



American Association for Budget and Program Analysis 2010 Fall Symposium


FROM THE BUDGET ACT TO THE RECOVERY ACT: A BALANCING ACT


November 23, 2010

Capital Hilton Hotel, 16th and K Streets, NW, Washington, DC
Farragut North Metro, Red Line
McPherson Square Metro, Orange and Blue Lines

8:00 - 8:45 am
Foyer

Registration and Coffee

Collection of donations for 

Breakfast sponsored by  Altum



8:45 - 9:00 am
Ballroom

Welcome: Jonathan Stehle, President, AABPA

9:00 - 10:15 am
Ballroom

Morning Speaker: Danny Werfel, Controller Office of Federal Financial Management, Office of Management and Budget



On October 13, 2009, the United States Senate confirmed Danny Werfel as the Controller of the Office of Federal Financial Management (OFFM) within the Office of Management and Budget (OMB). As Controller, he is responsible for coordinating OMB's efforts to initiate government-wide improvements in all areas of financial management, including financial reporting, improper payments, and real property management. Mr. Werfel is also responsible for coordinating the development of government-wide policy on financial accounting standards, grants management, and financial systems.

Prior to his current position, Mr. Werfel served in multiple capacities within OMB, including deputy controller, Chief of the Financial Integrity and Analysis Branch, budget examiner in the Education Branch, and policy analyst in the Office of Information and Regulatory Affairs. Mr. Werfel also served as a trial attorney in the Department of Justice's Civil Rights Division.

10:15 - 10:30 am **Networking Break**

10:30 - 11:45 am **Concurrent Sessions**

Senate

A. BFELoB and Financial Innovation Transformation (FIT) Office

A Perfect FIT? The new Financial Innovation Transformation Office at Treasury promises to look at innovative improvements to the financial management process across the government. The tie between financial management and budget is crucial. How will these changes affect budget formulation and execution? Learn what's coming down the pike from experts as they bring you up to speed on BFELoB tools and how work in this important area will help us get the right 'FIT'.

Moderator: Joseph Kull, Director, PricewaterhouseCoopers

Panelists: Adam Goldberg, Director, Office of Financial Innovation and Technology,
U.S. Department of the Treasury
Phil Wenger, Deputy Policy Lead, Budget Formulation and Execution
Line of Business

Federal A

B. Leadership: A Look from All Levels

This session will offer a unique look at leadership and career development from all levels across the budget and program analysis profession. Hear from panelists on how they have and are currently tackling the challenges of leading from above, below, and beside. This panel will end with a highly interactive session to give you several ideas on what next steps you could take to excel in an environment where training budgets are shrinking. The need for professional development is crucial not only for the individual, but also for the future of the profession.

Moderator: Queen Vo, Senior Associate, PricewaterhouseCoopers
Panelists: Melissa Merrell, Analyst, Congressional Budget Office
David Robinson, Associate Director of Management Resources,
National Institute of Standards and Technology
Patricia Kelley, Chief Financial Officer, Pension Benefit Guaranty Corporation
Elizabeth Robinson, Chief Financial Officer, National Aeronautics and Space Administration (Invited)

Federal B

C. Change Management, the Crucial New Reality in the Federal Government

The value of any IT investment is not realized simply with the migration to new technology, but ultimately comes with the use, adoption, and general acceptance of IT and associated processes into the standard business workflow of the organization. At the heart of any successful implementation of an IT investment is a successful change management methodology. This session will cover key factors to a successful change management approach and showcase the Departmental E-Budgeting System (DEBS), an integrated budget environment that leverages the power of the internet with the benefits of common productivity suites to formulate, report, track, and publish budgets throughout the internal, OMB, and Congressional justification budget lifecycle.

Moderator: Ricardo Aguilera, Associate Professor, CFO Academy
Panelists: Andy Rider, Program Manager, Department of Labor
Donald McCrory, Principal, PricewaterhouseCoopers

11:45 - 12:00 pm **Networking Break**

AABPA would like to thank the sponsors of the 2010 Fall Symposium:



**Robert Sunshine, Deputy Director,
Congressional Budget Office**

ROBERT SUNSHINE is Deputy Director of the Congressional Budget Office, a post he assumed in August 2007. Before then, he was the Assistant Director for Budget Analysis for eight years. In that capacity, he oversaw much of the work of the agency. He supervised the preparation of cost estimates and intergovernmental mandate statements. He also managed the preparation of CBO's multiyear projections of federal spending that constitute the "baseline" for the Congressional budget process, the agency's annual analysis of the President's budget, and its ongoing estimates of spending for Congress' budget scorekeeping system. In 2003, he received the James L. Blum Award for exceptional and distinguished accomplishment and leadership in public budgeting from AABPA.



**Barry Anderson, Private
Consultant**

BARRY ANDERSON is the former head of the Budgeting and Public Expenditures Division in the Organization for Economic Cooperation and Development (OECD) in Paris. Prior to joining OECD, Mr. Anderson was a budget advisor at the International Monetary Fund. Before joining the IMF, Mr. Anderson served in various positions dealing with federal budgeting in the United States federal government, most recently as the deputy director and then the acting director of the Congressional Budget Office. He has also been a member of the Federal Accounting Standards Advisory Board, and has taught courses on the U.S. budget process.



**Susan Irving, Director for Federal
Budget Issues, Government
Accountability Office**

SUSAN IRVING currently is a Director for Federal Budget Issues at the U.S. Government Accountability Office where she oversees work on the structure of the federal budget, the congressional budget process, user fees, the U.S. fiscal position, the long-term fiscal outlook, debt and debt management, and related issues. Prior to joining GAO, Dr. Irving held a number of positions in and out of government, largely concerned with economic policy. She has served as a Legislative Assistant and Legislative Director to members of the Senate Finance Committee, as Staff Director of the President's Council of Economic Advisers in the Executive Office of the President, and as Vice President of the Committee for a Responsible Federal Budget.



**Marvin Phaup, Director
Federal Budget Reform
Initiative, The Pew
Charitable Trusts**

MARVIN PHAUP is project director of the Federal Budget Reform Initiative and is also a research scholar and professorial lecturer at George Washington University. He previously served as deputy assistant director in the Financial Studies group of the Congressional Budget Office's Macroeconomic Analysis division and as a senior economist for the Federal Reserve Bank of Cleveland. Marvin holds a PhD and MA in Economics from the University of Virginia.



1:45 - 2:00 pm **Networking Break**
2:00 - 3:15 pm **Concurrent Sessions**

Senate

D. Beyond the Federal Level: State and Local Perspectives

Hear from colleagues at the state and local level on their recent experiences with the Recovery Act, balanced budget requirements, and the current economic climate. This panel will include lessons learned and potential opportunities as a result of the recent changes.

Moderator: Joseph Kull, Director, PricewaterhouseCoopers
Panelists: Scott Pattison, Executive Director, National Association of State Budget Officers
Edward Mazur, Senior Advisor, Clifton Gunderson
Stanley Czerwinski, Director for Intergovernmental Relations, Government Accountability Office

E. Career Road Map – Pathway to Advancement

Government and private sector organizations are focused on building internal talent pathways and ensuring readiness of talent for critical roles. High performers will be proactive in using all available means to prepare themselves for greater responsibility and authority. A great way to do that during FY 2011 is to test the new Career Road Map that has been developed collaboratively by the interagency Budget Formulation & Execution Line of Business (BFELoB) human capital workgroup. This panel will discuss the purpose and use of the Career Road Map from the perspective of the human capital manager, the budget manager, and the budget analyst.

- Moderator: Kitty Wooley, Management and Program Analyst, Department of Education
- Panelists: Sandy Wells, Director, Strategic Employee Development, Department of the Interior
Shelley Rappaport, Manager, Grant Thornton LLP
Melissa Neuman, Budget Preparation Specialist, Office of Management and Budget

F. Continuing Resolutions for the Ages: Managing Program Uncertainty in an Era of Fiscal Uncertainty

Over the past three decades, the U.S. Congress has enacted a continuing resolution (CR) in all but three years. As we embark on this journey again in FY2011, the implications of its inevitable operational and legal challenges, and the priorities of a newly elected Congress loom large. Furthermore, despite our vast experience with CRs in contemporary public administration, the added uncertainty of a lingering economic slowdown, and unprecedented deficits and debt, truly make these continuing resolutions for the ages! A panel of program and budget professionals will share their expertise on the current legal and operational challenges of CRs in an age of program and economic uncertainty, as well as provide the historical context and future outlook of the CR process.

- Moderator: Patrick Washington, Analyst, Government Accountability Office
- Panelists: Ken Kelly, Budget Methods Specialist, Office of Management and Budget
Tom McCabe, Senior Analyst, Strategic Issues, Government Accountability Office
Thad Juszczak, Retired federal budget officer
Sheila Rajabiun, Assistant General Counsel, Broadcasting Board of Governors

3:15 - 3:30 pm

Networking Break: Ice Cream Bar

3:30 - 4:30 pm
Ballroom

Afternoon Speaker: Jeanne Sahadi, Senior Writer and columnist CNN Money.com

Jeanne Sahadi is a senior writer at CNNMoney.com. She currently covers tax policy and all issues pertaining to the federal deficit and debt. In the past few years, she reported on the health reform debate, the housing crisis, and the economic and financial meltdown that ensued. Prior to that, she covered the debates over proposed reforms to the tax code, Social Security, pension law, and bankruptcy law. Early in her tenure at CNN, where she has worked since 1998, she covered identity theft and a host of personal finance issues.



She has been a frequent guest on CNN's business and personal finance shows as well as on CNNRadio and its affiliates.



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Looking for more budget and program news? Join these AABPA groups and pages to receive updates in between symposia!



American Association for Budget and Program Analysis
Spring Symposium

May 18, 2010

FROM THE BUDGET ACT TO THE RECOVERY ACT AND BEYOND


Capital Hilton Hotel, 16th and K Streets, NW

Farragut North Metro, Red Line/McPherson Square Metro, Orange and Blue Lines

8:00 - 8:45 am

Foyer

Registration, Breakfast, and Coffee

Collection of donations for the American Red Cross
Breakfast sponsored by  Altum

8:45 - 9:00 am

Welcome: Melissa Merrell, President, AABPA



9:00 - 10:15 am

Ballroom

Morning Speaker: Maya MacGuineas, President, Committee for a Responsible Federal Government

Maya MacGuineas is the President of the Committee for a Responsible Federal Budget. Additionally, she is the Director of the Fiscal Policy Program at the New America Foundation, a nonpartisan think tank. Her areas of expertise include budget, tax, and economic policy. Maya testifies regularly before Congress, advises the administration and has published broadly.



Maya has worked at the Brookings Institution and on Wall Street. As a political independent, she has advised numerous candidates for office from both parties, and works regularly with members of Congress on health, economic, tax, and budget policy.


10:15 - 10:30 am **Break/Networking**

10:30 - 11:45 am **Concurrent Sessions**

Senate

A. The Wolf at the Nation's Door and the Termites in the Foundation: Everything You Want to Know about the National Debt (and more).

The uncontrolled growth of the federal debt is widely viewed as a serious threat to the economic and political stability of the United States. This panel of policy analysts and financial economists will examine the meaning and significance for us and future generations of the national debt. In the process, they will demonstrate the usefulness of several alternative measures of the debt, including amounts held by government trust funds and the Federal Reserve and contingent obligations. Each measure has something to say about our fiscal future. The panel will also discuss the implications of the changing composition and ownership of the federal debt. The moderator promises to engage the audience in this discussion, so bring your questions and comments and join in.

Moderator:  Marvin Phaup, Director, Federal Budget Reform Initiative, Pew Charitable Trusts, Research Scholar, Trachtenberg School, The George Washington University

Panelists: Victoria Allred, Research Director, Peterson-Pew Commission on Budget Reform
Alan Rhinesmith, Senior Policy Adviser, Congressional Oversight Panel

Federal A

B. Learn from the Leaders: Careers for Budget and Program Analysts

This session offers career development insight for budget and program analysts at all levels and in various fields of the profession. Whether you are new to the profession, or have 20+ years experience, this session is for you! Seasoned professionals will discuss how their careers have evolved, provide insight into opportunities and career paths for budget and program analysts, and share lessons they've learned along the way. This panel will end with a highly interactive session where you will be able to ask for career advice, connect with your colleagues, and make new professional contacts. Bring your business cards for some serious networking!

Moderator: ✓ Queen Vo, Senior Associate, PricewaterhouseCoopers

Panelists: ✓ Joseph Kull, Director, PricewaterhouseCoopers
Marty Rubenstein, Budget Director, National Science Foundation
Jolene Lauria-Sullens, Deputy CFO, Department of Justice
Kathleen Turco, Associate Administrator, U.S. General Services Administration (invited)

Federal B

C. Understanding, Analyzing, and Responding to Systemic Risk: New Solutions to Age-Old Problems

Do the terms "economic meltdown" or "global financial crisis" cause you pause? What are the consequences of financial instability? This panel will discuss:

- * The nature and structure of our current supervisory and regulatory system,
- * Constraints and gaps implicit in current financial system oversight,
- * The importance of cross-entity surveillance; and
- * An overview of the National Institute of Finance and Office of Financial Research

Moderator: Rex Reagan, Senior Managing Consultant, IBM

Panelists: ✓ Marlon Attiken, CPA, Office of Risk and Compliance, Global Business Services
✓ Tom Day, Senior Manager, Office of Thrift Supervision
✓ Dr. Allan Mendelowitz, Member, Committee to Establish the National Institute of Finance
Chris Laursen, Senior Consultant, NERA Economic Consulting

11:45 - 12:00 pm **Networking Break**

12:00 - 1:45 pm **Lunch Speaker: Shelley H. Metzenbaum, Associate Director for Performance and Personnel Management, Office of Management and Budget**
Ballroom

Shelley H. Metzenbaum serves as the Associate Director for Performance and Personnel Management of the U.S. Office of Management and Budget, reporting to the nation's first Chief Performance Officer. She previously served as founding director of the Collins Center for Public Management at UMass Boston's McCormack School, associate administrator for Regional Operations and State/Local Relations at the U.S. EPA, undersecretary of the Massachusetts Executive Office of Environmental Affairs, Massachusetts capital budget director, executive director of Harvard's Kennedy School Executive Session on Public Sector Performance Management, and executive director of the Environmental Compliance Consortium. She is a fellow of the National Academy of Public Administration and holds a Ph.D. in public policy from Harvard's Kennedy School of Government.



1:45 - 2:00 pm **Networking Break**

2:00 - 3:15 pm **Concurrent Sessions**

Senate

D. Are States Too Big to Fail?

Should the federal government assist states facing financial failure? If so, when and in what ways? If not, why not? What are the ramifications of both positions? What impact might federal assistance have on states that have managed fiscal restraint and responsibility? Does assistance enable future mismanagement and delay hard decision-making? Should the federal government step in to assist states with pension contribution shortfalls as it aids corporations through the Pension Benefit Guarantee Corporation?

Moderator: ✓ Joseph Kull, Director, PricewaterhouseCoopers

Panelists: ✓ Senator Meg Burton-Cahill, Arizona State Senate

✓ Susan Offutt, Chief Economist, U.S. Government Accountability Office

Federal A

E. Social Network Analysis and Career Development

Join with the LINKS Center at the University of Kentucky to learn the fundamentals of social network theory and analysis. Deeper than Facebook or Twitter, social network analysis can be used to influence leadership, advance your career, improve performance, decrease turnover and conflict, and inspire innovation. This session will explore the differences between 'social network analysis' and 'social network media' using classic studies, measures, and theories related to this field. Become more familiar with key topics in social network analysis and learn how these theories and analytic tools can improve understanding of relationships between and within organizations.



Moderator: ✓ Darreisha Bates, Analyst, U.S. Government Accountability Office

Panelist: ✓ Scott Soltis, Doctoral Candidate, University of Kentucky

Federal B

F. Budget Formulation and Execution Line of Business – MAX Collect and the MAX Federal Community

This panel will discuss how two of the tools available through the BFELoB — MAX Collect and the MAX Federal Community — are being used to address real issues today. Budget practitioners from several Federal agencies will discuss how they use the tools to collaborate with component offices and simplify the production of standard documents such as QFRs, do forecasting, and continuously update operating plans. OMB will discuss their use of the tools, including using the data collection and reporting tool to generate sections of the 2011 President's Budget.

Moderator: ✓ Mark Dronfield, BFELoB Program Management Office, Department of Education

Panelists: ✓ Ben Taylor, Policy Analyst, Office of Management and Budget
✓ Jason Matthews, Budget Analyst, Minerals Management Service, Department of Interior
✓ Lauren Bloom, Budget Analyst, Department of Education
✓ Michael Cupertino, Budget Analyst, Department of Justice

3:15 - 3:30 pm

Ice Cream Bar/Networking Break



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Intro
Marr

3:30 - 4:30 pm
Ballroom

Afternoon Speaker: Bill Frenzel, Guest Scholar at the Brookings Institution and Former Member of the House of Representatives

Bill Frenzel has been a guest scholar at the Brookings Institution since January 1991, when he retired from the U.S. House of Representatives after serving his Minnesota constituency for twenty years.



Frenzel was the ranking minority member on the House Budget Committee and was the principal Republican economic spokesperson in the House. He was a member of the House Ways and Means Committee and its Trade Subcommittee, and was a congressional representative to the General Agreement on Tariffs and Trade (GATT) in Geneva for fifteen years. In 1993, he was special advisor to the president for NAFTA. In 2001, President Bush appointed him to the Social Security Commission, and in 2002, to the Advisory Committee on Trade Policy and Negotiations (ACTPN), which he chairs. In January, 2005, he was appointed to President Bush's Tax Reform Commission.

In 2002, he received an Honorary Doctor of Laws Degree from Hamline University. Frenzel received his B.A. and M.B.A. from Dartmouth College and served as a Naval Officer during the Korean War.

AABPA would like to thank the sponsors of the 2010 Spring Symposium:



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**American Association for Budget and Program Analysis
2009 Fall Symposium
Budgeting in a Changing Environment:
The New Normal**

November 24, 2009
Capital Hilton Hotel, 16th and K Streets, NW, Washington, DC
Farragut North Metro, Red Line
McPherson Square Metro, Orange and Blue Lines

8:00 - 8:45 am
Foyer

Registration, Coffee
Collection of donations for Toys for Tots



8:45 - 9:00 am
Ballroom

Welcome: Melissa Merrell, President, AABPA



9:00 - 10:15 am
Ballroom

**Morning Speaker: Doug Elmendorf, Director
Congressional Budget Office**

Douglas W. Elmendorf is the eighth Director of CBO. His term began on January 22, 2009. Prior to CBO, Doug Elmendorf was a senior fellow in the Economic Studies program at the Brookings Institution. As the Edward M. Bernstein Scholar, he served as coeditor of the Brookings Papers on Economic Activity and the director of the Hamilton Project, an initiative to promote broadly shared economic growth.



