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| asmc1   |  | | --- | | **ASMC Alamo City Chapter** | | |
| **Professional Development Symposium** | |
| **29-30 January 2018** | |
| ***“Achieving Star Performance”*** | |
| **PROGRAM OVERVIEW** | |
| ***NOTE:*** *CPE hours shown are based on DoD and ASMC criteria; therefore, acceptance by other Certification Programs is subject to their eligibility requirements and subject to approval by their certification authorities.* | |
|  | **KEYNOTE PRESENTATIONS** |
| **KN-1** | **Defense Financial Management** |
| This presentation will discuss federal and defense financial management trends and issues. It will include information regarding federal revenue, expenses, and deficits as well as DoD budget trends. It will also address the function of enterprise risk management and DoD audit readiness. Finally, it will include a short update on ASMC programs and activities. 1 CPE |
| Al Runnels, CDFM-A, CGFM; Executive Director; American Society of Military Comptrollers |
| **KN-2** | **Funding Cyberspace Operations**  Financial Stewardship in the Land of 1’s and 0’s. |
| *Kenneth Hubbard, BG, CDFM; Assistant Chief of Staff G8; US Army Central* |
| **K**  **N-3** | **DoD Financial Management Workforce Update**  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. From competencies to career roadmaps to certification, this presentation will explore the various strategies and initiatives the DoD FM leadership has developed to help employees, mentors, and supervisors achieve success, both professionally and in executing the DoD mission. 1 CPE |
| *Glenda Scheiner, SES, CDFM-A, DFMC3; Director, Human Capital and Resource Management; Office of the Under Secretary of Defense (Comptroller)* |
| **KN-4** | Not confirmed yet |
| *TO BE PROVIDED WHEN AVAILABLE* |
| *Al Flowers, MG (Ret); U.S. Air Force* |
|  | **WORKSHOP PRESENTATIONS** |
| **#01** | **Comptrollers: The Most Destructive Innovation Force (and How to Become Positive)** |
| An examination of some of the negative practices imposed upon innovation by military financial managers, and some ways to overcome them. 1 CPE |
| *Mick Simonelli, CDFM, CMA; Principal; Simonelli Innovation LLC* |
| **#02** | **The Business of Army Medicine** |
| How the US Army Medial Command is accomplishing its mission in an environment of shrinking budgets. 1 CPE |
| *Derrick Flowers, COL; Chief Financial Officer / G8; HQ, Army Medical Command* |
| **#03** | **Managing Health Care Costs – Military vs. Public** |
| A discussion to explore several pressing areas of interest as the Military Health System (MHS) reforms. What needs to happen for the MHS to compete with the private sector for the delivery of a health benefit? What lessons can the MHS learn from profit managed care? What is the role of the Comptroller? Can cost control, a robust benefit and readiness coexist in the MHS? 1 CPE |
| *Mark Cronk, COL (R); VP, Primary Care Network Operations & Practice Acquisitions; WellMed Medical Management* |

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| **#04** | **Three Amigos - Harvey, Irma and Maria** |
| Review the role financial managers across the Department of Defense played in responding to Hurricanes Harvey, Irma and Maria. Describe the Joint Operations Area and the differences between operations in each incident. Provide attendees with financial management lessons learned from Installation and Unit response perspective. Provide an overview of the DoD Financial Management Augmentation Team construct and operations CW the DoD FMR. 1 CPE |
| *Pat Reynolds, CDFM-A; Chief Financial Officer / G8; US Army North* |
| **#05** | **The Congressional Landscape and the Air Force Budget** |
| Article 1 of the US Constitution grants Congress the responsibility to raise and support Armies and to appropriate funds to that purpose. This thought-provoking presentation will discuss the process in which Congress exercises that power and authority and will provide an update on the current Congressional state of play with regard to the budget. 1 CPE |
| *Kerry Britt, COL; Director, Congressional Appropriations Liaison; Office of the Deputy Assistant Secretary Air Force (Budget)* |
| **#06** | **Leadership is a Privilege** |
| Imparting a clear vision and inspiring others are fundamental to team success. But, extraordinary teams expect and deserve high performance not only from themselves, but from their leaders as well. It's a great feeling to be part of a high performing team and a privilege to lead one. This discussion presents some of the traits and characteristics of leaders who not only accomplish the goal, but also maximize the potential of every team member. 1 CPE |
| *Kerry Britt, COL; Director, Congressional Appropriations Liaison; Office of the Deputy Assistant Secretary Air Force (Budget)* |
| **#07** | **Resource Management for Leaders** |
