Group</td>
<td>IFAS</td>
<td>The Craddock Group</td>
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<tr>
<td>Castro &amp; Company</td>
<td>Immersion Consulting</td>
<td>The Joachim Group</td>
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<td>cBEYONDa</td>
<td>Lodestar Consulting</td>
<td>Trilogy Federal</td>
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<tr>
<td>Centennial Technologies</td>
<td>Macro Solutions</td>
<td>Watkins Government Services</td>
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<td>Creoal Consulting</td>
<td>MIL Corporation</td>
<td>Workiva</td>
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<td>Crowe</td>
<td>MLINQS</td>
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Future Members

Automation Anywhere
Palantir
Tableau
UiPath
ServiceNow
Amazon Web Services
Splunk

Who Has a Contact?

Reach to Susan!

Who Else??
AGA Remarks

Gerry Boaz, CGFM, CPA, CGMA
Immediate Past National President

Melinda Miguel, PMP, CIG
National President

Gwen Sykes, MPA, CGFM
National President-Elect

Ann Ebberts, MS, PMP
Chief Executive Officer
2021-2022 Committee Reports

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

Annual ERM Workshop with AFERM (June 15, 2022) In Person!
- 14 Sponsors, over 130 attendees
- 2022 Summary Report in Process
- 2021 ERM Workshop Report Released September 2022

Grants Survey and Report (2.0)
- Report Issued in April 2022
- Featured in AGA Journal

PRAC Research Project
- Research of Fraud in Several Pandemic Relief Funded Programs
- Report in Process
Accounting & Auditing Committee

Intergovernmental Grants Forum
- Half-day Forum held July 17, 2022
- Speakers from Federal and State Government
- Presentations covered status of Pandemic Funding, perspectives from grant managers, auditors and Inspectors General Offices

Sustainability and DE&I
- Presentation from FASAB
- Sessions at PDT

Exploration of OMB and Treasury Guidance (upcoming)

Collaboration with Defense Committee (continuing)
## Defense Committee

Productive Year – membership continues to grow
Leverage Monthly Meetings as an Open Platform for DoD Finance Leadership

<table>
<thead>
<tr>
<th>Month</th>
<th>Speaker</th>
<th>Topic</th>
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<tbody>
<tr>
<td>September 2021</td>
<td>Lorin Venerable, DOD IG</td>
<td>FY2020 DOD Audit Results and Findings</td>
</tr>
<tr>
<td>October 2021</td>
<td>Alaleh Jenkins, Navy</td>
<td>FY2020 DON Audit Progress</td>
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<tr>
<td>November 2021</td>
<td>Juan Arratia, DHS</td>
<td>Government Procurement</td>
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<tr>
<td>February 2022</td>
<td>Tom Harker, Former Secretary of Navy</td>
<td>DON Audit Progress</td>
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<tr>
<td>March 2022</td>
<td>Doug Glenn, OPM CFO</td>
<td>Governmental Auditability</td>
</tr>
<tr>
<td>June 2022</td>
<td>Natasha Anderson, Army FIAR Lead</td>
<td>FY2021 Audit Progress</td>
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# Defense Committee

## Current Initiatives

<table>
<thead>
<tr>
<th>Initiative</th>
<th>Topic</th>
<th>Responsible Party</th>
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<tbody>
<tr>
<td>Wake Up Wednesday Sessions</td>
<td>Environmental Liabilities around the World</td>
<td>Improvement DOD’s Internal Control Environment</td>
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<td>Government Property in the Hands of Contractors</td>
<td>Military Housing Privatization Challenges</td>
<td>CFO/OGC/IPA Audit Coordination</td>
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<td></td>
<td>CFO/CIO/OCA/IPA Community Collaboration</td>
<td>Audit Comment Resolution Practices &amp; Tracking</td>
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Defense Committee

Continue to Foster Information Sharing and Collaboration with other Committees

Actively support NLT and PDT with relevant Sessions:
• NLT – “Solving DOD Audit Issues at Virtually NO Cost to the Government”
• PDT – “Lock Down your Supply Chain – Accelerate the Forensics and Interrogation of your Supply Chain through Automation and Artificial Intelligence”

Initiated “Wake Up Wednesdays” to promote knowledge sharing across the Federal Government for relevant topics
• Next session is September 22, 2022 – Navy’s ADVANTA
Defense Committee

Continuing facilitation of small group leadership meetings on technical accounting topics

- Pension investment strategies with CalPERS
- Navy solution to mitigate military housing material weakness

Finalizing Thought Piece on Financial Management Training and Culture in the DoD

Collaborating with ASMC on relevant DOD related topics
Annual PIO-CFO Summit (May 12, 2022) In Person!
• Featured speakers from OMB, GAO, USDA, DOL, Ed, Treasury, SBA and TN
• 15 Sponsors
• Produced Summit Post-event Report:
  • Federal agency strategic planning
  • Who’s excelling in Evidence-based Policymaking at the federal, state and local levels
  • How organizations are integrating performance and financial management
  • The focus on improving the customer experience in the President’s Management Agenda
Performance Improvement Committee