Doug Elmendorf was previously an assistant professor at Harvard University, a principal analyst at the Congressional Budget Office, a senior economist at the White House's Council of Economic Advisers, a deputy assistant secretary for economic policy at the Treasury Department, and an assistant director of the Division of Research and Statistics at the Federal Reserve Board. In those positions, he worked on budget policy, Social Security, Medicare, national health care reform, financial markets, macroeconomic analysis and forecasting, and other topics.

10:15 - 10:30 am **Break/Networking**

10:30 - 11:45 am **Concurrent Sessions**

Senate

A. Budget Impact of Health Reform

We hear repeatedly that rising health care costs are a leading cause of the growing long-term federal deficit and debt. If left unchecked, increases in the cost of health care will threaten funding for other priorities. What options are there to rein in health care costs? How will federal reform options affect state budgets and public services? The panelists will lay out some of the major options and bring us up-to-date on reform legislation under consideration in the Congress.

Moderator: Edward Brigham, Former Federal Executive, Department of Transportation

Panelists: Dr. Leighton Ku, The George Washington University School of Public Health

Dr. Donald Marron, Georgetown University Public Policy Institute

Dr. Christine Ferguson, The George Washington University School of Public Health, and former Commissioner of the Department of Public Health in Massachusetts

Federal A

B. Harnessing Web 2.0: What is it and how can I use it?

Increasingly, new methods of connecting people who share common interests are revolutionizing the way we communicate and interact with each other, both socially and professionally. Agencies and offices are adapting collaborative technologies to increase efficiency and information sharing. What are some of these new technologies and how can you use these tools at work to improve effectiveness and find new resources for career networking? This session will give an overview of the new technologies, showcase methods used by some federal offices, and discuss potential returns on investment and challenges of implementation.

Moderator: Andrew Krzmarzick, Community Manager, GovLoop
Panelists: Mary Davie, Assistant Commissioner, Office of Assisted Acquisition Services, U.S. General Services Administration
Shannon Finnegan, Senior Analyst, Strategic Issues, U.S. Government Accountability Office
JoAnna Berry, Web and Data Librarian, U.S. Government Accountability Office
Phil Wenger, Deputy Policy Lead, Budget Formulation and Execution Line of Business

Federal B

C. Further Along the Budget Execution Integration Road: Is Your Agency Ready?

Each year federal agencies make more progress to integrate budget execution data and processes. Both Treasury and OMB are introducing new systems and guidance that will make life easier. Are you and your agency ready for these changes? This session will explore the new systems and review current and upcoming guidance.

Moderator: Holden Hogue, Financial Management Service, Department of the Treasury
Panelists: Teresa Tancre, Budget Review Division, Office of Management and Budget
Jeff Hoge, Financial Management Service, Department of the Treasury
Kathy Winchester, Financial Management Service, Department of the Treasury

11:45 - 12:00 pm **Break/Networking**

Foyer

12:00 - 1:45 pm **Lunch Speaker: Isabel Sawhill, Senior Fellow,
The Brookings Institution**

Ballroom

Isabel V. Sawhill is a senior fellow in Economic Studies at the Brookings Institution. She serves as director of the Budgeting for National Priorities project and co-director of the Center on Children and Families. She holds the Cabot Family Chair. She served as Vice President and Director of the Economic Studies program from 2003 to 2006.



Prior to joining Brookings, Dr. Sawhill was a senior fellow at The Urban Institute. She also served as an associate director at the Office of Management and Budget from 1993 to 1995, where her responsibilities included all of the human resource programs of the federal government, accounting for one-third of the federal budget.

1:45 - 2:00 pm **Break/Networking**

Looking for more budget and program news? Join these AABPA groups and pages to receive updates in between symposia!



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*Senate***D. ARRA – A New Look at Data and Transparency**

On October 30, recipients of funds from the American Reinvestment and Recovery Act (ARRA) reported that 640,329 jobs were created or saved as a direct result of stimulus projects. The unprecedented level of detailed information reported by a large number of recipients into a new centralized reporting system provides a new set of data intended to increase transparency in government. The lessons learned from the first round of recipient reporting could shape the future of how government collects and reports data. This panel will discuss the quality and reliability of these data and the concept of the Citizen Inspector General.

Moderator: Teri Gullo, Deputy Assistant Director for Budget Analysis, Congressional Budget Office

Panelists: James McTigue, Assistant Director, Strategic Issues, U.S. Government Accountability Office
John Pasquantino, Acting Chief, Recovery Branch, Office of Federal Financial Management, Office of Management and Budget
Gary Bass, Executive Director, OMB Watch
Scott Pattison, Executive Director of National Association of State Budget Officers

*Federal A***E. Becoming a 21st Century Budget Office: Assessments and Tools to Build Capacity**

The world around us is constantly changing, and the federal government must change to keep up. Is your budget office evolving? Do you look for ways to make small incremental improvements in processes and quality? Or is it time for a complete overhaul?

Come hear how three federal agencies are transforming their budget offices and preparing for the future. How do you start these conversations and engage your entire organization? What tools do you use? How do you plan for and manage change but not disrupt the current work products? What tips and tools can help you with process change, increased use of technology, higher quality output and products, and continual workforce development?

Convener: Tom Skelly, Budget Director, Department of Education

Panelists: Karin O'Leary, Budget Director, Department of Justice
Michael Sieverts, Deputy Budget Director, National Science Foundation
Michael (Ike) Kelley, Chief of Budget Administration, Department of Interior

*Federal B***F. Using Evaluation and Performance Data to Inform Budget Decisions**

Evaluation and performance data can help decision-makers differentiate well-performing programs from those that are less effective and also provide an additional level of transparency to government services. This panel will identify lessons learned from the implementation of the Government Performance and Results Act (GPRA) requirements and the Program Assessment Rating Tool (PART) and include recommendations for improving the federal process. This session also will feature the Commonwealth of Virginia's evaluation of state agencies and its adoption of a new budget system that incorporates performance data.

Moderator: Dr. Paul Posner, Program Director, Public and International Affairs, George Mason University

Panelists: Dr. Kathryn Newcomer, Director, The Trachtenberg School of Public Policy and Public Administration, The George Washington University
Dr. Stephanie Shipman, Applied Research and Methods, U.S. Government Accountability Office
Jo Jo Martin, Performance Budgeting Project Manager, Commonwealth of Virginia

3:15 - 3:30 pm
Ballroom

Ice Cream Bar Break/Networking

3:30 - 4:30 pm

Afternoon Speaker: Robert Hale, Under Secretary of Defense
(Comptroller), Department of Defense

Ballroom

Robert F. Hale is the principal advisor to Secretary of Defense Robert M. Gates on all budgetary and fiscal matters, including the development and execution of the Defense Department's annual budget of more than \$600 billion. As Chief Financial Officer, Mr. Hale also oversees the Department's financial policy, financial management systems, and business modernization efforts.

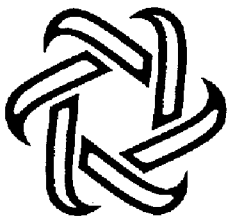


At the time of his nomination by President Barack Obama in January 2009, Robert Hale was Executive Director of the American Society of Military Comptrollers (ASMC), the professional association of Defense financial managers. For three-and-a-half years, he led the society's certification program (the Certified Defense Financial Manager program), as well as training programs, a professional journal, and other activities, including ASMC's National Professional Development Institute, an annual conference which attracts more than 3,500 participants.

From 1994 to 2001, Mr. Hale served in the Pentagon as the Assistant Secretary of the Air Force (Financial Management and Comptroller), where he was responsible for annual budgets of more than \$70 billion, efforts to streamline Air Force financial management, and compliance with the Chief Financial Officers Act.

For the 12 years prior to his Air Force service, Mr. Hale headed the National Security Division at the Congressional Budget Office (CBO), developing quantitative analyses of major defense budget issues and testifying frequently before Congressional committees.

AABPA would like to thank the sponsors of the 2009 Fall Symposium:



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**American Association for Budget and Program Analysis
2009 Spring Symposium**

TRANSFORMING CRISIS INTO OPPORTUNITY

April 16, 2009

Capital Hilton Hotel

16th and K Streets, NW, Washington, DC

Farragut North Metro, Red Line

McPherson Square Metro, Orange and Blue Lines

8:00 - 8:45 am
Foyer

Registration, Coffee

Collection of donations for Capital Area Food Bank



8:45 - 9:00 am
Ballroom

Welcome: Carl Moravitz, President, AABPA

Carl Moravitz is a managing consultant for IBM Business Consulting Services and a former Federal budget director at the U.S. Treasury Department, the Internal Revenue Service, the Voice of America, and the Department of Homeland Security.



9:00 - 10:15 am
Ballroom

Morning Speaker: Jon Desenberg, Policy Director, The Performance Institute

As the Policy Director at The Performance Institute, Jon Desenberg is responsible for developing, structuring, and implementing creative solutions for strategic planning and performance management needs. With over 16 years of government management experience, Jon has worked with more than 40 Federal and local government organizations, non-profit agencies, and private corporations. In addition, Jon leads partnerships with major management software and service providers and develops white papers, research, webinars and other content for industry leaders.



Jon also directed the Transitions in Governance Project, a coalition of major government organizations developing management recommendations with both major political parties for the Presidential administration.

10:15 - 10:30 am **Break/Networking**

10:30 - 11:45 am **Concurrent Sessions**

South American B **A. Budgetary Scoring and Accounting for Recent Federal Policies in Financial Markets**

This roundtable discussion, moderated by Marvin Phaup, The George Washington University, will consider the budgetary treatment of federal actions taken to re-start the credit and capital markets, including TARP, the federal takeover of Fannie Mae and Freddie Mac, expanded use of explicit and implicit guarantees, equity purchases, and new credit initiatives of the Federal Reserve System.

Moderator: Marvin Phaup, The George Washington University

Panelists: Jennifer Main, Chief Financial Officer, Office of Financial Stability, U.S. Department of the Treasury

Jim Hearn, Deputy Staff Director, Minority, Senate Budget Committee

Doug Holtz-Eakin, President, DHE Consulting and former Director, Congressional Budget Office

Additional panelists to be announced

B. The Budget, the Economy, and Who Has the Magic Eight Ball?

Over the past 12 months, our country has experienced a radical realignment of our market economy, and the federal government has taken unprecedented actions in response. We now talk about private entities being "too big to fail" and trillion dollar deficits, bank takeovers and a global crisis. How will the current economic reality affect this year's budget process? What will be the likely effect of the stimulus package? Will it be enough or will Congress consider a second bill this year? How will states use the funds provided in the stimulus bill, and will those funds alleviate the stresses on state budgets? When will the economy begin to recover? Join us for a lively discussion with congressional, executive, and state representatives as we explore the relationship of the budget to the economy and what to expect this year.

Moderator: Melissa Merrell, Analyst, Congressional Budget Office
Panelist: Teri Gullo, Deputy Assistant Director, Budget Analysis Division,
Congressional Budget Office
Austin Smythe, Staff Director, House Budget Committee, Minority Staff
Scott Pattison, Director, National Association of State Budget Officers
James Horney, Director of Fiscal Affairs, Center on Budget and Policy
Priorities

C. Saving Time and Money with BFELoB Tools

Agencies will discuss how they are finding value in tools developed by the Budget Formulation and Execution Line of Business (BFELoB). Agencies are saving time and money by using BFELoB tools such as the MAX Federal Community for collaboration within their agency, across agencies, and for receipt of updates from OMB; MAX Online Meetings for conducting meetings with remote participants; MAX Collect (eBriefing) for collecting data from across their agency and publishing that data into reports; the Decision Matrix for evaluating agency budget system needs and understanding the functionality of budget systems in the current marketplace; and more. Come find out how you can use these tools in your office.

Moderator: Andy Schoenbach, BFELoB Policy Lead and Budget Systems Chief, Office of Management and Budget
Panelists: Michael Sheridan, Management Analyst, Office of Health Affairs,
Department of Homeland Security
Michele Heffner, OpenGov, General Services Administration
Michael Cupertino, Budget Analyst, Department of Justice
Michael Sieverts, Deputy Budget Director, National Science Foundation

11:45 - 12:00 pm **Break/Networking**

12:00 - 1:45 pm **Lunch Speaker: Dr. Donald Kettl, Director of the Fels
Institute of Government, University of Pennsylvania**

Ballroom

Dr. Kettl is the Director of the Fels Institute of Government at the University of Pennsylvania. He has published a wide range of articles and books, including *System Under Stress: Homeland Security and American Politics*; *The Transformation of Governance* (winner of the National Academy of Public Administration's 2003 Louis Brownlow Book Award for the best book in public administration); *Deficit Politics: The Search for Balance in American Political Life*, 2nd ed.; *The Global Public Management Revolution: A Report on the Transformation of Governance*; and *The Politics of the Administrative Process*, 3rd ed. (with James W. Fesler).



He is also a Nonresident Senior Fellow at the Brookings Institution, executive director of the Century Foundation's Project on Federalism and Homeland Security, and Academic Coordinator of the Government Performance Project.

Presentation of the Marykathryn Kubat Award for Student Research

1:45 - 2:00 pm **Break/Networking**

2:00 - 3:15 pm **Concurrent Sessions**

South American B

D. International Response to the Financial Crises

While the current economic crisis has had a serious effect on the U.S. financial sector as well as the overall economy, its impact has been felt across the globe. Since October, the International Monetary Fund (IMF) has lent almost \$50 billion to countries adversely impacted by the crisis, and world leaders have called for increasing the IMF's resources by at least \$250 billion as the number of countries needing assistance is expected to grow. Coming out of the Great Depression and World War II, the world community agreed to work together to limit the impact of future financial crises and increase international trade. Such coordination was evident during the Mexican peso crisis of 1994 and the Asian financial crisis of 1997. As the first world-wide crisis since the Depression, this is the severest test yet of the international commitment to work together to seek resolution and avoid the temptation to implement beggar-thy-neighbor economic policies which deepened the Great Depression.

Moderator: Tom Melito, Director, International Affairs and Trade, Government Accountability Office

Panelists: Clay Berry, Director, Office of International Monetary Policy, U.S. Department of the Treasury
Loren Yager, Director, International Affairs and Trade, Government Accountability Office
Jonathan E. Sanford, Specialist in International Trade and Finance, Congressional Research Service

Senate

E. Financial Regulation: What Went Wrong and Where Do We Go?

What issues of administrative design, method, and management should guide the \$700 billion bailout, and how will management of the bailout guide or constrain financial regulatory reform? What are the lessons of administrative design, method, and management that can be drawn from the current crisis? What fundamental principles should guide financial regulation and regulatory institutions in the future? This panel will provide a cutting-edge discussion, highlighting challenges of principle, design, method, and management that should guide financial regulatory reform. The devil is in the details, and the details of financial regulatory reform need attention.

Moderator: Patrick Mullen, University of Illinois at Springfield

Panelists: Orice Williams, Director, Financial Markets, Government Accountability Office
Anne Khademian, Virginia Tech, Alexandria Campus
Giselle Datz, Virginia Tech, Alexandria Campus
Tom Stanton, Johns Hopkins University and NAPA Fellow

Statler A/B

F. Creating Your Future: A Career Roadmap

Do you manage your career? Or is it something you think about once a year with your annual appraisal? The most successful people and organizations have a strategy (or even multiple strategies) for where they are headed, how they want to get there, and indicators that measure progress. Research also shows that employees are happier, more productive, and less stressed as they gain more control over their destiny. This panel will explore how several professionals are managing the technical and leadership aspects of their careers; traditional and maybe not-so-traditional ways you can gain valuable exposure; and also introduce you to one system you can use to create goals, track competencies, gather feedback from coaches, schedule training classes, and more. Kick it up a notch!!

Moderator: Melissa Kline, Program Examiner, Office of Management and Budget

Panelists: Julia Anderson, Executive Director, Financial Management Programs, Management Concepts
Jon Stehle, Analyst, Government Accountability Office
Kitty Wooley, Human Capital Management Staff, Department of Education

3:15 - 3:30 pm
Ballroom

Ice Cream Bar Break/Networking

3:30 - 4:30 pm
Ballroom

Afternoon Speaker: Stan Collender, Partner, Qorvis Communications



Stan Collender, a partner in the Washington, D.C. office of Qorvis Communications, is one of the leading experts on the federal budget and congressional budget process. He writes the very popular column, "Fiscal Fitness," which is published weekly by the Capital Hill newspaper *Roll Call*. Between 1997 and 2007 Stan wrote a weekly column "Budget Battles" for nationaljournal.com. He is also the author of *The Guide to the Federal Budget*, which was one of the most assigned texts on the subject during the 19 years when an annual edition was published, and the founder of the blog "Capital Gains and Games."

Stan has been involved with the congressional budget process since 1974 and is one of only a limited number of people who has worked for both the House and Senate Budget Committees. As a member of the House Budget Committee staff, he served as administrator of the Task Force on State and Local Government. For the Senate Budget Committee, he was responsible for analyzing defense spending. Stan also served as the administrator of the Task Force on the Budget of the Northeast-Midwest Congressional Coalition, a bipartisan group of representatives from the states in those regions.

AABPA would like to thank the sponsors of the 2009 Spring Symposium:

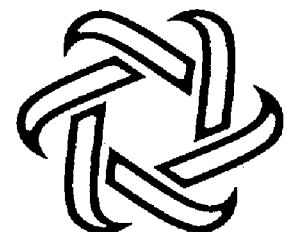
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**American Association for Budget and Program Analysis
2008 Fall Symposium**

Navigating Transition, Leading Change

November 18, 2008

Capital Hilton Hotel

16th and K Streets, NW, Washington, DC

Farragut North Metro, Red Line

McPherson Square Metro, Orange and Blue Lines

8:00 - 8:45 am
Foyer

Registration, Coffee

Collection of donations for Toys for Tots



8:45 - 9:00 am
Ballroom

Welcome: Carl Moravitz, President, AABPA

Carl Moravitz is a managing consultant, IBM Business Consulting Services and a former Federal budget director at the U.S. Treasury Department, the Internal Revenue Service, the Voice of America and the Department of Homeland Security.



9:00 - 10:15 am
Ballroom

**Morning Speaker: Sallyanne Harper, CFO and CAO,
Government Accountability Office**

Sallyanne Harper is currently the Chief Financial Officer (CFO) and Chief Administrative Officer for the U.S. Government Accountability Office (GAO). In her current capacity, Ms. Harper is responsible for the full range of financial, IT, human capital and knowledge services functions in support of the GAO, a legislative branch accountability agency that serves the Congress and the American people.



