

DATA Act Training

Presented by the Data Foundation and the Performance Institute

May 3-4, 2016

Performance Institute, 3101 Wilson Blvd., Arlington, VA

Final Syllabus

TUESDAY, MAY 3

8:00 am - 9:00 am

Registration and Breakfast

9:00 am - 10:30 am

Session 1: Introduction to the DATA Act: History, Intent, and Opportunities

Faculty:

Hudson Hollister, Interim President, Data Foundation

Danny Werfel, former Controller, White House Office of Management and Budget

Abstract: The DATA Act of 2014 is the nation's first open data law and the largest transformation for federal financial management, spending oversight, and award reporting since the CFO Act of 1990. In this lecture, Hudson Hollister, who wrote the initial version of the DATA Act as a Congressional staffer before its introduction by Rep. Darrell Issa and Sen. Mark Warner in 2011, will describe the history of the law, its original intent, and how it shapes the modernization of federal spending. Danny Werfel, who served as deputy controller and controller of the Office of Management and Budget, will put the mandate in context with the federal government's history of financial management reforms.

10:30 am - 11:00 am

Break

11:00 am - 12:30 pm

Session 2: DATA Act Standardization: How It Works

Faculty:

Marcel Jemio, DATA Act Solutions Architect, Treasury Department

Tim Gribben, Deputy Chief Financial Officer, SBA

Omar Marquez, Senior Manager, Kearney & Co.

Abstract: Applying government-wide data standards to federal spending - financial data, award data, and related information - is the central goal of the DATA Act. This session introduce the DATA Act information model that OMB and the Treasury Department have established. The DATA Act information model expresses government-wide spending data elements and how they relate to one another.

12:30 pm - 1:30 pm

Lunch

1:30 pm - 2:30 pm

Session 3: DATA Act Visualization: How it Works

Faculty:

Bryce Pippert, Booz Allen Hamilton

Kaitlin Devine, DATA Act Product Manager, Treasury Department

Abstract: The government-wide data structure created by OMB and the Treasury Department under the DATA Act makes new visualizations possible. Technology companies are creating visualization solutions that allow federal leaders to navigate their agency's financial information once the underlying data sets are standardized. This hands-on tour of one such solution will provide a first glimpse of how standards can drive insights.

2:30 pm - 3:30 pm

Session 4: DATA Act, Financial Management Systems, and Shared Services

Faculty:

John Marshall, founder, Shared Services Leadership Coalition

Mike Wood, Executive Consultant, CGI Federal

Kate Yalowitz, Consulting Director, CGI Federal

Guru Sarma, Client Partner, Federal Civilian, SAP

Leslie Casson Stevens, Industry Value Expert Advisor, SAP

Geoff Green, Vice President, Oracle

Abstract: The leading ERP vendors are updating their product offerings to make it easier for federal agencies to standardize their financial and award information, as required by the DATA Act. In the future, the shared services model will offer a low-cost option for agencies to outsource DATA Act standardization alongside financial management activities. This panel discussion will explore the changes that the leading ERP vendors are taking to meet DATA Act challenges and provide a preview of how the shared services model will apply to the DATA Act mandate.

3:30 pm - 4:00 pm

Break

4:00 pm - 5:00 pm

Session 5: DATA Act Opportunities for Recipient Reporting

Faculty:

Helena Sims, Intergovernmental Director, Association of Government Accountants

Adam Roth, CEO, StreamLink Software

Christopher Zeleznik, Intergovernmental Lead, DATA Act Program Management Office, Department of Health and Human Services

Nicole Martinez-Moore, Policy Analyst, White House Office of Management and Budget

Abstract: Federal contractors and grantees face complex reporting obligations, imposed by government-wide laws and regulations and by agency-specific practices. Standardized data fields could eventually be used by contractors' and grantees' software to automatically fulfill some reporting obligations. This lecture and demonstration will explore the possibilities for standardized reporting by contractors and grantees. It will also introduce the Department of Health and Human Services' DATA Act pilot program to standardize the data elements used in grantees' reports.

5:00 pm

Adjournment

WEDNESDAY, MAY 4

8:00 am - 9:00 am

Registration and Breakfast

9:00 am - 10:30 am

Session 6: DATA Act Standardization and Financial Analytics

Faculty:

Demek Adams, Practice Director, Global Public Sector, Grant Thornton

Steve Hanmer, former Program and Budget Analyst, Department of Health and Human Services

Mick Collins, Senior Vice President, BackOffice Associates

Abstract: By conducting an inventory of an agency's financial and award data, extracting relevant data from source systems, and assembling a single, standardized picture, financial managers can derive managerial insights. This lecture and demonstration will show how agencies can match their financial and award data to the government-wide data structure created by OMB and the Treasury Department under the DATA Act - then answer business leaders' questions much more quickly than before. The session will also offer observations on how standardized financial data reduces processing costs and improves management.

10:30 am - 11:00 am

Break

11:00 am - 12:30 pm

Session 7: Data Standardization and Anti-Fraud Analytics

Faculty:

David Williams, former Inspector General, U.S. Postal Service

Bill Siemer, Assistant Inspector General for Investigations, U.S. Postal Service

Gary Barlet, Chief Information Officer, U.S. Postal Service Inspector General

Abstract: As agencies standardize and publish spending data sets of higher quality, inspectors general are using them to drive anti-fraud analytics. This lecture and demonstration will introduce the analytical tools being adopted by inspectors general and explain how standardizing spending data reduces the cost and complexity of such tools. It will also explore how standardized data is being used to illuminate potential fraud in other contexts, such as corporate finance and tax.

12:30 pm - 1:30 pm

Lunch

1:30 pm - 3:00 pm

Session 8: How Financial Transparency Changes Government

Faculty:

Seth Unger, Senior Advisor, Ohio Treasurer Josh Mandel

Rebecca Williams, Senior Implementation Advisor, Center for Government Excellence, Johns Hopkins University

Ken Melero, Federal Director, Socrata

Abstract: On the state and local level, financial managers have seen their roles elevated and their work improved as a result of new financial transparency policies and tools. In some jurisdictions, internal financial managers and the public are using the same data sets and the same platforms. This lecture and demonstration will show how standardizing and publishing spending information have transformed the practices and outlook state and local governments.

3:00 pm - 3:30 pm

Break

3:30 pm - 4:30 pm

Session 9: A Vision for a Data-Centric Future

Faculty:

Dick Gregg, former Fiscal Assistant Secretary of the Treasury

Hudson Hollister, Interim President, Data Foundation

Abstract: Even before the passage of the DATA Act, the government had embraced the goal of data-centric financial and award reporting. This lecture will explain how the DATA Act reinforces that goal and how - if the law is fully implemented - federal financial management will change in coming years. Current and former leaders in financial management will put the DATA Act in context and envision a future of cost savings and transformation.

4:30 pm

Adjournment