

2016 PRE-PDI SESSIONS

CERTIFIED DEFENSE FINANCIAL MANAGEMENT (CDFM) MINI-COURSES

All CDFM pre-PDI mini-courses offered on Monday and Tuesday are aligned to DoD FM Certification Program competencies and associated proficiency levels. By completing these courses you will gain additional knowledge, earn CPE credits, and fulfill hours toward your DoD FM Certification requirements.

1. DoD Certification Levels 1/2. Competencies – Fundamentals and Operations of Budget (PL1) – 2 hrs; Budget Execution (PL3) – 0.5 hrs; Budget Concepts, Policies, and Principles (PL3) – 0.5 hrs; Audit Concepts, Policies, and Principles (PL3) – 1.5 hrs; Financial Management Analysis (PL3) – 1.5 hrs; Decision Support (PL1) – 2 hrs. (Total PL1 credit hrs: 4; Total PL3 credit hrs: 4)
Course Length: 8 hrs

CDFM Module 1 (Resource Management Environment) – Mini-Course [FMF3989, 8 credit hrs]

Joe Mullane, Enhanced Defense Financial Management Training Course (EDFMTC) Instructor

Textbooks will not be provided, but may be purchased on site. Instructors will use the 2013a version of the textbook. This pre-PDI session (eight hour course) is an additional fee of \$250.

CDFM Module 1 (Resource Management Environment) is an intensive one-day (eight hours) mini-course that addresses the material covered in the Enhanced Defense Financial Management Training Course (EDFMTC) related to the Management of Government Resources. Individuals who have completed a significant amount of exam preparation and are looking for a final review prior to taking the exam may find this course helpful.

Learning Objectives:

1. Describe the Federal Legislative Process and its genesis
2. Summarize authorities, responsibilities, and roles of the three Federal Government branches
3. Explain roles of the President, Congress, OMB, DoD, and Government agencies in the Federal budget process
4. List the major components of the Federal budget
5. Identify principal budget execution functions and responsibilities
6. Relate DoD manpower financial budgets to manpower structure
7. Summarize mobilization processes for military and civilian personnel
8. Summarize requirements of the Federal Activities Inventory Reform Act of 1998
9. Describe the key elements of DODI 1400.33 as they relate to the Most Efficient Organization
10. Recognize and use the terms defined in the Commercial Activities Program
11. Describe the Government's ethical standards
12. Identify the statutory Merit Principles and Prohibited Personnel Practices
13. Describe the processes for: Performance appraisal, training, EEO complaint process, poor performance, and conflict resolution
14. Explain a Reduction in Force
15. Describe the Federal employee retirement systems
16. Discuss the concept of internal control
17. Describe the importance and requirements of the Federal Managers' Financial Integrity Act and OMB Circular A-123
18. Summarize standards, techniques, and documentation required in DoD's Internal Control Program

Group Live Presentation. NASBA Field of Study: Finance. Course Level: Basic. Intended Audience: Individuals interested in becoming a CDFM. May 30, 0800-1700, 8 CPEs

2. DoD Certification Levels 1/2. Competencies – Budget Concepts, Policies, and Principles (PL3) – 3.5 hrs; Budget Formulation, Justification, and Presentation (PL3) – 0.5 hrs; Budget Execution (PL3) – 1 hr; Financial Management Analysis (PL3) – 2 hrs; Decision Support (PL1) – 1 hr. (Total PL1 credit hrs: 1; Total PL3 credit hrs: 7)

Course Length: 8 hrs

CDFM Module 2 (Budget and Cost Analysis) – Mini-Course [FMF3990, 8 credit hrs]

Marvin Ormerod, Enhanced Defense Financial Management Training Course (EDFMTC) Instructor

Textbooks will not be provided, but may be purchased on site. Instructors will use the 2013a version of the textbook. This pre-PDI session (8 hour course) is an additional fee of \$250.

CDFM Module 2 (Budget and Cost Analysis) is an intensive one-day (eight hours) mini-course that addresses the material covered in the Enhanced Defense Financial Management Training Course (EDFMTC) related to Budget and Cost Analysis. Individuals who have completed a significant amount of exam preparation and are looking for a final review prior to taking the exam may find this course helpful.

Learning Objectives:

1. Discuss the organizational structure of DoD
2. Describe the purpose of the PPBE process
3. Describe the functions of planning, programming, budgeting and execution phases of PPBE
4. Discuss roles and responsibilities of key officials involved in the PPBE process
5. Describe key products/documents of the PPBE process
6. Describe purpose and use of the Defense Planning Guidance (DPG)
7. Describe the purpose and use of Resource Management Decisions (RMDs)
8. Describe how Combatant Command priorities are determined
9. Describe how budget estimate submissions are modified
10. Describe the purpose and use of Economy Act Orders and Project Orders
11. Describe how inter-service and intergovernmental agencies are reimbursed for products received and services rendered
12. Describe the purpose and duration of DoD appropriations
13. Describe the three funding policies
14. Describe the purpose and use of Working Capital Funds
15. Describe the purpose and use of Non-Appropriated Funds
16. Explain obligation adjustments available to expired/cancelled appropriations
17. Describe the procedures for recording refunds
18. Describe the Defense Acquisition Management System life cycle
19. State the relationship between cost analysis and the DoD acquisition cycle
20. Identify DoD cost guidance and principles
21. Describe cost estimating techniques and methods used in the acquisition process
22. Describe the purpose of the following DoD acquisition-related requirements/initiatives: Analysis of Alternatives, Cost as an Independent Variable, and Earned Value Management
23. Identify the types of contractor cost data reporting requirements associated with the Earned Value Management System (EVMS)
24. Differentiate between favorable and unfavorable EVMS identified cost and schedule variances
25. Describe fundamental principles of cost and economic analysis
26. Identify statistical techniques used in cost and economic analysis
27. Differentiate between quantifiable and non-quantifiable benefits
28. Explain key elements of the DoD Strategic Management Plan
29. Define Business Process Reengineering (BPR)
30. Explain the key elements of BPR
31. Describe the composition of a successful BPR team
32. Identify the steps of the Lean Six Sigma process
33. Define benchmarking
34. Describe the goals, requirements, and documents of the Government Performance and Results Act (GPRA) and the GPRA Modernization Act of 2010

35. Describe Defense business reform initiatives
36. Distinguish between outsourcing and privatization
37. Identify at least three miscellaneous sources of funds and retention justification

Group Live Presentation. NASBA Field of Study: Finance. Level: Basic. Intended Audience: Individuals interested in becoming a CDFM. May 30, 0800-1700; May 31, 0800-1700, 8 CPEs

3. DoD Cert Level 2. Competencies – Budget Execution (PL3) – 2 hrs; Financial Concepts, Policies, and Principles (PL3) – 2 hrs; Accounting Concepts, Policies, and Principles (PL3) – 2 hrs; Audit Concepts, Policies, and Principles (PL3) – 2 hrs. (Total PL3 credit hrs: 8)

Course Length: 8 hrs

CDFM Module 3 (Accounting and Finance) – Mini-Course [FMF3991, 8 credit hrs]

Joe Mullane, Enhanced Defense Financial Management Training Course (EDFMTC) Instructor

Textbooks will not be provided, but may be purchased on site. Instructors will use the 2013a version of the textbook. This pre-PDI session (eight hour course) is an additional fee of \$250.

CDFM Module 3 (Accounting and Finance) is an intensive one-day (eight hours) mini-course that addresses the material covered in the Enhanced Defense Financial Management Training Course (EDFMTC) related to Accounting and Finance, Auditing, and Fiscal Law (Fiscal Law is tested in all three modules). Individuals who have completed a significant amount of exam preparation and are looking for a final review prior to taking the exam may find this course helpful.

Learning Objectives:

1. Summarize constitutional authority for expending funds
2. Explain the authorized “purpose,” “time,” and “amount,” factors in use of funds
3. State possible penalties and reporting requirements associated with an Antideficiency Act (ADA) violation
4. State the purpose and use of a continuing resolution
5. Summarize the roles of accountable officers
6. Describe the four distinct functions of finance
7. Summarize the responsibilities of DoD finance personnel
8. Summarize certifying policies and pecuniary liability
9. Describe public funds safeguard requirements
10. List and summarize the key finance forms used for reporting and accountability
11. List the financial statements included in the Financial Report of the United States Government
12. Summarize the laws and regulations impacting DoD accounting
13. Describe the role of each of the various organizations that impact DoD accounting policies
14. List the types and uses of Government funds
15. Differentiate between and define the functions of proprietary, budgetary, and managerial cost accounting
16. List the general ledger account structure
17. Identify the basic DoD financial statements
18. Explain the legal requirement concerning audit of federal agency financial statements
19. Explain the relationship between the Financial Improvement and Audit Readiness (FIAR) process and the requirement for audited financial statements
20. Summarize the Generally Accepted Government Auditing Standards (GAGAS)
21. Define the types of audits and other engagements performed by auditors
22. List the internal audit groups within DoD
23. Discuss the phases of an audit
24. Discuss the contents and purpose of the audit report

Group Live Presentation. NASBA Field of Study: Accounting (Governmental). Course Level: Basic. Intended Audience: Individuals interested in becoming a CDFM. May 31, 0800-1700, 8 CPEs

4A/B. DoD Certification Level 2. Competencies – Budget Formulation, Justification and Presentation (PL3) – 1 hr; Financial Management and Reporting Analysis (PL3) – 1 hr; Decision Support (PL3) – 4 hrs. (Total PL3 credit hrs: 6)

Course Length: 16 hrs

CDFM Module 4 (Acquisition Business Management) [FMF2640, 6 credit hrs]

Rich Arns, ASMC Licensee, Archway Training Associates

Ed Clancy, Acquisition Business Management (Module 4) Instructor

The Module 4 Addendum textbook will be provided. This pre-PDI session (eight hours per day for two days) is an additional fee of \$475.

The Acquisition Business Management CDFM Module 4 course is a two-day (16 hours) comprehensive overview of the rules governing the acquisition of major Defense systems from the Program Manager's perspective and incorporates the concepts and rules outlined in the Defense Acquisition Guidebook as well as DoDI 5000.02. The course is designed for DoD financial management personnel as well as those working in the Acquisition field and is intended for individuals who have elected to pursue the CDFM with Acquisition Specialty (CDFM-A).

Learning Objectives:

1. Identify and explain key functions of DoD's decision support systems for strategic planning and resource allocation, determination of capability of needs, and acquisition of systems
2. Describe the Acquisition Program Baseline (APB), the Technology Development Strategy (TDS) and the Acquisition Strategy, to include statutory and regulatory requirements of each
3. Define systems engineering and identify its role in systems acquisition management
4. Explain the principal role of key systems engineering processes, both technical and technical management
5. Recognize key actions of systems engineering applied through the phases of the systems life cycle, and the important input/output products from each phase
6. Identify key systems design considerations required within the systems engineering framework
7. Identify key systems engineering tools, techniques and resources available and/or required for management, oversight and analysis, as well as the documentation requirements
8. Define affordability
9. Describe the concept known as full funding and the concept of cost as an independent variable
10. Describe how affordability is considered during the phases of the system life cycle
11. Explain the difference between life-cycle cost and total ownership cost and describe how each is important in system affordability and management
12. Define Analysis of Alternatives (AOA), recognize its key elements, and explain its role in system concept refinement
13. Describe the principal acquisition program cost estimates, with their approval authority, and the key tools and techniques of life-cycle cost estimating
14. Describe the basic principles of EVM and when EVM is applicable
15. Explain how EVM is valuable to managing an acquisition program
16. Be able to manipulate basic EVM data and interpret the results
17. Recognize the concept of Life-Cycle Sustainment and the Program Manager's responsibilities in implementing a Total Life-Cycle Sustainment program
18. Define Performance Based Life-Cycle Support
19. Explain the key activities in the System Life Cycle
20. Identify the key acquisition milestone documentation required for Program Life-Cycle Sustainment
21. Define Human Systems Integration (HSI) and identify the domains/elements of HIS
22. Explain the importance of HIS relative to the total systems approach of the acquisition process
23. Describe the mandatory requirement for, and the key guidelines for, human factors engineering and human factors integration, as applied to the systems acquisition process
24. Define the terms net-centricity, Global Information Grid (GIG), and National Security Systems

25. Recognize the key concepts for acquiring net-centric Information Technology (IT) and National Security Systems (NSS)
26. Define Defense Business Systems and the Business Enterprise Architecture (BEA)
27. Recognize the process for acquiring a Defense Business System and the actions required to comply with the Clinger-Cohen Act of 1996, as well as those special requirements for acquisition and management of defense business systems
28. Explain the term "technology protection" and also the key policies and procedures for technology protection and who is responsible for their execution
29. Define Critical Program Information (CPI) and Designated Science and Technology Information (DS&TI)
30. Describe important policy issues associated with the DoD Research and Technology Protection (RTP) effort
31. Identify the types of Test and Evaluation (T&E) and explain their purposes to include where within the system life cycle each is appropriate
32. Recognize key T&E planning documents and explain the purpose of each, including the phase of the system life cycle each is due and the management level of review/approval required
33. Explain the difference between milestone decisions and decision reviews
34. Name the major milestone decision points within the system life cycle, explaining the appropriate phase where each occurs
35. Identify the level and timing of major decision reviews
36. Identify the program requirements for executive level review, the reviews required and the roles played by the Defense Acquisition Board (DAB), Information Technology Acquisition Board, Joint Requirements Oversight Council and the DoD Acquisition Executives
37. Explain the Integrated Product Team (IPT) concept and recognize the various types of IPTs
38. Define exit criteria, including its purpose and who creates, reviews, and approves it
39. Explain when, why, and what type of independent assessments are performed
40. Describe the major periodic reports generated during the system life cycle, their purpose, when they are due and who creates, reviews and approves them
41. Describe joint programs and explain key management considerations in the acquisition of joint systems
42. Define an international cooperative program and describe key elements in the management framework for international cooperative programs
43. Explain three key contract cost, schedule, and performance status reports and identify when and under what circumstances they are required
44. Describe the contract quality assurance activity and how it is usually performed
45. Recognize those special considerations relating to the acquisition of services and service related contracts within DoD

Group Live Presentation. NASBA Field of Study: Specialized Knowledge and Applications. Level: Intermediate. Prerequisite: General knowledge of financial management and defense acquisition management. Intended Audience: Individuals interested in becoming a CDFM with Acquisition Specialty designation (CDFM-A). May 30, 0800-1700; May 31, 0800-1700, 16 CPEs

INFORMATIONAL DoD FINANCIAL MANAGEMENT CERTIFICATION PROGRAM WORKSHOPS

The Informational DoD Financial Management Certification Program workshops offered on Tuesday will provide you additional information about the program and CPE credits. They are optional and provided at no additional cost.