Prior to joining GAO in January 2000, Ms. Harper served as Chief Financial Officer of the U.S. Environmental Protection Agency (EPA). At EPA, she was responsible for all aspects of EPA's strategic planning, financial management and reporting, budgeting and financial systems. She had previously served as deputy CFO, head of management and administration, including IT, and finance director.

10:15 - 10:30 am **Break/Networking**

10:30 - 11:45 am **Concurrent Sessions**

Federal A

**A. The New Budget Office by BFELoB: How Budget Systems and
Collaboration Tools Can Improve Quality of Life for Budget Staff**

The Budget Formulation and Execution Line of Business (BFELoB) is combining agency knowledge across the federal government for your benefit. See the latest product developments, including nine budget systems reviewed against government-wide requirements, a new Q&A/Briefing Book application ready for use during the budget season, upgrades and advanced agency uses of the MAX Federal Community (wiki), and efficiencies through the use of online meeting technologies.

Convener: Andy Schoenbach, BFELoB Policy Lead and Budget Systems Chief,
Office of Management and Budget

Panelists: Emily Fort, Budget Systems, Office of Management and Budget
Jeff Swartz, Office of Budget, Environmental Protection Agency
Phil Wenger, BFELoB Deputy Policy Lead, Office of Management and
Budget

Federal B

B. Building a Career Road Map: Core Competencies for Budget Staff

Wouldn't it be helpful to have a GPS to navigate your career? This session will highlight the Federal Core Competencies for Budget Staff Exposure Draft and how agency staff and managers can use them to improve recruitment, hiring, and development. Learn how NASA University is addressing human capital needs by implementing a full range of solutions, beginning with a staffing analysis, and opportunities for subject matter experts to teach new staff, plus training aimed at agency-specific processes.

Convener: Mark Wichlin, Deputy Budget Director, Department of Labor
Panelists: Navneeta Chandra, BFELoB, Department of Education
David Bachrach, FYI For Your Information, Inc.
Jean Rayhle, Program Analyst, National Aeronautics and Space Administration

Statler A/B

C. The Federal Government in 2040: The Future is Not What It Used To Be

Although budget projections abound for 5 to 125 years, the recent financial crisis with the accompanied bail-out has rendered most projections as quaint and off-target. This panel's crystal ball will explore three trajectories and their implications for the future: (1) entitlements vis-a-vis demographics, (2) larger budget trajectories and potential reforms, and (3) technological changes and their potential impacts on society. Along the way, the Panel will explore several wild cards and great unknowns: longer life spans, changing demographics, immigration, out-migration, political structures, and many facets of technological changes – from dealing with cyber-attacks to new forms of communication and new ways of “connecting” to each other and to devices. Concluding comments will cover how we as individuals can influence our nation's future – a take-home vision of hope and optimism.

Convener: Joan M. McKean, Program Analyst, NOAA Financial Systems, Department of Commerce
Moderator: Michael Sieverts, Deputy Director, Budget Division, National Science Foundation
Panelist: Maya MacGuineas, President, Committee for a Responsible Federal Budget
Carl Moravitz, IBM Global Business Solutions
George O. Strawn, Chief Information Officer, National Science Foundation

11:45 - 12:00 pm **Break/Networking**

Foyer

12:00 - 1:45 pm **Lunch**

Ballroom

Presentation of the James Blum Award for Distinguished Service in Budgeting

Each year, AABPA awards the James L. Blum Award for Distinguished Service in Budgeting. Nominees for this award have a distinguished record of accomplishment in public budgeting, are respected leaders in the budget community, have significantly advanced the state of knowledge in the field, and set exceptionally high standards of achievement, professionalism, and ethics for all public servants.

1:45 - 2:00 pm **Break/Networking**

2:00 - 3:15 pm

Concurrent Sessions

Federal A

D. Crossing the Divide: Topics in Budget Execution and Financial Management Integration

In these turbulent times, agencies face many challenges related to budget execution and financial management. Led by BFELoB and FMLoB, and like never before, OMB, Treasury, and Agency budget execution and financial management experts are working together to alleviate these challenges. This session will explore current problems and the path to solutions in areas such as reconciling receipts and outlays between budget and financial statements; realignment of the Program and Financing schedule, apportionment, and budget execution reports; and building execution processes into budget and financial management systems. See how newly developed products, such as the Budget Execution process maps (published in Draft by BFELoB) can help your agency in these efforts, as well as in training new analysts and opening communications across the "divide."

Convener: Holden Hogue, Financial Management Service, Department of the Treasury
Panelists: Jan Smith, Office of Budget, Department of the Interior
Karen McBride, Office of Federal Financial Management, Office of Management and Budget
Chris Friedline, Office of Performance Budgeting, Department of the Treasury
Teresa Tancre, Budget Review Division, Office of Management and Budget

Statler A/B

E. Pathways to Leadership: Building Leaders for the Budget Community

Like many professions, the budget community is losing key staff, managers, and leaders to retirement. According to OPM, over the next few years, a large percentage of SES will be eligible for retirement. What is your agency doing to prepare for this brain drain? How can the budget community respond now to be ready to fill these critical vacancies? Learn about the new Chief Financial Officer (CFO) Academy and how it is helping prepare leaders for the broader financial community, best practices from DOD, and how other organizations are preparing now for future leadership requirements.

Convener: Tony Scardino, Budget Director, Department of Housing and Urban Development
Panelists: Ricardo Aguilera, CFO Academy, National Defense University
Sandra Gregory, Office of the Comptroller, Department of Defense
Karin O'Leary, Budget Director, Department of Justice

Federal B

F. The Budget World During a Period of Transition

Perhaps no other profession is more impacted by the transition than budget staff. This panel will provide insights into how the transition might impact budget staff in both the executive and legislative branches and the budget processes in the near term of preparing the President's Budget. What are the priorities of the new President and Congress, how will these priorities be funded, and how might this impact budget offices?

Convener: Ed Brigham, Former Federal Executive
Panelists: Philip Joyce, Professor of Public Policy and Public Administration, The George Washington University
Beth Robinson, Assistant Director for Budget, Office of Management and Budget

3:15 - 3:30 pm
Ballroom

Ice Cream Bar Break/Networking

3:30 - 4:30 pm
Ballroom

Afternoon Speaker: Robert Bixby, The Concord Coalition

Rarely do budget and program analysts have the opportunity to see the core of our professions—fiscal responsibility and the US budget—showcased on the big screen. Last winter, I.O.U.S.A., a documentary that examines the rapidly growing national debt and its consequences for the United States and its citizens, premiered at the Sundance Film Festival. The film features Warren Buffett, Alan Greenspan, Paul O'Neill, Robert Rubin, Paul Volcker, David Walker and Bob Bixby, illustrating a vivid and alarming profile of America's economic future. Since the movie's release, mortgage crisis, credit crunch, and market meltdown have become household realities, and the country waits to see if the \$700 billion response from the Congress is the answer to our current economic situation.



Join us for a viewing of highlights from I.O.U.S.A. and remarks by Bob Bixby, Executive Director of the Concord Coalition, on how the US fiscal situation has changed since the movie was released, what actions the newly-elected President and the Congress could take to improve the country's balance sheet, and what other challenges lie ahead.

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American Association for Budget and Program Analysis

2007 Spring Symposium



Back to the Future:

***The Federal Budget
in a Time of Change***

April 17, 2007
Capital Hilton Hotel

8:00 – 8:45 a.m. **Registration, Continental Breakfast**

8:45 – 9:00 a.m. **Welcome, Teri Gullo, President, AABPA**

9:00 – 10:00 a.m. **Opening Plenary Session**
Ballroom

Bill Hoagland, Vice President of Public Policy, CIGNA (and
formerly Director of Budget and Appropriations for the Senate
Majority Leader)

10:00 – 10:15 a.m. **Break/Networking**

10:15 – 11:30 a.m. **Morning Concurrent Sessions**

Senate

Track A. The Budget Formulation and Execution Line of Business (BFE LoB): Solutions for the Budgeting Community

Panelists will discuss specific solutions of BFE LoB, including agency budgeting tools, collaboration, data collection and tracking, budget performance and integration, human capital, data standards, and more. Join this session for a complete BFE LoB update and discuss the possibilities for each solution area.

Convener: **Tom Skelly**, BFE LoB Managing Partner and Budget Officer, Department of Education

Speakers: **Andrew Schoenbach**, Budget Systems Branch Chief and BFE LoB Policy Lead, Office of Management and Budget

John Moore, Budget Systems Branch Deputy Chief and BFE LoB Deputy Policy Lead

Sandi McCabe, Project Management Officer, Department of Education

Federal B

Track B. The 2008 Budget: Proposals, Perspectives & Prospects

Hill veterans give their insights and answer your questions about the 2008 budget process in the Congress. What are the prospects for the President's 2008 funding requests? Will Congress be able to reach final agreement on a budget resolution? What are the prospects for annual appropriations bills this year, or is another full-year continuing resolution in our future? Is another omnibus reconciliation bill in the offing? And how will the new "PAYGO" rules affect the budget process this year and into the future?

Convener: **Sandy Davis**, Special Assistant to the Director, Congressional Budget Office

Speakers: **Ed Lorenzen**, Senior Policy Advisor, Office of the House Majority Leader

Cheri Reidy, Director for Revenue and Budget Review, Senate Budget Committee, Republican Staff (invited)

Lee Price, Chief Economist, House Appropriations Committee, Democratic Staff

Federal A

Track C. High Risk Federal Programs: Challenges and Solutions

Since 1990, GAO has periodically reported on government operations that it has designated as high risk. Lasting solutions to high-risk problems offer the potential to save billions of dollars, improve services, strengthen public confidence, enhance performance and accountability, and ensure the ability of government to deliver on its promises. Join us for a discussion about GAO's High-Risk List and its use as an accountability and public management tool. Representatives from GAO, academia, and an agency will discuss how the High-Risk-List affects an agency and its programs and how the agency's operations change as a result.

Convener: **Jackie Nowicki**, Assistant Director, GAO/Strategic Issues

Speakers: **George Stalcup**, Director, GAO/Strategic Issues

Karen Kunz, Ph.D. Candidate, University of Illinois at Springfield

James M. Martin, Deputy Chief Financial Officer, U.S. Department of Housing and Urban Development

11:30 – 1:15 p.m. **Lunch and Speaker**

Awards and Presentations
Teri Gullo, President of AABPA

Speaker
Peter Orszag, Director, Congressional Budget Office

1:15 – 1:30 p.m. **Break/Networking**

1:30 – 2:45 p.m. **Afternoon Concurrent Sessions**

Senate

Track A. The Budget Formulation and Execution Line of Business (BFE LoB): Leveraging LoB Solutions to Transform Your Agency
BFE LoB solutions are available to your agency today. Join this interactive session to discuss Line of Business solutions and how they are being applied to make budgeting more efficient and effective across government.

Convener: **Michael Sieverts**, Budget Director, National Science Foundation

Speakers: **Andrew Schoenbach**, Budget Systems Branch Chief and BFE LoB Policy Lead, Office of Management and Budget

John Moore, Budget Systems Branch Deputy Chief and BFE LoB Deputy Policy Lead, Office of Management and Budget

Sandi McCabe, Project Management Officer, Department of Education

Shelly McAllister, Budget Analyst, Office of Management and Budget

Chantale Wong, Deputy Budget Director, Department of Treasury

Jeff Swartz, BFE LoB Project Leader, Environmental Protection Agency

Federal B

Track B. Paul Revere or Cassandra? The Policy Implications of Long-Term Fiscal Projections
In 2006, the deficit totaled about 2 percent of the economy (\$250 billion), and that level is expected to continue over the next ten years, assuming AMT relief and the continuation of Bush tax cuts. Then the fiscal situation is expected to deteriorate markedly, forcing decisions about ongoing federal spending and revenue-raising. Panelists will discuss key variables that will affect those decisions including health care costs, tax policy, and demographic shifts.

Convener: **Robert Bixby**, Executive Director, The Concord Coalition

Speakers: **Jay McTigue**, Assistant Director, Government Accountability Office

John Sabelhaus, Chief, Long-Term Modeling Group, Congressional Budget Office

Richard Kogan, Senior Fellow, Center on Budget and Policy Priorities

Federal A

Track C. Back to the Future, Part II: FY 2007 Funding Odyssey

Fiscal Year 2007 included both a long period under a continuing resolution and then severely reduced annual funding levels for the balance of the year. This has created new problems for agency budget officials. Three agency budget officers discuss how they and their agencies have responded to these conditions.

Convener: **Thad Juszczak**, Senior Manager, Grant Thornton LLP

Speakers: **Deborah Patrick**, Director, Budget Division of the Food Safety and Inspection Service, Department of Agriculture

David Schurr, Comptroller, National Aeronautics and Space Administration (NASA)

Stephen Wade, Budget Director, Administration for Children and Families, Department of Health and Human Services

2:45 – 3:00 p.m. **Break/Networking**

3:00 – 4:20 p.m. **Afternoon Plenary Session: The Maltese Budget**

Ballroom

"Mysterious, dark, and foreboding." Is that a description of a film noir movie from the 1940s or the 2007 federal budget debate? It's both. Find out how that's possible when Stan Collender again brings his unique way of thinking about the deficit, spending, and revenues to AABPA.

Stan Collender, Managing Partner, Qorvis Communications

4:20 – 4:30 p.m.

Closing Comments

Teri Gullo, President, AABPA

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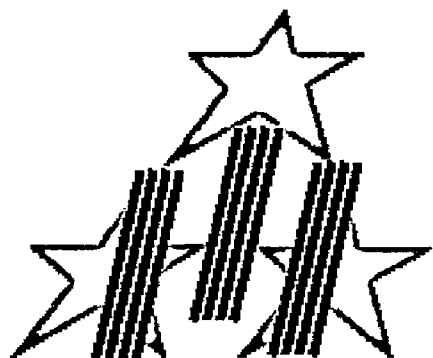
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2006 Fall Symposium



AABPA

Creating the Budget of the Future: Changing the Way the Federal Government Formulates and Executes the Budget

November 14, 2006
Capital Hilton Hotel

8:00 – 8:45 a.m. **Registration, Continental Breakfast**

8:45 – 9:00 a.m. **Welcome, Teri Gullo, President, AABPA**
Margie Armen, President, Public Financial Publications, Inc.

9:00 – 10:00 a.m. **Opening Plenary Session: Overview of Line of Business Objectives**
Ballroom **for Budget Formulation and Execution**
*How Can the Line of Business Improve the Efficiency and Effectiveness of
Federal Budgeting?*

Beth Robinson, Assistant Director for Budget,
Office of Management and Budget, Executive Sponsor—BF&E LoB

Andy Schoenbach, Chief of Budget Systems Branch,
Office of Management and Budget, Policy Lead—BF&E LoB

Tom Skelly, Budget Director, Department of Education, Managing
Partner—BF&E LoB

10:00 – 10:15 a.m. **Break/Networking**

10:15 – 11:30 a.m. **Morning Concurrent Sessions**

South American A **A. Next Steps for Integrating Budget Formulation and Execution: Turning Best Practices into Common Solutions**

This panel will identify best practices to improve the integration and standardized exchange of budget formulation, execution, planning, performance measurement, and financial management information across government.

Convener: Jeffrey Hoge, Director, Accounting Systems Division,
Department of Treasury

Speakers: Mark Wichlin, Director, Departmental Budget Center,
Department of Labor

Michael Sieverts, Acting Budget Director, National
Science Foundation

Ed Walsh, Senior Policy Advisor for Appropriations,
Environmental Protection Agency

South American B **B. The Future of the Budgeting Profession**

The green eyeshades are off! Make way for a new generation of networked, mobile, and technologically advanced professionals. Traditional job descriptions, training programs, and incentive packages no longer meet the needs of the new workforce. How can we recruit, train, and retain the next generation of analysts?

Convener: Phil Joyce, Professor, George Washington University

Speakers: Melissa Petersen, Program Examiner, Office of
Management and Budget

Bion Stewart, Budget Desk Officer, Department of
Homeland Security

Statler A/B **C. Continuity of Operations: How Will Agencies Continue Financial Transactions in an Emergency?**

The changing threat environment and recent emergencies highlight the need for COOP capabilities that enable agencies to continue essential functions across a broad spectrum of emergencies. According to FEMA, COOP plans must ensure continuity of operation and facilitate interagency coordination. How might the BF&E LoB facilitate these activities?

Convener: Judy Thomas, Office of Management and Budget

Speakers: Walter Schultz, Deputy Budget Officer, Justice Department

Pam Haze, Co-Director, Office of Budget, Interior Department

James Sweetman, Assistant Director for Information
Management, U.S. Government Accountability Office

11:30 – 1:15 p.m. **Lunch and Speaker**
Master Change, Thrive Under Pressure, and Bounce Back from Setbacks!

Al Siebert, Director, The Resiliency Center
and author of *The Resiliency Challenge*

1:15 – 1:30 p.m. **Break/Networking**

1:30 – 2:45 p.m. **Afternoon Concurrent Sessions**

South American A **D. Green and Beyond: Leveraging the Budget Line of Business to Improve Management Scorecards**

The interests and operations of all agency components converge at their funding source: the budget. How can the BF&E LoB help improve management results?

Convener: Joseph Kull, Director, Washington Federal Practice,
PricewaterhouseCoopers

Speakers: William Mea, Office of Federal Financial Management,
Office of Management and Budget

Carl Moravitz, Senior Managing Consultant, IBM Global
Business Services

Al Siebert, Director, The Resiliency Center

South American B **E. Budget Reform Proposals: Their Impact on How Agencies Formulate and Execute Their Budgets**

Budget reforms are hot topics once again on Capitol Hill. Deficit targets, spending caps, line-item vetoes, rescissions, and earmark reforms all affect how agencies do their work. What are these reforms? How can budget systems be structured that are flexible enough to quickly accommodate changes in a politically dynamic environment?

Convener: Winnie Chang, Analyst, House Budget Committee

Speakers: Jim Hearn, Director for Federal Programs and Budget
Process, Senate Budget Committee

Rodney Bent, Deputy CEO, Millennium Challenge
Corporation

Statler A/B

F. Using Performance Information in Entitlement Reform

Entitlements are an ever increasing portion of the federal budget. Is it time for significant entitlement reform? Can budget and performance analysis inform and influence the policy debate? What innovative tools and approaches can enhance the analytical capacity of agencies?

Convener: Susan Irving, Director, Federal Budget Analysis, U.S. Government Accountability Office

Speakers: Paul Van de Water, Vice President for Health Policy, National Academy of Social Insurance

Sue Nelson, Vice President for Federal Advocacy, American Heart Association

Dennis Putze, Senior Quantitative Analyst, Office of Child Support Enforcement, Department of Health and Human Services

2:45 – 3:00 p.m.

