



Fourth Annual AGA Charleston, SC

# PDT 2019

PROFESSIONAL DEVELOPMENT TRAINING

November 21, 2019



9200 University Blvd.

North Charleston, SC 29406

## EVENT SUMMARY

### Professional Development Training (PDT)

The AGA Charleston chapter is hosting its fourth annual Professional Development Training (PDT) on November 21, 2019 at Charleston Southern University. The event offers notable speakers, up to 8 hours of Continuing Professional Education (CPE) and opportunities for valuable networking. The PDT offers attendees educational sessions that are directly applicable to government financial operations.

## EVENT DATE

Thursday, November 21, 2019

## LOCATION

Charleston Southern University  
9200 University Blvd., North Charleston, SC, 29406

## ATTENDEES

### Who Should Attend the Training?

The PDT training will benefit government financial professionals from all levels of government, as well as their private sector partners. This includes:

- Accountants/Auditors
- Treasurers
- Budget Professionals
- Fraud Examiners
- Chief Financial Officers
- Financial Managers
- Business Analysts
- Comptrollers
- IT Professionals
- Program Directors

If you are involved in government financial management and accountability, then the AGA Charleston Professional Development Training is for you.

## BENEFITS

### Benefits of PDT

The PDT training will benefit government financial professionals from all levels of government, as well as their private sector partners. This includes:

- Up to 8 hours of Continuing Professional Education (CPE)
- Exceptional value; high quality and low cost CPE
- Learn from experienced industry leaders
- Network with fellow professionals
- Stay up-to-date on industry issues that affect your organization and your career
- Relevant topics designed to educate and inform

## AGA CHARLESTON

### Learn more about the AGA Charleston Chapter

The PDT provides an opportunity to learn more about AGA if you are not currently a member. Member application forms will be available at the AGA Charleston Membership table at the PDT. The current AGA Charleston Chapter Executive Committee (CEC) members will be on site to help answer any questions you have about the chapter.

## FEES

### Registration Fees

Attendee Type	Registration Fee
AGA Member	\$90
Non AGA Member	\$140
Student/Retiree Rate*	\$35
Group (5+) Rate**	\$90

\*Student rate is applicable to full-time students who are not employed.

\*\*Group rate applies to attendees from the same employer or the same professional organization where 5 or more employees/members attend.

## BREAKFAST/LUNCH

### Lunch Provided by AGA Charleston Sponsors

Join us for breakfast and lunch for the opportunity to network with colleagues. PDT attendees will be provided breakfast and lunch, funded by the AGA Charleston sponsors.

## SOCIAL EVENT

### Happy Hour at King Street Grille-Northwoods Mall

The Charleston AGA chapter welcomes chapter members and PDT attendees to a Happy Hour Networking Event at the King Street Grille-Northwoods Mall. Please stop in after the PDT to enjoy food and beverages with your fellow Charleston AGA members and PDT attendees!

