

TRAINING AGENDA		
Thursday, December 14, 2017		
7:45am	Registration Desk Open <i>Foyer Area</i>	
8:30am – 8:35am	Sheena Kennedy, President, Charleston AGA – Opening Remarks <i>Drew Conference Center Room</i>	
8:35am – 9:35am	Ann Ebberts, “Data Transparency, A New Way of Life” <i>Drew Conference Center Room</i>	
9:35am – 9:55am	Coffee Break with Sponsors <i>Foyer Area</i>	
9:55am – 11:10am	Project Management Panel Session Moderated by Peg Kendra, The MIL Corporation <i>Drew Conference Center Room</i>	
11:10am – 11:20am	Break/Transition	
11:20am – 12:10pm	Breakout Session Stan Van Ostran, “Keeping Freight Moving” <i>Drew Conference Center Room</i>	Breakout Session Elizabeth Amory, Debt Collection <i>Room 110</i>
12:10pm – 12:35pm	Lunch <i>Drew Conference Center Room</i>	
12:35pm – 1:40pm	Steve Hodlin, Continuous Improvement <i>Drew Conference Center Room</i>	
1:40pm – 1:50pm	Break/Transition	
1:50pm – 3:05pm	Breakout Session Auditing Panel Session Moderated by Bryan Hall, CGI Federal <i>Drew Conference Center Room</i>	Breakout Session Leadership Panel Session Moderated by Tim Ceschin, IFAS, LLC <i>Room 110</i>
3:05pm – 3:15pm	Break/Transition	
3:15pm – 4:30pm	Ed Lugo, Ethics in Leadership <i>Drew Conference Center Room</i>	
4:30pm – 4:35pm	Closing Remarks <i>Drew Conference Center Room</i>	
4:45pm	Happy Hour at Wild Wing Cafe	

SOCIAL EVENT

Happy Hour at Wild Wing Cafe

The Charleston AGA chapter welcomes chapter members and PDT attendees to a Happy Hour Networking Event at the Wild Wing Cafe. Please stop in after the PDT to enjoy food and beverages with your fellow Charleston AGA members and PDT attendees!

Wild Wing Cafe: 7618 Rivers Ave, North Charleston, SC 29406

<http://www.wildwingcafe.com/locations/north-charleston-sc>

P: (843) 818-9464

PDT Speaker Biographies

Elizabeth Amory

Attorney Adviser, U.S. Department of State

Elizabeth Amory is a graduate of Rutgers University and the University of Virginia School of Law. Since September 2001 she has served as an Attorney Adviser in the Office of the Legal Adviser for the U.S. Department of State. In that capacity, Ms. Amory has advised Department management on a wide range of issues from the consolidation of the Department's global financial operations to the administration of the U.S. Refugee Admissions Program, and has represented the United States Government before administrative bodies, at the United Nations, and in other international forums. From 2011 to 2012, Ms. Amory served on a detail to the National Security Staff in the Executive Office of the President as the Director for Human Rights and Refugees. Ms. Amory currently lives in Charleston, S.C.



Marie Bedard, PMP

*Past President, Project Management Institute (PMI) Charleston
Operations Lead, SPAWAR*

Mrs. Bedard obtained PMP certification in September 1999 and is among the Charter members of PMI Charleston. She served as the VP of Membership at the first PMI Charleston Chapter meeting held in May 2000. Since that auspicious start, Marie has served in numerous board positions including Past President. Twenty years of professional project management experience includes: project management consulting for a variety of government agencies; establishing and managing a contracting and project management office for a financial institution; and Navy civilian service. Marie currently is the Operations Lead for the Defense Health IT Division at SPAWARSCEN Atlantic, a \$350M Department of Health IT related program supporting the Defense Health Agency among others. Programs supported include efforts in cyber defense, big data/data analytics, IT infrastructure modernization, IT/IS application development and deployment, and IT infrastructure sustainment.



Ann Ebberts, PMP

CEO, AGA National

Ann has more than 30 years of management consulting experience with the federal government in the areas of financial management, financial process improvement, program evaluation, shared services, and in providing project management and advisory support services for the implementation of accounting, acquisition, travel and grant management systems (ERP).

