



Over Four Decades of Industry-led
Collaborative Research

CAM-I AUTUMN MEETING

2020

September 14 - 15 Virtual

Supply Chain Management Today

CAM-I Vision:
***To be recognized as a premier
collaborative forum for innovative,
leading edge management solutions
that create lasting value.***

Invitation from the President of CAM-I

You are formally invited to the Consortium for Advanced Management International (CAM-I) Autumn Meeting, September 14 - 15, 2020.

The theme of the meeting is [Supply Chain Management Today](#)

Meeting details:

- The General Session with 3 guest presentations will take place on Tuesday 15th September. The log in details to the meeting will be sent to all registrants two weeks before the meeting.
- The Members Forum will follow the General Session on Tuesday 15th September 2020 (this is by invitation to members only)
- The Special Interest Group meetings will take place on Monday 14th September and for the remainder of Tuesday 15th September after the Members Forum. The log in details will be sent to registrants two week before the meeting by the Special Interest Group leaders.

Our quarterly meetings are the primary vehicle to further CAM-I's mission – To serve as a collaborative forum of thought leaders who develop practical and effective management tools, techniques and methods to advance the way organizations manage costs, processes and performance.

Attendees will receive CPE credits credit hours for the meeting upon receipt of the meeting evaluation which will be sent out to all registrants via Survey Monkey.

[Click To Register For "CAM-I Autumn 2020 Meeting"](#)

[Select two groups to attend for the two days and Tuesday morning session.](#)

More details may be found in the attached meeting notice.

If you have any questions about our programs, please contact me anytime at ashok@cam-i.org or at (512) 296-6872. I look forward to connecting with you in September!



Ashok Vadgama
President, CAM-I

Agenda

MONDAY, September 14, 2020

ALL CENTRAL TIMES

Interest Group Sessions

- 10:00 AM - 4:30 PM Cost and Profitability Management
Contact – Tim Clarke Timothy.Clarke@paceint.com
- 10:00 AM - 4:30 PM Performance Management
Contact - Derek Sandison dsandison@landmark.ca
- 10:00 AM - 4:30 PM Integrated Risk and Value Management
Contact – Sean Catanese Sean.Catanese@kingcounty.gov
- 7:00 AM - 2:00 PM Forecasting For Procurement Of Complex Acquisition And Support Projects
Contact - Rob Young Rob.Young252@mod.gov.uk

TUESDAY, September 15, 2020

ALL CENTRAL TIMES

- 9:00 AM Welcome
Chauntelle Hellner, Deputy Director Business Resource Center, King County,
CAM-I Industry Chair
Ashok Vadgama, CAM-I President
- 9:20 AM “Effects on Global Supply Chain Management in a COVID-19 Environment”
Robert Patrick, Director, Business Development, Allegheny Technology Inc.
- 10:15 AM “Using Analytics for Supply Chain Management”
Bryce Gartner, Principal - CB Digital, Cherry Bekaert LLP
- 11:15 AM “Rethinking Operations and Cost Management– CAM-I Agenda Post COVID-19”
Dr. Shahid Ansari - Provost and Professor Emeritus, Babson College
Founding CEO Babson Global Inc.
Ashok Vadgama – CAM-I President
- 12:10 PM Members Forum by Invitation only

Interest Group Sessions

- 1:30 PM - 4:30 PM Cost and Profitability Management
Contact – Tim Clarke Timothy.Clarke@paceint.com
- 1:30 PM - 4:30 PM Performance Management
Contact - Derek Sandison dsandison@landmark.ca
- 1:30 PM - 4:30 PM Integrated Risk and Value Management
Contact – Sean Catanese Sean.Catanese@kingcounty.gov

Registration

Register today at www.cam-i.org and click on “Meetings” at the top of the page.

On Registration -

- Please select two groups to attend for the two days.
- Select Tuesday morning session.