Break/Networking

3:00 – 4:20 p.m.
Ballroom

Afternoon Plenary Session

Part 1. A Private Sector Perspective: Overarching Strategic Framework for the LoB Initiatives and Implementation Challenges

Stan Soloway, President, Professional Services Council

Part 2. Bringing it Together: Recommendations from Conference Sessions

This is your chance to advise the Budget Line of Business Task Force about how the LoB can increase the efficiency and effectiveness of federal budgeting.

Andy Schoenbach, Chief of Budget Systems Branch, Office of Management and Budget, Policy Lead—BF&E LoB

Tom Skelly, Budget Director, Department of Education, Managing Partner—BF&E LoB

4:20 – 4:30 p.m.

Closing Comments, Teri Gullo, President, AABPA

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AMERICAN ASSOCIATION FOR BUDGET AND PROGRAM ANALYSIS
2006 SPRING SYMPOSIUM AGENDA

"BUDGETING FOR DISASTERS"

May 24, 2006
Capital Hilton Hotel
16TH and K Street, N.W., Washington, D.C.
Farragut North Metro Stop - Red Line

- 8:00 - 8:45 a.m. Registration, Coffee Foyer
- 8:45 - 9:00 a.m. Welcome, Shelly McAllister, President, AABPA Ballroom
- 9:00 - 10:15 a.m. Morning Speaker: Dan Crippen, Economist & Former Director, Congressional Budget Office. Member of the Return to Flight Task Group, an independent NASA review panel. Ballroom
- 10:15 - 10:30 a.m. Break/Networking Foyer & Ballroom
- 10:30 - 11:45 a.m. Concurrent Sessions (Panels)
- Federal A**
- A. Obligational Accounting: Ensuring Compliance with Fiscal Law**
Convener: Hannah Laufe, Senior Attorney, Government Accountability Office
Speakers: Tom Armstrong, Assistant General Counsel for Appropriations Law, Government Accountability Office
Ed Martin, Director, Senior Financial Analyst, Department of Health & Human Services
Judy Thomas, Budget Methods Specialist, Office of Management & Budget

The Antideficiency Act prohibits an agency from obligating or expending funds in advance or in excess of an available appropriation and apportionment. Obligational accounting underlies fiscal control and permits an agency to determine on any given day if it is in compliance with the Antideficiency Act. This panel will discuss what obligational accounting is as defined by GAO and federal case law, what agencies are required to include in their system of funds control in order to track and control expenditures and obligations, and how an agency implements these requirements.

Federal B

- B. Budget & Appropriations Outlook: An Update from the Hill**
Convener: Sandy Davis, Special Assistant to the Director, Congressional Budget Office
Speakers: Gail Millar, General Counsel, Senate Budget Committee, Majority Staff
Bill Hoagland, Director of Budget Appropriations, Office of Senate Majority Leader Bill Frist
David Pomerantz, Professional Democratic Staff, House Appropriations Committee

Experienced staff from Capitol Hill will discuss current issues in the Congressional budget and appropriations process. Topics will include the current status of the budget resolution, supplemental and regular appropriations bills, and other budget legislation; the outlook for budget legislation for the remainder of the Congressional session; the impact of the 2006 Congressional mid-term elections on the budget process; the prospects for

Congressional action on budget process reform; and a gaze into the crystal ball for what budgetary issues may await legislators in FY08 and beyond.

Statler AB

C. Developing the Next Generation of Budget Analysts

Convener: Jolene Lauria-Sullens, Budget Director, Department of Justice

Speakers: Karin O'Leary, Deputy Director, Department Of Justice
Budget Staff

Mary Rubenstein, Budget Director, National Science
Foundation

Joe Kull, PriceWaterhouseCoopers

Barry White, Council for Excellence in Government

A panel to explore the challenges in recruitment and retention of budget professionals and share best practices.

11:45 - 12:15 p.m.

Break/Networking Foyer

12:15 - 1:45 p.m.

Luncheon Speakers: **Phyllis F. Scheinberg, Assistant Secretary for Budget and Programs/ Chief Financial Officer U.S. Department of Transportation: "Perspectives of a Cabinet Department Chief Financial Officer"** Ballroom

John Schuhart, Deputy Chief Financial Office, Directorate of National Intelligence: "The Office of the Director of National Intelligence's Progress and Plans, and the Role of Program and Budget Analysis with the National Intelligence Program" Ballroom

Lunch & Presentation of the Blum and Kubat Awards

1:45 - 2:00 p.m.

Break/Networking Foyer

2:00 - 3:15 p.m.

Federal A

Concurrent Sessions (Panels)

D. Use of Performance Information in Budgeting and Managing

Convener: Robert Shea, Counselor to the Deputy Director for Management, Office of Management & Budget

Speakers: Rick French, Department of Labor

Morris McTigue, George Mason University's Mercatus
Center

This panel will discuss the Government's efforts at performance management and what it needs to do to improve.

Federal B

E. Intergovernmental Grants: Balancing Flexibility and Control Amidst Current Budget Challenges

Convener: Michelle Sager, Government Accountability Office

Speakers: Timothy Conlan, Professor, Department of Public and
International Affairs, George Mason University

John Cuaderes, Staff Director, Subcommittee on Federalism
and the Census, House Committee on Government Reform

Todd Richardson, Deputy Director, Office of Policy

Development and Research, Department of Housing and
Urban Development

This panel will consider the current intergovernmental grants environment in terms of 21st century challenges such as strained budgets at all levels of government and non-routine events (e.g., natural disasters, pandemic flu planning, and homeland security preparedness). These challenges are balanced against perennial questions such as how to best target funds to those most in need as well as those best placed to respond to opportunities while also assuring flexibility, accountability and results.

Statler AB

F. Lessons from Katrina

Convener: Joe Kull, PricewaterhouseCoopers

Speakers: Margaret Young, Chief Financial Officer, Federal Emergency Management Agency

Jenni Main, Chief Financial Officer, Small Business Administration

Dennis Dauphin, Assistant Director for Enforcement and Corrections, Department of Justice

This panel will examine the different agency perspectives on their response to Hurricane Katrina.

3:15 - 3:30 p.m.

Break/Networking Foyer

3:30 - 4:30 p.m.

Afternoon Speaker: **Maya MacGuineas, New America Foundation: President, Committee for a Responsible Federal Budget & Director, Fiscal Policy Program** Ballroom

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**AMERICAN ASSOCIATION FOR BUDGET AND PROGRAM ANALYSIS
2005 FALL SYMPOSIUM**

"Surviving in Second Term Crosscurrents"

November 1, 2005
Capital Hilton Hotel
16th & K St., NW, Washington, D.C.
Farragut North Metro Stop – Red Line

- 8:00 – 8:45 AM Registration, Coffee Foyer
- 8:45 – 9:00 AM Welcome, Shelly McAllister, President, AABPA Ballroom
- 9:00 – 10:15 AM **Morning Speaker:** Paul Posner, Managing Director, Strategic Issues, Government Accountability Office
- 10:15 – 10:30 AM Break/Networking Foyer & Ballroom
- 10:30 – 11:45 AM Morning Concurrent Sessions:

Federal A

A. Integrating Budgeting and Accounting: Making Incremental Improvements and Blazing New Frontiers

Convener: Teresa Tancre, Budget Methods Specialist, Office of Management & Budget

Speakers: Jeff Hoge, Director, Accounting Systems Division, Department of Treasury

Ed Martin, Senior Financial Analyst, Department of Health and Human Services

Chris Fairhall, Project Manager, Office of Management and Budget

People like you (staffers, front-line managers, and senior managers) are leading the government to make both incremental improvements and blaze new frontiers in integrating budgeting and accounting. The hard questions you asked in the past pushed OMB and Treasury to open FACTS II in 1998-99, and the questions you are asking now are prompting agencies, OMB and Treasury to make other changes to further integrate budgeting and accounting. This session tells you about upcoming changes, small and large, that will help the government produce the right numbers (they add up AND are correct) at the right time (sooner) in a programmatically meaningful way.

Federal B

B. Consulting For and By the Federal Government

Convener: Rex Reagan, Acquisition Management Branch Chief, US-VISIT Program Office, Department of Homeland Security

Speakers: Anne Kelly, CEO, Federal Consulting Group, Treasury

Annie Mazur, CFO, Federal Consulting Group, Treasury

Ron Oberbillig, COO, Federal Consulting Group, Treasury

The Department of Treasury Franchise Fund is one of the government's leading shared service providers. As an entrepreneurial government enterprise, the Franchise was established to provide common administrative support services on a competitive and fully cost-reimbursable basis. The panel will discuss the strategies that agencies have used to achieve results and accomplish the objectives of the President's Management Agenda, the PART, and GPRA.

Statler A/B

C. Perilous Prognostication: The Art and Science of Revenue Forecasting

Convener: David Weiner, Chief of the Modeling Unit, Congressional Budget Office

Speakers: Mark Booth, Chief Revenue Forecaster, Congressional Budget Office

Joel Platt, Chief Revenue Forecaster, Treasury

Fitzroy Lee, Director of Taxation and Research, D.C. Tax Office

The chief revenue forecasters for CBO, the U.S. Treasury, and the District of Columbia will discuss their experiences forecasting revenues. Topics will include the volatility of revenue forecasts, the major sources of forecasting errors, and what it is like to work in an environment where you get to regularly produce forecasts that you know will be wrong.

- 11:45 – 12:15 PM Break/Networking Foyer

12:15 – 1:45 PM **Lunch Speaker:** Karen Evans, E-Gov Administrator, Office of Management & Budget *Ballroom*

1:45 – 2:00 PM Break/Networking *Foyer*

2:00 – 3:15 PM Afternoon Concurrent Sessions:

Federal A

D. Third-Party Financing of Federal Projects

Convener: Gail Zimmerman, Budget Methods Specialist, Office of Management & Budget
Speakers: Carol Henn, Senior Analyst, Strategic Issues, Government Accountability Office
Joseph Sikes, Housing Program Office, Department of Defense
Kathy Gramp, Congressional Budget Office

Budgetary pressures have spawned a new approach to financing federal projects. Since 1998, third parties have borrowed roughly \$12 billion to fund federal projects. Third-party financing arrangements have a number of negative consequences. In general, projects are more costly and, if agencies do not initially record the full cost of governmental activities, the budget understates the size of the federal government and its obligations.

Federal B

E. Electronic Budgeting: Can One Size Fit All?

Convener: Marty Rubenstein, Budget Director, National Science Foundation
Speakers: Ed Walsh, Staff Director Budget Formulation, Control and Policy Staff, Environmental Protection Agency
Andrew Rider, DEBS Program Manager, Department of Labor
Dave Harmon, MAX Project Manager, Office of Management and Budget

Budget formulation is described by some as "art," by others as "science," and by others as a combination of both. Which is it? Hear how several major agencies manage their budget formulation process, what they are doing to integrate software solutions into their budgeting processes, and how your agency can streamline common processes.

Statler A/B

F. Performance Budgeting: Is PART Making a Difference?

Convener: Jackie Nowicki, Assistant Director, Government Accountability Office
Speakers: Stephanie Shipman, Assistant Director, Government Accountability Office

Description: Is PART making a difference on program operations? What's the relationship between PART and GPRA and how has it changed over time? What progress have agencies made in improving the supply of performance information needed for PART reviews, and are the associated program evaluations likely to yield the type of information needed? How well does PART assess programs related to a common goal? Has PART spurred Congressional interest in performance budgeting and performance management? Join us for a discussion on GAO's two October 2005 reports on these issues.

3:15 – 3:30 PM Break/Networking *Foyer*

3:30 – 4:30 PM **Afternoon Speaker: "Nightly Budget Report"** *Ballroom*
Stanley Collender, Managing Director Washington Operations,
Financial Dynamics Business Communications

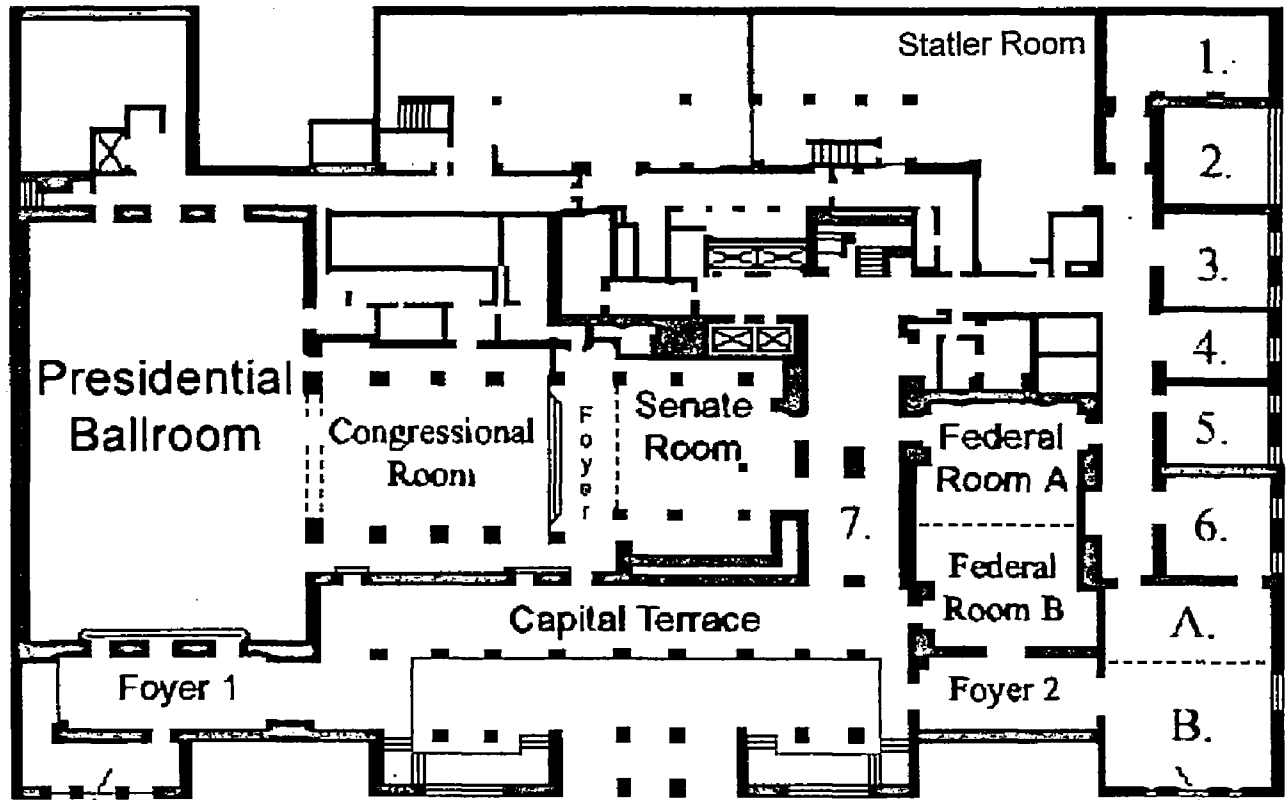
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Continental Room

1. Pan American Room
2. Massachusettes Room
3. New York Room
4. Michigan Room
5. Ohio Room
6. California Room
7. Upper Lobby

South America Room

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AMERICAN ASSOCIATION FOR BUDGET AND PROGRAM ANALYSIS
2005 SPRING SYMPOSIUM

“Budget and Performance – An ‘Xtreme Sport’”

April 13, 2005
Capital Hilton Hotel
16TH and K Street, N.W., Washington, D.C.
Farragut North Metro Stop - Red Line

- 8:00 - 8:45 a.m. Registration, Coffee Foyer
- 8:45 - 9:00 a.m. Welcome, Pat Mullen, President, AABPA Ballroom
- 9:00 - 10:15 a.m. Morning Speaker: **Former Congressman Charles Stenholm**
Mr. Stenholm heads the Centrist.org group and is famous as the founder of the Blue Dog Democrats. He is a leading advocate of Social Security reform.
- 10:15 - 10:30 a.m. Break/Networking Foyer & Ballroom
- 10:30 - 11:45 a.m. Concurrent Sessions (Panels)

Senate Room

A. OMB’s Review of Community and Economic Development

Convener: Denise Fantone, Gov’t. Accountability Office

Speakers: Dustin Brown, Program Examiner, Office of Management & Budget
Amber Wichowsky, Program Examiner, Office of Management & Budget
Mary Plessner, Deputy Assistant Secretary for Management Services and
CFO, Economic Development Administration, Dept. of Commerce
Donna Fabiani, Financial Strategies & research Program Manager, CDFI
Funds, Department of Treasury

What do HUD, USDA, Treasury, HHS, and Commerce have in common? They each have programs that were assessed together in an OMB FY2006 cross-cutting PART review. With additional cross-cutting assessments of credit, block grants, and Small Business Research (SBIR) programs promised for FY2005, come join us in a discussion of what it takes to participate in a “super” PART review from the perspectives of OMB examiners and agency officials.

**South American B
Room**

B. The Future of the Finance Professional

Convener: Joan McKean, National Oceanographic and Atmospheric Administration

Speakers: Kenneth Bresnahan, Consultant, Grant Thornton LLP, *Moderator*
Susan Grant, Chief Financial Officer, Department of Energy
James Lynch, Managing Consultant, IBM Business Consulting Services
Sallyanne Harper, Chief Adm. Officer, Gov’t. Accountability Office

The JFMIP White Paper, *The Federal Financial Management Workforce of the Future*, delivered an eloquent challenge: the finance professions must change and adapt. There has been a paradigm shift from transaction support to multi-skilled analysis and decision making. What are the underlying causes that have changed the nature of our work? What is the career design that will support the new culture? Are there examples of successful workforce transformations as models? These questions will be answered and the evolving role of the Federal CFO reviewed.

Finally, exploring the key challenge, *what can you do as an individual - are you part of the problem or part of the solution* - will provide strategies with which to revamp our careers and brighten our view of the future.

South American A Room

C. The 10th Anniversary of the Unfunded Mandates Reform Act

Convener: Leo Lex, Principal Analyst, Congressional Budget Office
Speakers: Orice Williams, Director Strategic Issues, Gov't. Accountability Office
Molly Ramsdell, Director of Budgets & Revenue Committee, National Conference of State Legislatures
Neil Eisner, Assistant General Counsel, Department of Transportation

This panel will explore whether the requirements imposed on federal agencies under the Unfunded Mandates Reform Act of 1995 have changed the way those agencies interact with state and local governments. Our panel of experts will review UMRA's basic requirements, discuss how the law has worked over the last decade, and consider whether the law should be strengthened.