She has spent the last 26 years of her career at Booz Allen Hamilton, recently retiring after serving as a Vice President in the Financial Services group. She began her career providing

PDT Speaker Biographies (continued)

financial support to many large Navy shipbuilding and communications engineering programs. Since 1995, she has focused her attention on the civilian agencies, developing new clients, building high performing teams, and developing and executing strategic plans for providing management and technical support services to organizations including the USAID, EPA, GSA, U.S. Departments of Agriculture, Commerce, Justice, Labor, State and VA, and most recently to World Bank, International Monetary Fund, InterAmerican Development Bank and Fannie Mae. Internal to Booz Allen, she also provided leadership to the Financial Analyst functional community of practice, identifying competencies and applicable certifications required and supported monthly topical learning sessions as well as serving in several other governance roles.

Ann has a B.S. degree in Marketing Management from Virginia Tech, an M.S. Degree in Systems Management from the University of Denver, and is a certified Project Management Professional. She has been a member of AGA for more than 15 years and served as Booz Allen's representative to the Corporate Partner Advisory Group (CPAG).

She lives in Alexandria with her husband Alan and together they have four grown children.



Darin Gerdes, Ph.D.

Associate Professor of Management, CSU

Darin Gerdes is a leadersmith. His passion is applied leadership education, and he has spent most of his professional life cultivating leadership in others. He is currently the Director of Education for Great Business Networking (GBN). He developed the Leadership track for the MBA program at Liberty University before becoming the Director of Graduate Programs in the School of Business at Charleston Southern University where he designed the Master of Arts in Organizational Leadership.

He served for three years as a member of his local public school board and he presently serves as the president of the South Carolina Home Education Association (SCHEA). He has taught at a half dozen colleges and universities including Liberty University, Regent University, Charleston Southern University, Geneva College, and LCC International University in Lithuania. He has given lectures internationally in four Eastern European countries. Dr. Gerdes is a member of Psi Chi ($\Psi\chi$), the National Honor Society for Psychology and Sigma Beta Delta ($\Sigma\beta\Delta$), the International Honor Society for Business. He is a member of the Academy of Management (AOM) and he serves as an officer for the South East Case Research Association (SECRA).

Dr. Gerdes has earned undergraduate degrees in government and psychology from Liberty University, a Masters of Business Administration (MBA), a Master of Arts in Public Policy (MA), and a Ph.D. in Organizational Leadership from Regent University. He lives in North Charleston, SC with his wife and 6 children.

PDT Speaker Biographies (continued)



Jim Harmon

Project Manager at Spry Methods

A certified Project Management Professional (PMP) with over 40 years in a leadership and management role within the U. S. Navy and as a defense contractor. A cryptologic operations professional with over 40 years of experience in the Electronic Warfare field, specifically cryptology, tactical C4ISR, information operations, and training. Currently serving as Project Manager for two SSC LANT projects. Experienced in BD and Capture Management (EMSolutions, SAIC and Booz Allen). Mr. Harmon has served as Program and Project Manager for over 30 projects supporting the Space and Naval Warfare Systems Center, Charleston (SSC-C) and the

U.S. Coast Guard. Also a Master Training Specialist (MTS) and highly skilled in curriculum development, training management, and instruction.

Mr. Harmon is a Vietnam War veteran. His specialties include program/project management; training; business development; process management and control; leadership and management oversight; tactical cryptologic operations management.



Dr. Steven F. Hodlin

Vice President, Blackbaud, Leadership & Operational Excellence

Steven Hodlin is currently Vice President of Leadership Development & Operational Excellence for Blackbaud, Inc. where he is responsible for the quality processes and leading the quality improvement initiatives, as well as building the Blackbaud leadership pipeline. Previously, he served as Vice President of Performance Excellence for Video Gaming Technologies, Inc. In that role, Steve led all quality and performance improvement activities. Through his leadership, VGT was recognized by the state of Oklahoma with three quality awards based on the Baldrige Performance Excellence

Criteria: Commitment Award, Achievement Award, and Excellence Award. VGT also received the Performance Excellence Commitment Award from the state of Tennessee. VGT was recognized as having best practices in measurement and analysis agility, and customer service by the Oklahoma Quality Foundation. His experience includes Vice President of Business Excellence at DST Output, where he was responsible for leading the enterprise's business excellence and lean six sigma initiatives. DST Output was a three-time recipient of Industry Week's Top Ten Best Plants in North America.