King Street Grille: 2150 Northwoods Boulevard, North Charleston, SC 29406

<https://thekingstreetgrille.com/king-street-grille-at-northwoods-mall/>

P: (843) 824-5464

# TRAINING AGENDA

Thursday, November 21, 2019

7:45am	<b>Registration Desk Open (Breakfast available during check in)</b> <i>Foyer Area, 2<sup>nd</sup> Floor, Strom Thurmond Center</i>	
8:30am – 8:35am	<b>Megan V. Jones, President, AGA Charleston SC Chapter – Opening Remarks</b> <i>Gold Room-Strom Thurmond Center</i>	
8:35am – 9:35am	<b>Patrick A. Cowen, AGA National Governing Board Member, Sr. IT Auditor, City of Tallahassee, FL</b> <b><i>Why Internal Controls?</i></b> <i>Gold Room-Strom Thurmond Center</i>	
9:35am – 9:55am	Coffee Break with Sponsors <i>Foyer Area, 2<sup>nd</sup> Floor, Strom Thurmond Center</i>	
9:55am – 11:10am	<b>Senator Sean M. Bennett, Chairman, Senate Ethics Committee</b> <b><i>Wrapped Around the Axle</i></b> <i>Gold Room-Strom Thurmond Center</i>	
11:10am – 11:20am	Break/Transition	
11:20am – 12:10pm	Breakout Session <b>Eric C. Myers, Special Agent, DOS/OIG</b> <b><i>DOS-OIG Fraud Awareness Briefing</i></b> <i>Gold Room-Strom Thurmond Center</i>	Breakout Session <b>Christie Rainwater, Mayor of Hanahan</b> <b><i>Level Up: Performance and Productivity Improvement</i></b> <i>Room WCCL 102</i>
12:10pm – 12:35pm	<b>Lunch</b> <i>Gold Room-Strom Thurmond Center</i>	
12:35pm – 1:40pm	<b>Jeffrey C. Mounts, Deputy Comptroller of the Office of the Comptroller/Global Financial Services, Department of State</b> <b><i>Lessons Learned from the 2019 USG Shutdown</i></b> <i>Gold Room-Strom Thurmond Center</i>	
1:40pm – 1:50pm	Break/Transition	
1:50pm – 3:05pm	Breakout Session <b>Herbert Brown, Recognition Resources, LLC</b> <b><i>Culture, Engagement and Recognition: Elevating Your Team's Performance</i></b> <i>Gold Room-Strom Thurmond Center</i>	Breakout Session <b>Dr. Darin Gerdes, Professor of Management, CSU</b> <b><i>Leadership for Accountants</i></b> <i>Room WCCL 102</i>
3:05pm – 3:15pm	Break/Transition	
3:15pm – 4:30pm	<b>Greg Habib, Mayor of Goose Creek</b> <b><i>Leadership and Ethics: A View from an Elected Official</i></b> <i>Gold Room-Strom Thurmond Center</i>	
4:30pm – 4:35pm	<b>Peg M. Kendra, CGFM Certification Director, AGA Charleston SC Chapter – Closing Remarks</b> <i>Gold Room-Strom Thurmond Center</i>	
4:45pm	Happy Hour – <i>The King Street Grille, Northwoods Mall</i>	

## PDT Speaker Biographies



### **Senator Sean M. Bennett (R - Dorchester)**

*District 38 - Dorchester, Charleston, & Berkeley Counties*

Sean is President and CEO of Asset Integration Consultants, Inc. a comprehensive wealth management firm in Summerville, SC. A graduate of the University of South Carolina, Sean has been providing financial planning and wealth management assistance to individual & business clients since 1993. After completing his course work at College of Charleston, he was awarded the CERTIFIED FINANCIAL PLANNER™ (CFP®) designation by the Certified Financial Planner Board of Standards.

First elected in 2012, Sean represents District 38 which is made up of the greater Summerville, SC area to include Dorchester, Charleston, and Berkeley counties. He is a believer that South Carolina can become a significant economic engine in the southeast that can provide unlimited opportunities to all citizens. He has been recognized as an advocate of the business, education, and law enforcement communities, and strives to improve the national division that has gridlocked many government functions.

Sean serves on the Senate Finance, Fish, Game, and Forestry, Banking and Insurance, and Labor, Commerce and Industry standing committees and is Chairman of the Senate Ethics Committee. As well as the Special Joint Committee on Pensions, Department of Commerce Oversight Committee, Co-Chairman of the Conference of Tax Reform Committee, and is Chairman of the Department of Employment & Workforce Oversight Committee.

He is a Liberty Fellow, a Riley Fellow, a member of the Aspen Institute's Rodel Fellowship in Public Leadership, The American Enterprise Institute Leadership Network, and is an alumnus of Leadership South Carolina.

He is a member and Past President of the Summerville Rotary Club, Past Chairman of the Greater Summerville/Dorchester County Chamber of Commerce, Past President of the Summerville Catholic School Board and Past Chairman of the Charleston Regional Development Alliance (CRDA). He has also served on the boards of The Education Foundation, the Berkeley, Charleston, Dorchester Council of Governments (BCDCOG), Charleston Area Transportation Study Policy Committee (CHATS), Economic Leadership Council, and several charitable organizations.

Sean is a native of the South Carolina Lowcountry and is a veteran of the SC Army National Guard. He, his wife Tina, and daughters Haile & Hayden Grace reside in Summerville, SC and are members of St. John the Beloved Catholic Church. He and his family enjoy boating, kayaking, and attending sporting events.

## **Herb Brown**

*President, Recognition Resources, LLC*



Herb has over 40 years the employee recognition industry. Herb is President of Recognition Resources and is a Senior Director for HALO Recognition. He has assisted over 100 organizations integrate recognition into their employee engagement strategy.

Herb has been invited to speak to a variety of SHRM (Society for Human Resource Management) and ASHHRA (American Society for Healthcare Human Resources Administration) state and local chapters since 2011 on the topics of recognition, engagement and employee experience. He has contributed to SHRM chapter newsletters about how companies can maximize the benefit of their investments in building its culture with recognition. Herb served on the Sterling Workplace Award committee for the Greater Richmond SHRM chapter.