11:45 - 12:00 p.m. Break/Networking *Foyer*

12:00 - 2:00 p.m. Lunch *Ballroom*

Luncheon Speaker: **Mr. Douglas Holtz-Eakin, Director of the Congressional Budget Office**

Presentation of the Blum and Kubat Awards

2:00 - 2:10 p.m. Break/Networking *Foyer*

2:10 - 3:20 p.m. Concurrent Sessions (Panels)

Congressional Room

D. 30-Year Anniversary of the Congressional Budget Act

Convener: Phil Joyce, Professor, George Washington University
Speakers: James Horney, Senior Fellow, Center on Budget & Policy Priorities
Louis Fisher, Senior Specialist, Congressional Research Service
Donald Wolfensberger, Director, Congress Project
Woodrow Wilson International Center for Scholars

The Congressional Budget and Impoundment Control Act, which created the congressional budget process, is now 30 years old. The Act created the congressional budget resolution, the Budget Committees, and the Congressional Budget Office. This panel will rely on a number of experts, all of whom have been participants in and observers of the process over its history. These experts will make observations concerning the effects that the process has had on Congressional budgeting, on relations between the Congress and the executive branch, and on budget outcomes.

Massachusetts Room

E. Homeland Security Budgeting

Convener: Rex Reagan, Department of Homeland Security
Speakers: Andrew Abrams, Branch Chief, Department of Homeland Security, Office of Management & Budget
Richard Williams, Director of PA&E, Department of Homeland Security Administration
David Nicholson, Chief Financial Officer, Transportation Security Agency

Formulation of an annual departmental budget is a daunting task for professional managers: the technical requirements are numerous; the audiences you play to are many; and the planning begins almost 2 years before enactment. Consider having to create a budget where one never existed, for 22 agencies coming together for the first time (some of which never before existed in their new form), with no guiding strategic plan, leaders that haven't worked together, and having to develop a five-year budget plan? That was the task for the Department of Homeland Security during its first years. Join OMB DHS Examiner Andrew Abrams; DHS Director of Planning, Analysis and Evaluation Richard Williams; and CFO for Transportation Security Administration RADM (Ret) David Nicholson, to see how it was accomplished, and apply these methods to your agency.

3:20 - 4:30 p.m.

Afternoon Speakers: **Panel Discussion on "Budgeting In Baghdad"**

Convener: Judy Thomas, Office of Management and Budget

Speakers: Abe Dymond, Assistant General Counsel, Govt. Accountability Office
Douglas Hamilton, Deputy Assistant Director, Macroeconomic Analysis Division, Congressional Budget Office
Sarah Horigan, International Affairs Division, Office of Management & Budget

This panel will discuss their Iraq-CPA experiences from the perspective of budgeting in a warzone; providing fiscal law guidance; and providing technical assistance such as the establishment of a civil servant payroll system.

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AMERICAN ASSOCIATION FOR BUDGET AND PROGRAM ANALYSIS
2004 FALL SYMPOSIUM

"Is The Past Prologue? What Is In Store For The Next Four Years"

November 19, 2004
Capital Hilton Hotel
16TH and K Street, N.W., Washington, D.C.
Farragut North Metro Stop - Red Line

- 8:00 - 8:45 a.m. Registration, Coffee Foyer
- 8:45 - 9:00 a.m. Welcome, Pat Mullen, President, AABPA Ballroom
- 9:00 - 10:15 a.m. Morning Speaker: **David Osborne, Co-Author, *The Price of Government: Getting The Results We Need In An Age Of Permanent Fiscal Crisis*, Senior Partner, Public Strategies Group**
- Mr. Osborne will be discussing his recent book.
- 10:15 - 10:30 a.m. Break/Networking Foyer & Ballroom
- 10:30 - 11:45 a.m. Concurrent Sessions (Panels)
Senate Room
- A. The Price of Government: A Round Table Discussion**
Convener: Teri Gullo, Chief, State & Local Government Cost Estimates Unit, Congressional Budget Office
Speakers: Paul Posner, Managing Director, Strategic Issues, Government Accountability Office
Richard Keevey, Director of the Performance Consortium, the Human Resources Management Consortium and Director of State Operations at the National Academy of Public Administration
Carl Moravitz, Consultant, IBM Business Consulting Services and Former Budget Director at the Department of the Treasury

After listening to David Osborne speak about "The Price of Government", this expert panel will discuss results-based government, performance budgeting, and other issues raised by Mr. Osborne.

South American B Room

- B. Continuity of Operations**
Convener: Judith Thomas, Office of Management and Budget
Speakers: James Sweetman, Senior Analyst, Information Technology, Government Accountability Office
Edward Brigham, Associate Director for Management & Administration, Department of Transportation
Bing Bradshaw, Senior Budget Methods Specialist, Budget Concepts Branch, Office of Management & Budget

Agencies have been required to be prepared for "Continuity of Operations" (a.k.a. "COOP") for years now. After the Oklahoma City bombing and 9-11 these requirements are much more real. How do you determine your mission critical functions? What's the role of the budget offices? Is your agency head involved? If you are in a Department, what does your Secretary's Office expect from your COOP site? And finally, how would budget execution be handled Government-wide in a COOP situation? This panel will discuss the perspectives of an agency (Transportation), GAO, and OMB.

Statler Room

C. GAO and the Red Book: Resources to Get the Job Done

Convener: Margie Armen, Senior Attorney, Government Accountability Office
Speakers: Thomas H. Armstrong, Assistant General Counsel, Government Accountability Office
Kord H. Basnight, Senior Attorney, Government Accountability Office

You know about the Government Accountability Office, still called GAO, you've heard about the Principles of Federal Appropriations Law, commonly called the Red Book. Complete the picture by hearing from the head of GAO's Budget and Appropriations Law group and the Red Book Editor for the 3rd Edition. Explore the resources available to help you grapple with appropriations law questions.

11:45 - 12:15 p.m. Break/Networking Foyer

12:15 - 1:45 p.m. Lunch Ballroom

Luncheon Speaker: **Mr. Clay Johnson, Deputy Director for Management, Office of Management and Budget**

Mr. Johnson will discuss the President's Management Agenda, progress made to date and what we can look forward to in the next year.

1:45 - 2:00 p.m. Break/Networking Foyer

2:00 - 3:15 p.m. Concurrent Sessions (Panels)

Senate Room

D. When The Rubber Hits The Road: FY2005 Performance Budgets in Congress

Convener: Melissa Wolf, Government Accountability Office
Speakers: Jim McEntire, Deputy Assistant Secretary for Budget and Performance Planning, Department of Labor
Rich Efford, Staff Assistant Appropriations Subcommittee on Transportation, Treasury, and Independent Agencies

In an interactive setting, agency officials and congressional appropriations subcommittee staff will discuss their experiences preparing and using FY2005 performance budgets. The areas for discussion will include, among other things, what "performance budgeting" displays were provided, whether they were useful, and why.

South American B Room

E. Defense Budgeting: A Global Perspective

Convener: John Roth, Deputy Comptroller, Office of the Undersecretary of Defense (Comptroller), Office of Secretary of Defense
Speakers: Vice-Admiral Stan Szemborski, Deputy Director of Program Analysis & Evaluation, Office of Secretary of Defense
Bryan Smith, Branch Chief, Operations, National Security Division, Office of Management & Budget
Dick Reed, Senior Analyst, Budget Policy & Procedures, Assistant Secretary of Navy, Financial Management & Comptroller, Navy

Previous Defense budget strategies were performed with conflicts and contingencies in mind. Neither of which were designed to cope with an undefined projected schedule. A global perspective must now be instituted to budget not only for traditional defense acquisitions but also for offensive tactical operations and the requirement for a potential open-ended timeframe. To address this vital operation requires budget techniques and skills that reside with the Pentagon.

Statler Room

F. Accelerated Financial Statements

Convener: David Zavada, Chief, Financial Standards & Grants Branch, Office of Federal Financial Management, Office of Management & Budget

Speakers: Dana James, Accountant, Office of Management & Budget
Lisa Casias, Deputy Director for Financial Policy, Department of Commerce
Chris Fairhall, Budget Analyst, Office of Management & Budget

What is the impact of accelerated financial statements? This panel will discuss the perspectives of agencies and OMB on the potential impact accelerated financial statements will have on FACTS II, the President's Budget, and the Statement of Budgetary Resources.

3:15 - 3:30 p.m.

Break/Networking Foyer

3:30 - 4:30 p.m.

Afternoon Speaker: **Ms. Maya MacGuineas, Executive Director, The Committee for a Responsible Federal Budget**

Ms. MacGuineas will discuss the long-term pressures on the budget.

AMERICAN ASSOCIATION FOR BUDGET AND PROGRAM ANALYSIS
2004 SPRING SYMPOSIUM

“A National Budget for Global Issues”

April 13, 2004
Capital Hilton Hotel
16TH and K Street, N.W., Washington, D.C.
Farragut North Metro Stop - Red Line

- 8:00 - 8:45 a.m. Registration, Coffee Foyer
- 8:45 - 9:00 a.m. Welcome, Rex Reagan, President, AABPA Ballroom
- 9:00 - 10:15 a.m. **The Honorable Mr. Joel Kaplan, Deputy Director for the Office of Management and Budget.**
The Honorable Ms Janet Hale, Under Secretary of Management, Department of Homeland Security.
- 10:15 - 10:30 a.m. Break/Networking Foyer & Ballroom
- 10:30 - 11:45 a.m. Concurrent Sessions (Panels)

A. The Budget Outlook: Macro Deficits, Micro Constraints?

Convener: Dr. Phil Joyce, George Washington University
Bill Hoagland, Office of the Senate Majority Leader
Jim Horney (invited), Deputy Staff Director (Democrats),
Senate Budget Committee
Van Dorn Ooms, Senior Fellow, Committee for Economic
Development

The Bush Administration and the Congressional Budget Office each forecast deficits in excess of \$500 billion for fiscal year 2005, and baseline deficits are forecast to remain at record levels for the next several years. Panelists will discuss reasons for these deficit trends, prospects for reducing these deficits, and the impact that this macrobudgetary environment may have on Congressional appropriation decisions.

B. Performance Budgets: Format Follows Function

Convener: Thad Juszczak, Department of Health & Human Services
Speakers: Anne Phan, Department of State
Dick Rock, Department of Energy
Terry Grindstaff, Environmental Protection Agency
Cory Gilbertson, Department of Health & Human
Services

This panel will review the performance budget formats used by different agencies to comply with the budget and performance integration initiative of the President's Management Agenda.

C. PART: Prospects and Challenges for the Program Assessment Rating Tool (PART)

Convener: Stephanie Shipman, General Accounting Office
Speakers: Denise Fantone, Assistant Director, Strategic Issues,
General Accounting Office
Cora Beebe, Director, National Academy of Public
Administration
Robert Shea, Counsel to the Deputy Director for
Management, Office of Management & Budget

Central to implementing the performance and budget integration initiative of the PMA, OMB's PART is a diagnostic tool meant to provide a consistent approach to evaluating federal programs. This session features various perspectives on PART and its implementation in FY's 04 and 05.

11:45 - 12:15 p.m.

Break/Networking Foyer

12:15 - 1:45 p.m.

Lunch Ballroom

Luncheon Speaker: **The Honorable Mr. Sean O'Keefe,
Administrator, National Aeronautics and Space
Administration**

1:45 - 2:00 p.m.

Break/Networking Foyer

2:00 - 3:15 p.m.

Concurrent Sessions (Panels)

D. Current Issues in Appropriations Law – Dialogue and Debate

Convener: Margie Armen, Senior Attorney, General Accounting
Office
Speakers: Thomas H. Armstrong, Assistant General Counsel,
Budget and Appropriations Group, General Accounting
Office
Rosalyn J. Rettman, Associate General Counsel for
Budget, Office Management & Budget
Jennifer L. Smith, Deputy General Counsel,
Congressional Budget Office

What's Changing? What's Not? Hear from the experts.

E. Developing Key National Indicator Systems

Convener: Pat Mullen, General Accounting Office
Speakers: Thomas Yatsco, Senior Analyst, Strategic Issues,
General Accounting Office
Elizabeth Powell, Senior Analyst, Strategic Issues,
General Accounting Office
Jane Ross, Project Director, National Academy of
Sciences (NAS)
Katherine Wallman, Chief Statistician of the United
States, Office of Management & Budget

For a democracy that is performance-oriented and accountable, national performance indicators are needed to assess the overall position and progress of our nation, frame strategic issues and chart future direction. To begin the dialogue to establish such a system, GAO, NAS, and a distinguished panel of experts have been working to determine what would comprise such a system. This session provides background about the key national indicators system, support provided by NAS, and OMB's observations about the system.

F. The Role of the Human Capital Officer and Future HR Challenges in the Federal Government

Convener: Marta Perez, Office of Personnel Management

Speakers: Ms. Marta Perez, Associate Director, Division for Human Capital Leadership and Merit System Accountability, Office of Personnel Management
Kevin Mahoney, Deputy Associate Director, Center for General Government, Office of Personnel Management

The role of the Human Capital Officer has evolved over the years from personnel specialist to strategic planner. With a significant percentage of Federal employees eligible for retirement over the next 5-10 years, how can we assure that each agency has the staff to accomplish its mission?

3:15 - 3:30 p.m.

Break/Networking Foyer

3:30 - 4:30 p.m.

Afternoon Speaker: **Mr. Stanley E. Collender**, General Manager, Financial Dynamics Business Communications "***The Federal Budget Game Show***" Ballroom

"The Federal Budget Game Show" is the latest in Stan Collender's series of high energy and highly entertaining presentations. This year find out if the federal budget put the U.S. economy in "Jeopardy." Discover whether the White House will have to play "Let's Make A Deal" with conservative Republicans to get anything done. And find out why this year's budget debate might seem like a never-ending episode of "The Gong Show."

AMERICAN ASSOCIATION FOR BUDGET AND PROGRAM ANALYSIS
2003 FALL SYMPOSIUM

"Crisis Budgeting: Domestic and International"

November 21, 2003
Capital Hilton Hotel
16TH and K Street, N.W., Washington, D.C.
Farragut North Metro Stop - Red Line

- 8:00 - 8:45 a.m. Registration, Coffee Foyer
- 8:45 - 9:00 a.m. Welcome, Rex Reagan, President, AABPA Ballroom
- 9:00 - 10:15 a.m. Morning Speaker: **Dr. Dov Zakheim**, Deputy Secretary of Defense
(Comptroller), Department of Defense
"Homeland Defense and the Global War on Terrorism"
- 10:15 - 10:30 a.m. Break/Networking Foyer & Ballroom
- 10:30 - 11:45 a.m. Concurrent Sessions (Panels)

Senate Room

A. Performance Budgeting: Implementing the Program Assessment Rating Tool (PART)

Convener: Jackie Nowicki, Senior Analyst, General Accounting Office
Randy Lyon, Chief, Commerce Branch, Office of Management & Budget
Stephanie Shipman, Ass't. Director, Applied Research & Methodologies, General Accounting Office
Scott Cameron, Deputy Assistant Secretary for Performance and Management, Office of the Assistant Secretary for Policy, Management, & Budget; US Department of the Interior

Central to implementing the performance and budget integration initiative of the PMA, OMB's PART is a diagnostic tool meant to provide a consistent approach to evaluating federal programs. This session features various perspectives on PART and its implementation in FYs 04 and 05.

Statler Room

B. Progress Update: Bridging the Gap Between Budget and Accounting

Convener: Judith Thomas, Budget Methods Specialist, Office of Management & Budget

Speakers: Jeff Hoge, Director, Accounting Systems Division, Governmentwide Accounting Financial Mgmt. Ser., Department of Treasury
Teresa Tancre, Budget Concepts Branch, Office of Management & Budget
Ed Martin, Office of Budget, Health & Human Services

This panel presentation is an update on two previous AADPA symposium sessions (November 2001 and May 2002) that were entitled "Linking Accounting and Budget Data".

Treasury and OMB have been working very closely together on a major effort to streamline the Federal financial and budget processes to achieve a reduction in the reconciliation process that frequently occurs between budget analysts and accountants. This panel (Treasury, OMB, and HHS) will give their perspectives on the progress to date on bridging the gap between the linking of accounting and budget data.

So. American B C. **Web-Enabled Budget Systems**

Convener: Dr. Joan McKean, Program Analyst, Department of Commerce

Speakers: Dr. John Cleckner, President, User's Friend, Inc.
Stephen Elko, Jr., Principal, Enterprise Systems Engineering
Peter Maxey, Chief, Systems & Policy Div., Off. Of Budget, Off. Of the Secretary, Department of Commerce
Bob McFadden, Chief, Systems & Legislation, Budget & Planning Off., U.S. State Department

These systems are the next big wave. What's not to like? They network and serve geographically dispersed facilities, allow simultaneous review by many, and easily disseminate budget decisions. Significant benefits include moving budgetary data more quickly and accurately between the various levels of an organization and having electronic budget submission. Such systems can empower client organizations to enter and track their budget requests and justifications online. They make it possible to notify client organizations immediately when funding documents are issued. Further, the audit trail and integrated text provide detailed explanations of how budget numbers are derived. Budget operating plans and funds management can be an integral component of all financial transactions. Data is extracted and made available via a data warehouse, with report creation on demand. *Sounds wonderful* - doesn't it, but what are the pitfalls and roadblocks to implementing these capabilities in your own work environment? Four veterans will share their successes as well as the difficulties they had to overcome. Bring your questions.

11:45 - 12:15 p.m.

Break/Networking Foyer

12:15 - 1:45 p.m.

Lunch Ballroom

Luncheon Speaker: **The Honorable David Walker**, Comptroller General, General Accounting Office

Awards Ceremony

1:45 - 2:00 p.m.

Break/Networking Foyer

2:00 - 3:15 p.m.

Concurrent Sessions (Panels)

So. American B D. **Integrating Information Technology Investments and Budget Decision Making**

Convener: Dianne Shaughnessy, Chief, Division of Budget Administration, U.S. Department of the Interior

This panel will discuss Agency challenges and experiences in integrating information technology investments and budget decision making with a focus on completion of OMB's Exhibit 53 and Exhibit 300s. The panel will also discuss GAO's Information Technology Investment (ITIM) Framework.

Participants in this session can expect to increase appreciation of how the capital planning process can result in better budget decisions, and share their own experiences in IT portfolio management.

Senate Room

E. Appropriations Update

Convener: George Krumbhaar, Managing Editor, usbudget.com
Speakers: Peter Cohn, Appropriations Reporter, Congress Daily
Bill Hoagland, Director of Budget & Appropriations, Office of the Senate Majority Leader
Jim Horney, Deputy Staff Director, Senate Budget Committee

Congress was supposed to have finished its work by October 15, but a month later it was still stuck in appropriations purgatory, with Democrats fighting Republicans, the House fighting the Senate, and Republicans from both chambers fighting the White House. How this is all being resolved? What does it suggest for next year, when tempers will be higher and the pressure to adjourn even greater? Our panel of experts includes senior Republican and Democratic congressional staff, as well as a prominent Washington journalist who covers the appropriations beat.