Please note: Workshop 8 is also offered on Friday, June 3rd, and Workshop 9A/B is also offered on Thursday, June 2nd.

8. DoD FM Certification Supervisor and Component Certification Authority (CCA) Training

Glenda Scheiner, DFMCP3, CDFM, CDFM-A, Director, Human Capital and Resource Management, Office of the Under Secretary of Defense (Comptroller)

Please note: Workshop 8 is also offered on Friday, June 3rd

While this workshop provides information about the DoD FM Certification Program and provides 1.5 CPEs, it does NOT provide direct credit toward meeting DoD FM Certification Program requirements.

Are you a supervisor or Component Certification Authority (CCA) for the DoD FM Certification Program and feeling "challenged" by the FM Learning Management System (LMS)? This workshop is for you! This course provides targeted training regarding how to evaluate and approve items in the DoD FM LMS. Come join us and learn valuable tools to eliminate any frustration with the LMS tool and prepare you to accomplish your LMS roles like a pro!

Group Live Presentation. NASBA Field of Study: Specialized Knowledge and Applications. Course Level: Advanced. Prerequisite: General knowledge of DoD FM Certification program. Intended Audience: FM Supervisors and DoD FM Component Certification Authorities (CCAs). May 31, 1430-1545; June 3, 1400-1515, 1.5 CPEs

9A/B. DoD FM Certification User Training (Part A & Part B)

Kellie O'Mara-Gordon, DFMCP3, CDFM, CIA, Program Manager, DoD FM Certification Program, Financial Workforce Management Division, Office of the Under Secretary of Defense (Comptroller)

Please note: Workshop 9A/B is also offered on Thursday, June 2nd.

While this workshop provides information about the DoD FM Certification Program and provides 3 CPEs, it does NOT provide direct credit toward meeting DoD FM Certification Program requirements.

This two-part workshop (Part A and Part B) provides foundational information on the DoD FM Certification Program and then delves deeper into how to complete the three-step process using the FM Learning Management System (LMS).

NOTE: PART A AND PART B MUST BE TAKEN TOGETHER.

This two-part course (Part A and Part B) provides foundational information on the program and then delves deeper into how to complete the three-step process using the FM Learning Management System.

User Training Part A walks the students through how to evaluate their education and training history. This course will cover: Overview of FM Online and FM myLearn websites; How to find Training and Support resources; Review the Certification requirements for each level; How to search for courses in FM myLearn; How to understand the course alignments; How to use the Academic Matrix; and How to complete the Learning History Worksheet.

User Training Part B walks the students through completing the DoD FM Certification in the DoD FM LMS using the 3-Step Process. The 3-Step Process includes: Record Course, Upload Documentation, and Request Approval. This course will cover: How to log into the DoD FM LMS; Overview of DoD FM LMS; Following the Learning History Worksheet to record a course; How to record an academic course; How to upload documentation; How to request approval for an achievement; How to assign the Alternate/Primary Track; How to run user reports; and How to request approval for DoD FM Certification.

Group Live Presentation. NASBA Field of Study: Personnel/HR. Course Level: Basic. Intended Audience: All members of the Financial Management community. May 31, 1245-1400; May 31, 1430-1545; June 2, 1400-1515; June 2, 1545-1700, 3 CPEs

MICROSOFT WORKSHOPS

The MICROSOFT workshops offered on Tuesday will provide you additional skills and CPE credits. They are optional and provided at no additional cost.

11. MICROSOFT – What's New in Using Microsoft Office 2013

Ed Fritts, Senior Financial Systems Analyst, Teksouth Corporation
Joshua Cherkinsky, Senior Financial Systems Analyst, Teksouth Corporation
Brandon Pittman, Senior Financial Systems Analyst, Teksouth Corporation
Matthew Ryan, Senior Financial Systems Analyst, Teksouth Corporation
Benjamin Cella, Project Manager, Teksouth Corporation

During this workshop you will learn: How to use Flash Fill, Slicers, EXCEL Charts, Conditional Formatting, and the best for last—How to use PowerPoint to record for training, briefings, demos, etc. The website is: <http://www.teksouth.com/teksouth-desktop-tools/>. Look for 2016 National PDI. Come learn these great tools.

Group Live Presentation. NASBA Field of Study: Finance. Course Level: Basic. Intended Audience: All levels of Financial Management. May 31, 1100-1215, 1.5 CPEs

12. MICROSOFT – EXCEL Tips and Tricks

Ed Fritts, Senior Financial Systems Analyst, Teksouth Corporation
Joshua Cherkinsky, Senior Financial Systems Analyst, Teksouth Corporation
Brandon Pittman, Senior Financial Systems Analyst, Teksouth Corporation
Matthew Ryan, Senior Financial Systems Analyst, Teksouth Corporation
Benjamin Cella, Project Manager, Teksouth Corporation

This course will provide shortcuts for everyday use of Excel 2010. Areas of focus will include: resizing columns/rows; opening multiple windows within a workbook; formatting worksheets as tables; creating manual line breaks within a cell; creating custom lists; preventing "divide by zero" (#DIV/0) errors; creating absolute cell references; using SumIF, SumIFS, CountIFS, VLookup and other Excel functions. Our training aids will be picture by picture illustrations to help beginners. Our goal is to share these great skills with everyday Excel users so they can spend more time ANALYZING! We'll post all training materials one week before the National PDI if you want to bring them with you. The website is: <http://www.teksouth.com/teksouth-desktop-tools/>. Look for 2016 National PDI. Come learn these great tools.

Group Live Presentation. NASBA Field of Study: Finance. Course Level: Basic. Intended Audience: All levels of Financial Management. May 31, 1245-1400, 1.5 CPEs

13. MICROSOFT – The "Washing Machine"

Ed Fritts, Senior Financial Systems Analyst, Teksouth Corporation
Joshua Cherkinsky, Senior Financial Systems Analyst, Teksouth Corporation
Brandon Pittman, Senior Financial Systems Analyst, Teksouth Corporation
Matthew Ryan, Senior Financial Systems Analyst, Teksouth Corporation
Benjamin Cella, Project Manager, Teksouth Corporation

During this workshop you will learn how to create a Washing Machine using EXCEL and ACCESS which will help you from manually cleaning up EXCEL workbooks. We will walk you step by step through the process of how to link automatically from EXCEL to ACCESS and back to EXCEL. ACCESS is where we will do the cleanup and send it back to another EXCEL workbook ready to go. We'll post all training materials one week before the National PDI if you want to bring them with you. The website is: <http://www.teksouth.com/teksouth-desktop-tools/>. Look for 2016 National PDI. Come learn these great tools.

Group Live Presentation. NASBA Field of Study: Finance. Course Level: Basic. Intended Audience: All levels of Financial Management. May 31, 1430-1545, 1.5 CPEs

2016 WEDNESDAY, SPECIAL WORKSHOP

15. ASMC Annual FM Survey Retrospective: Defense Financial Management... What We Have Learned and Where We Are Going

*Lou Crenshaw, CDFM, President, Crenshaw Consulting Associates
Ariane Whittemore, Director, Security and Defense, Grant Thornton, Public Sector*

This workshop will be a roundtable format with a short briefing by survey director, VADM Lou Crenshaw USN (Ret.) of the results and trends of the past ten years of the annual ASMC Survey of defense financial management officials conducted by Grant Thornton and ASMC. Discussion with workshop attendees will follow.

*Group Live Presentation. NASBA Field of Study: Management Advisory Services. Course Level: Basic. Intended Audience: FM professionals representing DoD and USCG field level activities. This workshop is **limited to the first 40 people who register**. June 1, 1710-1800, 1.0 CPE*

PDI 2016 THURSDAY AND FRIDAY MINI-COURSES AND WORKSHOPS

MINI-COURSES

All of the mini-courses offered on Thursday and Friday are aligned to DoD FM Certification Program competencies and associated proficiency levels. By completing these courses you will gain additional knowledge, earn CPE credits, and fulfill hours toward your DoD FM Certification requirements.

17A/B. DoD Certification Level 2. Competency – Budget Execution (PL3). Budget Execution and Performance Integration – Mini-Course [FMF6416, 2.5 credit hrs]

Adrienne Ferguson, Professor of Practice, CFO Academy, NDU iCollege

This mini-course will address the budget execution and management reporting function within a government organization. The connection between budget formulation, budget enactment, and budget execution will be covered. In addition, an overview of different techniques used to integrate budget and performance will be provided. Examples highlighting the effective use of performance data in supporting budget decision-making will be addressed.

Learning Objectives:

1. Evaluate the key interrelationships between budget formulation, budget enactment, and budget Execution
2. Assess the factors and tools in leading successful execution of an organization's budget
3. Examine the role of Congress in budget execution and the Constitutional and legal requirements set forth for this important financial management function
4. Determine how to protect an agency's integrity by providing advice and counsel on compliance with Congressional legislation including appropriations and authorization acts, proper use of funds, as well as the Anti-Deficiency Act
5. Distinguish various uses of performance data and how it can be effectively used to report and monitor budget execution information used to make budget decisions

Group Live Presentation. NASBA Field of Study: Business Management and Organization. Course Level: Basic. Intended Audience: All levels of Financial Management. June 3, 0900-1015; June 3, 1045-1200, 3 CPEs

**18A/B. DoD Certification Level 2. Competencies – Accounting Concepts, Policies and Principles – 1.5 hrs (PL3) and Budget Concepts, Policies and Principles – 1.0 hrs (PL3).
Budgeting and Accounting: Making the Connection – Mini-Course [FMF7082, 2.5 credit hrs]**

Phil Davidson, Senior Trainer, Management Concepts, Inc.

This course is designed for junior DoD or contract employees from several different backgrounds: accountants who want insight into DoD budgeting, budgeteers who want insight into DoD accounting, and systems people who want a basic understanding of DoD budgeting and accounting so they can implement new financial systems.

Learning Objectives:

1. Make the connection between budgeting and accounting
2. Apply budget and accounting terminology appropriately
3. Describe the use of the U.S. Government Standard General Ledger account structure
4. Relate budget obligations to DoD assets, liabilities, and expenses
5. Determine unfunded budget requirements from accounting reports. Improve budget estimating with accounting information

Group Live Presentation. NASBA Field of Study: Accounting (Governmental). Course Level: Basic. Intended Audience: Junior DoD or contract employees. June 2, 1400-1515; June 2, 1545-1700, 3 CPEs

**19A/B. DoD Certification Level 2. Competency – Accounting Analysis (PL3).
Cost Concepts for Accounting Analysis – Mini-Course [FMF4055, 2.5 credit hrs]**

LTC Steven G. Hanson, CDFM-A, LSS BB, Army G-1, Compensation and Entitlements Allowances Branch Chief, Talent Management Task Force, USA

In this mini-course we present the use of accounting information to support decision making. The course will discuss cost concepts including cost measurement, types of cost, the development of cost models for different applications, allocation of cost from inputs to outputs and cost behavior including how measures of productivity relate to unit cost. We will develop a framework for life-cycle cost estimates and explain the use of present value analysis to support the comparison of alternatives over time. In this context, students will develop better understanding of relevant costs and their uses in different processes to support the DoD component fiscal environment to achieve mission goals.

Learning Objectives:

1. Understand varying types of costs and their relevance in different processes and situations
2. Understand and use different measures of cost
3. Use models of cost to derive, calculate, and apply costs to different processes
4. Allocate cost from inputs to outputs and calculate unit cost
5. Calculate life-cycle cost within a given scenario
6. Understand net present value and its use in defense cost analysis

Group Live Presentation. NASBA Field of Study: Accounting. Course Level: Intermediate. Prerequisite: General knowledge of Cost Management. Intended Audience: Financial Managers who use accounting data to influence decisions. June 2, 1400-1515; June 2, 1545-1700, 3 CPEs

**20A/B. DoD Certification Level 2. Competency – Financial Management Analysis (PL3).
Cost-Benefit Analysis – Mini-Course [FMF3588, 2.5 credit hrs]**

Rick Hurley, CDFM-A, Instructor, Financial Management Programs, Management Concepts, Inc.