AGA Webinar (December 15, 2021)
• *Leading Performance Management Practices*
  • Featured speakers including Former Maryland Governor Martin O’Malley, Treasury’s Senior Advisor for Policy Outreach Jed Hermann, Colorado’s Director of Planning & Budgeting Lauren Larson and Stockton, CA City Manager Harry Black

AGA Webinar (September 7, 2022)
• *Results for America*
  • Featuring speakers from federal and state government.
Small Business Committee

CPAG SBC Focus and Goals
• We focused on increasing the value and business growth for small businesses. How can we help each other and how can we help the Federal Government meet their Small Business goals? We discussed AGA annual events, working together as teaming partners, writing AGA Journal articles, participation on AGA Podcasts, NLT, and PDT sponsorships.

SBC December Event (Virtual)
• This year, the SBC’s annual December training event was titled, “Pathways to Financial Recovery During and After a Pandemic”. The AGA congratulated us for hosting a successful event – 500 participants! Thank you to all the sponsors!
Small Business Committee

AGA Journal Articles
• We published articles/columns in the *Journal of Government Financial Management*:
  • Castro & Company – An Unmodified Opinion, *Creating Value in Government*
  • RMA Associates – *Culture Still Eats Strategy for Breakfast*

AGA Event Sponsorship
• The SBC is a PDT Platinum sponsor with 8 companies participating. Five of the 8 co-sponsors submitted session topics to the AGA for review; 5 topics were selected.
Technology Committee

Technology & Transformation Summit (November 18, 2021)
• 1,400 participants, 15 sponsors
• Innovation Challenge Winner: NSF’s Financial Obligation Root Cause Explorer (FORCE)

The State of Cybersecurity in Government Report
• Published in March 2022

Held Tech Topic Presentations
In Progress/Upcoming

• Re-envisioning Tech Topics to increase collaboration and promote greater participation

• Initiating planning for the December 8, 2022, Technology & Transformation Summit/Innovation Challenge

• Scoping and completing initial planning for new Hackathon event (late summer/fall 2023)
The Year Ahead

CPAG Chair
Dave Zavada, CPA
Senior Partner
Kearney & Company

CPAG Vice Chair
Caitlin McGurn, CPA, PMP, CISA
Partner, Public Sector, Fin Svcs
Guidehouse
2022-2023 Committee Leadership

Accounting & Auditing Committee
Chair: Bert Nuehring, CPA (Partner, Crowe)
VC: Marlon Perry, CPA (Partner, KPMG)

Defense Committee
Chair: Ginger Bonin, CPA (Managing Director, KPMG)
VC: Reza Mahbod, CGFM, CDFM, CDPSE, CFE (President/CEO, RMA Associates)

Performance Improvement Committee
Chair: Mary Goldsmith (National Federal Sector Director, RSM US)
VC: Sarah Cunningham, CGFM (Director, Summit Consulting)

Small Business Committee
Chair: Curtis Joachim, CGFM, CPA (President, The Joachim Group CPAs & Consultants)
VC: Susan Miller, CPA (Managing Member, Watkins Government Services)

Technology Committee
Chair: Kerry Canfield, CGFM (Vice President, CGI)
VC: Michael Huffman (Chief Growth Officer, cBEYONData)
Get Involved!

• Join a CPAG Committee
• Write a Journal article
• Get Your CGFM
• Sign Up as a Mentor
• Record an AGA Podcast
• Volunteer with your Chapter
• Recruit New Members
• Talk to Students About Careers in Government

• Bring Training to Your Office (GFM and More)
• Post Positions to AGA’s Job Board
• Engage w/AGA via LinkedIn, Twitter and Facebook
• Sponsor a Research Project
• Be a CEAR Reviewer
• Nominate Others for AGA Awards
Published Research

- CFO Survey Pulse Updates
- Grants Competency Model Survey Analysis
- The State of Cybersecurity in Government
- Reduce Government Fraud with a Dynamic Approach
- Embracing the Future of Government Payments – Federal and State Agencies Continue to Reduce Paper
- Inspector General Survey
- ERM Workshop Summary Report

Many More Here:
AGA - Online Publication Library (agacgfm.org)
CPAG Communications & Calendar

Monthly Corporate Partner Update email

August 2022
Committee planning meetings

September 20-21, 2022
Internal Control & Fraud Prevention Training

December 8, 2022
Technology & Transformation Summit – Innovation Challenge

February 2023
National Leadership Training

Monthly Dinners Back in the Fall!
Open Discussion

Your Ideas Please!