



San Francisco Financial Center Customer Advisory Board Conference

February 26-27, 2008 – Hyatt Regency Albuquerque, New Mexico

Tuesday, February 26, 2008:

- 7:30 - 8:00** **Registration / Continental Breakfast**

- 8:00 – 8:30** **Welcome to the Albuquerque Customer Advisory Board Conference**
Philip Belisle, Regional Director, San Francisco Financial Center
Opening Introductions -
David Martin, Chairperson, San Francisco Financial Center Customer Advisory Board

- 8:30 – 9:15** **Collection and Cash Management Modernization (CCMM) Initiative**
Sheryl R. Morrow, FMS Assistant Commissioner, Federal Finance

- 9:15 – 9:45** ***CAB Group Photo & Morning Break***

- 9:45 – 10:45** **Governmentwide Accounting (GWA) and Reporting Modernization Project**
Mike Norman, Agency Liaison, Governmentwide Accounting

- 10:45 – 11:00** ***2nd Morning Break***

- 11:00 – 11:45** **PAM – RFC Payment Processing and Treasury Account Symbol-Business Event Code (TAS-BETC) - Jesse Chavez, COTR, Kansas City Regional Financial Center**

- 11:45 – 12:00** **CAB Business Reminder – Dinner Update and Election of Vice Chairperson**

- 12:00 – 1:00** ***Lunch***

- 1:00 – 2:30** **Succession Planning – Optimizing Organizational Performance Workforce and OPM/Western Management Development Center - Where Government Develops Great Leaders – Bud Paulson, Director, Western Management Development Center**

- 2:30 – 3:00** **IRS Leadership Succession Review – What worked and did not work!**
David Martin, Former Chief, Accounting Operations, Internal Revenue Service

- 3:00 – 3:15** ***Afternoon Break***

- 3:15 – 3:45** **OPM Best Practice Presentation**
Meyer Persow, Disbursements Policy Officer, Financial Reporting & Policy Group, Office of the Chief Financial Officer, Office of Personnel Management

- 3:45 – 4:15** **CAB Disaster Recovery Workgroup Updated Report**
Lake Gardner, Project Lead, and Joe Paule, Project Co-Lead

- 5:00** ***Hospitality/Group Dinner: High Finance Restaurant at Sandia Peak - Ride the world’s longest tram to the peak of fine dinin***



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PROGRAM AGENDA

Wednesday, February 27, 2008:

- 7:30 – 8:00** **Networking Session / Continental Breakfast**
- 8:00 – 9:30** **Agency Updates (4-5 minutes per agency)**
- 9:30 – 9:45** ***Morning Break***
- 9:45 – 10:30** **Collections Success Story at the National Business Center**
Connie Sanborn, Chief, Accounting Operations Division, Financial Management Directorate, National Business Center, Department of the Interior
- 10:30 – 11:15** **We Are Shaping Our Future – Social Security Administration**
Russia Williams, Fiscal Management Analyst, and Theresa Wilkerson, Financial Management Analyst, Social Security Administration
- 11:15 – 11:30** ***2nd Morning Break***
- 11:30 – 12:00** **FMS Programs at Work at Tricare Management Activity**
Evelyn Young, Certifying Officer/Accountant, Tricare Management Activity, Department of Defense
- 12:00 – 1:00** ***Lunch / Networking Session***
- 1:00 – 1:30** **Fiscal Management of the National Atomic Museum**
Charles Loeber, Engineer/Historian, & President, National Atomic Museum Foundation
- 1:30 – 2:30** **CAB Business Meeting**
 - Selection of new CAB Workgroup Project
 - Election of new CAB Vice Chairperson
 - The National Atomic Museum Tour – Travel & Logistics Update
 - Next CAB Meeting - Payment Management Customer Conference
August 26-28, 2008 - Chicago, Illinois
 - Closing Remarks
- 2:30 – 2:45** **Travel to the National Atomic Museum**
- 2:45 – 4:15** **Depart tour of the National Atomic Museum**