Herb is a graduate of Penn State University with a Bachelor of Arts degree in communications and has completed post graduate studies in counseling. He served eight years on the school board for the Unionville-Chadds Ford School District (PA), overseeing a variety of capacities including Board President.

His current volunteer activities include heading a Crisis Response Ministry team for Seacoast Church – West Ashley campus. Herb and his wife Susan live on Johns Island, SC and have two grown daughters. He enjoys golf, tennis, and reading – especially books on the Civil War.



## **Patrick A. Cowen**

*Audit Manager, Tallahassee City Auditor's Office*

Patrick Cowen is an Audit Manager with the Tallahassee City Auditor's Office where he has worked in internal auditing since 2010. Prior to becoming an Audit Manager, he served as the City's IT Auditor, and represents the City of Tallahassee on red and yellow book peer reviews throughout the country.

Patrick is currently a Director (for Chapters) on the AGA National Governing Board, the Tallahassee Chapter's National Council of Chapters representative, and has held various other roles for his local AGA Chapter. Patrick is a Certified Public Accountant, a Certified Internal Auditor, a Certified Information System Auditor, and holds an MBA and a BS in Communications from Florida State University. He is also a member of the Association of Local Government Auditors, the Institute of Internal Auditors, and ISACA where he serves as a mentor in the SheLeads Tech program.



## **Dr. Darin Gerdes, Ph. D**

*Professor of Management, Charleston Southern University*

Dr. Gerdes served for three years as a member of his local public schoolboard and he has served as a past president of the South Carolina Home Education Association (SCHEA), where he is still a member of the board. He also serves as the president of the South East Case Research Association (SECRA).

Dr. Gerdes has taught at a half dozen colleges and universities including Charleston Southern University, Columbia International University, Colorado Christian University, Geneva College, Liberty University, LCC International University in Lithuania, and Regent University. 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 the Christian Business Faculty Association (CBFA). Dr. Gerdes has an interdisciplinary background that includes undergraduate degrees in government and psychology from Liberty University, a Master of Business Administration (MBA), a Master of Arts in Public Policy (MA), and a Ph.D. in Org. Leadership from Regent University.

He was the recipient of the 2018 CBFA Teaching Award. He was also the recipient of the 2019 Best Case Award from SECRA.

He lives in North Charleston, SC with his wife and 6 children.



## **Christie Rainwater**

*Mayor, City of Hanahan*

Christie and her husband Mark have made Hanahan home as they raise their family of four children: Caleb, Daniel, Haley, and Zachary.

Christie was born and raised on Long Island, NY and moved to South Carolina in 2007. She has a degree in Business Administration from the State University of New York and a degree in Childhood Education from CW Post, Long Island University. She has worked in the business field as well as an elementary school teacher.

After the birth of her second son, Christie became a stay at home Mom and continues to hold that career as first in her life. In addition to her role as a homemaker, Christie is currently a small business owner as a Director with Pampered Chef and regularly works with her large team to support their success. Christie's husband Mark served in the United

States Air Force on Active Duty and in the Reserves and retired after 23 years of combined service. He is an engineer for a USAF contractor in the local area.

While her volunteer work does not bring in income, Christie considers helping others one of the greatest rewards in life. She leads in the Women's Ministry at her church in addition to volunteering in the Children's Ministry. She and Mark also have led a couples' small group for several years here in Hanahan. Christie also volunteers in one capacity or another at each of her kids' schools. Christie was elected in Hanahan City Council in 2017.



## **Gregory Habib**

*Mayor, Goose Creek South Carolina*

Greg Habib was elected as Goose Creek's Mayor in April of 2018, after serving on City Council for two years. Goose Creek has been Greg Habib's home since 1982, when his father transferred with the United States Navy.

Mr. Habib has been a visible member of the community, participating in numerous civic and professional organizations. In addition to serving as president of the Boys and Girls Clubs of the Lowcountry, he served on the board of directors for the Callen-Lacey Children's Shelter, has volunteered as a youth sports coach, and is a member of the Berkeley County Chamber of Commerce.

Mr. Habib is the General Manager for Charleston Steel and Metal, a locally owned metal reclamation facility, where he has worked since 2005. His leadership there includes executing all aspects of operations and logistics, plus sales, purchasing and strategic development. Prior to that, he spent 10 years at Trident Technical College, five as the Director of Career Services, where he guided students to meet the needs of local employers.

