



San Francisco Financial Center  
**CUSTOMER ADVISORY BOARD CONFERENCE**  
*August 26-27, 2009 - Portland, Oregon*



**AGENDA**  
**Wednesday, August 26, 2009**

- 8:00 – 8:30**                    **Registration / Continental Breakfast**
- 8:30 – 9:00**                    **Welcome and Introductions**  
Philip Belisle, Regional Director, San Francisco Financial Center,  
Financial Management Service
- Lake Gardner, Manager, General Accounting Section, National Business Center  
Chairperson, San Francisco Financial Center (SFC) Customer Advisory Board (CAB)
- 9:00 – 9:15**                    **Welcome to the Bonneville Power Administration**  
David Armstrong, Executive Vice President and Chief Financial Officer,  
Bonneville Power Administration
- 9:15 – 10:00**                **Insiders View of the U.S. Treasury’s Economic Recovery Effort**  
Wanda Rogers, Assistant Commissioner, Management, Financial Management Service
- 10:00 – 10:30**                *Group Photo & Morning Break*
- 10:30 – 11:15**                **Collections and Cash Management Modernization Update**  
Sheryl Morrow, Assistant Commissioner, Federal Finance, Financial Management Service
- 11:15 – 12:00**                **Transaction Reporting System (TRS) Update**  
Monica Shelton, TRS Deputy Project Manager, Financial Management Service  
Kay Gilley, TRS Agency Outreach Lead, PNC Bank
- 12:00 – 1:00**                    *Lunch*
- 1:00 – 1:45**                    **Environmental Protection Agency – San Francisco Region IX Office**  
Selected as one of the “best places to work” in the federal government
- 1:45 – 2:45**                    **Agency Updates (4 minutes per agency)**  
Suggested topic: What is your agency doing to make it one of the best places to work  
in the federal government?
- 2:45 – 3:00**                    *Afternoon Break*
- 3:00 – 4:00**                    **Agency Panel Discussion**  
Facilitator - Connie Sanborn, Chief, Accounting Operations, National Business Center  
How is your agency affected by the American Recovery and Reinvestment Act of 2009?
- 4:00 – 4:15**                    **Group Dinner & Travel Logistics**
- 6:00**                              **Local restaurant in downtown Portland**



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**AGENDA**  
**Thursday, August 27, 2009**

- 8:00 – 8:30**                    **Continental Breakfast / Networking**
- 8:30 – 9:15**                    **Bonneville Power Administration – Agency Profile**  
Pilar Rowe, Manager, Disbursements, Bonneville Power Administration  
Bena Kluegel, Manager, Cash & Treasury Management, Bonneville Power Administration
- 9:15 – 10:00**                **Presidio Trust of San Francisco – Agency Profile**  
Carla Armstrong, Controller, Presidio Trust of San Francisco
- 10:00 – 10:15*                *Morning Break*
- 10:15 – 11:00**                **Identity Theft – What You Can Do To Reduce It**  
Dennis Fernald, Supervisor, U.S. Postal Inspection Office, Portland Office
- 11:00 – 12:00**                **User Provision IBM Tivoli Identity Management (ITIM) – What You Need To Know**  
Michael P. Moran, Director, Data Access Control Division, Financial Management Service  
Brenda Alexander, ITIM Branch Manager, Financial Management Service
- 12:00 – 1:00*                *Lunch*
- 1:00 – 1:15**                    **Disaster Recovery Workgroup Update**  
Joe Paule, Project Co-Lead
- 1:15 – 2:00**                    **New Workgroup Project – Security Access/Enrollment Breakout Session**  
New Workgroup Project Facilitator – Lake Gardner, SFC CAB Chair  
Breakout Session Facilitators - TBD
- Enrollment Processes
  - System Access
  - Customer Service
- 2:00 – 2:15*                    *Afternoon Break*
- 2:15 – 3:00**                    **Breakout Sessions – Results & Conclusions**
- Assemble Workgroup Committee
  - Elect Project Lead and Co-Lead
- 3:00 – 3:30**                    **CAB Business Meeting – Updates & Future Initiatives**
- Closing Remarks
  - Next CAB Conference – See you in San Francisco