



Corporate Partner Advisory Group (CPAG)

All Hands Meeting

July 19, 2022

Agenda

- 5:00 pm Welcome and Introductions from our 2021-2022 Chair
- 5:05 pm AGA Remarks
- From the National President
 - From the CEO
- 5: 15pm The Year in Review
- Committee Reports
 - Committee Leadership Recognition
- 5:40pm The Year Ahead
- New Committee Leadership Announcements
 - Get involved!
 - CPAG Communications & Calendar
 - Open Discussion - Your Ideas!
- 6pm Adjourn

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

11th Hour Service

2ndWave

Aeyon

Allmond and Company

AOC Solutions

Becker

Blake Willson Group

Castro & Company

cBEYONData

Centennial Technologies

Creol Consulting

Crowe

Decision Lens

Deva & Associates, P.C.

Diligent

Empirical Concepts

Harper, Rains, Knight & Co

i360technologies

IFAS

Immersion Consulting

Lodestar Consulting

Macro Solutions

MIL Corporation

MLINQS

ProScopeo

Savantage

Significance

Starry Associates

Summit Consulting

TCG

The Craddock Group

The Joachim Group

Trilogy Federal

Watkins Government Services

Workiva

Future Members



Automation Anywhere

Palantir

Tableau

UiPath

ServiceNow

Amazon Web Services

Splunk

Who Else??

Who Has a Contact?

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

Month	Speaker	Topic
September 2021	Lorin Venerable, DOD IG	FY2020 DOD Audit Results and Findings
October 2021	Alaleh Jenkins, Navy	FY2020 DON Audit Progress
November 2021	Juan Arratia, DHS	Government Procurement
February 2022	Tom Harker, Former Secretary of Navy	DON Audit Progress
March 2022	Doug Glenn, OPM CFO	Governmental Auditability
June 2022	Natasha Anderson, Army FIAR Lead	FY2021 Audit Progress
July 2022	David Walker, Former Comptroller General of the United States	DoD and Government-wide Financial Management

Defense Committee

Current Initiatives

Identification of Evaluation Criteria to Consolidate Accounting and Auditing Efforts	Government-wide Collaboration on Pensions and Health Care Accounting	G- Invoicing Implementation	Improving DOD's Internal Control Environment
		Deputy CFO Communications	
Wake Up Wednesday Sessions	Environmental Liabilities around the World	Implementation of Workforce Training – Why Accounting?	CFO/OGC/IPA Audit Coordination
Government Property in the Hands of Contractors	Military Housing Privatization Challenges	CFO/CIO/OCA/IPA Community Collaboration	Audit Comment Resolution Practices & Tracking

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

Performance Improvement Committee

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



Technology Committee

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 \(agacgfm.org\)](http://agacgfm.org)



CPAG Communications & Calendar

Monthly Corporate Partner Update email

August 2022

Committee planning meetings

September 20-21, 2022

Internal Control & Fraud Prevention
Training

Monthly Dinners Back in the Fall!

December 8, 2022

Technology & Transformation Summit
– Innovation Challenge

February 2023

National Leadership Training

Open Discussion

Your Ideas Please!