Contact Info

CAM-I, Consortium for Advanced Management International

Ashok Vadgama

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General Information

CPE Credits

NASBA
NATIONAL REGISTRY
OF CPE SPONSORS

Participants in this program will earn 1 CPE credit for every hour they are in attendance. The 2 day program qualifies for a maximum of 16 CPE credits.

Course Level: Basic to intermediate

Program Level/Prerequisite Knowledge: Participants should have a basic knowledge of cost, process, and/or performance management.

Preparation: No advanced preparation is required.

All Study is Group-Live

Learning Objectives and Program Description: Descriptions and learning objectives for individual general session presentations and interest groups can be found in the next section of this document.

CAM-I is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org.



Sponsor ID# 103282

Contact Information

For more information about this program or for any questions regarding administrative policies such as cancellations, please contact CAM-I office at 512-617-6428.

Code of Conduct

As CAM-I members we:

- Value and nurture the ideas and viewpoints of others.
- Value and leverage the diversity that others bring.
- Respect the time, contributions, confidence, and rights of others.
- During meetings, we suspend the specific interest of our own organization in favor of promoting the general welfare of CAM-I members.
- Conduct ourselves during CAM-I meetings in an uplifting, reputable manner.
- Are learning and growing individually and collectively.
- Respect the collaborative environment and commitment not to market or procure during the meetings.
- First time guests are invited to the meeting. Guests will not receive any post meeting output from the working groups as that material belongs to the members. When guests participate in these groups, we would like guests to make Interest Group Leaders aware if there is anything that we should not quote upon their input in these meetings on our post meeting notes to members.

Dress Code

All scheduled meeting and evening events are business casual.

Upcoming Meetings

- October 19 - 20 2020, Bristol, United Kingdom
- December 7 - 9 2020, Seattle, Washington
- February 2021, United Kingdom, Date & Venue TBD
- March 8 - 10 2021, Alexandria, Virginia
- June 7 - 9 2021, Portland, Oregon
- September 13 - 15 2021, Alexandria, Virginia

CAM-I General Session Presentations

“Effects on Global Supply Chain Management in a COVID-19 Environment”

Robert Patrick, Director, Business Development, Allegheny Technology Inc.

Learning Objectives

- The participants will learn about the effect COVID-19 is having on business sectors, specifically focused on defense and commercial aerospace.
- The participants will learn how businesses are assessing the effect of COVID-19 and what they are doing in response.
- The participants will learn what risk mitigation factors are being implemented or could be implemented to more effectively respond to the effects of the COVID-19 pandemic.
- The participants will learn how this COVID-19 experience may apply to other real world challenges regarding supply chain management.

Speaking Tuesday September 15, at 9:20 a.m.

“Using Analytics for Supply Chain Management”

Bryce Gartner, Principal - CB Digital, Cherry Bekaert LLP

Learning Objectives

- Defining the critical questions to drive supply chain analysis
- Identifying key data elements both internally and externally to enrich analysis;
- Evolving and emerging technologies enabling faster, more consistent and deeper analysis;
- Understanding of where Artificial Intelligence and Machine Learning fit in the supply chain process;
- Communicating impactful solution stories through data visualization.

Speaking Tuesday September 15, at 10:15 a.m.

“Rethinking Operations and Cost Management– CAM-I Agenda Post COVID-19”

Dr. Shahid Ansari - Provost and Professor Emeritus, Babson College, Founding CEO Babson Global Inc.
Ashok Vadgama – CAM-I President

Learning Objectives

- Understand how the environment in the 1980's and 1990's influenced the development of CAM-I's cost and profit management models.
- Appreciate the positive contributions of the CAM-I model in increasing efficiency and profitability.
- Recognize some of the dysfunctional impacts and how they have created a new set of challenges today.
- Identify the new challenges and the future work that is needed to address these challenges.
- Review some of the key research questions to be addresses by cost and profit management models of the future.

Speaking Tuesday September 15, at 11:15 a.m.