Statler Room

F. Reduction of Total Ownership Cost (R-TOC): Is It a Requirement?"

Convener: Dr. Jay Mandelbaum, RTOC Program Manager, Office of Secretary of Defense
Speakers: Nanette Ramsey, Army Material Command Value Engineering Program Manager, Army
Mike Skratulia, Navy RTOC Program Manager, Navy
Gary McNutt, AFTOC Team Leader

Total ownership cost is a budget-breaking issue facing Department of Defense acquisitions and life cycle costs. The Pentagon has established mechanisms to reduce these costs while preserving acquisition and engineering integrity. The Office of Secretary of Defense will provide a tri-service presentation on the parameters of the R-TOC program and the successes from this effort.

3:15 - 3:30 p.m.

Break/Networking Foyer

3:30 - 4:30 p.m.

Afternoon Speaker: **Dr. Rudy Penner**, Urban Fellow, Former Director of the Congressional Budget Office ***"Budget Crisis at the Door"***
Ballroom

AMERICAN ASSOCIATION FOR BUDGET AND PROGRAM ANALYSIS
2003 SPRING SYMPOSIUM

"Budgeting in a Deficit Environment: The Ways and Means"

May 2, 2003

Capital Hilton Hotel

16TH and K Street, N.W., Washington, D.C.

Farragut North Metro Stop - Red Line

8:00 - 8:45 a.m.

Registration, Coffee

Foyer

8:45 - 9:00 a.m.

Welcome, Debi Schilling, President, AABPA

Ballroom

9:00 - 10:15 a.m.

Morning Speaker: **Dr. Dov Zakheim**, Deputy Secretary of Defense
(Comptroller), Department of Defense

10:15 - 10:30 a.m.

Break/Networking

Foyer and Ballroom

10:30 - 11:45 a.m.

Concurrent Sessions (Panels)

South American B

A. The Changing Outlook for Federal Budgeting (*Encore Panel*)

Convener: Sandy Davis, Special Assistant to the Director,
Congressional Budget Office

Speakers: Teri Gullo, Chief of the State and Local Cost Estimates
Unit, Congressional Budget Office

Jim Hearn, Senior Analyst for Government Finance
and Management, Senate Budget Committee

Beth Robinson, Deputy Assistant Director for Budget
Review and Concepts, Office of Management
and Budget

Changing demands and uncertainties, always core issues for Federal budgeting, now seem to define the Federal budget process. Budgetary pressures caused by the war in Iraq, concerns about the economy, homeland security, state and local funding needs, and other significant pressures now frame the budget debate. And that debate follows a period of extraordinary budgetary change, with large surpluses having disappeared and potentially significant deficits in the offing. Lawmakers also face the question of whether they should extend the system of budget enforcement procedures - the discretionary spending caps and PAYGO requirements - that expired last fall, or seek a new framework for budget and fiscal policy. An experienced group of panelists will discuss what these and other issues mean for Federal budgeting and the Federal budget outlook.

Statler A

B. Long-Term Commitments in the Federal Budget

Convener: Christine E. Bonham, Assistant Director, Strategic
Issues, General Accounting Office (GAO)

Speakers: Jim Brumby, Deputy Division Chief, Fiscal Affairs
Department, International Monetary Fund

Carol Henn, Senior Analyst, Strategic Issues, GAO

Daniel Kowalski, Director of Budget Review, House
Budget Committee, Majority Staff

The looming Federal commitment to pay Social Security and Medicare benefits to the baby boom generation is common knowledge, but what other fiscal exposures are also looming out there, beyond the budget horizon? Federal fiscal exposures range from explicit liabilities like the publicly-held debt to implicit promises embedded in current policy or public expectations. The government is expected to pay, but the budget often has not given decision makers any idea of the costs involved. This panel will introduce ideas for budgeting for such exposures, using environmental liabilities as an example. Key Budget Committee staff will talk about what they might do about it and an IMF official will provide an international perspective on how other countries view such exposures.

South American A

C. An Introduction to Activity-Based Budgeting

Convener: Diane Shute, Partner, Grant Thornton LLP

Speakers: Major Rollin D. Brewster, Project Manager, Center for Business Excellence, U.S. Marine Corps
Martin J. Heinze, Program Analyst, Minerals Management Service, Department of the Interior

Facing an increasing demand for predictive capacity to articulate, justify, and/or sustain their budgetary requirements, more organizations are turning to Activity-Based Budgeting (ABB). Using ABB to leverage and expand activity-based costing information, managers understand, and perhaps more importantly, can prove, the interplay between the demand for goods and services and the factors that impact their capacity to satisfy that demand. ABB will help your organizational, operational and resource management staffs to work more closely to formulate and justify your requirements, and that means success at the budget table - now and in the future. Speakers from the U.S. Marine Corps and the Minerals Management Service will explain how their respective organizations are implementing this cutting-edge technique.

Statler B

D. Competitive Sourcing - Where Are We Now?

Convener: David C. Childs, Office of Federal Procurement Policy, Office of Management and Budget (OMB)

Speakers: William J. McQuaid, Senior Program Analyst, Investment Branch, OMB
John K. Needham, Assistant Director, Acquisition and Sourcing Management Group, General Accounting Office
Jerry E. Williams, Chief, Federal Financial Systems Branch, Office of Federal Financial Management, OMB

For the first time since 1983, the fundamental policy structure and procedures associated with the OMB Circular A-76 are being re-written - in the context of the President's Management Agenda. Agencies have spent two years gearing up, i.e., developing the necessary infrastructure to expand competition and to make public-private competition a recurring part of everyday public business decision making. As noted in the press, the Department of Defense alone, expects to compete up to 226,000 commercial positions over the next five years. The civilian agencies too, after years of inactivity, expect to compete an additional 200,000-plus positions over the next five years. But that is not all. The focus is on the context for these important changes and the new ground rules for public-private competition. Related changes in the management and operations of inter-service support agreements (ISSA) are in the Circular, in OMB's new Business Rules for Intra governmental Transactions, and via the related assignment of DUNS numbers to public support service providers. These changes will, necessarily, have a dramatic affect on the way business is accomplished, how hiring decisions are made, how budgets are allocated and estimated, and on how work is allocated to public and private sector sources.

11:45 - 12:15 p.m.

Break/Networking

12:15 - 1:45 p.m.

Ballroom

Lunch

Speaker: **Douglas Holtz-Eakin**, Director, Congressional Budget Office

Awards Ceremony

1:45 - 2:00 p.m.

Break/Networking

2:00 - 3:15 p.m.

Concurrent Sessions (Panels)

Statler A

E. 2004 Appropriation Prospects

Convener: George Krumbhaar, Managing Editor, *usbudget.com*

Speakers: Bill Ghent, Budget Reporter, *Congress Daily*
Bill Hoagland, Director of Budget and Appropriations,
Office of the Senate Majority Leader
Joseph J. Minarik, Policy Director, Democratic Staff,
House Budget Committee

Perhaps at no time in the past decade has the appropriations picture been so uncertain. Many factors contribute to this, including the Middle East situation, the closely divided Congress, disagreements over economic stimulus policy, and the increasing difficulty of resolving congressional needs with conservative budgetary goals. Panel members will bring insider knowledge of recent developments, plus different perspectives, to what is expected to be a lively debate over spending priorities and the likely course of Congress over the FY 2004 budget.

South American B

F. Building the Department of Homeland Security: People, Dollars, and Facilities

Convener: Phyllis Scheinberg, Deputy Assistant Secretary for Budget and Programs, Department of Transportation

Speakers: Captain Gary Blore, Budget Officer, U.S. Coast Guard
Robert Gardner, Assistant Administrator for Finance and Administration and Chief Financial Officer, Transportation Security Administration
Carl Moravitz, Budget Director, Department of Homeland Security

First, we had the challenge of creating a new Transportation Security Agency from scratch and going from zero to sixty (thousand people, not miles per hour) in less than a year. Then, we immediately had another and even bigger challenge to create a brand new Department of Homeland Security made up of approximately 200,000 people from 22 different agencies with a budget of \$34 billion. The panel members will discuss some of the many, many challenges involved in bringing together the various organizations and cultures into one department that is built from scratch. We will address the perspectives of the losing and gaining departments and the agencies that moved from established organizations to a new organization that is still in its formative stage.

Statler B

G. Breathing Life into GPRA: The PART Initiative

Convener: Diana Espinosa, Deputy Assistant Director for Management, Office of Management and Budget

Speakers: Patti Barnett-Jones, Program Analyst, Office of the Assistant Secretary for Budget, Technology and Finance, Department of Health and Human Services
Morris Robert Bosin, Director of Planning Staff, Food and Drug Administration, Department of Health

and Human Services
Mary Cassell, Program Examiner, Education Branch,
Office of Management and Budget
Matthew Vaeth, Program Examiner, Public Health
Branch, Office of Management and Budget

For the FY 2004 President's Budget 234 programs, representing about 20 percent of the Federal budget, were assessed using the Program Assessment Rating Tool (PART). The PART is an analytical tool that helps identify a program's strengths and weaknesses so that agencies can focus their efforts to improving program performance. Did the PART generate information that was useful to the budget process? Have PART findings been used to drive improved program performance? Has the PART met its performance goals? How could the PART or the process for completing it be more useful to decision-makers? This panel will examine the first year experience of using the PART by having panelists representing both the Departmental and OMB perspectives share their experiences. The Panel aims to generate a frank discussion about the PART and how it was used.

South American A

H. Financial Management Performance Standards

Convener: Joseph L. Kull, Deputy Comptroller, Office of Management and Budget

Speakers: Donald G. McCrory, Deputy Chief Financial Officer,
National Science Foundation
Robert J. Shea, Counselor to the OMB Director for
Management

Improved financial performance is one of the five government-wide initiatives of the President's Management Agenda. Timely, useful, and accurate financial information that informs the decision-makers is the underpinning of results-oriented management. Successful implementations of the Agenda's competitive sourcing and expanding electronic government initiatives will require cost and pricing data. Leveraging the Federal Government's human capital requires the ability to capture current costs and project future expenses. Budget and performance integration is perhaps the ultimate expression of cost accounting. Financial information helps to establish what the American people received for their hard-earned tax dollar. Reducing the billions of dollars in erroneous payments the government makes every year is critical to American's fiscal health. This Panel will focus on government-wide efforts to improve financial performance by accelerating and expanding financial reporting. Using a case study of the only agency to achieve a green status score on the Executive Branch Management Scorecard, the Panel will describe efforts to identify and reduce an estimated thirty billion-plus dollars in annual erroneous payments.

3:15 - 3:30 p.m.
Foyer

Break/Networking

3:30 - 4:30 p.m.
Ballroom

Afternoon Speaker: **Stanley Collender**, National Director of Public Affairs and Managing Director of the Federal Budget Consulting Group, Fleishman-Hillard, Inc. *"The Deficit Strikes Back"*

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AMERICAN ASSOCIATION FOR BUDGET AND PROGRAM
ANALYSIS
2002 FALL SYMPOSIUM

“Budgeting for Better Public Service”

November 22, 2002

Capital Hilton Hotel

16th and K Street, N.W., Washington, D.C.

Farragut North Metro Stop – Red Line

- 8:00 - 8:45 a.m. Registration, Coffee
- 8:45 - 9:00 a.m. Welcome, Deborah Schilling, AABPA President
- 9:00 - 10:15 a.m. Morning Speaker: **Paul C. Light**, Director, Center for Public Service, Brookings Institution, Washington, D.C.
- 10:15 - 10:30 a.m. Break/Networking
- 10:30 - 11:45 a.m. Concurrent Sessions

A. Creating the Department of Homeland Security: Structural and Oversight Issues

Convener: Gail Zimmerman, Office of Management and Budget

Speakers: Denise Fantone, Assistant Director for Strategic Issues, General Accounting Office

Robert Gardner, Associate Undersecretary for Finance and Administration, Transportation Security Administration

Beth Robinson, Deputy Assistant Director for Budget Review and Concepts, Office of Management and Budget

Matt Schmit, Analyst, Budget Analysis Division, Congressional Budget Office

In proposing to create a new Cabinet Department of Homeland Security, the President has laid out the most extensive reorganization of the Federal Government since the 1940s. This panel will explore some of the issues that need to be addressed in connection with the establishment of a new department. For example, what functions will the new Department assume and how will it be organized? How will the Department integrate these functions? What are the key resource and performance management issues? In addition to logistical, structural and budget issues, Congress will need to consider how to provide oversight when the components cross so many lines. Panelists will provide some insight into these issues and how decisions are being made and implemented.

B. Conflicts During Budget Formulation in a Deficit Environment

Convener: Philip Joyce, Associate Professor, George Washington University

Speakers: Kerry Weems, Deputy Assistant Secretary for Budget, Department of Health and Human Services

Barry White, Council for Excellence in Government

Third Speaker to be Announced

The return of Federal budget deficits has introduced new challenges into the process of budget formulation. Unlike fiscal years 1999 through 2002, where agencies were facing a formulation environment in which budget surpluses were forecast for the foreseeable future, the 2003 and 2004 budget processes have occurred in the context of large and growing budget deficits. This panel, which will include both agency budget officers and veterans of OMB, will discuss how budget formulation differs, depending on whether the overall budget outlook is favorable (budget surpluses) or unfavorable (budget deficits).

C. The President's Financial Plan: His Recipe for Improved Financial Reporting

Convener: Don Hammond, Fiscal Assistant Secretary, Department of the Treasury, Chair of the CFO Council's Committee on Financial Statement Acceleration

Speakers: Steve App, Chief Financial Officer, Federal Deposit Insurance Corporation

Robert Reid, Deputy Assistant Secretary, Accounting Policy, Department of the Treasury

Jim Sturgill, Assistant Commissioner, Government-Wide Accounting, Financial Management Service

One component of the President's Management Agenda is Improving Financial Performance. A key element of this objective is to increase the quality and usefulness of financial reports. To help meet this objective, OMB has accelerated the dates for agency and government-wide reporting to be November 15 and December 15 respectively in 2004. This panel will provide first hand insights into what is happening in order to meet these dates. Hear from senior executives personally involved in this change. Get the lessons learned from a CFO experienced in report acceleration. Hear about how the agency budget execution reporting dates are changing NOW to facilitate this transition. Learn about the new process that is being implemented to provide for improved government-wide financial reporting.

D. Capital Planning for IT: Linking E-Gov to the President's Management Agenda

Convener: Edward Brigham, Department of Transportation

Speakers: Kimberly Nelson, Program Analyst, Information Policy Technology Branch, Office of Management and Budget

Lisa Schlosser, Associate Chief Information Officer, Office of the Secretary, Dept. of Transportation

Other Speakers from OMB *To Be Announced*

Capital planning for Information Technology investments is being emphasized more than ever in the Federal budget process. The scope of Exhibit 300s submitted by agencies with their annual budget requests has been expanded for FY 2004. The Exhibit 300s are requiring Federal agency budget offices and chief information officers to collaborate more closely. What are OMB's goals for IT capital planning? What will your agency gain by doing better IT capital planning? How can the experiences of other Federal agencies help your agency prepare better Exhibit 300s?

11:45 - 12:15 p.m.

Break/Networking

12:15 - 1:45 p.m.

Lunch

Speaker: **Dan L. Crippen**, Director, Congressional Budget Office

1:45 - 2:00 p.m.

Break/Networking

2:00 - 3:15 p.m.

Concurrent Sessions

E. The Changing Outlook for Federal Budgeting

Convener: Sandy Davis, Senior Analyst, Congressional Budget Office

Speakers: Philip Joyce, Associate Professor, George Washington University

Paul Posner, Director of Budget Issues, General Accounting Office

Roy Meyers, Associate Professor, University of Maryland, Baltimore County

The prospects for both the Federal budget and the budget process have changed dramatically over the past year. Rising surpluses have been replaced with actual and projected deficits. Lawmakers are struggling to reach a consensus on new policies for the budget and new fiscal goals for the budget process. Uncertainty and volatility in the political and economic arenas make budgeting difficult at best. With this in mind, panelists will review the current budget outlook, discuss how budgeting and the budget process have changed in the post-September 11 world, review progress in the application of performance measures to the budget process, and discuss possible options for improving budgeting in these rapidly changing times.

F. The Role of Federal, State, and Local Governments in Homeland Security: Who Sets the Standards? Who Foots the Bill?

Convener: Teri Gullo, Chief, State and Local Government Cost Unit, Congressional Budget Office

Speakers: George Foresman, Deputy Director for Preparedness, State of Virginia *Invited*

Tom James, Assistant Director, Strategic Issues, General Accounting Office

Peter Orszag, Senior Fellow in Economic Studies, Brookings Institution.

Frank Shafroth, Director, Office of State and Federal Relations, National Governors' Association

In response to September 11th there has been an unprecedented effort to improve Homeland Security at all levels of government. President Bush's new Homeland Security Blueprint, which emphasizes that this is a "national strategy, not a Federal strategy," suggests that state and local governments "can and should play important roles," not only in enhancing the protection of people and property, but in sharing the costs of those enhancements as well. But many questions remain, including how such efforts will be coordinated and how recent fiscal strains at the Federal and state levels will affect priorities. In this compelling session, panelists representing Federal, state, and local levels of government will describe recent efforts to protect the public from future terrorists' attacks. They also will provide insight into what these increased efforts will cost the nation and how they should be funded.

G. Budget Formulation Tools, An Update

Convener: Gail MacColl, Assistant Director, Applied Research and Methods, General Accounting Office

Speakers: Jonathan D. Breul, Director, Federal Management and IBM Business Consulting Services

Andrew Pavord, Senior Advisor to the Chief Operating Officer, Small Business Administration

A new budget formulation tool has made its debut this season at OMB. Known as the Program Assessment Rating Tool (PART), this instrument is designed to summarize and assess information about program purpose and design, strategic planning, management, and results as part of the budget review process. Questions on the PART provide the framework for discussion of each program's budget request, and answers (primarily yes/no) provide the basis for identifying issues that need to be addressed and for a summary judgment on program effectiveness. Panelists will comment on this potentially promising but controversial tool from several perspectives.