| Not all leaders have accounting or finance degrees. In the DoD, many leaders rose through the ranks serving with excellence as Soldiers, Sailors, Marines, and Airmen; or as competent Civil Service subject matter experts. Most leaders have achieved mastery in their specialty area, whether that may be putting bombs on target or leading change as the DoD rolls out a new personnel system. This presentation will share some of the key things you, in the military comptroller field, can impart to your leaders to get them up to speed in terms of the accounting and finance knowledge your leaders need to know. 1 CPE |
| *Elvis Ruiz, PhD, CPA, CIA; Chief, Internal Review; HQ, Installation Management Command* |
| **#08** | **Authentic Leadership for the Financial Leader** |
| Authentic Leadership is a leadership tenet that underlies other leadership theories. This presentation will describe Authentic Leadership as a theory unto itself, tie Authentic Leadership to other leadership theories, and exemplify how Authentic Leadership can be used by DoD financial leaders. 1 CPE |
| *Elvis Ruiz, PhD, CPA, CIA; Chief, Internal Review; HQ, Installation Management Command* |
| **#09** | **Leveraging Data Analytics as a Force Multiplier in the Non-appropriated Fund World** |
| From a non-appropriated fund perspective, the Office of Deputy Assistant Secretary of Defense Military Community and Family Policy (DASD MC&FP) is using data analytics to evaluate the cost and performance of Morale, Welfare, and Recreation (MWR) activities by Service and across DoD. Use of data analytic tools and software has enabled MC&FP to conduct trend analysis, respond to RFIs from Senior Leaders and GAO within hours vice days, and detect potential funding issues before they occur. 1 CPE |
| *Jeremy Blain; Senior Manager; Grant Thornton, LLP* |

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| **#10** | **Non-Appropriated Funds Transformation** |
| Significant changes are underway in the Non-appropriated Fund world including a new Standardized General Ledger and Chart of Accounts, major financial accounting system upgrades, and the first major policy updates in over 10 years. Participants will learn about all these changes and how it will enhance the ability to deliver critical MWR services to our military service members and their families. 1 CPE |
| *Jeremy Blain; Senior Manager; Grant Thornton, LLP* |
| **#11** | **Audit 101 for the Non-Audit Professional** |
| Many Financial and Resource Management Professionals have key roles in the audit process. This course will provide an overview of the objectives, key steps, and standard issues associated with audits with a special emphasis on DoD. 1 CPE |
| *Erica Gaddy; Director; Grant Thornton, LLP* |
| **#12** | **Best Practices and Lessons Learned on Maintaining Auditability** |
| As the Department of Defense undergoes its full external audit, financial and resource managers will soon need to focus on what comes next in terms of maintaining auditability. Mr. Jared Martin (SES), is the Deputy Director of the VA Financial Services Center and is well versed in helping large complex organizations such as the VA, Social Security Administration, and Department of Energy maintain "clean" audits. He will share his lessons learned and VA, Social Security Administration, and Department of Energy maintain "clean" audits. He will share his lessons learned and best practices gained from decades of experience. 1 CPE |
| *Jared Martin, SES, CPA; Deputy Director of VA Financial Services Center; Department of Veterans Affairs* |
| **#13** | **What to expect from an Audit: Army Full Financial Statement** |
| Provide an overview of what to expect in a full financial statement audit. Discuss the impact of Army's business process and information technology systems in the audit. 1 CPE |
| *Mo Kohistani & Scott Smith; Senior Manager; Ernst & Young* |
| **#14** | **Balance Sheet: Asset and Liability Accountability** |
| Overview of key asset and liability line items impacting the Army's balance sheet including results of line item examinations and progress to date in achieving auditability. 1 CPE |
| *Candice Baptiste & Scott Smith; Senior Manager; Ernst & Young* |
| **#15** | **The Power of the 8s** |
| 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. 1 CPE |
| *Dave Weinberg, COL (Ret); Principal; Kearney & Company* |
| **#16** | **Biased: Who Me?** |
| We all have internal biases that affect our daily activities. Using a series of examples and audience surveys, this presentation will show how several of these basic human biases can alter our ability to provide unbiased information to senior leaders, difficulties leaders have in receiving an unbiased message, and ways of minimizing their influence. 1 CPE |
| *Robert (Rob) Bickel, PhD; Technical Director; Air Force Financial Management Center of Expertise* |

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| **#17** | **The Value of Decision Support** |
| 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. 1 CPE |
| *Robert (Rob) Bickel, PhD; Technical Director; Air Force Financial Management Center of Expertise* |
| **#18** | **Risk: It's More Than Modeling** |