This mini-course will introduce cost-benefit analysis and how it is used to support decision-making in the organization, thereby increasing public welfare and improving efficiency.

Learning Objectives:

1. Describe cost-benefit analysis (CBA) and how it is used to justify federal programs
2. Describe CBA fundamentals and underlying cost principles
3. Identify federal sources of cost benefit analysis guidance
4. Define the various types of costs associated with CBA
5. Describe the time value of money and Net Present Value

Group Live Presentation. NASBA Field of Study: Finance. Course Level: Basic. Intended Audience: All levels of Financial Management, but particularly those dealing with Acquisition, June 2, 0900-1015; June 2, 1045-1200, 3 CPEs

**21A/B. DoD Certification Level 2. Competency – Decision Support (PL3).
Concepts, Techniques and Tools that Support Performance Budgeting – Mini-Course [FMF4053, 2.5 credit hrs]**

Dr. Natalie Webb, Executive Director and Professor of Economics, Defense Resources Management Institute (DRMI), Naval Postgraduate School

The instructor will develop concepts that support performance management and budgeting at the unit or sub-organization level. Topics will include responding to strategic guidance by mapping strategic goals and objectives to unit or organization goals and objectives; using unit or organization-level goals to establish indicators that provide information on progress towards these goals and objectives; using performance hierarchies to align measures with goals and objectives; and using targets to guide organizational action. Students will gain a better understanding of the overall environment and processes of performance management and budgeting in small organizations within DoD, and will understand better how to think about measuring performance at the unit or sub-organization level.

Learning Objectives:

1. Understand the links between strategic guidance and goals and objectives at the unit or sub-organization level
2. Use unit or sub-organization goals and objectives to establish indicators on performance and efficiency
3. Create a performance hierarchy to align measures
4. Create and use performance targets to guide organizational action

Group Live Presentation. NASBA Field of Study: Economics. Course Level: Intermediate. Prerequisite: Some knowledge of performance measures of efficiency and effectiveness helpful, but not required. Intended Audience: Personnel at all levels interested in tools and ways to think about performance in government organizations and sub-units. June 2, 1400-1515; June 2, 1545-1700, 3 CPEs

**22A/B. DoD Certification Level 2. Competency – Decision Support (PL3).
Operational Decision Support – Mini-Course [FMF4049, 2.5 credit hrs]**

Brad Warnick, CDFM-A, Cost Analyst, Air Force Financial Management Center of Expertise

This mini-course presents an overview of the decision support process as viewed by resource managers involved in supporting resource decisions. It walks the students through each step in the decision support process, while providing them with techniques and group scenarios to practice using the techniques in the classroom. There is also material on scaling and designing the analysis based on the decision maker

and/or decision that needs to be made. The core of the course is the preparation of a Decision Support Analysis in a group setting to highlight the relevant features of a proper decision support analysis.

Learning Objectives:

1. Determine when a decision support analysis is needed and how to prepare one
2. Identify contents of a proper decision support analysis
3. Possess a basic ability to complete the required steps of the decision support process

Group Live Presentation. NASBA Field of Study: Business Management and Organization. Course Level: Intermediate. Prerequisite: General knowledge of Financial Management and features of a decision support model. Intended Audience: All levels of Financial Management. June 3, 0900-1015; June 3, 1045-1200, 3 CPEs

**23A/B. DoD Certification Level 2. Competency – Decision Support (PL3).
Problem Formulation/Data Presentation or Decision Support – More than Analysis – Mini-Course [FMF4049, 2.5 credit hrs]**

Karl Jehle, Operations Branch Chief, Air Force Financial Management Center of Expertise

This mini-course will explore the non-analytical aspects of decision support. Analytically-minded individuals often focus their attention mostly on data collection and analysis. However, the decision support process is much more than just analysis. The first session focuses on correctly identifying and formulating the issue, to include setting the proper objective, identifying assumptions, identifying alternatives, and properly scoping the effort to support the decision maker. The second session focuses on the critical steps after completing the analysis, such as making a recommendation, properly presenting the analysis, and ways that the packaging of the analysis influences the decision maker beyond the basic information. In both sessions, good and bad examples will be discussed to highlight the key issues.

Learning Objectives:

1. Understand how to properly identify and formulate the objective of an analysis
2. Learn how to properly scope an analysis to support the decision making process
3. Determine how to package and deliver a completed analysis to the decision maker

Group Live Presentation. NASBA Field of Study: Business Management and Organization. Course Level: Basic. Intended Audience: All levels of Financial Management. June 3, 1400-1515; June 3, 1545-1700, 3 CPEs

**24A/B. DoD Certification Level 2. Competency – Decision Support (PL3).
Enabling Informed Decision Making – Mini-Course [FMF4092, 2.5 credit hrs]**

*Rick Diggs, CDFM, Deputy Director, Defense Financial Management and Comptroller School
Maj David Ratliff, PhD, Instructor, Defense Financial Management and Comptroller School*

This mini-course presents a universal Decision Support methodology based on the major tenets of the Military Decision Making Process. This interactive presentation will walk participants through a simplified Decision Support model, emphasizing the deliverables and their importance in providing sound advice. Course sub-topics include: issue identification, stakeholder analysis, establishing and weighting evaluation criteria, types of data and measures, critical thinking and effective communication. The session will conclude with real-world examples of successful and not-so-successful presentation techniques.

Learning Objectives:

1. Define a Decision Support framework and specific enhancing analysis techniques
2. Comprehend the elements of sound critical thinking and effective communication
3. Comprehend the importance of using these techniques to justify your position when advising

decision makers

Group Live Presentation. NASBA Field of Study: Business Management and Organization. Course Level: Basic. Intended Audience: All levels of Financial Management. June 2, 0900-1015; June 2, 1045-1200, 3 CPEs

25A/B. DoD Certification Level 2. Competency – Audit Concepts, Policies and Principles (PL3). Internal Controls: Meeting Federal Requirements for Accountability – Mini-Course [FMF3589, 2.5 hrs]

Robert Black, Jr., CGFM, Senior Instructor, Management Concepts, Inc.

This mini-course will help participants in reducing the risk of waste, fraud, and mismanagement within their agency, and supporting accountability efforts. Participants will learn what controls are and why they are important; the requirements, standards, and guidance available for internal controls; the importance of risk management; and the eight steps in an internal control process.

Learning Objectives:

1. Define internal controls and their importance
2. Identify the mandates for internal controls in the federal government
3. Define the five GAO standards
4. Describe risk and risk management
5. Identify the eight steps in an internal control process

Group Live Presentation. NASBA Field of Study: Auditing. Course Level: Basic. Intended Audience: Internal Control is for Everyone. June 3, 1400-1515; June 3, 1545-1700, 3 CPEs

26A/B. DoD Certification Level 2. Competency – Team Building (Lead Teams/Projects) (PL3). Leadership for the Future - Mini-Course [FML2885, 2.5 credit hrs]

Richard Gustafson, CMA, CDFM, CGFM, Professor of Practice, CFO Academy, NDU iCollege

Leading teams today requires inspiration, strategic thinking, cross-boundary collaboration, outcome-focused approaches, change management, and innovative decision-making. At its essence, this type of leadership is centered on three primary functions: setting direction; aligning the team; and motivating and inspiring. It also must address a strategic systems thinking approach. While seeking to fulfill these core leadership functions, DoD financial managers must also effectively fulfill the essential management functions of: (1) planning and budgeting; (2) organizing and staffing; (3) controlling; and (4) problem solving.

Learning Objectives:

1. Assess the leadership and management functions associated with the execution of financial management functions and determine how defense financial managers need to operate as they assume leadership positions
2. Recommend strategies for teams to be both led and managed more effectively
3. Evaluate how strategic systems thinking can integrate and guide teams better

Group Live Presentation. NASBA Field of Study: Personal Development. Course Level: Intermediate. Prerequisite: General knowledge of team dynamics. Intended Audience: Anyone responsible for leading teams or projects. June 2, 0900-1015; June 2, 1045-1200, 3 CPEs

27A/B. DoD Certification Level 3. Competency – Budget Execution (PL5). Budget Execution and Performance Integration – Mini-Course [FMF6417, 2.5 credit hrs]

Adrienne Ferguson, Professor of Practice, CFO Academy, NDU iCollege

This mini-course will address the budget execution and management reporting function within a government organization. The connection between budget formulation, budget enactment, and budget execution will be covered. In addition, an overview of different techniques used to integrate budget and performance will be provided. Examples highlighting the effective use of performance data in supporting budget decision-making will be addressed.

Learning Objectives:

1. Evaluate the key interrelationships between budget formulation, budget enactment, and budget execution
2. Assess the factors and tools in leading successful execution of an organization's budget
3. Examine the role of Congress in budget execution and the Constitutional and legal requirements set forth for this important financial management function
3. Determine how to protect an agency's integrity by providing advice and counsel on compliance with Congressional legislation including appropriations and authorization acts, proper use of funds, as well as the Anti-Deficiency Act
4. Distinguish among various uses of performance data and how they can be effectively used to report and monitor budget execution information used to make budget decisions

Group Live Presentation. NASBA Field of Study: Business Management and Organization. Course Level: Intermediate. Prerequisite: Knowledge of Budgeting Process. Intended Audience: Mid to Senior Level Managers. June 2, 0900-1015; June 2, 1045-1200, 3 CPEs

28A/B. DoD Certification Level 3. Competency – Financial Management Analysis (PL5). Analytical Decision Making for Financial Managers – Mini-Course [FMF4052, 2.5 credit hrs]

Dr. Diana Angelis, CPA, Associate Professor, Defense Resources Management Institute (DRMI), Naval Postgraduate School

The instructor will provide an overview of models and tools used to support financial managers in defense organizations. Topics covered will include stakeholder analysis; defining, framing and scoping a problem; formulating and evaluating models; and tradeoff analysis that supports making good choices across alternatives, including cost-benefit analysis, cost-effectiveness analysis, and risk analysis. The focus is on practical application to management decisions, especially those involving resources. Students will develop better understanding of and the ability to apply analytical tools and concepts in support of the DoD component fiscal environment to achieve mission goals.

Learning Objectives:

1. Be able to identify stakeholders and understand stakeholder needs
2. Be able to define, frame and scope a problem
3. Be able to understand and apply basic models in support of defense decision analysis
4. Explain systems analysis and apply appropriate concepts to a decision problem
5. Apply basic cost-benefit analysis to a scenario
6. Understand the difference between cost-benefit and cost-effectiveness analysis and when to apply each
7. Apply basic concepts of risk analysis to a defense decision problem

Group Live Presentation. NASBA Field of Study: Finance. Course Level: Advanced. Prerequisite: Some experience in critical thinking. Intended Audience: Mid to upper level financial and program managers. June 2, 0900-1015; June 2, 1045-1200, 3 CPEs

29A/B. DoD Certification Level 3. Competency – Advanced Financial Management (PL5). The Economic Environment and the Application of Economic Tools Supporting Financial Managers – Mini-course [FMF4051, 2.5 hrs]

Dr. Natalie Webb, Executive Director and Professor of Economics, Defense Resources Management Institute (DRMI), Naval Postgraduate School

The instructor will present information on the economic environment of defense decision making including tools and concepts from economic theory and practice that help explain resources available for defense and how to make better use of them. Concepts presented include an abstract model for an economy and the tradeoffs made to allocate resources to defense, a framework for making tradeoffs to support the economic and efficient use of resources, and tools and concepts of marginal analysis that allow financial managers to make better tradeoffs among competing alternative uses of funds. In this context, students will develop better analytical skills to help shape the DoD component fiscal environment to achieve mission goals.

Learning Objectives:

1. Develop an understanding of the greater U.S. and global economies and the resources available for defense and national security purposes
2. Use a model to visualize tradeoffs between two (or more) categories of resources
3. Apply tradeoff analysis to find economic and efficient uses of resources
4. Apply marginal reasoning to make better choices between or among alternative uses of funds

Group Live Presentation. NASBA Field of Study: Economics. Course Level: Advanced. Prerequisite: Basic macroeconomics helpful, but not required. Intended Audience: Those interested in macroeconomics topics affecting defense decision making and a short review of useful micro tools. June 3, 0900-1015; June 3, 1045-1200, 3 CPEs

**30A/B. DoD Certification Level 3. Competency – Decision Support (PL5).
Multi-criteria Decision-making for Financial Managers – Mini-Course [FMF4056, 2.5 credit hrs]**

Dr. Eva Regnier, Associate Professor, Defense Resources Management Institute (DRMI), Naval Postgraduate School

The instructor will introduce an approach to the measurement of effectiveness in supporting decision-making by managers in defense organizations. The focus is on practical application to management decisions involving many organizational objectives with emphasis on formulating the problem, understanding the analytical process involved in evaluating potential solution alternatives, and interpreting the results of the analysis in support of choosing a solution. The course will include value-focused thinking, defining objectives, creating objectives hierarchies, identifying attributes, and creating value functions. The results will be used in a cost-effectiveness framework to support the selection of alternatives. Attendees will develop a better understanding of and the ability to make decisions when faced with multiple objectives in support of better decision-making within DoD.