3:15 - 3:30 p.m. Break/Networking

3:30 - 4:30 p.m. Afternoon Speaker: **Angela B. Styles**, Administrator of Federal Procurement, Office of Federal Procurement Policy, Office of Management and Budget

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AMERICAN ASSOCIATION FOR BUDGET AND PROGRAM
ANALYSIS
2002 SPRING SYMPOSIUM

"Fast Changing Priorities and Budget Challenges in a Nation at War"

May 2, 2002
Capital Hilton Hotel
16th & K St., NW, Washington, D.C.
Farragut North Metro Stop – Red Line

- 8:00 - 8:45 a.m. Registration, Coffee
- 8:45 - 9:00 a.m. Welcome, Edward Brigham, President, AABPA
- 9:00 - 10:15 a.m. Morning Speaker: **Stephen A. Perry**, Administrator, General Services Administration
- 10:15 - 10:30 a.m. Break/Networking
- 10:30 - 11:45 a.m. Concurrent Sessions

A. Preparing for Appropriation Hearings: Words of Wisdom

Convener: Deborah Schilling, Director of Budget, GSA

Speakers: Carl Moravitz, Departmental Budget Director,
Department of the Treasury
Barbara Retzlaff, Director of Budget, Department of
Commerce

For months you've worked to prepare your budget submission. Circular A-11 has been your constant companion, and you have lived in fear of the dreaded OMB passback. Now, the President's budget has been submitted to Congress and you can relax, right? *Wrong.* Your Appropriations Subcommittee hearings have been scheduled and you have to justify yourself all over again. Have no fear, this group of intrepid panelists, steered by years of experience, will share their experiences in developing agency budget justifications, preparing testimony, and in figuring out just what you can and can't say as you prepare your agency for the hearings on your annual budget request.

B. The President's Management Agenda: Linking Performance to The Budget

Convener: Philip R. Dame, Deputy Assistant Director for Budget Analysis and Systems, OMB

Speakers: Robert Gardner, Financial Officer, Transportation
Security Administration
Justine F. Rodriguez, Deputy Associate Director for
Economic Policy, OMB

In their exploration of the integration of budget and performance the panel will discuss the reasons for the initiative, the elements of integration, how to improve agency management scorecards, and one agency's exemplary efforts to integrate budget and performance as well as the lessons learned worth passing along.

C. Homeland Security - The Strategic Budget Issues

Convener: Gregory T. Kiley, Principal Analyst, National Security Division, Congressional Budget Office

Speakers: Betty Davis, Chief Financial Officer,
Transportation Security Administration
Richard Falkenrath, Senior Director, Programs and Budget, Office of Homeland Security
Michael O'Hanlon, Senior Fellow, The Brookings Institution
Matthew Schmit, Analyst, Defense and International Affairs, Cost Unit, Congressional Budget Office

Since the terrorist attacks of September 11, 2001, homeland security has become an often touted phrase to justify emergency supplemental funding. Over \$38 billion of the President's 2003 budget falls into this category and is double the amount spent in 2002. Homeland security actually covers dozens of federal agencies and as many Congressional committees with oversight jurisdiction. This panel will focus on the practicalities of budgeting for homeland security and on evaluating the effectiveness of that spending.

D. Linking Accounting and Budget Data (*Encore Panel from the Fall 2001 Symposium*)

Convener: Judith Thomas, Senior Budget Analyst, Office of the Budget, U.S. Department of the Interior

Speakers: Schuyler Leshner, Deputy Chief Financial Officer, U.S. Department of the Interior
Edward Martin, Chief of the Budget Execution Branch, Departmental Budget Office, U.S. Department of Health and Human Services
Judy Yuran, Director, U.S. Standard General Ledger Division, Financial Management Service, U.S. Department of the Treasury

As we move forward in the twenty-first century, one of the important transformations we are witnessing in the Federal budget community is the progress towards better integration and coordination of budgetary and accounting data. Treasury and the Office of Management and Budget (OMB) have been working very closely together on a major effort to streamline the Federal financial and budget processes and achieve a reduction in the reconciliation process that frequently occurs between budget analysts and accountants. OMB is already several years into the process of linking budget execution data from the centralized Treasury database (FACTS II) into budget accounts within the President's Budget (MAX A-11-11). This process will go a step further, beginning with the FY 2004 President's Budget.

11:45 - 12:15 p.m.

Break/Networking

12:15 - 1:45 p.m.

Lunch, Speaker: **G. William Hoagland**, Republican Staff Director, Committee on the Budget, U.S. Senate

Awards Ceremony

1:45 - 2:00 p.m.

Break/Networking

2:00 - 3:15 p.m.

Concurrent Sessions

E. Project Matrix: Identifying the Critical Infrastructures in the Federal Government

Convener: John Tritak, Director, Critical Infrastructure Assurance Office, U.S. Department of Commerce

Speakers: Michael Lombard, Senior Coordinator for Infrastructure Security Analysis and Project Matrix Program
Matrix

Glenn Schlarmin, Senior Director for Federal Information Systems Security, Office of Management and Budget

Stephen Stern, Senior Nuclear Engineer, Office of Policy and International Affairs, Department of Energy

Project Matrix [tm] identifies the assets and interdependencies that the Federal government requires to fulfill its most critical responsibilities to the nation, which, if incapacitated or destroyed, would have a serious effect on the nation at large, or adversely affected major segments of the population, and require near term remediation. This three-step process identifies the most critical assets, captures their critical interdependencies, and ties them to the underlying private sector infrastructures. This session will provide a technical briefing on Project Matrix [tm], a client agency experience, and the perspective of the Office of Management and Budget. OMB has recently required large Federal agencies to participate in Project Matrix [tm].

F. FY2003 Appropriations: Who's Doing What to Whom, and How Much Will It Cost?

Convener: Lisa Caruso, Budget/Appropriations Reporter for the National Journal's CongressDaily

Speakers: James W. Dyer, Staff Director for the House Appropriations Committee Majority

Jim Horney, Budget Analyst for the Senate Budget Committee Chairman, Kent Conrad

Hazen Marshall, Deputy Chief of Staff and Budget Analyst for Assistant Senate Minority Leader And Senate Budget Committee Member, Don Nickles

The battles over the FY 2003 budget resolution were only a prelude to what promises to be an especially contentious appropriations season. The high-stakes fall elections, the return to budget deficits and the added budgetary pressures exerted by defense and homeland security needs have already sparked intense partisanship on Capitol Hill over tax and spending policy. Adding fuel to the fire, members of both parties have their backs up over White House efforts to rein in congressional earmarks, particularly in an election year, and the larger question of consultation between the executive and legislative branches. This panel of veterans of numerous budget battles will explore who is doing what to whom, what the eventual outcome could be – and most importantly, how much it will cost.

G. Contingency Budgeting: The Lessons of FY2002

Convener: Richard P. Emery, Assistant Director for Budget, Office of Management and Budget

Speakers: Jim Boden, Chief, Financial Institutions Branch, OMB
Charles Kieffer, Deputy Staff Director for Senate Appropriations, U.S. Senate

David Morrison, Defense Subcommittee, Senate Committee on Appropriations

The terrorist attacks of September 11, 2001, created considerable pressure for an immediate response before many requirements were known. The President proposed and the Congress enacted the "2001 Emergency Supplemental Appropriations Act for Recovery from and Response to Terrorist Attacks on America". This panel will look at issues involved in budgeting for contingencies: natural disasters, overseas contingencies, and the response to terrorism. Related issues are: executive flexibility vs. appropriate Congressional oversight, budgeting for contingencies for defense within totals or as a targeted response to specified requirements, and estimating the costs of FEMA's response.

H. Medicare Reform: Does It Have a Future and What Should It Be Like?

Convener: James R. McTigue, Jr, Assistant Director for Budget Analysis, Strategic Issues Group, General Accounting Office

Speakers: Marilyn Moon, Senior Fellow, The Urban Institute

Solomon M. Mussey, Director, Medicare and Medicaid

Cost Estimates Group, Office of the Actuary,

Centers for Medicare and Medicaid Services

Michael J. O'Grady, Senior Research Director, Center for Health Affairs, Project HOPE

Only a year ago, the prospects for Medicare reform, including prescription drug coverage, were nearly as high as the then projected \$5.6 trillion 10-year budget surpluses. Today, the Nation is fighting a war on terrorism, recovering from a recession, and running budget deficits. Although our priorities have shifted, the aging of our population continues, and Medicare cost growth has once again climbed into double digits. What is the current outlook for the Medicare program? How should the program be "modernized" and how long can we afford to wait?

3:15 - 3:30 p.m.

Break/Networking

3:30 - 4:30 p.m.

Afternoon Speaker: **Stanley E. Collender**, Senior Vice President, Fleishman-Hillard, Inc., "The Three-Ring Budget"

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AMERICAN ASSOCIATION FOR BUDGET AND PROGRAM
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2001 FALL SYMPOSIUM

"Budgeting and Performance in Times of Uncertainty"

November 2, 2001
Capital Hilton Hotel
16th & K St., NW, Washington, D.C.
Farragut North Metro Stop - Red Line

- 8:00 - 8:45 a.m. Registration, Coffee
- 8:45 - 9:00 a.m. Welcome, Edward Brigham, AABPA President
- 9:00 - 10:15 a.m. Morning Speaker: John W. Spratt, U.S. Representative, 5th District, South Carolina and Ranking Member on the Budget Committee
- 10:15 - 10:30 a.m. Break/Networking
- 10:30 - 11:45 a.m. Concurrent Sessions

A. Whither the Surplus

Convener: Sandy Davis, Principal Analyst, U.S. Congressional Budget Office

Speakers: *Richard Emery*, Assistant Director for Budget, Office of Management and Budget
Paul Posner, Director, Budget Issues Group, General Accounting Office
Jennifer Winkler, Minority Senior Analyst for Budget Review, Senate Budget Committee

Until the tragic events of September 11, lawmakers were preoccupied with numerous questions about budget surpluses. Would the tax cut and a slowing economy threaten to bring total surpluses below the levels in the Social Security and Medicare trust funds? What is the most significant measure of the surplus? Can or should a surplus "lockbox" be constructed? That debate now seems purely academic. Those same surpluses are now a resource needed to recover and respond, and to help deal with the broader economic consequences of that day. Other questions now emerge. Are the projections of large future surpluses and the debate over their disposition of things of the past? If so, how will the budget debate change and what new budgetary issues are likely to surface? To help you sort through those and other questions, a panel of top budget officials from OMB and Capitol Hill will share their perspectives on the status of the budget surplus, the current budget debate, and possible future trends.

B. Work Force Restructuring - Avoiding the Coming Crisis in Human Capital

Convener: Kerry Weems, Acting Deputy Assistant Secretary for Budget, U.S. Department of Health and Human Services

Speakers: *Jonathan Breul*, Senior Advisor to the Deputy Director for Management, U.S. Office of Management and Budget
Chris Mihm, Director of Strategic Issues, U.S. General Accounting Office
Andrew Richardson, Professional Staff Member, U.S. Senate Committee on Government Affairs

By 2004, 32 per cent of the Federal workforce will be eligible for voluntary retirement; another 21 per cent eligible for early retirement. Federal agencies will need strategies to recruit, reward, train and retain the skilled work force of the 21st Century. The President has a set of proposals and has made strategic management of human capital one of his management initiatives. Attitudes toward Federal employment may be changing in light of events of September 11 and the economic downturn that was deepened by those events. This panel, with representatives from GAO, OMB and the Congress, will examine the coming work force "crisis" and discuss a range of solutions.

C. Working Capital Funds: The Risks and the Rewards

Convener: Denise Fantone, Strategic Issues Office, U.S. General Accounting Office

Moderator: *Jennifer Ayers*, Administrator, Working Capital Fund, U.S. Department of Commerce

Speakers: *Howard G. Borgstrom*, Working Capital Fund Manager, U.S. Department of Energy
Barry Hudson, Managing Director, Treasury Franchise Fund, U.S. Department of the Treasury
Scott Snell, Assistant Director, Budget Staff, U.S. Department of Justice

Working Capital Funds have been around a long time providing an assortment of administrative services in Government-owned business-type operations. Long-gone are the days of sleepy operations with a guaranteed customer base. After over a decade of budget caps and customer demands to cut costs, Working Capital Fund managers cannot afford to be complacent. How are these managers dealing with some of the perennial challenges, such as staffing to meet demand and pressures to outsource? What are managers doing not only to survive but to thrive in a more competitive environment?

D. Linking Accounting and Budget Data

Convener: Judith Thomas, Senior Budget Analyst, Office of Budget, U.S. Department of the Interior

Speakers: *Jeffrey Hoge*, Manager, Program Requirements and Standards Branch, Government-wide Accounting, US. Department of the Treasury
Edward Martin, Director, Office of Budget Execution, Office of Finance, U.S. Department of Health and Human Services.
Teresa Tancre, Budget Methods Specialist, Budget Reviews and Concepts Division, U.S. Office of Management and Budget

As we move forward in the 21st Century one of the important transformations we are witnessing in the Federal budget community is the progress towards better integration and coordination of budgetary and accounting data. Treasury and OMB have been working very closely together on a major effort to streamline the

Federal financial and budget processes and to achieve a reduction in the reconciliation process that frequently occurs between budget analysts and accountants. OMB is already several years into the process of linking budget execution data from the centralized Treasury database (FACTS II) into budget accounts within the President's Budget (MAX A-11). This process will go a step further beginning with the FY 2004 President's Budget. Implementation of the first phase of Treasury's Government-wide Accounting Project is expected to be released in December of 2001. This panel (Treasury, OMB, and HHS) will give their perspectives on the major initiative of linking accounting and budget data and the progress and implications to date.

11:45 - 12:15 p.m.

Cash Bar/Networking

12:15 - 1:45 p.m.

Lunch

Speaker: Robert D. Reischauer, President, Urban Institute

1:45 - 2:00 p.m.

Break/Networking

2:00 - 3:15 p.m.

Concurrent Sessions

E. Outsourcing: Financial Management Applications

Convener: Richard B. Willett, Partner (retired), Grant Thornton LLP

Speakers: *Karen R. VenDouern*, Public Sector Senior Practice Director, Usinternetworking, Inc.
Timothy Vigotsky, Director, National Business Center, U.S. Department of the Interior

Outsourcing keeps growing as more government agencies recognize the effectiveness of "other-operated" (leased) vs. owned applications and attendant support. After outsourcing (whatever it may be), agencies can concentrate on their core businesses instead of having to maintain an IT (or other skills as the case may be) staff. From then on someone else is responsible for maintenance/upgrades. This session will cover outsourcing financial management systems (and accounting operations as well) to other government agencies as well as non-government ASP's (application service providers). Discussion will candidly include risks as well as rewards of outsourcing.

F. Performance-Based Budgeting

Convener: Michael J. Curro, Assistant Director, Strategic Issues, U.S. General Accounting Office

Speakers: *Steven Gallagher*, Director, Budget Formulation and Program Analysis Division, NOAA, U.S. Department of Commerce
Suneel Kapur, Strategic Planner, U.S. Department of Energy
Paul Legler, Manager, Cost Management Programs, Grant Thornton LLP

Performance budgeting at the Federal level has been an elusive subject since the first Hoover Commission. GPRA re-energized, and to some extent redefined the terms of this discussion. So, where are we? This Panel will provide a broad overview, beginning with a government-wide comment on agency progress in linking plans, budgets, and financial information. Then, it will focus on real world departmental and bureau experiences in moving toward performance-based budgeting. Finally, the Panel will summarize the issues that organizations need to consider they begin to implement it.

G. Whatever Happened to the Appropriations for FY 2002?

Convener: George Krumbhaar, Managing Editor, us budget.com

Speakers: *Lisa Caruso*, Budget/Appropriations Reporter for the *National Journal's Congress Daily*
Dennis Kedzior, Associate, Paul Magliocchetti Associates, Inc.
Rick May, Legislative Consultant, Brownstein, Hyatt and Farmer, P.C.

The September 11 terrorist attacks sharply altered the FY 2002 budget/appropriations debate, shattering once firm prohibitions against "spending" Social Security Trust Fund surpluses and hastening agreement on a budget end game. There's some doubt, however, whether they have altered deeply held views on Federal spending. Some senators and representatives have pressed for more funding for education and worker protection. Fiscal conservatives, while backing billions in emergency measures related to the attacks, have pressed to maintain discipline elsewhere in the budget. This panel will explore how recent events have changed the FY 2002 budget end game, and how these changes may affect future budget and appropriations debates. Outside the added spending following the attacks, is the budget much different from what it would have been? Will the country's coming together on anti-terrorism change some of the political rules of the game?

H. Enabling E-Government - A Call to Action by the President

Convener: Shelly McAllister, Budget Specialist, Budget Review and Concepts Division, U.S. Office of Management and Budget

Speakers: *Lester Diamond*, Assistant Director, Accounting And Information Management Division, GAO
William H. McVay, Senior Policy Analyst, Information Policy and Technology, Office of Information and Regulatory Affairs, U.S. Office of Management and Budget
Debra Stouffer, Deputy CIO for IT Reform, U.S. Department of Housing and Urban Development

One of the President's Management Agenda items is the expanded use of E-Government. He is looking to you to develop a plan to coordinate resources and expenditures. Are you ready to answer that call? In this session you will hear the latest scoop on what is being done to increase performance gains across agency boundaries, such as E- Procurement, E- Grants, E- Regulation, and E- Signatures. Are you ready for digital signatures? A single E-Procurement portal for the entire government? Apply for and manage grants online? Do you know who your citizen bases and customers are? Do they see value in the programs or projects you are delivering? Are you ready to identify opportunities to unify and simplify business process around a citizen-driven strategy?

3:15 - 3:30 p.m. Break/Networking

3:30 - 4:30 p.m. Afternoon Speaker: **Kay Coles James**, Director, U.S. Office of Personnel Management

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AMERICAN ASSOCIATION FOR BUDGET & PROGRAM ANALYSIS
2001 SPRING SYMPOSIUM

"Budgeting in a Time of Transition"

May 23, 2001

Capital Hilton Hotel

(Farragut North/West Metro Stops)

- 8:00 - 8:45 a.m. Registration, Coffee
- 8:45 - 9:00 a.m. Welcome, Sandy Davis, President, AABPA
- 9:00 - 10:15 a.m. Morning Speaker: *Congressman Steny Hoyer (D-MD)*
- 10:15 - 10:30 a.m. Break/Networking
- 10:30 - 11:45 a.m. Concurrent Sessions

A. Budget Automation: How to Use It to Support the Budget Process

Convener: Steve Leeds, Special Assistant to the Director, Budget Office, U.S. Commerce Department

Speakers: John Murphy, Director Office of Strategic Planning, U.S. Treasury Department

Robert McFadden, Supervisory Budget Analyst, Office of Financial Management and Planning, U.S. Department of State

Terry Ouverson, Deputy Director, Budget Division, EPA

Many agencies' approaches to automation are labor-intensive; they rely on procedures or systems that are able to accept information only after it has been created elsewhere and/or entered anew for each step in the budget process. In addition, the process of producing information to meet new needs, such as the capacity to provide data for GPRA, Accountability Reports, and other requirements, is often done on an *ad hoc* basis. The idea of a comprehensive, integrated, and fully automated budget system remains an elusive goal for most agencies. Nevertheless, some agencies which have successfully addressed these challenges with their automated tools are represented on this panel.

