



*Planning  
for the Future*  
The 2012 San Francisco  
Customer Advisory Board

## The 13<sup>th</sup> San Francisco Financial Center Customer Advisory Board Conference March 20-21, 2012 - Presidio of San Francisco

Tuesday, March 20, 2012

- 7:30 - 8:00      **Registration / Networking**
- 8:00 - 8:30      **Welcome and Introductions**  
Philip Belisle, Regional Director, San Francisco Financial Center, Financial Management Service (FMS)  
  
Pilar Rowe, Manager, Disbursements, Bonneville Power Administration  
Chairperson, San Francisco Financial Center Customer Advisory Board (CAB)
- 8:30 - 9:15      **U S Treasury Financial Innovation and Transformation (FIT) Update**  
Andrew Ganahl, Business Strategist, FIT, Department of the Treasury
- 9:15 - 9:45      **Group Photo and Morning Break***
- 9:45 - 10:30    **Payment Information Repository Presentation - Planning for the Future**  
Gavin Jackson, Deputy Assistant Commissioner, Payment Management, FMS
- 10:30 - 11:30   **FMS Payment Modernization Session - Group Panel Discussion**  
Panel Moderator - Jim Bates, SBA Denver Finance Center  
GWA Program Panelist - Carolann Marker, GWA/FMS  
SPS Program Panelist - Gary Ng, PM/FMS  
PAM Program Panelist - Lori Meyer, KFC/FMS
- 11:30 - 1:00    **Lunch***
- 1:00 - 2:30      **Agency Updates (four minutes per agency)**
- 2:30 - 3:00      **Afternoon Break***
- 3:00 - 3:30      **Office of Natural Resources Revenue (ONRR) - CAB Best Practice Presentation**  
Rita De Braccio, Supervisory Accountant, ONRR, Department of the Interior
- 3:30 - 4:00      **Closing Session - Group dinner and travel logistics**
- 5:00              **Travel to the Bistro Restaurant at the Cliff House**





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### AGENDA Wednesday, March 21, 2012

- 7:30 - 8:00      **Registration / Networking**
- 8:00 - 8:45      **GOVerify Improper Payments Presentation - Helping Agencies Prevent Improper Payments**  
Tom Vannoy, GOVerify Program Manager
- 8:45 - 9:30      **Department of Homeland Security, Transportation Security Administration (TSA)  
CAB Best Practice Presentation**  
Chief Fred H. Lau, Federal Security Director, TSA, Oakland International Airport
- 9:30 - 10:15      **Morning Break***
- 10:15 - 10:30    **FMS Programs Access Workgroup Update**  
Project Lead - Pilar Rowe, Manager, Disbursements, Bonneville Power Administration  
Bill Radford, Director, Enterprise Business Solutions Integrator Staff, FMS
- 10:30 - 10:45    **Treasury Offset Program (TOP) Update**  
David Burgess, TOPS Relations Branch, Debt management Service, FMS
- 10:45 - 11:15    **OTCnet Financial Services Update - Deposits Made Easy**  
Susanna Fisch, OTCnet, FMS
- 11:15 - 12:00    **National Park Service - Presidio Historical Park Presentation**  
Craig Middleton, Executive Director, Presidio Trust of San Francisco
- 12:00 - 12:15    **CAB Business Meeting:**
- Closing remarks
  - Final updates and future initiatives
- 12:15 - 1:30      **Lunch***
- 1:30 - 3:00      **Tour of historical Presidio of San Francisco**