Learning Objectives:

1. Understand and discuss value-focused thinking and its utility in defense decision-making
2. Formulate the correct decision problem and appropriate objectives for choosing a solution
3. Create an objectives hierarchy to support decision analysis
4. Identify attributes of the decision issue
5. Incorporate values and preferences into a decision model
6. Evaluate potential solutions and recommend the optimal solution(s)

Group Live Presentation. NASBA Field of Study: Management Advisory Services. Course Level: Basic. Intended Audience: All levels of Financial Management. June 2, 1400-1515; June 2, 1545-1700, 3 CPEs

**31A/B. DoD Certification Level 3. Competency – Decision Support (PL5).
Decision Support for Leaders – Mini-Course [FMF6759, 2.5 credit hrs]**

LTC Steven G. Hanson, CDFM-A, LSS BB, Army G-1, Compensation and Entitlements Allowances Branch Chief, Talent Management Task Force, USA

The instructor will build a foundation in model development and expand on it by defining pre-decision analysis (cost estimating tools and effectiveness analysis) and post-decision analysis (cost accounting and performance management), providing elements and examples of each. The instructor will discuss specifying, collecting and using data in analysis, and will identify pre- and post-decision cross-cutting accounting tools that financial managers can employ to improve their decision making, providing more efficient and effective allocation of resources. Benefits of each of the tools and techniques will be presented. The instructor will briefly discuss regression analysis and sensitivity analysis. These issues and concepts provide the foundation required to understand higher level DoD accounting tools, applications and methods.

Learning Objectives:

1. Identify how to specify, collect, and use data properly
2. Identify tools and techniques that can be applied to pre- and post-decisional analysis and the benefits of each
3. Define regression analysis and sensitivity analysis

Group Live Presentation. NASBA Field of Study: Business Management and Organization. Course Level: Intermediate. Prerequisite: General knowledge of accounting principles and data analysis. Intended Audience: Leaders/Managers who supervise personnel, and those with regular decision making responsibilities. June 3, 0900-1015; June 3, 1045-1200, 3 CPEs

**32A/B. DoD Certification Level 3. Competency – Decision Support (PL5).
Risk Management – Mini-Course [FMF6758, 2.5 credit hrs]**

Dr. Diana Angelis, CPA, Associate Professor, Defense Resources Management Institute (DRMI), Naval Postgraduate School

The course focuses on three areas: (1) establishing a quantitative definition of risk; (2) describing the steps to conduct a probabilistic risk analysis; and (3) discussing strategies for mitigating risk. Each of these areas involves a conceptual presentation and discussion followed by examples, the majority of which relate to the public sector. Emphasis is placed on developing a model and using simulation to solve the model and produce a probabilistic description of risk. This quantitative method will be contrasted with more qualitative methods of assessing risk. Different ways to summarize risk into a single number will also be discussed. The final part of the course will describe strategies for mitigating risk. Determining how the amount of resources to allocate to mitigating risk depends on the decision maker's preferences. The quantitative measure of risk facilitates the primary trade-off to be made by the decision maker: Is the estimated risk reduction offered by an alternative worth its cost?

Learning Objectives:

1. Ask and answer the correct questions to develop a quantitative measure of risk
2. Interpret exceedance curves and use them to compare risks
3. Select the most appropriate summary measure of risk
4. Identify four broad strategies to mitigate risk
5. Determine the appropriate way to trade off between risk and cost

Group Live Presentation. NASBA Field of Study: Management Advisory Services. Course Level: Intermediate. Prerequisite: Some knowledge of probability will be useful. Intended Audience: All levels of Financial Management. June 3, 0900-1015; June 3, 1045-1200, 3 CPEs

**33A/B. DoD Certification Level 3. Competency – Developing Others (Lead People) (PL5).
Leadership for the Future – Mini-Course [FMF2882, 2.5 credit hrs]**

Richard Gustafson, CMA, CDFM, CGFM, Professor of Practice, CFO Academy, NDU iCollege

This mini-course examines the leadership strategies that shape, develop, and motivate the financial management workforce. It describes the environment that today's DoD financial managers must leverage for success, focusing on breaking down stovepipes, growing social networks, technological trends, and managing pressure and disorder in today's world. The mini-course explores creativity and innovation as necessary attributes of a motivated workforce for capitalizing on a world of increasing uncertainty, ambiguity, and change.

Learning Objectives:

1. Analyze conditions under which the financial management workforce can excel
2. Evaluate leadership strategies to motivate the workforce
3. Personal growth and how to maintain your edge in an uncertain world

Group Live Presentation. NASBA Field of Study: Personal Development. Course Level: Advanced. Prerequisite: General background with leading people. Intended Audience: Managers and Leaders of People. June 3, 1400-1515; June 3, 1545-1700, 3 CPEs

WORKSHOPS

All of the workshops are offered on either Thursday or Friday and will provide CPE credits.

35. Current Budget Issues

Gretchen Anderson, CDFM, CGFM, DFMCP3, Director, Revolving Funds, Office of the Under Secretary of Defense (Comptroller)/Program Budget

MG Thomas Horlander, Director, Army Budget, Office of the Assistant Secretary of the Army (Financial Management and Comptroller)

Thomas Simoes, Director, Investment and Development Division, Office of the Assistant Secretary of the Navy (Financial Management and Comptroller)

Maj Gen James F. Martin, Jr., Deputy Assistant Secretary for Budget, Office of the Assistant Secretary of the Air Force (Financial Management and Comptroller)

This workshop will provide a current overview of the Defense Department's FY 2017 budget request, a look forward to FY 2018 and beyond, and potential future alternative funding profiles. The FY 2017 budget information will include a discussion of the political/economic context, any congressional action to date, strategic themes and priorities, and the key initiatives in the budget. The workshop will also address the status of FY 2016 budget execution.

Group Live Presentation. NASBA Field of Study: Finance. Course Level: Basic. Intended Audience: All levels of Financial Management. June 2, 1045-1200, 1.5 CPEs

36. The 114th Congress and the DoD Budget

Colonel Randy Toris, CDFM-A, Congressional Budget and Appropriations Liaison, Budget and Appropriations Affairs Directorate, Office of the Under Secretary of Defense (Comptroller)

In January 2016, the second session of the 114th Congress began what is sure to be an eventful election year. Party politics reign supreme as we move toward possible return of the Senate to Democratic control or a continuation of the Republican control of both chambers of Congress. Even with budget deals and partial avoidance of sequester pains, the country still faces enemies, limited resources and stalemate politics that will impact the way the Department of Defense operates. This workshop will examine the complex, but symbiotic relationship between DoD and Congress to develop annual appropriations to perform the Nation's security mission in this challenging era of declining budgets and increasing uncertainty around the world.

Group Live Presentation. NASBA Field of Study: Finance. Course Level: Basic. Intended Audience: All levels of Financial Management. June 3, 1400-1515, 1.5 CPEs

37. Congressional Enactment Process

Eric Nemoseck, CDFM, BCEFM-FM L3, DoD FM L2, Professor of Financial Management, Defense Acquisition University (DAU)

As a DoD employee, having a basic understanding of the congressional enactment process and the impact that it has on your program, can have a large impact of your organization's success. This workshop will explain the overall congressional enactment process, including why the Authorization and Appropriation Laws are important, the roles of Congressional staffers, the Congressional committees that review Defense acquisition programs, the general rules of appealing a Congressional mark of the President's Budget, and the importance of the Legislative Liaison Offices involved in the interaction between Congressional and DoD officials.

Group Live Presentation. NASBA Field of Study: Finance. Course Level: Basic. Intended Audience: All levels of Financial Management, but particularly those dealing with Congressionally-appropriated funds. June 2, 1545-1700, 1.5 CPEs

38. Combatant Command Resourcing Challenges and Successes in a Complex and Changing Environment

*Mark Peterson, Chief Financial Officer, US Special Operations Command
Robert (Mike) Maxwell, Director of Resources, US Africa Command.
Elaine McCusker, Director, Resources and Analysis (J8), US Central Command
James McGinley, CDFM-A, Director, Program Analysis and Financial Management, US Transportation Command*

A panel of senior SES resource managers from Special Operations Command (SOCOM), Africa Command (AFRICOM), Central Command (CENTCOM), and Transportation Command (TRANSCOM) provide current insights on their command mission, requirements, and resourcing.

Group Live Presentation. NASBA Field of Study: Specialized Knowledge and Applications. Course Level: Basic. Intended Audience: All levels of Financial Management. June 2, 1545-1700, 1.5 CPEs

39. Budget Execution 101

James Krott, Professor of Financial Management, Defense Acquisition University

This workshop will cover many of the very basics of budget execution, such as accountability, appropriation lifecycle and laws, flow of funds, reclaims and reprogramming.

Group Live Presentation. NASBA Field of Study: Finance. Course Level: Basic. Intended Audience: Entry level Financial Managers. June 3, 1400-1515, 1.5 CPEs

40. Installation Resource Management

*Lloyd Walker, CDFM, DFMCP3, Supervisory Budget Analyst, HQ Installation Management Command (IMCOM)
Colonel Larry G. Rice, Jr., Comptroller and Deputy Director, Resources Directorate, Air Force Installation and Mission Support Center*

This workshop will cover the development, resourcing and execution of the Installation Management Enterprise Budget.

Group Live Presentation. NASBA Field of Study: Business Management and Organization. Course Level: Basic. Intended Audience: All levels of Financial Management. June 2, 1400-1515, 1.5 CPEs

41. POM and Budget Systems Modernization at US Special Operations Command

*Paul Burke, Co-Founder and Director of DoD Programs, Definitive Logic
Edward Cody, Senior Manager, Definitive Logic
Ruth Santarsieri, CDFM-A, Chief, Systems Integration, US Special Operations Command*

This workshop will focus on the current success and future roadmap of the PPBE modernization effort currently underway at US Special Operations Command. Over the past fiscal year, US Special Operations Command has embarked on modernizing the framework of systems that support their PPBE process. The project will detail our roadmap, current achievements, and the path forward. We will address the challenges experienced, our success with change management, and our strategy to keep the project on-schedule.

Group Live Presentation. NASBA Field of Study: Business Management and Organization. Course Level: Basic. Intended Audience: All levels of Financial Management. June 3, 1045-1200, 1.5 CPEs

42. Resources: What Do We Really Need?

Aron Swyers, Chief, Strategic Plans and Programs, Air Force Financial Management Center of Expertise

With today's shrinking budgets, many organizations feel they are unable to complete mission essential tasks. This session will explore that premise, focusing on the need to differentiate between historical execution and the future tasks that are truly required for national defense. Included will be discussion on the shift from a historical approach of entitlement to one of adjusting to the new realities of reduced levels of service and the tools needed to make resourcing decisions in this new environment.

Group Live Presentation. NASBA Field of Study: Business Management and Organization. Course Level: Basic. Intended Audience: All levels of Financial Management. June 3, 1545-1700, 1.5 CPEs

43. Current Issues in the Defense Working Capital Fund (DWCF)

Gretchen Anderson, CDFM, CGFM, DFMCP3, Director, Revolving Funds, Office of the Under Secretary of Defense (Comptroller)/Program Budget

This workshop will provide an update on current issues in Working Capital Fund management. Selected topics include cash management, the status of implementing the Government Wide Accounting overnight cash initiative, transportation of things, customer relations, and innovative acquisition practices.

Group Live Presentation. NASBA Field of Study: Business Management and Organization. Course Level: Basic. Intended Audience: All Financial Managers interested in Working Capital Fund Issues. June 3, 0900-1015, 1.5 CPEs

44. Mission Effectiveness through Cost Effectiveness

*Gretchen Anderson, CDFM, CGFM, DFMCP3, Director, Revolving Funds, Office of the Under Secretary of Defense (Comptroller)/Program Budget
Bruce Busler, Director, Joint Distribution Process Analysis Center, US Transportation Command
Leonard Olijar, CPA, Director, Bureau of Engraving and Printing
Dr. Dale Geiger, DBA, CGFM, CMA, Cost Management and Control SME, Government Management Corporation*

Constrained resources give the financial community a new role critical to their organization's mission success. Hear from mission/thought leaders who have enhanced mission effectiveness by improving cost effectiveness.

Group Live Presentation. NASBA Field of Study: Business Management and Organization. Course Level: Basic. Intended Audience: All Financial Managers. June 2, 0900-1015, 1.5 CPEs

45. The Power of Analytics in Cost Management

*Denise Oberndorf, Director of Cost Management and Analytics, CALIBRE
David Molinari, Senior Operations Research Analyst, US Department of the Army*

This session will explain how to analyze historical and transactional data, both financial and non-financial data (cost and performance), to inform decisions. The different types of trends in data and how to compare cost and performance data for a more comprehensive understanding of operations. Instruction will introduce simple tools and processes to view cost and performance data as well as how to leverage that information to inform decisions like funding requirements, cost targets, capacity constraints and impacts of budget reductions.