As a longtime Goose Creek homeowner, son of parents who retired in Goose Creek, and father of two sons who were raised in Goose Creek, Mr. Habib is committed to help the city reach its potential. He will draw on those connections and his experiences as an educator, business leader, and volunteer in his service on the Goose Creek City Council.

Mr. Habib is a 1986 graduate of Goose Creek High School. He subsequently earned a Bachelor of Arts in Political Science and a Master of Education in Higher Education from the University of South Carolina. He and his wife Ellen have two sons, Phillip and Coleman, both graduates of Goose Creek's Stratford High School.



## **Eric Myers**

*Special Agent, U.S. Department of State, Office of Inspector's General*

Eric Myers is a Special Agent for the U.S. Department of State's Office of Inspector General. A former English Department faculty member and Assistant Director of Academic Advising at Elizabethtown College, he began his law enforcement career in 2002 with the U.S. Department of the Interior in Sacramento, CA, including subsequent posts in Herndon and Reston, VA, and Washington, D.C.

Eric has been part of several significant investigations: 9/11; Jack Abramoff; "Sex, Drugs and Oil" scandal; Hillary Clinton's email practices at the State Department; and the Deepwater Horizon explosion, where he served as the lead agent for the Civil task force. He developed and oversaw the first ever workers' compensation fraud program for his previous agency. In addition to his investigative work, he trains agents in firearms and law enforcement control tactics, and he also teaches at the Inspector General Criminal Investigator Academy.

A native of PA, Eric currently resides in Charleston, SC, where he enjoys coaching Little League baseball, exploring the Holy City's rich history (and fine craft breweries), and cheering on the Alabama Crimson Tide.



## **Jeffrey C. Mounts**

*Deputy, and currently Acting, Comptroller in the Office of the Comptroller/Global Financial Services (CGFS) at the U.S. Department of State.*

As Comptroller, Mr. Mounts carries out the delegated authorities and responsibilities of the Department's Chief Financial Officer (CFO) and also serves as the Department's Deputy Chief Financial Officer (DCFO). The Comptroller leads the CGFS Bureau in supporting the Department's global financial management activities, systems, and services. The Comptroller serves as the primary financial management advisor to the Under Secretary for Management and other Department executives and acts as the Department's external liaison on all matters relating to the Department's worldwide financial management operations. The Comptroller chairs the Department's Management Control Steering Committee (MCSC) and serves as the internal administrative review official for debts collected by the Department domestically and oversees the exercise of debt collection authorities delegated to CGFS by the Under Secretary for Management.

As Deputy Comptroller, Mr. Mounts leads the worldwide development, deployment, and support of the Department's resource management systems, the preparation of the Department's Agency Financial Report including the Department's financial statements, and financial policy and financial management of federal assistance. He also chairs the Department's Senior Assessment Team (SAT) responsible for overseeing the technical aspects of the financial reporting process.

Mr. Mounts has 27 years of federal financial management and human capital compensation experience, including executive leadership and subject matter expertise in personnel and pay policy, worldwide payment execution and banking services, after-employment pension and benefit administration, corporate systems development and program management, and global shared services implementation and operation. Mr. Mounts previously served in Charleston, SC as the Managing Director for Global Compensation and before that as the Director of Systems Development and Maintenance. He also served in Washington, D.C. as the Director of Core Systems Development and in Bangkok, Thailand as the Director of Systems Development and Maintenance.

Mr. Mounts represents the Department of State on the Chief Financial Officer's Council and the Human Resources Line of Business Shared Service Provider group. He has previously served on the Executive Steering Board of the Office of Management and Budget and Chief Information Officer Council's Shared Services Subcommittee and the Unified Shared Services Management Provider Council.

Mr. Mounts holds a Juris Doctorate from the University of Maryland School of Law, a Master of Public Management (Public Finance) from the University of Maryland, and a Bachelor of Science in Political Science/Education from South Dakota State University.

# Thank You to Our 2019-2020 Charleston AGA Sponsors

## Platinum Level Sponsors



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For more information about our services, please contact Bryan Hall at [Bryan.Hall@cgifederal.com](mailto:Bryan.Hall@cgifederal.com).



### **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](mailto:fhaynes@haynesinc.com).

## Platinum Level Sponsors (Continued)



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Integrated Finance and Accounting Solutions ("IFAS") is an 8(a), Economically Disadvantaged WOSB 8(m), Service-disabled Veteran Owned, Woman Owned, Small Disadvantaged Business and is ISO 9001:2008 Certified.

IFAS is an accounting and management consulting firm with experience providing Global Financial Services Support, Budget and Resource Management, A-123, IT Support Services and Business Process Improvement services to our federal clients.