| We've all heard about the importance of including a risk assessment in our financial estimates. However, risk is more than adjusting the numbers and should be an integral part of the decision making process. This presentation will discuss how many risks are not financially based, how to include non-financial risk in an overall analysis, and how to make risk relevant to the final recommendation/decision. 1 CPE |
| *Robert (Rob) Bickel, PhD; Technical Director; Air Force Financial Management Center of Expertise* |
| **#19** | **Fact-Based Decision Making** |
| 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. 1 CPE |
| *Robert (Rob) Bickel, PhD; Technical Director; Air Force Financial Management Center of Expertise* |
| **#20** | **Communication** |
| This presentation focuses on improving communication. Discussion starts with identifying roadblocks to effective communication. Next, the presentation suggests some techniques to help improve communication. 1 CPE |
| *Jerardo A. Perez; Profession of Arms Center of Excellence (PACE)* |
| **#21** | **ECHO - Empathy, Charity, Humility, and Optimism** |
| ECHO is a way to define what kind of person you are. It stands for Empathy, Charity, Humility, and Optimism each of us possess. Just as a voice will echo back to you in the right environment, the same holds true for other echos...attitude, loyalty, sincerity, honesty, and trust. Each of us chooses what kind of echo we create at work, home, and with friends. Our ECHO presentation explains the concept, and challenges listeners to reflect on their own echos. 1 CPE |
| *Jerardo A. Perez; Profession of Arms Center of Excellence (PACE)* |
| **#22** | **Trust** |
| Trust is a presentation on this complex issue. While it is easy to see when trust is not present, folks struggle to define or describe it. So, the presentation focuses on the definition of trust, why it is important for relationships...person to person or person to org. We close out by discussing those things that are "trust busters" and provide some ways to build trust by using some recommended PACE tools. 1 CPE |
| *Jerardo A. Perez; Profession of Arms Center of Excellence (PACE)* |
| **#23** | **Mentoring and Coaching** |
| This presentation focuses on what mentoring and coaching are and how they compare. A combination of mentoring and coaching is critical for growing leaders in your organization. A critical element for both processes is feedback. So, the presentation closes with a discussion on feedback challenges and techniques/tips to improve feedback. 1 CPE |
| *Jerardo A. Perez; Profession of Arms Center of Excellence (PACE)* |

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| **#24** | **Microsoft Power Business Intelligence** |
| Power BI is a suite of business analytics tools that deliver insights throughout your organization. Learn how to connect to hundreds of data sources, simplify data prep, and drive ad hoc analysis. Learn how to produce beautiful reports, then publish them for your organization to consume on the web and across mobile devices. Learn how to create personalized dashboards with a unique, 360-degree view of their business. 1 CPE |
| *Joshua Cherkinsky, Chief Executive Officer; Cherktek Consulting, LLC* |
| **#25** | **Microsoft Excel Pivot Table Tutorial** |
| This course is designed for beginner and intermediate Excel users. Topics covered include: creating, formatting, and setting up Pivot Tables; Pivot Table drag and drop; customizing Calculated fields; best uses for Slicers; applying conditional formatting; building a Pivot Chart. Our goal is to introduce and refresh analysts with this underutilized, powerful, and time saving capability. All training materials will be posted one week before the event. The website is http://www.teksouth.com/teksouth-desktop-tools. 1 CPE |
| *Willie Barreto; Desktop Analytics Trainers/Developers; Teksouth Corporation* |
| **#26** | **MS Excel Tips and Tricks** |
| This course will provide shortcuts for everyday use of Excel 2010/2013. 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/formulas. Our goal is to share these great skills with everyday Excel users to allow time for actual ANALYSIS! All training materials will be posted one week before the event. The website is http://www.teksouth.com/teksouth-desktop-tools. 1 CPE |
| *Albert Yoo; Desktop Analytics Trainers/Developers; Teksouth Corporation* |
| **#27** | **Top 10 Tips & Tricks for Windows 10 - Office 2013/2016 Excel & PowerPoint** |
| We'll cover some of the best tips for Windows 10 that can be useful for Gov't computers. We will share some past and present best tips and tricks for Office Excel and PowerPoint that will change your everyday use. Here a few of the new features you'll learn about: New Charts that came out with PowerPoint 2016, new features with Excel 2013/2016 using Pivot Tables, 2 brand new features that cross all Office 2016 software plus many more old tricks most people don't know about. You won't leave disappointed and we'll send everything to you using AMRDEC Safe. 1 CPE |
| *Micah McLauchlin; Desktop Analytics Trainers/Developers; Teksouth Corporation* |