Group Live Presentation. NASBA Field of Study: Economics. Course Level: Basic. Intended Audience: All levels of Financial Management, but particularly those interested in understanding and controlling costs. June 3, 1400-1515, 1.5 CPEs

46. Cost Benefit Analysis Case Study: European Infrastructure Consolidation (EIC)

*Dr. Craig College, CDFM, Senior Vice President, Strategy Development, CALIBRE Systems, Inc.
Kurt Weaver, Assistant for Infrastructure Analysis and Evaluation, Office of the Deputy Assistant Secretary of the Army for Installations, Housing and Partnerships
Steven Arenson, Deputy Director, Strategic Plans and Programs, Office of the Deputy Assistant Secretary of the Air Force for Installations (SAF/IEI)
Dr. Bill Tarantino, President, Active Decision Support Inc.*

The Secretary of Defense-directed analysis of European infrastructure capacity, with a focus on reducing long-term expenses through footprint consolidations, was completed and presented in early 2015. The EIC analysis was the first opportunity to examine the costs and benefits of consolidating European infrastructure across all of DoD in the European theater. The Secretary's EIC decisions will significantly reduce cost; eliminate excess infrastructure; and validate the remaining European infrastructure without degrading strategic or operational capabilities. This panel will present a real world application of cost analysis, cost benefit analysis, force modelling, and scenario development efforts to inform DoD-wide installation cost-saving real property decisions that support force structure and the national military strategy.

Group Live Presentation. NASBA Field of Study: Management Advisory Services. Course Level: Basic. Intended Audience: All levels of Financial Management, but particularly those interested in use of business case analysis in large scale infrastructure decision-making. June 3, 1045-1200, 1.5 CPEs

47. Cost Management Strategies

*Kristyn Jones, CDFM, Director, Federal Advisory, KPMG
Carolyn Cordone, CDFM, Chief Financial Integrity, Business Support Directorate, Defense Health Agency
Brian Jacobs, DAWIA3 - Business – Cost Estimating, Chief, Cost and Performance Management Division, Office of the Deputy Assistant Secretary of the Army (Cost and Economics)
David D. Dalenberg, CDFM, PMP, DFMCP3, Lead Financial Systems Analyst, Office of the Under Secretary of Defense (Comptroller)/DCFO/BIO*

In an era of declining budgets and manpower, this workshop will highlight both commercial leading practices as well as strategies and techniques from OSD, the Services and Agencies to help identify, analyze, and control costs. Speakers will discuss how they are improving their organization's understanding and management of costs using DOTMLPF-F to optimize their use of resources, use cost data to tie planning and budgeting to execution, and enable cost-informed decision making.

Group Live Presentation. NASBA Field of Study: Business Management and Organization. Course Level: Intermediate. Prerequisite: General knowledge of cost accounting and management. Intended Audience: Mid to senior level Financial and Cost Managers. June 2, 1400-1515, 1.5 CPEs

49. How DoD Decisions Are Made in Washington

Honorable Robert Hale, CDFM-A, DFMCP3, Former DoD Comptroller

How are important DoD financial decisions made in Washington? As the former DoD comptroller, and former head of the defense group at the Congressional Budget Office, the Honorable Robert Hale has first-hand experience about how the White House, DoD, and Congress play in these decisions. In this workshop he will describe the process for selecting issues, gathering information, and making decisions -- focusing on major decisions made in the Office of the Secretary of Defense. He will also describe the process for making decisions in Congress, and how recent turmoil has disrupted that process. Mr. Hale will use brief case studies of past issues, as well as personal anecdotes, to illustrate the decision-making processes.

Group Live Presentation. NASBA Field of Study: Specialized Knowledge and Applications. Course Level: Basic. Intended Audience: All Financial Managers, especially those requiring an understanding of high-level decision making processes. June 2, 1400-1515, 1.5 CPEs

50. Current Issues in DoD Financial Operations - Where the Action Is!

Mark Easton, CDFM-A, Deputy Chief Financial Officer, Office of the Under Secretary of Defense (Comptroller)

Wesley Miller, CDFM-A, Deputy Assistant Secretary of the Army for Financial Operations, Office of the Assistant Secretary of the Army (Financial Management and Comptroller)

Victoria Crouse, CPA, CDFM-A, DFMCP3, Chief Strategy Officer, Office of the Deputy Assistant Secretary of the Navy (Financial Operations)

Thomas Murphy, CPA, CDFM, Deputy Assistant Secretary of the Air Force for Financial Operations Office of the Assistant Secretary of the Air Force (Financial Management and Comptroller)

David McDermott, Deputy Director for Operations, Defense Finance and Accounting Service

While everyone seems to talk about audit all the time, believe it or not, there is a lot more going on in the world of DoD financial operations? This panel provides highlights of a variety of issues addressed by top DoD financial operations leaders. They'll offer FMers an informative and insightful view of the latest financial management issues, challenges, outlooks, and change management strategies at all three Services and DFAS. Come hear what the most senior Defense financial operations leaders see for the future as they discuss the current challenges facing both DoD and government, in the midst of diminishing resources and higher expectations for compliance and transparency. Learn what they're thinking about issues relating to our people, processes, and systems and how it will impact DoD's future business environment and financial operations. (Note: for an update on DoD's current audit efforts and lessons learned, please attend Workshop #65.)

Group Live Presentation. NASBA Field of Study: Accounting (Governmental). Course Level: Basic. Intended Audience: All levels of Financial Management, but particularly those interested in what's shaping Defense financial management today. June 2, 0900-1015, 1.5 CPEs

51. Improved Cash Accountability with Government-Wide Accounting Mandate: How It Will ROCK Your World!

Alaleh Jenkins, CPA, CDFM, Assistant Deputy Chief Financial Officer and Director for Financial Improvement and Audit Readiness (FIAR), Office of the Under Secretary of Defense (Comptroller)

Michele Gaw, CPA, CGFM, DFMCP, Director, Accounting Standards and Reporting, Defense Finance and Accounting Services

In this session we will present DoD-wide cash accountability and GL FBWT daily reporting and reconciliation framework that aligns with Treasury's GWA initiatives, standardizes with little to no manual reconciliation, provides for warehousing of detailed transactional data and supports the audit assertion of the FBWT.

Group Live Presentation. NASBA Field of Study: Accounting (Governmental). Course Level: Basic. Intended Audience: All levels of Financial Management. June 2, 1045-1200, 1.5 CPEs

52. Standardizing Interagency Agreements: The Key to Auditability and Improved Local Control

Mary Kemp, CDFM, DFMCP3, Senior Financial Systems Analyst, Business Integration Office, Office of the Deputy Chief Financial Officer, OUSD(C)

*Keith Jarboe, CPA, Systems Accountant, Department of Treasury, Bureau of the Fiscal Service
Selester Copeland, Financial Information Systems and Integration Analyst, HQ USMC, DC P&R, RFA
Systems Integration and Data Integrity*

The Department faces numerous challenges to achieving auditability. One of the key challenges is overcoming a major material weakness related to Intra-governmental Transactions (IGT) where DoD components have difficulty eliminating financial differences that result from reimbursable work performed between buyer and seller organizations. DoD is adopting a standardized workflow process for all reimbursable work orders. Come to this session to learn more about the DoD mandate to use the US Treasury Invoice Processing Platform (IPP) for the creation and storage of buyer/seller agreements and DoD's near-term implementation goals.

Group Live Presentation. NASBA Field of Study: Accounting (Governmental). Course Level: Basic. Intended Audience: All levels of Financial Management, particular those responsible for buy/sell reimbursable agreements. June 3, 1045-1200, 1.5 CPEs

53. Understanding the US Standard General Ledger (USSGL)

John Argodale, Principal, Kearney & Company

Anitra Akanbi, CPA, CGFM, Director, Financial Reporting, Office of the Assistant Secretary of the Army (Financial Management and Comptroller)

Joanne Zillic, CPA, CFE, CDFM, Chief of Business Intelligence, Office of the Assistant Secretary of the Army (Financial Management and Comptroller), USAFMCOM

The USSGL provides a uniform chart of accounts standardizing the classification and recording of budgetary and proprietary financial transactions including allotments, obligations, accruals and disbursements. Proper classification and recording of financial transactions through the USSGL is critical to producing accurate, reliable and auditable financial statements. During this session you will learn how the USSGL provides the foundation for auditable financial statements, understand how the chart of accounts is organized, learn the difference between budgetary and proprietary accounts, understand financial transaction posting logic and how the transactions you process update the general ledger and audited financial statements, and learn how the general ledger is balanced and closed at month end.

Group Live Presentation. NASBA Field of Study: Accounting. Course Level: Basic. Prerequisite: General knowledge of DoD accounting transactions. Intended Audience: Financial Managers who are responsible for audit readiness and ensuring the accuracy of financial transactions posted in accounting systems. June 2, 1400-1515, 1.5 CPEs

54. The Brave New World of Grants Management, Decoding the Impact of Uniform Guidance and Its New Requirements for "Effective Internal Controls"

James McKay, CICA, Senior Director, Kforce Government Solutions (KGS), Inc.

Andrea Brandon, Co-Chair of the Council on Financial Assistance Reform (COFAR) and the Director for Financial Assistance Policy and Oversight, Department of Homeland Security

Christopher Coppenbarger, Program Management Officer, Grants Management Line of Business, Office of the Chief Financial Officer, US Department of Agriculture

The Brave New World of Grants Management: Understand the unprecedented impacts of the new Uniform Guidance (2CFR200) on DoD grant making agencies, especially new requirements for pre-award risk assessments and internal control systems that comply with GAO standards and comport with OMB Circular A-123. Hear the perspectives of Defense grants policy makers and management on implementation as well as how Civilian agencies like DHS and USDA are coping with these new challenges.

Group Live Presentation. NASBA Field of Study: Accounting (Governmental). Course Level: Basic. Intended Audience: All levels of Grant Program and Financial Management. June 3, 0900-1015, 1.5 CPEs

55. Shared Services in the Federal Government: Getting the Lay of the Land

*Kevin Greer, CPA, PMP, CDFM, CGFM, Managing Director, Accenture Federal Services
David D. Dalenberg, CDFM, PMP, DFMCP3, Lead Financial Systems Analyst, Office of the Deputy Chief Financial Officer, OUSD(C)
Mark Rose, CPA, CGFM, Director of Financial Operations/Comptroller, US Coast Guard
Aaron Gillison, DFMCP3, Director, Information and Technology, Defense Finance and Accounting Service*

Since its introduction in the early 80's – with the Office of Management and Budget mandate that all departments and agencies migrate their payroll operations to one of four certified payroll services providers – shared services in the Federal Government has evolved significantly. The government initiatives established lead agencies for various mission support operations, including human resources, financial management, grants management and geospatial operations. The initiatives also established center provision of software applications related services, including platforms for human capital management. During the Obama Administration, the focus has been on establishing shared services centers for financial management applications and building an expanded framework for human capital management. In this session, we will discuss the nature of the Administration's shared services work and the progress to date, including impacts and expectations for DoD. We will also discuss plans for the remainder of the term and actions being taken to institutionalize the shared services delivery model within the Executive Branch.

Group Live Presentation. NASBA Field of Study: Accounting. Course Level: Basic. Intended Audience: All levels of Financial Management. June 2, 1045-1200, 1.5 CPEs

56. Antideficiency Act (ADA): The 4-4-4 Plan to Avoid Violations

Phil Davidson, Senior Trainer, Management Concepts, Inc.

This workshop will include discussion on the 12 types of ADA violations and examines which ones are automatic and which ones may be correctable. The four A's include: Appropriation, Apportionment, Allocation, and Allotment. The four May's are: Allowance, Augmentation, Purpose, and Time. Finally, the four Don'ts are: Indemnification, Obligate in advance, Parking of funds, and Voluntary services. This workshop uses real life examples to emphasize legal requirements and how effective funds control can provide the best protection against violations of the ADA.

Group Live Presentation. NASBA Field of Study: Finance. Course Level: Basic. Intended Audience: All levels of Financial Management. June 3, 1545-1700, 1.5 CPEs

57. Current and Recurring Issues in Fiscal Law

Keith Dunn, CDFM, Associate Counsel, Office of the Assistant Secretary of the Navy (Financial Management and Comptroller)

This workshop will include an examination of current issues in fiscal law, as well as a survey of those issues which arise with some regularity. Special attention will be paid to recent GAO and other decisions.

Group Live Presentation. NASBA Field of Study: Business Law. Course Level: Basic. Intended Audience: All levels of Financial Management. June 3, 1400-1515, 1.5 CPEs

58. You Know How DFAS Supports DoD Appropriated Funds, Now Learn about DFAS Non-Appropriated Fund (NAF) Financial Services Support to DoD

*Gene Kincy, CGFM, CFE, BlackBelt, Director, Defense Finance and Accounting Service—Texarkana
Kayla Harbour, Deputy Director, Defense Finance and Accounting Service—Texarkana*

This workshop will provide information about DFAS NAF Financial Services support to the Army and DoD Instrumentalities within their Morale, Welfare and Recreation (MWR) programs. The MWR is a quality-of-life program that supports the warfighter. It includes social, fitness, recreational, and educational activities that enhance community life. It attracts and retains quality soldiers and families. As a service provider, DFAS provides Vendor Pay, Payroll, Disbursing and Accounting services to over 252 customers worldwide. Learn about DFAS NAF Accounting, Accounts Payable and Payroll responsibilities. See how DFAS uses commercial banking to conduct NAF business.