Steve has led quality and process improvements in numerous industries including financial services, semiconductor equipment, data communications and internetworking, cutting tools, electronics, and defense. He has led three organizations to state quality awards, based upon the Baldrige performance excellence criteria, and led an organization to the U.S. Senate Productivity Award.

PDT Speaker Biographies (continued)

Steve has served as a senior judge, an examiner trainer, and as a member of the board of directors for MassExcellence (Massachusetts Quality Award). He has developed several national training modules related to the Baldrige Performance Excellence criteria, as chartered by a grant from the Department of Commerce.

Steve has served as a senior examiner and alumni examiner for the Malcolm Baldrige National Quality Award since 1994. He was a senior examiner for the Maryland U.S. Senate Productivity Award, training the Maryland state examiners in this process.

Steve is certified by the American Society for Quality (ASQ) as a Software Quality Engineer, Six Sigma Black Belt, Manager of Quality/Organizational Excellence, Quality Engineer, Reliability Engineer, and Quality Auditor. He is also certified as an executive coach, career coach, business coach, and balanced scorecard professional. He has been an edit reviewer for ASQ Quality Press since 2004.

Steve holds a B.S. in Industrial Engineering and Operations Research from the University of Massachusetts, an MBA from Babson College, and a Ph.D. in Management from Walden University, specializing in Leadership and Organizational Change. He has testified in U.S. Congress as a quality expert, is a frequent speaker at conferences, and has had some of his work published.



Edwin (Ed) Lugo

Visiting Professor, Department of Criminal Justice - The Citadel

Adjunct Instructor, Technical College of the Low Country

U.S. Secret Service - Special Agent In Charge – Retired

Mr. Edwin (Ed) Lugo is a Visiting Professor in the Criminal Justice and the Fine Arts Department at The Citadel. He is also an Adjunct Instructor at the Technical College of the Low Country.

Due to his specialization in Forensic Investigative Studies, Ed often teaches Interdisciplinary courses that address the evolving need in preparing supervisory personnel for jobs that require creative, imaginative, and inventive effort while working in a technologically oriented environment.

Professor Lugo had a long career with the United States Secret Service which began in 1985. During his tenure, he was recognized as “Having coordinated the most effective anti-counterfeiting effort in the history of the Secret Service”. Career assignments included duty on the Presidential Protective Detail and Resident Agent in Charge in Mexico City, Mexico and Bogota, Colombia. He ended his tenure with the Federal Government in 2007, as the Special Agent in Charge of the Secret Service Office in Baltimore, Maryland.

PDT Speaker Biographies (continued)



Stacy Mack

Project Manager, Liberty Business Associates (Liberty)

Stacy has been a Project Manager at Liberty since May 2015. She ensures client requirements are met through managing the day-to-day activities of over 40 employees on client site. She also provides direct support to another client, participates in back-office initiatives, and contributes to business development efforts.

Prior to joining Liberty, Stacy was a Project Manager at eGroup, a Systems Analyst for the MIL Corporation supporting Global Compensation at the US Department of State, and the PMO Manager at South Carolina Federal Credit Union. She started her career in Project Management at SCRA/ATI in various project support roles, beginning with her first job out of college as an Administrative Assistant.

Stacy has a Bachelor of Arts degree from the College of Charleston, where she was a double major in Philosophy and Communications. After earning a PMP in 2004, she served in various roles on the PMI Charleston Chapter Board of Directors for about 10 years, including a term as Chapter President.

A Charleston resident since 1991, Stacy lives on James Island with her husband, Adam, and two very mischievous cats



Robert Marten

Project Manager, Johnson & Johnson

Robert Marten currently manages the development of enterprise level software systems at Johnson & Johnson Insurance in Mount Pleasant. Robert holds a systems engineering management degree from the United States Air Force Academy where he graduated in 2006. After graduation, he was given the opportunity to develop a unique perspective on project management while serving as an Aircraft Commander leading cargo and intelligence combat missions in the United States Air Force.

After leaving the military, Robert gained experience managing the development of information systems while working as the Director of Information, Marketing and Public Relations for the William Jessup University Athletic Department. Robert currently holds both project management professional (PMP) and agile certified practitioner (ACP) certifications from the Project Management Institute.