| **#28** | **FM Succession Planning** |
| A strategic perspective on succession planning to include developing people, career planning, assessing talent, mentoring and the challenges to succession planning. 1 CPE |
| *James Cerda; Director of Workforce Management & Executive Services; Assistant Secretary of the Air Force (Financial Management & Comptroller)* |
| **#29** | **Writing a Winning Resume for Federal Jobs** |
| Throw away that UA Jobs formatted resume! Did you know that federal government does not require a standard job application or resume? Learn how to write a winning resume for federal positions that helps you stand out and leaves the hiring manager wanting to know more about you! |
| *Crystal Moore, CDFM; Director, Financial Management & Comptroller Career Field Team; Air Force Personnel Center* |
| **#30** | **Effective Interviewing** |
| You are on an interview every day! This course is an interactive presentation with demonstrations and provides you a proven method to help you prepare for interviews in a way that makes you feel better prepared and less nervous for any interview. |
| *Crystal Moore, CDFM; Director, Financial Management & Comptroller Career Field Team; Air Force Personnel Center* |
| **#31** | **Air Force Civilian Career Development and the Career Planning Cycle (CPC)** |
| The skies the limit with your career! This workshop will highlight exceptional training, education, and experiential opportunities available within the Air Force Financial Management career field. Not all opportunities require mobility and there is room to grow where you are planted, if that is your desire. Additionally, the workshop highlights how to create an individual development plan and enter the Career Planning Cycle (CPC) to gain valuable personalized feedback from leadership. |
| *Crystal Moore, CDFM; Director, Financial Management & Comptroller Career Field Team; Air Force Personnel Center* |
| **#32** | **Leadership in Maintaining Your FM Certification** |
| Learn the most effective way to maintain your DFMCP. Maintaining your certifications can be difficult without a plan. You worked hard to earn them. Learn how Leadership can teach you efficient ways to keep your certifications. |
| *John Gioeli; Director, Government Programs; Becker Professional Education* |
| **#33** | **Thrift Savings Plan and Taxes** |
| *TO BE PROVIDED WHEN AVAILABLE* |
| *Richard Ure; Chartered Federal Employee Benefit Consultant; Federal Benefits and Retirement* |
| **#34** | **Social Security** |
| *TO BE PROVIDED WHEN AVAILABLE* |
| *Richard Ure; Chartered Federal Employee Benefit Consultant; Federal Benefits and Retirement* |
| **#35** | **FERS/CSRS Pension Benefits and Retirement** |
| *TO BE PROVIDED WHEN AVAILABLE* |
| *Richard Ure; Chartered Federal Employee Benefit Consultant; Federal Benefits and Retirement* |
| **#36** | **Health Insurance Into Retirement** |
| *TO BE PROVIDED WHEN AVAILABLE* |
| *Richard Ure; Chartered Federal Employee Benefit Consultant; Federal Benefits and Retirement* |
| **#37** | **Federal Employees Retirement System Retirement Plan** |
| This seminar will help you understand; Eligibility to Retire (Standard, VERA, VESIP, RIF); Best time to retire; How much my annuity will be worth; How to qualify for the FERS Bonus annuity; Survivor Benefit Rules; Military and civil service redeposit requirements; how the FERS Supplement works, and Health Insurance. |
| *Brad Tobler & Don Lindberg; Benefits Advisors; Federal Employee Benefits* |
| **#38** | **Thrift Savings Plan** |
| This seminar will help you understand the difference between TSP Traditional, TSP Roth, Inter-fund and Contribution Allocations, the matching program, Catch-up, and a description of each fund (G,F,C,S,I) in the program. Finally, we will discuss loans and withdrawals. |
| *Ron McLane; Benefits Advisor; Federal Employee Benefits* |
| **#39** | **Social Security and Federal Employees' Group Life Insurance** |
| This seminar will compare the options of signing up for Social Security at the earliest date (62 years old) and at your full retirement age; the earnings test; and carrying Federal Group Life Insurance basic or optional (a, b, or c) coverage into retirement. |
| *Ron McLane; Benefits Advisor; Federal Employee Benefits* |

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| **#40** | **Toastmasters: Who We Are** |
| We are San Antonio Sociable Toastmasters. We are a club dedicated to fostering the growth of speakers of varying skill. In our presentation, we aim to present a brief history of Toastmasters and its importance in professional growth. We would like to use a majority of our time presenting an example meeting where we will demonstrate how a typical session would progress. Our presentation will include a slide show, followed by a demo meeting given by current members of the club. There will be voluntary crowd involvement and a short Q & A Session at the end. |
| *Colin D. Watts; US Air Force* |
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