Group Live Presentation. NASBA Field of Study: Accounting. Course Level: Basic. Intended Audience: All level of Financial Management. June 3, 1045-1200, 1.5 CPEs

59. Financial Institutions Operating on DoD Installations

William Hawbecker, Director, Department of Defense Banking and Credit Union Programs, Defense Finance and Accounting Service

This workshop will provide an overview of financial institution (bank and credit union) operations on DoD installations. It will include (1) identification of DoD issuances governing operations of financial institutions on DoD installations and key points from policy; (2) why financial institutions are on installations and how they get there; (3) identification of differences between stateside and overseas operations, to include the DoD Overseas Military Banking Program; (4) how financial institutions support official DoD operations and DoD communities, to include DoD financial education initiatives; (5) discussion of roles and responsibilities of DFAS and the Military Services in administering financial institution operations on DoD installations; and (6) discussion of roles and responsibilities of financial institutions while operating on DoD installations.

Group Live Presentation. NASBA Field of Study: Business Management and Organization. Course Level: Basic. Intended Audience: All levels of Financial Management, particularly those who advise leadership on or require financial services and/or financial education at the installation level. June 3, 1400-1515, 1.5 CPEs

60. Fact Based Decision Making

Dr. Robert Bickel, Technical Director, Air Force Financial Management Center of Expertise

This session will discuss the need to ground any decision support analysis in facts. While many of us are fluent in processing DATA, not all data is created equal. The need for unbiased facts, how to determine if the correct level of detail is being included, and how different sets of facts can change the recommended outcome will be discussed. Included will be multiple examples of the correct and incorrect use of data and how to differentiate between facts and data.

Group Live Presentation. NASBA Field of Study: Business Management and Organization. Course Level: Basic. Intended Audience: All levels of Financial Management, but particularly those who use/need data to inform their decisions. June 3, 1400-1515, 1.5 CPEs

61. The Value of Decision Support

Dr. Robert Bickel, Technical Director, Air Force Financial Management Center of Expertise

This session will discuss the difficulty in placing an explicit value on providing analysis to decision makers prior to making a decision. While in some cases, the analysis identifies new alternatives that reduce future costs (an actual savings), this is the exception. Many times the analysis recommends a higher cost alternative or simply validates the perceived best alternative. This session will present several ways of viewing the value of providing decision support as well as many valuation methods that are used incorrectly.

Group Live Presentation. NASBA Field of Study: Management Advisory Services. Course Level: Basic. Intended Audience: Anyone involved in supporting resource allocation decisions. June 2, 0900-1015, 1.5 CPEs

62. Enterprise Risk Management: Value Proposition

Todd Grams, Director, Deloitte and Touche, LLP

Mark Reger, CPA, Deputy Controller, Office of Federal Financial Management, Office of Management and Budget (invited)

Marianne Roth, Transportation Security Administration

Douglas Cliff, Chief, Office of Risk Management and Program Evaluation, Department of Commerce

How do you assess risk of mission failure or degradation? What criteria do you use for measuring risk? Is risk assessment a consistent and deliberate part of your everyday activities? How do we manage enterprise risk? What is the value proposition regarding ERM? Is it my job as a resource manager to know about everyone's risk? Come join us for an information-packed session on OMB Circulars A-11 and A-123 perspectives on Enterprise Risk Management as well as some keen lessons learned from agencies that have applied ERM practices. You may leave the session thinking of risk in a whole new way.

Group Live Presentation. NASBA Field of Study: Business Management and Organization. Course Level: Basic. Intended Audience: All levels of Financial Management that are interested in enterprise risk management. June 3, 0900-1015, 1.5 CPEs

63. How Commercial Off-the-Shelf (COTS) Business Intelligence (BI) Tools Can Improve Financial Management Analysis

Ross Hosse, CDFM, Senior Business and Financial Analyst, TASC

Carolyn North, CPA, CDFM-A, CGFM, PMP, Program Manager, TASC

Financial managers are used to looking at spreadsheets and accounting reports to analyze data. Presenting the data to leadership requires that data be presented in a clear, concise, understandable method. Financial Managers need to be able to provide analysis that is accurate and consistent between budget periods and also to provide quick analysis for those "what-if" scenarios. This workshop shows how to use off-the-shelf business intelligence tools to analyze data and to provide decision support to leadership.

Group Live Presentation. NASBA Field of Study: Business Management and Organization. Course Level: Basic. Intended Audience: Those providing decision support and receiving decision support information in the form of charts and visuals (dataviz). Date: June 2, 1545-1700, 1.5 CPEs

65. Audit and Audit Readiness – What Are the Lessons Learned So Far?

Alaleh Jenkins, CPA, CDFM, Assistant Deputy Chief Financial Officer and Director for Financial Improvement and Audit Readiness (FIAR), Office of the Under Secretary of Defense (Comptroller)

Wesley Miller, CDFM-A, Deputy Assistant Secretary of the Army for Financial Operations, Office of the Assistant Secretary of the Army (Financial Management and Comptroller)
Ann-Cecile McDermott, CPA, Assistant Deputy Commandant, Programs and Resources and Fiscal Director, Headquarters, US Marine Corps
Thomas Murphy, CPA, CDFM, Deputy Assistant Secretary of the Air Force for Financial Operations, Office of the Assistant Secretary of the Air Force (Financial Management and Comptroller)
Tony Hullinger, CDFM, DFMCP3, Director, Audit Readiness, Defense Finance and Accounting Service

This workshop will provide an overview of FY2015 Schedule of Budgetary Activities (SBA) Audit results, lessons learned and way forward to achieve audit readiness for 2017 NDAA mandate for all financial statements.

Group Live Presentation. NASBA Field of Study: Auditing (Governmental). Course Level: Basic. Intended Audience: All levels of Financial Management. June 3, 0900-1015, 1.5 CPEs

66. End Game Strategy for Audit for 2017 and 2018: Making the Final Assault on the Audit Summit

Alaleh Jenkins, CPA, CDFM, Assistant Deputy Chief Financial Officer and Director for Financial Improvement and Audit Readiness (FIAR), Office of the Under Secretary of Defense (Comptroller)

DoD's long journey to audit readiness is reaching a critical stage and there is only a short time before our statutory 2017 deadline for audit readiness. We'll let you know what to expect, what's needed to sustain an auditable financial posture, and how the future audit drumbeat will impact the culture of the DoD financial management community. Most importantly, we'll have a frank and honest discussion on what will be needed before the DoD can be ready for 2017 audit and realistically obtain, and sustain, a positive audit opinion on its consolidated financial statements.

Group Live Presentation. NASBA Field of Study: Auditing (Governmental). Course Level: Basic. Intended Audience: All levels of Financial Management, especially those dealing with the campaign to become audit ready. June 3, 1400-1515, 1.5 CPEs

67. The Audit Cycle A Never Ending Journey

William Holtzman, Senior Accountant, US Army Corps of Engineers
Wesley Miller, CDFM-A, Deputy Assistant Secretary of the Army for Financial Operations, Office of the Assistant Secretary of the Army (Financial Management and Comptroller)
William Roberts, Director, Army Audit Readiness, Office of the Assistant Secretary of the Army (Financial Management and Comptroller)

This workshop will take you on a year long journey of the audit cycle. Starting after the receipt of the audit opinion to receipt of the opinion on the next year's financial statements we will take you on a time tested journey of how to complete a successful CFO audit and how to incorporate a robust OMB A-123 Appendix A program all in the same year. During the workshop we will offer lessons learned related to the CFO audit cycle and how to use those test results and those gathered from the OMB A-123 Appendix A program to strength internal controls and get real value out of the audit cycle.

Group Live Presentation. NASBA Field of Study: Accounting (Governmental). Course Level: Basic. Intended Audience: All levels of Financial Management. June 3, 1545-1700, 1.5 CPEs

68. How the FM Target Environment Will Help Us Sustain Financial Auditability

Mark Easton, CDFM-A, Deputy Chief Financial Officer, Office of the Under Secretary of Defense (Comptroller)
Aaron Gillison, DFMCP3, Director, Information and Technology, Defense Finance and Accounting Service

There are several key enterprise process changes underway and technology enhancements and enablers that impact the future of DoD Financial Management. The Department must find ways to sustain audit in a declining resources environment in the coming years. Hear what processes, IT enablers, plans, and initiatives are underway to help us achieve steady-state auditability. This workshop does not focus on a particular initiative or delve into the details of audit requirements, but helps the audience "connect the dots" between multiple initiatives, relating this big picture view to a sustaining financial auditability year after year.

Group Live Presentation. NASBA Field of Study: Auditing (Governmental). Course Level: Basic. Intended Audience: DoD Financial Managers, Analysts, and Non-DoD and Industry Stakeholders. June 3, 1045-1200, 1.5 CPEs

69. TI-97 Audit Strategy and Plan of Execution

*Johanna Sears, CPA, Manager, PwC Public Sector LLP
Mobola Kadiri, CDFM, Assistant Director, FIAR Directorate, Office of the Deputy Chief Financial Officer, OUSD(C)
James Likes, CDFM, Director, Columbus Audit Readiness Office, Defense Finance and Accounting Service
Simone Reba, CDFM, Deputy Director, Defense Logistics Agency*

This workshop will discuss the details of and execution plan for the TI-97 Audit Strategy. This strategy is the roadmap for how the Department will achieve a Consolidated full financial statement audit of the Department in FY 2018, inclusive of TI-97.

Group Live Presentation. NASBA Field of Study: Specialized Knowledge and Applications. Course Level: Basic. Intended Audience: All levels of Financial Management, but particularly those supervising and dealing with TI-97 Audit Readiness, Audits, Examinations, and SSAE No. 16s. June 2, 1045-1200, 1.5 CPEs

70. What is the Status of the DoD SSAE 16 Reports and How Do I Use Them to Support My Financial Statement Audit and A-123 Compliance Requirements?

*Bradley Keith, CPA, CISA, PMP, CGEIT, CDFM, Director, PwC Public Services LLP
James Davila, CPA, DFMCP3, Staff Accountant, FIAR Directorate, Office of the Deputy Chief Financial Officer, OUSD(C)*

This workshop will provide participants with an update on the current status of SSAE 16s in the DoD and initiatives being undertaken to improve the usefulness of the reports to user organizations (and their auditors). This workshop will also include a walkthrough of a typical SSAE 16 report, including Complementary User Entity Controls, and provide insights into how the typical user organization can better use these reports.

Group Live Presentation. NASBA Field of Study: Accounting (Governmental). Course Level: Intermediate. Prerequisite: General knowledge of internal controls over financial reporting and audit readiness requirements. Intended Audience: All levels of Financial Management, but particularly those supporting financial statement audit readiness or A-123 (Appendix A) compliance. June 2, 1545-1700, 1.5 CPEs

71. Operating Materials and Supplies: Building a Risk Based Approach to Audit Remediation and Monitoring Controls

LCDR Khristopher Johns, CPA, CG Property, Audit Remediation, US Coast Guard

This workshop focuses on helping you build a successful and sustainable audit-ready OM&S program. Presenters will discuss accounting standards and successful best practices to include a checklist for: implementing a risk based approach to monitor critical areas, cost flow assumptions and their

documentation requirements, clarifying the end user and depot level maintenance activities, producing needed financial information (even in disconnected legacy systems), segregating OM&S from Construction in Progress, and delivering meaningful information to management and auditors.

Group Live Presentation. NASBA Field of Study: Accounting (Governmental). Course Level: Basic. Intended Audience: All levels of Financial Management, but particularly those working with Inventory and Related Property. June 3, 1545-1700, 1.5 CPEs

72. Do You Know How Much Your Property Costs?

CDR Matthew Manofsky, PE, CGFM, Chief, Audit Remediation Division, US Coast Guard

The speaker will discuss recent real property remediation efforts that led to a clean audit opinion. The discussion will offer a strategy and roadmap to remediate and sustain property based on the successful process used by the Coast Guard. The discussion will focus on remediation efforts for valuation, such as alternate valuation for software and alternate dates in services, and the current Coast Guard CIP process. Remediation management what information was and is captured for CG Assets and how is that information shared between operational and financial databases.

Group Live Presentation. NASBA Field of Study: Accounting (Governmental). Course Level: Basic. Intended Audience: All levels of Financial Management. June 2, 1045-1200, 1.5 CPEs

73. The Property Accounting Policy Landscape – Implications of Recent Changes and Future Trends

Craig Reineck, Sr., CDFM, CGFM, PMP, CPPA, ICEAA, Senior Manager, Deloitte & Touche LLP

Steven Chad, CPA, Partner, Deloitte & Touche LLP

Alaleh Jenkins, CPA, CDFM, Assistant Deputy Chief Financial Officer and Director for Financial Improvement and Audit Readiness (FIAR), Office of the Under Secretary of Defense (Comptroller)

Mark Rose, CPA, CGFM, Director of Financial Operations/Comptroller, US Coast Guard

Stephen Tkac, Deputy Director, Acquisition Resources and Analysis for Property and Equipment Policy, OUSD(AT&L)

Property accounting is an increasing priority, particularly for asset intensive organizations such as the Department of Defense and United States Coast Guard. Valuation, government furnished property, environmental liability completeness, and construction in progress are just a few of the challenges receiving focused attention. Financial and functional communities are working together in a variety of forums to identify these challenges and develop practical and innovative solutions to address them. This panel features leaders from the financial, functional, and audit communities who are at the forefront of helping the Department of Defense and the Coast Guard develop solutions to long standing property issues. The panelists will share their insights and lessons learned on bringing stakeholders together to develop strategies that respond to today's property challenges.