For more information regarding IFAS, LLC, please contact Tabatha Turman at [tturman@ifas-llc.com](mailto:tturman@ifas-llc.com) or Tim Ceschin at [tceschin@ifas-llc.com](mailto:tceschin@ifas-llc.com).



### **Kearney & Company**

Founded in 1985, Kearney is the premier CPA firm focused exclusively on the Federal Government, providing services across the financial management spectrum. Kearney has helped the Federal Government improve its financial operations' overall effectiveness and efficiency; increase its level of accountability and compliance with laws, regulations, and guidance; and protect its funds from fraud, waste, and abuse. We understand the Federal Government's need for efficiency and transparency.

For more information, contact Bryan Nelms at [bryan.nelms@kearneyco.com](mailto:bryan.nelms@kearneyco.com).

## Platinum Level Sponsors (Continued)



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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](mailto:pkendra@milcorp.com).



### STG

SOSi has a well-deserved reputation for exceeding client expectations on-time and under-budget. Since 1989, we have been a standard bearer for progress and innovation in the government contracting industry. With successful projects completed in over 30 countries, our unyielding commitment to excellence has fueled a bold approach to service delivery. Whether we're building and managing facilities in a hard-to-reach area of the world or providing leading-edge technologies for the most sensitive and mission-critical operations, SOSi delivers quality results.

For more information about our services, please contact Melissa DeMaria at [melissa.demaria@sosi.com](mailto:melissa.demaria@sosi.com).



If your organization is interested in sponsoring the AGA Charleston SC chapter, please visit <https://www.agacgfm.org/Chapters/CharlestonSC/Our-Chapter/Corporate-Sponsorship-Program.aspx>.

## **2019 PDT Task Force**

**Megan Jones, *President***, AGA Charleston SC Chapter

**Colleen Bridges, *Treasurer***, AGA Charleston SC Chapter

**Peg Kendra, *CGFM Professional Certification Director***, AGA Charleston SC Chapter

**Bryan Nelms, *NCC Representative***, AGA Charleston SC Chapter

**Robert Parsons, *Accountability Outreach***, AGA Charleston SC Chapter

**Konita Reid, *Secretary***, AGA Charleston SC Chapter

**Beth Da Re, *Member***, AGA Charleston SC Chapter

**Stacy Johnson, *Member***, AGA Charleston SC Chapter

**Georgia Middleton, *Member***, AGA Charleston SC Chapter

**Timmy Van Parys, *Member***, AGA Charleston SC Chapter

**DeAnna Wilson, *Member***, AGA Charleston SC Chapter

# CAMPUS MAP

ART STUDIO - 114	HEALTH SCIENCE BUILDING - 120	QUAD I - 306	WHITTINGTON HALL - 111
ASHBY HALL - 107	HUNTER CENTER - 200	QUAD II - 307	WINGATE BY WYNDHAM HOTEL - 700
ATHLETIC CENTER - 508	JAVA CITY - 102A	QUAD III - 308	WINGO HALL - 104
ATHLETIC TRAINING PROGRAM LAB - 119	JONES HALL - 106	RIVERS LIBRARY - 102	WOMEN'S NORTH - 302
ATHLETIC PERFORMANCE CENTER - 509	KINESIOLOGY PROGRAM LAB - 113	RUSSELL EAST - 303	WOMEN'S SOUTH - 300
BASEBALL PRESS BOX - 502	LEARNING CENTER - 304	RUSSELL WEST - 305	
BASEBALL STORAGE BUILDING - 503	LIGHTSEY CHAPEL - 100	SCIENCE BUILDING - 103	
BREWER CENTER - 400	LIGHTSEY MUSIC BUILDING - 101	SINGLETON BASEBALL COMPLEX - 511	
BUCCANEER FIELD HOUSE - 500	LITTLEJOHN PARLOR - 301	SOFTBALL PRESS BOX - 507	
COMMUNICATIONS CENTER (OLD) - 202	MORLEY POOL - 401	THURMOND CENTER - 201	
COMMUNICATIONS CENTER (NEW) - 205	NEW RESIDENCE HALL - 309	VISITOR CONCESSION STAND/ RESTROOMS - 510	
D.P. WINGO SCHOOL OF NURSING - 110	NORRIS HALL - 105	WHITFIELD CENTER FOR CHRISTIAN LEADERSHIP - 109	
FOOTBALL TICKET BOOTH - 505	NURSING ADDITION - 118	WHITFIELD STADIUM CENTER - 501	
GREENHOUSE - 103A	PHYSICAL PLANT - 203		