B. Performance Reports: Making the "A" List

Co-Conveners: Deborah Schilling, Director of Budget, GSA, Office of the CFO, and Patrick Mullen, Senior Analyst, Applied Research and Methods, GAO

Speakers: Kathryn Newcomer, Professor of Public Administration, George Washington University

Henry Wray, Counsel, Senate Committee on Government Affairs

This session provides an overview of recent events and thoughts about ways to improve reports for use by executive/ congressional decision-makers and the public. Panelists will discuss the statutory framework for performance-based management and accountability reporting; the agencies' perspective of quality performance reporting based on a

recent George Washington University study; and what congressional committees view as ways to improve performance reports, especially with new flexibility to consolidate reports. Handouts will include a synopsis of a GAO report on the statutory framework for reporting requirements and copies of "Using Program Evaluation to Support Performance Management: A Guide for Federal Executives."

C. Tax Cuts: The Long-Term Challenges

Convener: G. Thomas Woodward, Assistant Director for Tax Analysis, Congressional Budget Office

Speakers: Al Davis, Chief Economist, House Ways and Means Committee, Democratic Staff

Cheri Reidy, Senior Analyst for Revenues and Budget Review, Senate Budget Committee, Republican Staff

C. Eugene Steuerle, Senior Fellow, Urban Institute

The President's proposal to cut taxes dominates this year's budget debate. Is his tax cut proposal - estimated at \$1.6 billion over ten years - too big in light of uncertain surplus projections? Should it be accelerated to address the economic slowdown? Should a "tax trigger" be added to slow or suspend the tax cut, if projected surpluses do not materialize? What are the prospects for Congressional action? A balanced panel of experts will tackle these and associated timely and crucial issues.

D. Implementing Financial Systems in the Federal Government - So You Want to be a Project Manager

Convener: Rebecca J. Sweeney, Requirements Branch Chief, CAMS Program Office, NOAA

Speakers: Doris Chew, Assistant Executive Director, Joint Financial Management Improvement Program

Cynthia Schwimer, Comptroller, Office of Justice Programs, Justice Department

Jim Turdici, Director, Division of Accounting and Finance, Nuclear Regulatory Commission

J.F.M.I.P. has provided the road map for the financial management professional who aspires to lead an agency into the world of on-line, integrated financial systems. It is clear that such a leader must have in-depth knowledge in three additional arenas - information technology, project management, and contract management. Beyond these political acumen is essential to secure funding for a large, multi-year, multi-faceted project in an annual budget environment against a backdrop of changing leadership.

This job is one of the most challenging in the Federal Government today. Are you ready to meet that challenge?

11:45 - 12:15 p.m.

Cash Bar/Networking

12:15 - 1:45 p.m.

Lunch

James L. Blum Award for Distinguished Public Service in Budgeting: *Dennis Williams, Recipient*

Speaker: *Mitchell E. Daniels, Director, OMB*

1:45 - 2:00 p.m.

Break/Networking

2:00 - 3:15 p.m.

Concurrent Sessions

E. Budgeting for Research and Development

Convener: Edward Brigham, Associate Administrator

/Management-Administration, Transportation, RSPA

Speakers: Sarah Horrigan, Examiner, Science and Space Programs
Branch, OMB

Nick Stoer, President, Nicholas Stoer and Associates

The Federal Government is a major source of funding for research and development – from the discovery of new knowledge to the testing and demonstration of new technology or processes - which significantly benefit the Nation's economy. The panel will present the policy rationales for Federal involvement in research and development and describe the range of research programs from basic to applied. Then, the panel will share their insights about how to prepare budgets to justify and defend funding requests for the full range of research and development programs.

**F. Activity-Based Costing: Foundation of a Performance
-Based Organization**

Convener: Thomas J. Boland, Senior Manager, Grant Thornton LLP
and Director, U.S. Marine Corps Program Office

Speakers: Colonel David R. Clifton, Installation Reform Division, U.S.
Marine Corps

Kathryn S. East, Senior Manager, Management Consulting,
Grant Thornton LLP

In its efforts to reinvent government, the National Performance Review developed the concept of a performance-based organization (PBO), which is managed for results. The concept involves rechartering certain Federal executive agencies to permit them to negotiate alternative approaches to procurement, to personnel rules, and to increase their accountability. Activity-based costing is a powerful financial and analytical decision-making tool for agencies to use to become PBO's. When outputs of an organization can be better measured, accountability to the customer is enhanced. The internal workings of a PBO are refocused toward business processes and the products and services they provide - less so on formal and traditional structure.

G. Expiring Budget Caps - The Impact on the Budget Process

Convener: Susan Irving, Director for Federal Budget Issues, GAO

Speakers: *To Be Announced*

The discretionary spending caps expire this year. What does that mean for the budget and appropriations process? Budget process has been aimed at reaching balance since the Gramm-Rudman-Hollings legislation in 1985. What does control mean in an era of surpluses? This panel will offer its perspectives, depending on the state of play at the time of this Symposium.

H. Performance-Based Budgeting: What It Is and Tools for Implementation

Convener: Dave Wilkinson, Federal Territory Manager, Hyperion Solutions Corporation

Speakers: John Mercer, Deputy Director for Government Performance, Logicon Federal Data

Kelie Limehouse, Performance Management Domain Leader, Hyperion Solutions Corporation

John Mercer, the "Father of GPRA" will explain and illustrate real performance based budgeting, how it fulfills OMB instructions for agencies to integrate budgets with GPRA plans, and its relationship to object class budgeting. OMB has stated that the budget system he used for linking resources to results, and which was the inspiration for GPRA, "stands out as the single best example of a comprehensive approach to performance measurement that we have found," and that it is successful; because, "every program manager uses the system to plan, manage, and assess progress on a day-to-day basis." The Panel will demonstrate, with real world examples, how performance-based methodology is implemented through a suite of integrated, COTS software applications. Key performance activities are modeled and optimized to determine the agency's resource requirements, which become base inputs to a sophisticated budget formulation process.

3:15 - 3:30 p.m.

Break/Networking

3:30 - 4:30 p.m.

Afternoon Speaker: *Stanley E. Collender, Senior Vice President, Fleishman-Hillard, Inc.* "FrankenBudget"

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AMERICAN ASSOCIATION FOR BUDGET & PROGRAM ANALYSIS
2000 FALL SYMPOSIUM

The New Administration: Budget Priorities and Fiscal Realities

November 29, 2000
Washington-Hilton Hotel

8:00 - 8:45 a.m. Registration, Coffee

8:45 - 9:00 a.m. Welcome, Sandy Davis, President, AABPA

9:00 - 10:30 a.m. Morning Speakers:
Allen Schick, Senior Fellow, Brookings Institution
"Did the Election Kill the Budget Surplus?"

Natwar Gandhi, Chief Financial Officer, District of Columbia
"The Financial Status of the District: A Road to Recovery"

10:30 - 11:45 a.m. Concurrent Sessions

A. The Impact of E-Gov on Government Processes
Convener, Mark Brown, Deputy Chief Financial Officer/Deputy
Chief Administrative Officer, National Weather
Service

Speakers: Roger Baker, Chief Information Officer, Department
of Commerce

John Sindelar, Deputy Associate Administrator for
Government Wide Policy, GSA

The application of on-line interactive computing to the daily tasks of government is transforming everything it touches. It changes the content of individual jobs, relationships among workers, organizations, and clients - and it accelerates the changes it creates. This Panel of experts will discuss both the impact of E-Gov and how to get ready to take full advantage of it.

B. GPRA - Using Program Evaluation to Measure or Explain
Performance

Convener, Stephanie Shipman, Assistant Director, Center for
Evaluation Methods and Issues, GAO

Speakers: Stephanie Shipman

Marcelle Habibion, Senior Program Analyst, Program
Evaluation Service, Department of Veterans Affairs

William Macheel, Senior Program Analyst, Policy and
Program Development, Animal and Plant Health
Inspection Service, USDA

GAO identified creative ways that agencies integrated the results of different forms of assessments into their GPRA performance reports. Agency representatives will explain how program evaluation studies and methods helped

them deepen their understanding of program performance and improve their performance reporting.

C. How to Become a Certified Government Financial Manager
, Convener, Patrick R. Mullen, Senior Analyst, GAO

Speakers: Jeffrey Steinhoff, Managing Director, Financial
Management and Assurance, GAO

Herb Persil, Consultant and Former Budget Director,
HUD

Since its inception in 1994, the Certified Government Financial Manager (CGFM) program has become the standard by which government financial management professionals are measured. Its education, experience, and ethics requirements have served to elevate the most seasoned financial professionals. This session will bring together the principal architect of the CGFM program to explain its purpose, requirements, and process to become certified; and a former HUD budget director and long-time member of AABPA offers his perspectives on certification for budget and program analysis professionals.

D. Outsourcing - How Far Can It Go?

Convener, Richard B. Willett, Partner (retired), Grant Thornton,
LLP

Speakers: Richard B. Willett

Timothy G. Vigotsky, Director, National Business
Center, Department of the Interior

Outsourcing keeps growing as more government agencies recognize the effectiveness of "other-operated" (leased" vs. owned applications and attendant support. After outsourcing (whatever it may be), agencies can concentrate on their core businesses instead of having to maintain an IT (or other skills as the case may be) staff. From then on someone else is responsible for maintenance/upgrades. This session will cover outsourcing financial management systems to other government agencies as well as ASPs (Application Service Providers). Discussion will candidly include the risks as well as the rewards of outsourcing.

11:45 - 12:15 p.m.

Cash Bar/Networking

12:15 - 1:45 p.m.

Lunch, Speaker: Alice Maroni, Principal Deputy Under Secretary of Defense (Comptroller), "The View from DOD."

1:45 - 2:00 p.m.

Break/Networking

2:00 - 3:15 p.m.

Concurrent Sessions

E. AGA/AABPA Joint Program: *Capital Asset Planning -
Techniques for Meeting Federal Requirements*

Convener: Mike Noble, President, Washington DC Chapter,
Association of Government Accountants

Speakers: Mike Noble, "Ten Steps to a Successful Business
Case"

Pamela T. Geriner, MITRE Corporation, "Portfolio

Management and Resource Allocation in Federal Agencies

The speakers will review the best practices by Federal Agencies in meeting the requirements of the Clinger-Cohen Act and OMB's *Capital Programming Guide* for acquiring and managing major capital investments. Mr. Noble will recount his experience at the IRS, leading to develop guidance for doing business cases for capital investments. Dr. Geriner will share her experiences consulting with several Federal agencies on how to manage a portfolio of investments and allocate and prioritize resources to them.

F. "So a budgeteer, an accountant, and an auditor walk into a bar . . ." Merging Budget and Financial Reporting

Convener, Edward M. Rea, Chief, Budget Concepts Branch, OMB
Speakers: Chris Fairhall, Manager of Data Integrity, Office of the Chief Financial Officer, Department of Education

Neil Lobron, Budget Methods Specialist, OMB
Ray Reinhart, Project Manager, Government-wide Accounting Project, Financial Management Service, Department of the Treasury

There is a quiet revolution underway in the reporting of budget and financial information, in what is reported and how it is reported. Furthermore, budgeteers, accountants, and auditors are beginning to work together cooperatively in ways that could only be imagined just a few years ago. The panel will discuss what has been accomplished and what will happen in the next few years.

G. How Credit Programs Have Reformed Over the Past Ten Years, .

Moderator: Peter Davis, Senior Manager, Risk Management and Regulatory Practice Group, Ernst and Young

Speakers: Victoria Bateman, Deputy CFO, HUD
Mark Carney, Deputy CFO, Dept. of Education
Michael Discenza, Deputy COF, EXIM Bank
Stephanie Kaufman, Transportation Infrastructure Finance and Innovation Program, DOT
Courtney Timberlake, Chief of the Credit Crew, OMB

This panel will examine some probing questions regarding how the enactment of the Federal Credit Reform Act has affected the management of four Federal loan programs as well as the Federal Government's loan portfolio overall. A decade has passed since the enactment of Credit Reform. Are there signs that the FCRA has achieved its intended goals? Are there additional reforms that should be undertaken to produce financial risk management similar to those of commercial banks? What reforms can be achieved in the short term? In the long term? Meanwhile, some agencies continue to struggle to meet the basic credit reform risk measurement and reporting requirements. Why? We will explore these questions and more.

H. The Outlook for the Budget in Fiscal Year 2002 and Beyond

Convener, Phillip Joyce, George Washington University

Speakers: *Because of the nature of this topic, speakers will be announced after the national election, November 7, 2000.*

The Presidential and Congressional elections will have a major impact on future Federal budget policies. This session will bring together key players from the executive branch and the hill to discuss how Federal budget priorities are expected to be affected by the election, and specifically, what to expect for fiscal year 2002.

3:15 - 3:30 p.m.

Break/Networking

3:30 - 4:30 p.m.

Afternoon Speaker: Kenneth Apfel, Commissioner, Social Security Administration, "The Future of Social Security."

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**AMERICAN ASSOCIATION FOR BUDGET AND PROGRAM ANALYSIS
2000 SPRING SYMPOSIUM**

"A New Decade for the Federal Budget: The Issues, The Technology"

May 9, 2000
Marriott at Metro Center Hotel

8:00 - 8:45 a.m.	Registration, Coffee	<u>Foyer</u>
8:45 - 9:00 a.m.	Welcome, Thad Juszczak, President, AABPA Burkhead Award Presentation	<u>Salon B-D</u>
9:00 - 10:00 a.m.	Morning Speaker: Congressman Thomas Davis III (R-VA) <i>The Role of Budget Issues in this 2000 Campaign</i>	
10:00 - 10:15 a.m.	Break/Networking	<u>Foyer</u>
10:15 - 11:30 a.m.	Concurrent Sessions A. Issues in the Appropriations Process B. On-line Government, Budgeting for Information Technology C. Herding Cats: The Challenge of Planning, Budgeting and Auditing in Transitioning Nations	<u>Salon A</u> <u>Salon E</u> <u>London 2</u>
11:30 - 12:00 p.m.	Cash Bar/Networking	<u>Foyer</u>
12:00 - 1:45 p.m.	Lunch, Speaker: Comptroller General David Walker <i>Government Challenges in the Twenty-first Century</i> James L. Blum Award Ceremony	<u>Salon B-D</u>
1:45 - 2:00 p.m.	Break/Networking	<u>Foyer</u>
2:00 - 3:15 p.m.	Concurrent Sessions D. March Madness - Agency GPRA Performance Reports E. Practical Uses of Activity Based Costing F. Recruiting, Developing and Retaining Budget and Policy Professionals	<u>Salon A</u> <u>Salon E</u> <u>London 2</u>
3:15 - 3:30 p.m.	Break/Networking	<u>Foyer</u>
3:30 - 4:30 p.m.	Afternoon Speaker: Mortimer L. Downey, Deputy Secretary, Department of Transportation <i>Performance Management</i>	<u>Salon B-D</u>

**Concurrent Sessions
AABPA 2000 Spring Symposium**

A. Issues in the Appropriations Process

Salon A

Susan Nelson: Director of Budget Review, Senate Budget Committee (convener)
Susan Irving: Associate Director, Federal Budget Issues, GAO, (co-convener)
Beth Felder, Chief Counsel, Senate Budget Committee Majority Staff
Michael Stephens, Staff Assistant, House Committee on Appropriations Minority Staff
Susan A. Tanaka, Analyst, Budget Analysis Division, and Associate Director, Office of Communications, Congressional Budget Office

The U.S. has a budget surplus, yet caps on annual appropriations are still the law of the land. Just how tight are these caps and how will the Congress enact appropriation bills for 2001 with procedural restrictions on emergency spending and budget gimmicks? This panel of staff players will discuss the situation, hot topics, and outlook.

B. On-line Government: Budgeting for Information Technology

Salon E

Edward Brigham: Associate Administrator, Research and Special Programs Administration, Department of Transportation (convener)
Marilyn Holland, Chief, Program Planning and Management Division, Department of Agriculture
William McVay, Chief, Information Policy and Technology Branch, OMB
Deborah Stouffer, Director of Information Technology Reform, HUD

In a Memorandum dated December 17, 1999, President Clinton directed all Executive Branch agencies to undertake new steps to create an electronic government with "one-stop shopping" for the public to access government information and services. To achieve this, agencies must make major investments in technology and training. This Panel will discuss what budget staffs have to do to prepare for electronic government and to budget for these major capital investments.

C. Herding Cats: The Challenge of Planning, Budgeting and Auditing in Transitioning Nations

London 2

Stephen L. Leeds: Special Assistant to the Budget Director, Department of Commerce (convener)
Donald Drach: Deputy Director, Office of International Audit Organizational Liaison, GAO
Kenneth H. Torp: Associate Director for Budget, Office of Technical Assistance, Department of the Treasury

This panel will illustrate the differences between budgeting and planning in the U.S., other transitioning nations, and Ukraine, and the audit process in various countries. The panel will also provide an overview of the Technical Assistance Program, in which the speakers have participated.

D. March Madness - Agency GPRA Performance Reports

Salon A

Gail S. Zimmerman: Office of Management and Budget (convener)

Frank Burns: GPRA Implementation Coordinator, Department of Health and Human Services

Mark Catlett: Deputy Assistant Secretary for Budget, Department of Veterans Affairs

Walter Groszyk: Project Leader for GPRA Implementation, Office of Management and Budget

Robert Stockman, Chief Systems and Policies Division, Office of Budget, Department of Commerce

Annual program performance reports were due in mid-March 2000. This is the first year that agencies have had to prepare these reports, and they have adopted different strategies to satisfy the requirement. The panelists will describe what their respective agencies are doing and how these strategies are working.

E. Practical Uses of Activity Based Costing

Salon E

Clifton A. Williams: Director, Pricewaterhouse-Coopers (convener)

Robert J. Epley: Director, Compensation and Pension Service, Department of Veterans Affairs.

Robert Gardner: Assistant Commissioner for Budget, Immigration and Naturalization Service.

These three panelists will interactively review how several Federal entities are applying Activity Based Costing Management (ABCM) in managing various business aspects. Specific examples will include the Veterans Benefits Administration's use of ABCM to complement the balanced scorecard and the Immigration and the I.N.S.'s application to fee setting and clarification of operations for its managers.

F. Recruiting, Developing and Retaining Budget and Policy Professionals

London 2

Mark Brown: Deputy Chief Financial Officer, National Weather Service (convener)

Delores Chacon: President, U.S. Department of Interior University

Irwin T. David: Chief Financial Officer, National Weather Service

Beverly Pheto: Budget Director, Department of Transportation

This panel will discuss three ongoing efforts by government-wide groups to insure a continuing supply of program, budget, finance, and other administrative personnel for Federal Agencies. Detailed will be the efforts of the CFO Council's Recruitment and Retention Consortium, the Budget Officers Advisory Committee, and the Government-wide Acquisition Management Intern Program.