Group Live Presentation. NASBA Field of Study: Accounting (Governmental). Course Level: Basic. Intended Audience: Financial management and functional personnel (e.g. logistics, facilities management, program management, etc.) with property responsibilities. June 2, 1400-1515, 1.5 CPEs

74. Proven Approaches for Valuing PP&E – Beginning Balances and Future Sustainment – The USCG Story

Denise Lippuner, CPA, CGFM, Partner, Grant Thornton

CAPT Carl Messalle, CDFM, Chief, Office of Financial Reporting Policy and Property, US Coast Guard

CDR Matthew Manofsky, PE, CGFM, Chief, Audit Remediation Division, US Coast Guard

CDR Colin Campbell, Acting Deputy, Office of Financial Policy, Reporting, and Property, US Coast Guard

With the focus of attaining full financial statement auditability by 2017, DoD has turned its attention to supporting the values of property, plant and equipment. Current efforts are focused on supporting the

values of beginning balances as well as all PP&E assets to be acquired in the future. USCG undertook similar efforts as they contemplated how to overcome auditor identified weaknesses in supporting the value of its PP&E assets. Learn from a panel of USGC experts on what worked well and challenges they encountered as they worked through their PP&E valuation challenges.

Group Live Presentation. NASBA Field of Study: Accounting (Governmental). Course Level: Intermediate. Prerequisite: General knowledge of accounting principles. Intended Audience: All levels of Financial Management, but particularly those involved in preparing for a financial statement audit. June 3, 1045-1200, 1.5 CPEs

75. Approximating Historical Cost and Pragmatic Implementation of SFFAS #35

*Bobby Hart, CPA, CMA, CFM, PMP, CGFM, Senior Manager, Ernst and Young
Stephen Tkac, Deputy Director, Acquisition Resources and Analysis for Property and Equipment Policy, OUSD(AT&L)*

Valuation and Date-in-Service documentation for long-lived assets is one of the greatest challenges to achieve audit-compliance in the Federal Government, especially when some agencies are over two-hundred years old and have assets that have lasted just as long. In this workshop, you will learn how to implement SFFAS#35 through various techniques that create an auditable and repeatable process to approximate historical cost for all types of real and personal property across a Federal agency.

Group Live Presentation. NASBA Field of Study: Accounting (Governmental). Course Level: Basic. Intended Audience: All levels of Financial Management, but particularly those dealing with property accounting. June 2, 0900-1015, 1.5 CPEs

76. Managers' Internal Control Program (MICP)

(Robert) Steven Silverstein, DoD-Wide Managers' Internal Control Program Coordinator, FIAR Directorate, Office of the Deputy Chief Financial Officer, OUSD(C)

This workshop will address linkage between an improved operational, financial, program and administrative controls, improved efficiency and audit readiness. The course emphasis is upon the attributes of an effective Managers' Internal Control Program (MICP) that identifies, prioritizes and mitigates operational and financial deficiencies before the mission of the organization is negatively impacted versus after. The DoD MICP leverages DoD Instruction 5010.40, OMB Circular A-123, CFO Act and COSO.

Group Live Presentation. NASBA Field of Study: Accounting (Governmental). Course Level: Basic. Intended Audience: All levels of Financial Management. June 3, 0900-1015, 1.5 CPEs

77. Establishing an Internal Control Program to Achieve Sustainable Financial Audit Success

CDR Michael Danish, CGFM, Office of Internal Control, US Coast Guard

The speaker will present lessons learned on establishing an OMB Circular A123 compliant internal control program to attain organizational buy-in and inform leadership on key process performance to sustain financial audit success. The discussion will offer a strategy and roadmap based on the Coast Guard's successful yearly internal controls assessment including discussion of key metrics and dashboards.

Group Live Presentation. NASBA Field of Study: Auditing (Governmental). Course Level: Basic. Intended Audience: All Financial Managers. June 2, 0900-1015, 1.5 CPEs

78. The Science of Compliance: OMB Circular A-123 and Internal Controls OR Comply or Die: A Practical Guide to Survival for Internal Control Implementation and Compliance with OMB Circular A-123

James Gould, CPA, CGFM, Partner, KPMG
William Holtzman, Senior Accountant, US Army Corps of Engineers

This interactive course will provide insight on administering internal control programs that are efficient and effective, avoid duplication and minimize the burden on staff especially during this time of limited resources for our Federal agencies. This workshop is designed for the boots on the ground, management, and executives who are responsible for an effective internal controls program. The course will also discuss the evolution of internal controls, learn about best practices, and gain an understanding of assessing internal controls using Compliance methodology. The focus of this workshop will be on efficiently meeting OMB Circular A-123 requirements.

Group Live Presentation. NASBA Field of Study: Specialized Knowledge and Applications. Course Level: Basic. Intended Audience: All levels of Financial Management, but particularly those involved in Agency's Internal Control (A-123) compliance process. June 2, 1545-1700, 1.5 CPEs

79. Automated Controls through GRC: The Next Frontier

Robert Thorson, Manager, Accenture Federal Services
Simone Reba, CDFM, Deputy Director, Defense Logistics Agency
Steven Brown, Sustainment Director, Army GFEBS, US Army - PEO EIS

Governance, Risk, and Compliance (GRC), when used in Enterprise Resource Planning (ERP) systems environments, are critical enablers for ensuring robust internal controls, security and overall risk management. While many have heard about ERPs, few are familiar with the full scope GRC solutions can address. This workshop will discuss agencies who are implementing GRC to enable automated controls solution. Come listen to how these solutions will enhance financial internal controls and compliance and to benefit overall risk management and financial improvement efforts.

Group Live Presentation. NASBA Field of Study: Auditing (Governmental). Course Level: Basic. Intended Audience: All levels of Financial Management, Risk Managers, and Internal Controls. June 2, 1545-1700, 1.5 CPEs

80. Audit Remediation Success: The Essential Elements for Success

CDR Colin Campbell, Acting Deputy, Office of Financial Policy, Reporting, and Property, US Coast Guard

A successful audit is much more than establishing opening balances. This workshop focuses on helping you build a high performing organization using a successful and sustainable audit remediation program. Presenters will discuss critical success factors and successful best practices to include: developing a remediation strategy, essential change management elements, overcoming cultural barriers, looking beyond balances to the process as a whole, and verifying sustained compliance.

Group Live Presentation. NASBA Field of Study: Auditing (Governmental). Course Level: Intermediate. Prerequisite: General knowledge of accounting principles and internal controls. Intended Audience: All levels of audit remediation and internal control, but particularly mid-senior and senior leaders overseeing activities and setting strategies. June 2, 1545-1700, 1.5 CPEs

81. Thinking Outside the Box: Finding Creative Solutions to Fix Audit Findings

David Norquist, CGFM, Partner, Kearney & Company
Wesley Miller, CDFM-A, Deputy Assistant Secretary of the Army for Financial Operations, Office of the Assistant Secretary of the Army (Financial Management and Comptroller)
CAPT Carl Messalle, CDFM, Chief, Office of Financial Reporting Policy and Property, US Coast Guard
CDR Colin Campbell, Acting Deputy, Office of Financial Policy, Reporting, and Property, US Coast Guard

This workshop focuses on developing creative solutions to fix broken processes and downgrade audit findings. Presenters will discuss accounting standards, policies and procedures implemented by the

Coast Guard, and sample information for use. Specific concepts include: (1) Implementing risk based approaches; including the importance of viewing business processes from a holistic viewpoint and identifying key risk and control points early in the process; (2) Designing and implementing efficient and effective control packages that function together to mitigate risks without over controlling the process; and (3) Developing compensating procedures and controls to support financial reporting processes despite having non-compliant financial systems.

Group Live Presentation. NASBA Field of Study: Accounting (Governmental). Course Level: Intermediate. Prerequisite: General familiarity with accounting or auditing. Intended Audience: Financial Management personnel working with audit and audit remediation. June 2, 1400-1515, 1.5 CPEs

82. Synergistic Efforts Between Financial Audit and Cyber Security

*Danny Chae, CPA, CISA, Accountant, Office of the Assistant Secretary of the Navy (Financial Management and Comptroller)
Amira Tann, Director, IT Analysis and Internal Controls, Office of the Department of the Navy Chief Information Officer*

Department of the Navy has been making progress identifying areas of overlap between cyber security and financial audit readiness activities. We have gone as far as synergizing processes across those two disciplines and creating a single work stream that will satisfy both requirements. The challenge of meeting these two important goals are not unique to the Navy. The goal of this workshop is to share the DON efforts on how the quality of an entity's information security relates to successful financial audit outcomes.

Group Live Presentation. NASBA Field of Study: Auditing. Course Level: Intermediate. Intended Audience: All levels supporting audit readiness and financial audit. June 2, 1400-1515, 1.5 CPEs

83. Audit Trends and Framework for Improving Financial Data Quality and Financial Reporting

*Joseph Quinn, CPA, Partner, Ernst and Young
James Harvey, Partner, Ernst and Young
William Roberts, Director, Army Audit Readiness, Office of the Assistant Secretary of the Army (Financial Management and Comptroller)*

This workshop will include the evolution of audit in the federal space with a focus on the increased importance of IT controls, data reliability, data analytics, estimates and other topics. It will also focus on the common issues with data quality in the finance and accounting function. Common data quality issues result in problems such as purchase orders not being filled, vendors not being paid in a timely manner, and inactive customer accounts not being closed out in a timely manner, which will impede the year end closing process. Identifying the outstanding Data Quality issues and applying data cleansing rules to improve will alleviate these issues. Finally, we will present a framework for improving the financial reporting processes, procedures and tools. The combination of good data quality and a reliable financial reporting framework will help agencies meet their performance and audit measures.

Group Live Presentation. NASBA Field of Study: Auditing (Governmental). Course Level: Intermediate. Prerequisite: General knowledge of accounting principles. Intended Audience: All levels of Financial Management, particularly those involved in financial statement audits. June 2, 0900-1015, 1.5 CPEs

84. Getting an IPA Onboard: Key Lessons Learned for Awarding Contracts and On-Boarding IPAs

*Michael Leist, Director, Enterprise Management Services, Defense Finance and Accounting Service
Lorin Venable, CPA, Assistant Inspector General, Financial Management and Reporting, DoD Office of Inspector General*

Do you know what it takes to bring an independent public accounting firm on-board? This workshop will take you through the requirements generation to contract award process. During this joint Department of Defense Inspector General (DoDIG) and Defense Finance and Accounting Service (DFAS) workshop, DoDIG will offer lessons learned related to requirements generation, security, audit timing, and maintaining independence as well as provide insights into the audit assertion process. DFAS will discuss the contract formation process that starts upon receipt of the completed requirements package and offer insight into communication needs, key responsibilities, timelines, critical tasks, and lessons learned in this process. This workshop is a wonderful way to understand the overall process and leverage valuable lessons learned in onboarding an IPA.

Group Live Presentation. NASBA Field of Study: Specialized Knowledge and Applications. Course Level: Basic. Intended Audience: All those having an interest in onboarding an IPA. June 2, 1045-1200, 1.5 CPEs

85. Auditors General – Current Issues

*Randall Exley, CPA CIA, CFE, CAA, CGFM, Auditor General, Army Audit Agency
Luther Bragg, CPA, CGFM, Auditor General, Department of the Navy
Daniel McMillin, Auditor General, Department of the Air Force*

The auditors general for the three military departments will discuss current trends in audits, especially operational audits which often challenge assumptions and procedures with an eye toward improving efficiency. The session aims to give financial managers a better understanding of audit goals for the coming year.

Group Live Presentation. NASBA Field of Study: Auditing (Governmental). Course Level: Basic. Intended Audience: All levels of Financial Management. June 2, 0900-1015, 1.5 CPEs

87. Better Buying Power 3.0

Roberta Tomasini, CDFM-A, Professor, Financial Management, Defense Acquisition University

This workshop will cover Better Buying Power initiatives which have evolved since Sep 2010. Should Cost discussion includes what "Should Cost" means, the process for identifying should cost initiatives, as well as examples of should cost initiatives. The process could be used on any budget in which you are trying to reduce costs and get more for your money.

Group Live Presentation. NASBA Field of Study: Business Management and Organization. Course Level: Basic. Intended Audience: All levels of Financial Management. This initiative is being executed in the acquisition community. June 2, 1045-1200, 1.5 CPEs

88. IT Acquisition Improvement: Department Governance Initiatives and Impacts on PPBE

*Jennifer Knight, DFMCP3, Senior Manager, Lynch Consultants
Dean Pfoztzer, Director, Policy and Resources/Chief Financial Officer, CIO/G-6, US Army
Jeannette Evans-Morgis, Deputy Commander, Systems Engineering, Interoperability, Architectures, and Technology (DC SIAT), Marine Corps Systems Command
Marilyn Thomas, DAWIA Financial Management Level III, Deputy Chief Management Officer, Office of the Under Secretary of the Air Force*

This workshop will focus on recent Information Technology (IT) Governance Improvement initiatives to streamline IT acquisition processes, more effectively leverage technology, increase standardization and compatibility and reduce overall costs. The panel members will discuss specific initiatives, implementation challenges, successes, lessons learned and changes that have been necessary in PPBE and acquisition processes and workforce culture. The panel welcomes feedback from attendees on the impacts of changes on their organizations (both positive and negative) as well as recommendations to consider for future improvements.