PDT Speaker Biographies (continued)



Lisa Metheney

Deputy District Engineer for Programs and Project Management, US Army Corps of Engineers

Lisa Metheney serves as the Deputy District Engineer for Programs and Project Management for the U.S. Army Corps of Engineers. Charleston District, a position she assumed January 2014 where she is leading 250 employees around the state in developing and facilitating innovative and effective solutions that meet the engineering, environmental and emergency management needs for South Carolina, the U.S. Army and the nation.

A 24-year Corps veteran, Metheney oversees projects and services in an area spanning 32,000 square miles from the coast to the foothills of South Carolina, encompassing seven congressional districts, valued at approximately \$350 million annually to sustain navigation economics that are vital to the nation, while managing coastal risk reduction, ecosystem restoration, regulatory functions, emergency operations, military construction, and interagency and international services mission areas.

Metheney previously served as Assistant Chief, Programs and Project Management Division in Charleston, from June 2009 to January 2014. In this role, she supervised and managed product and service delivery valued at approximately \$275 million annually for civil works and military construction clients. She facilitated the effort with the Corps' national civil works transformation to modernize and streamline the Charleston Harbor Post 45 Deepening Feasibility study, which is one of the President's "We Can't Wait" initiatives. She participated with the Vice President's visit to Charleston as part of his tour of ports along the eastern seaboard to highlight this nationally significant infrastructure project.

Previous to this position, Metheney served as a planner, economist and a project manager for both civil works and military construction projects in the Huntington and Europe Districts. Metheney's focus in Huntington was on flood damage reduction projects, including major studies along the Greenbrier, Tug, Levisa Fork River and the West Columbus, Ohio, Local Protection project. She has also been active with the Corps' emergency management response to many natural disasters, including Hurricane Ivan and Dennis, as well as the flooding in West Virginia in 1993.

PDT Speaker Biographies (continued)



Bryan Nelms

Senior Manager, Kearney & Company

Bryan Nelms is a Senior Manager in Kearney & Company's Charleston office. He has more than 10 years of accounting and audit experience, including financial statement audit for several Department of Defense (DoD) components and commercial entities within employee benefit, construction contractor and real estate industries. Additionally, he has provided consulting services such as audit remediation and operational support for the National Credit Union Administration (NCUA) and Department of Commerce, and has participated in various research projects to develop white/position papers for Federal agencies.

Mr. Nelms has led trainings on Accounting Standards Codification (ASC) 820 - Fair Value Measurements and Disclosures, focused on Federal Accounting Standards Advisory Board (FASAB) requirements, and worked to ensure compliance with industry standards including those of the U.S. Department of Labor (DOL), Government Accountability Office (GAO) Financial Audit Manual (FAM) and Office of Management and Budget (OMB) Circulars.

Bryan most recently became a member of the Charleston AGA chapter this past November. He holds his B.S. in Accounting from the Pennsylvania State University. He is a Certified Public Accountant (CPA) licensed in the state of Virginia, as well as a Certified Information Systems Auditor (CISA).



Mark Poe

Project Management Professional, SPAWAR

Mr. Poe is an experienced Project Manager with a demonstrated history of working in the Defense & Space industry. He is skilled in managing large scale data driven clinical decision support systems for the Military Health System, U.S. Department of Defense. He has expert level knowledge in Earned Value Management and Capability Maturity Model Integration (CMMI).



Maxwell Rollins Ph.D.

Associate Professor of Business Administration, CSU

Dr. Rollins received his bachelor of science in applied mathematics in economics from the College of Charleston, a master of arts in education with a concentration in mathematics from The Citadel and a master in business administration from Charleston Southern University. He earned the Doctor of Business Administration in Leadership from Liberty University in 2017. Dr. Rollins was named the Director of Graduate Program in Business at CSU in November 2017.

PDT Speaker Biographies (continued)

Professor Rollins has taught in the mathematics department and the School of Business at Charleston Southern. Currently, he teaches undergraduate courses in economics, management, finance, statistics and the introductory business course, The World of Business. He serves as the president of the honor society, Sigma Beta Delta. He also has more than 30 years of entrepreneurial experience.

Skip Sergent

Director, Financial Oversight and Quality Assurance, U.S. Dept. of State

Skip Sergent has served in the U.S. Government financial management field since 1984 in both military and civilian capacities. Upon entry into the U.S. Air Force in 1984, he began his career as a Military Pay Technician. While in the Air Force, he also served in travel pay, quality assurance, cashiering, accounting, and budget. He has served as a deployed paying agent with the 4th Tactical Fighter Wing in Oman and Saudi Arabia during Operations Desert Shield and Desert Storm in 1990 – 1991 and also with the 437th Military Airlift Wing during Operation Uphold Democracy in Haiti in 1994 - 1995. Skip served on the Air Force Chief of Staff Operations Group from 1992 – 1994 preparing briefings, speeches, new force structure initiatives and Congressional testimony for the Chief of Staff of the U.S. Air Force. Upon relocating to Charleston, Skip left the Air Force in 1995 and began working at the U.S. Department of State Charleston Financial Service Center as a compensation plan analyst in FSN Payroll. After 13 years in FSN Payroll as a compensation plan analyst, lead compensation plan analyst and unit chief, he moved to the Office of Financial Oversight and Quality Assurance in 2009 as lead auditor. He began his current position as the Director of Financial Oversight and Quality Assurance in 2015.



Stanley R. Van Ostran

CFO, SC Ports Authority

Mr. Van Ostran joined the Authority in 2017 as the Chief Financial Officer. He earned a Juris Doctorate from the University of Tulsa – College of Law and a degree in Business Administration and Computer Programming from Missouri Southern State University. Mr. Van Ostran is an Attorney, Certified Public Accountant, Certified Internal Auditor, Chartered Global Management Accountant, Certified Financial Services Auditor and Certified Fraud Examiner and holds a Certificate in Risk Management Assurance. He is also an Accredited Airport Executive and International Airport Professional. Mr. Van Ostran is a member of the American Bar Association, American Institute of Certified Public Accountants and the

Institute of Internal Auditors.

Mr. Van Ostran was Chief Financial Officer for the Metropolitan Nashville Airport Authority from 2008 – 2017. He was named CFO of the Year in 2012 by the Nashville Business Journal and Finance Professional of the Year in 2016 by Airports Council International. Mr. Van Ostran previously served in several management roles for the State of Oklahoma, including Comptroller of the Oklahoma Lottery Commission; Administrator and Chief Financial Officer for the Oklahoma Capitol Improvement Authority, responsible for bond financing of capital improvements for the State of Oklahoma; and Chief Financial Officer for the Oklahoma Department of Central Services, administering the statewide programs for purchasing, property, risk and fleet management. Mr. Van Ostran also served as in-house counsel for National American Insurance Company and senior auditor for McDonnell Douglas Corporation.

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Platinum Level Sponsors



The MIL Corporation

The MIL Corporation provides federal government agencies with outstanding professional services in the areas of financial management and systems, information technology, engineering services, and cybersecurity. We pride ourselves on fostering long-term partnerships with our clients and constantly seek innovative methods to achieve results. Our company culture embraces continuous improvement and we are CMMI Level 3 and ISO 9001 certified. We have over 170 employees in the Charleston area and have supported our Charleston clients for more than 20 years.

We are never satisfied with simply meeting the challenge. We strive to exceed our customers' expectations. For more information about our services, please contact Peg Kendra at pkendra@milcorp.com or 843-343-3702.



Haynes Incorporated

Haynes, Inc. is a financial services and management consulting firm, with specializations in accounting transactions, process improvement, information technology, and network support. The firm has offices in Maryland, Virginia, and South Carolina.

For more information about our services, please contact Floyd N. Haynes at fhaynes@haynesinc.com.

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For more information regarding IFAS, LLC, please contact Tabatha Turman at tturman@ifas-llc.com or Tim Ceschin at tceschin@ifas-llc.com.



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Program**

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AGA Charleston PDT Task Force



Sheena Kennedy, CMA, CGFM
Chapter President



Rebecca Helms
Chapter President-Elect



Megan Jones
Chapter Events Director



Peg Kendra, CGFM
Chapter CGFM Director



Stacy Johnson, CGFM
Chapter Education Director



Tim Van Parys
Chapter Secretary

CSU Campus Map