Group Live Presentation. NASBA Field of Study: Business Management and Organization. Course Level: Basic. Intended Audience: All levels of Financial Management, particularly those involved in the funding, acquisition and life-cycle management of IT systems and infrastructure. June 2, 1545-1700, 1.5 CPEs

89. Intermediate Earned Value Management (EVM)

Robert Gustavus, CPA, Professor, Financial Management, Defense Acquisition University

This workshop will focus on how to maximize the use of EVM data, tailor the Cost Performance Report (CPR), evaluate a program's status and developing trends, generate Estimate at Completions (EACs), and incentivize the contractor to provide accurate/timely EVM data. Using this Integrated Management tool will help program offices and any organization using EVM to manage cost, schedule, and performance of the contractor in the meeting the requirements of the contract.

Group Live Presentation. NASBA Field of Study: Specialized Knowledge and Applications. Course Level: Intermediate. Prerequisite: Basic EVM information. Intended Audience: All levels of Financial Management, especially for personnel in programs where their contractor provides EVM reports. June 2, 1400-1515, 1.5 CPEs

90. Financial Management and Program Management: Integration and Intersections

Debbie Hahn, Professor of Financial Management, Defense Acquisition University

The cost estimators, earned value specialists, and financial managers are a means to an end for the single point of an acquisition program's responsibility, accountability and ownership: the Program Manager. This workshop explores the effective integration of these disciplines to support critical thinking and decision-making at the program level. How can you most effectively support your program leadership?

Group Live Presentation. NASBA Field of Study: Business Management and Organization. Course Level: Basic. Intended Audience: All levels of Financial Management with interest in how they can most effectively support their program leadership. June 3, 0900-1015, 1.5 CPEs

91. Recognizing and Mitigating Risk

Debbie Hahn, Professor of Financial Management, Defense Acquisition University

Risk occurs in every aspect of our business life and can negatively impact organizational AND ACQUISITION PROGRAM performance. Many leaders believe ACQUISITION program management and risk management are synonyms. In any regard, managing risk is a key focus of ACQUISITION program management, REGARDLESS OF ACQUISITION CATEGORY (ACAT). Unfortunately, many program managers do not adequately consider risk in their planning. This workshop focuses on how to identify risks, how to write risk statements, how to identify the root cause of the risk, and the impact risk has on financial management, budgeting AND PROGRAM EXECUTION. The concept of net factored risk will be discussed as a method of determining risk dollars required to budget.

Group Live Presentation. NASBA Field of Study: Business Management and Organization. Course Level: Basic. Intended Audience: All levels of Financial Management, but particularly those managing organizations. June 2, 0900-1015, 1.5 CPEs

92. Indirect Cost Rates – What Could Be Your Biggest (but nearly invisible) Contract Cost Driver

Gregory Martin, DAWIA III FM/LCL, PMP, CDFM, CGFM, Professor, Financial Management, Defense Acquisition University

You know that you pay for your contractors' labor and materials for the work it provides directly to you. But did you know that you also pay for your contractor's CEO, comptroller shop, security team, building depreciation and housekeeping staff? This workshop discusses and explores contractor indirect costs – what they are, how they fit into your contractor's rates, and how contractor business decisions and events unrelated to your work can affect what you have to pay.

Group Live Presentation. NASBA Field of Study: Finance. Course Level: Basic. Intended Audience: All levels of financial management, including those involved in budget, proposal price evaluation and program offices. June 3, 1045-1200, 1.5 CPEs

93. DCAA-DCMA-DFAS Roles in Contract Close-out – It's a Team Effort

*Kenneth Saccoccia, Deputy Director, Defense Contract Audit Agency
Jim Russell, Deputy Director, Defense Contract Management Agency
Pam Franceschi, Defense Finance and Accounting Service Columbus Site Director*

This session will provide an overview of the contract closeout process and the roles the three key Defense Agencies play in the process. The workshop will include actions being taken to reduce the amount of overage contracts – a significant DoD priority. Untimely closeout of contracts results in risk to the Department related to unliquidated obligations, expiring and canceling funds.

Group Live Presentation. NASBA Field of Study: Accounting (Governmental). Course Level: Basic. Intended Audience: All levels of Financial Management, but particularly those working with contract closeout. June 2, 1400-1515, 1.5 CPEs

95. DoD Financial Management Workforce Development

Glenda Scheiner, CDFM-A, DFMCP3, Director, Human Capital and Resource Management, Office of the Under Secretary of Defense (Comptroller)

In an age of decreasing budgets and multiplying challenges, the DoD FM leadership looks to recruit, retain, and develop a highly talented and capable workforce by providing the foundation, framework, and functional training needed for mission success. The Under Secretary of Defense (Comptroller) is dedicated to carrying out the GAO Green Book's fourth core principle – "Demonstrate Commitment to Competence" – by ensuring its workforce has the knowledge, skills, and abilities for the future. From competencies to career roadmaps to certification, this workshop will provide the latest info and updates on initiatives the DoD FM leadership has developed to help employees, mentors, and supervisors achieve success, both professionally and in executing the DoD mission.

Group Live Presentation: NASBA Field of Study: Personnel/HR, Course Level: Basic. Intended Audience: All levels of Financial Management. June 2, 1045-1200, 1.5 CPEs

96. DoD Force of the Future Implications for Civilian Personnel and the Civilian Appraisal System

Michael Beaupre, Technical Director, Human Resources Operations and Advisory Service, Defense Civilian Personnel Advisory Service

This workshop will provide an overview of: the Defense Performance Management and Appraisal System and Force of the Future initiatives impacting civilian personnel.

Group Live Presentation. NASBA Field of Study: Personnel/HR, Course Level: Basic. Intended Audience: Anyone interested in current issues impacting the Department's civilian personnel workforce. June 3, 0900-1015, 1.5 CPEs

97. Realizing the Goal of Attaining and Retaining the Best and Brightest Force of the Future

Kenneth Runkles, PMP, Accenture Federal Services

Maj Gen Mark Brown, Commander, 2nd Air Force, Keesler Air Force Base

DoD is in the process of building the “Force of the Future,” a comprehensive plan including a goal to recruit, train, and retain the next generation of warfighters and civilian personnel. Specifically, it includes a proposal to allow service members the opportunity to have a break in service to pursue other life goals; such as getting a degree, working with industry, and starting a family as a significant mechanism to both recruit and retain top talent. What are the top 3-5 challenges with this proposal and what strategies are needed to mitigate them? (1) How does the military choose who can elect to receive the opportunity of a break in service? (2) While the military recognizes the importance of this type of program to individual service members, what are the effects of a break in service on mission readiness? (3) What are the challenges and effects of returning personnel to duty? (4) How do you think the military, and specifically FM can leverage private sector experience further to be adaptable in a future DoD? (5) What should FM leaders look for in external talent when hiring?

Group Live Presentation. NASBA Field of Study: Business Management and Organization. Course Level: Basic. Intended Audience: All DoD Financial Managers. June 2, 1545-1700, 1.5 CPEs

99. Ethics for DoD Employees

Keith Dunn, CDFM, Associate Counsel, Office of the Assistant Secretary of the Navy (Financial Management and Comptroller)

This workshop will address some of the more common ethical issues confronting DoD employees, and will offer practical solutions to avoiding/correcting potential violations. Special attention will be paid to political activities and other current issues.

Group Live Presentation. NASBA Field of Study: Regulatory Ethics. Course Level: Basic. Intended Audience: All levels of Financial Management. June 2, 0900-1015, 1.5 CPEs

100. The Use and Abuse of Social Media at Home and at Work

Keith Dunn, CDFM, Associate Counsel, Office of the Assistant Secretary of the Navy (Financial Management and Comptroller)

This workshop will include discussion of some of the issues and pitfalls associated both with personal and official agency social media accounts, along with practical tips for using social media in a safe and productive manner.

Group Live Presentation. NASBA Field of Study: Social Environment of Business. Course Level: Basic. Intended Audience: All levels of Financial Management. June 3, 0900-1015, 1.5 CPEs

101. I'm Not Being Critical, I'm Just Thinking

Rick Diggs, CDFM, Deputy Director, Defense Financial Management and Comptroller School

Get ready for an interactive session that will advance your views about critical thinking. Opinions and beliefs based on critical thinking stand on firmer ground than those formulated through less rational processes. This dynamic workshop will explore the basic intellectual standards of critical thinking, identify common obstacles to critical thinking, and provide useful tools for the practical application of critical thinking principles. Come join us as we think about thinking.

Group Live Presentation. NASBA Field of Study: Management Advisory Services. Course Level: Intermediate. Prerequisite: General knowledge of critical thinking skills. Intended Audience: All levels of Financial Management. June 3, 1045-1200, 1.5 CPEs

102. Perfectly Off-Center: When Our Decisions Defy Economics

Maj David Ratliff, PhD, Instructor, Defense Financial Management and Comptroller School

Join us for a fun and interactive exploration of several prevalent biases which probably affect your decision making. We will identify, describe, and evaluate the implications of economically inconsistent or inefficient decisions many of us fall victim to, and provide some remedies and tools to assist in your critical thinking processes. A great complement to Workshop 101 "I'm Not Being Critical, I'm Just Thinking."

Group Live Presentation. NASBA Field of Study: Economics. Course Level: Basic. Intended Audience: All levels of Financial Management. June 3, 1400-1515, 1.5 CPEs

104. The Power of 8s

Dave Weinberg, CDFM, Owner, DaveSpeak and Partner, Kearney & Company

Numbers are a fact of life as are people. Both numbers and people take practice. Some are better at numbers than people and some are better at people than numbers. This presentation shows you how one number in particular is more powerful than all the others. It will teach you that if you can harness the power of 8's, you can harness the power of people. Both numbers and people are here to stay. Why not learn more about each? Enjoy this leadership lesson that will enrich your interaction.

Group Live Presentation. NASBA Field of Study: Personal Development. Course Level: Basic. Intended Audience: All levels of Financial Management, but particularly those supervising and dealing with people. June 2, 1045-1200, 1.5 CPEs

105. Taking Care of People

Dave Weinberg, CDFM, Owner, DaveSpeak and Partner, Kearney & Company

Taking Care of People...The resource that really matters is people. You know we have to take care of people, but do you really know what that means? The challenges of today make it more important than ever, so listen, learn and laugh with this high-energy presentation that will leave you wanting more! This workshop (presented by a former Air Force FM Colonel) gives you his list of what it means to take care of people in an energetic, anecdotal, real life approach...and challenges you to do it better.

Group Live Presentation. NASBA Field of Study: Personal Development. Course Level: Basic. Intended Audience: All levels of Financial Management, but particularly those supervising and dealing with people. June 3, 1545-1700, 1.5 CPEs

106 - MICROSOFT – EXCEL PivotTables

*Ed Fritts, Senior Financial Systems Analyst, Teksouth Corporation
Joshua Cherkinsky, Senior Financial Systems Analyst, Teksouth Corporation
Brandon Pittman, Senior Financial Systems Analyst, Teksouth Corporation
Matthew Ryan, Senior Financial Systems Analyst, Teksouth Corporation
Benjamin Cella, Project Manager, Teksouth Corporation*

During this session you will learn the techniques of creating and using Microsoft's #1 analytical tool in Excel 2010. Areas of focus will include creating, setting up and basic navigation of PivotTables. We'll also teach you how to add fields, filter pages, adding formulas, applying filters, formatting, drilling down and other PowerPoint skills. Our training aids will be picture by picture illustrations to help beginners. Our goal is share these great skills to everyday Excel users so they can spend more time ANALYZING! We'll post all the training materials one week before the National PDI if you want to bring them with you. The website is: <http://www.teksouth.com/teksouth-desktop-tools/>. Look for 2016 National PDI. Come learn these great tools.

Group Live Presentation. NASBA Field of Study: Finance. Course Level. Basic. Intended Audience: All levels of Financial Management. June 2, 0900-1015; June 3, 1545-1700, 1.5 CPEs

107. Build Your Chapter: 25 Tips on Recruitment and Retention

*Libby Long, Associate Executive Director, American Society of Military Comptrollers
Ron Lloyd, Program Support Coordinator, American Society of Military Comptrollers*

This workshop is an excellent source for ASMC chapter tools and information, as well as an opportunity to share experiences, ideas and solutions with fellow ASMC chapters from across the country. The core of this workshop is one of interest to all chapters – membership recruitment and retention. Get some ideas from headquarters as well as chapter leaders – learning what challenges they are experiencing and how they have tackled these challenges. Share and receive best practices for service our members.

Group Live Presentation. NASBA Field of Study: NA. Intended Audience: Anyone interested in ASMC chapter growth and development. June 3, 1545-1700