CAM-I Projects

Cost and Profitability Management

Understand and Demonstrate the Value of Business Enabling Functions - the group's objective is to assist member organizations to understand and quantify the value business support functions bring to organizations. A principle-based Value framework has been designed for functions who want to understand how internal stakeholders view value. The framework has 9 value principles which enable member organizations to consistently define the value business support functions bring to an organization. This framework will thereby allow cost and value trade-offs to be quantified.

Defining Value for Services - Value Analysis is an optimization methodology of aligning resources (cost) in proportion to the relative importance of Customer Functional Requirements. Value Analysis historically has been applied to manufacturing. However, it is equally effective for Service Industries and general process improvement. Services can present nuanced challenges in quantifying the processes performed and the associated importance to the customer. The group will continue to expand pilots of value analysis for services.

Strategic Cost and Profitability Value Management Roadmap - CAM-I has contributed significantly to the field of Cost, Process and Performance Management. This group is using existing the CAM-I body of knowledge to create a maturity roadmap. By using the roadmap, member organizations can benchmark their position in terms of maturity and what next steps to take to improve their organization.

Plans are also being formulated to add data analytics, modeling and artificial intelligence.

Other areas include work developing the following guidebook -

- A Primer on Value Analysis that includes Value Management, Value of Business functions, Principal Based Value Framework and Cost and Profitability Management.

Learning Objectives:

After participating in this interest group, you will understand:

- Understand the key values and principles that support functions need to embrace in order to demonstrate value to their customers.
- You will understand the alignments between cost management and customer value.
- Understand existing capabilities and gaps in quantifying value for service organizations.
- Recognize the value business enabling functions bring to an organization and thereby facilitate appropriate cost / value trade-offs.
- Discover how to create a value maturity curve and roadmap.

Tim Clarke, Phone: (925) 357-6777 or tim.clarke@paceint.com

Matt Anderson, Phone: (314) 232-0931 or matthew.a.anderson@boeing.com

CAM-I Projects Continued

Performance Management

The group is focused on these Phase III initiatives:

Key Performance Management Framework (PMF) Deliverables:

- PMF Awareness Training for members and guests at quarterly meetings
- PMF Implementation Workshop facilitated in-house for member companies
- PMF Instructor Certification Process and Program (“Train-The-Trainer”)
- Updated PMF Executive Overview (joint publication with CPA Canada) with a more graphical explanation of the methodology
- On-line Organizational Readiness Assessment tools and analytics
- Guidance on integrating PMF concepts with other IG’s methodologies

Current research and development:

- Providing high level guidance on improving organizational readiness.
- Packaging PMF instructor materials into a practical Implementation Guidebook.
- Documenting business success stories in the use of the Framework.
- Developing an approach to providing more detailed guidance on specific improvement techniques and accessing associated reference materials.

Learning Objectives:

After participating in this interest group you will:

- Understand the difficulties organizations have in developing a consistent approach to improving business performance
- Learn about the benefits of implementing CAM-I’s Performance Management Framework and its specific applicability to your organization
- Contribute to the ongoing research in expanding the capabilities of the Framework

Chair: Derek Sandison, Phone: (905) 301-0429 or dsandison@landmark.ca

CAM-I Projects Continued

Integrated Risk and Value Management

To be in business is to face a constant stream of potential risks that can disrupt daily activity and put the future of the organization in jeopardy. However, what if the organization were able to assess their potential risks for enterprise value? Robust organizations know how to take on measured risks that boost returns to stakeholders. If handled properly, it may even be possible to increase stakeholders' perceived value when taking on incremental risk. The goal of the Integrated Risk and Value Management interest group at CAM-I is to explore this risk-value continuum, modifying existing thought and proactively to enable organizations to maximize value by optimizing risk.

Learning Objectives:

After participating in this interest group you will:

- Understand the evolution of risk management utilizing the CAM-I IRVM philosophy
- Understand the strategic nature of integrating risk and value management for the betterment of the organization
- Be able to engage incremental risk in your home organization in a way that delivers enterprise value

Chair: Sean Catanese, Phone (314) 378-9611 or Sean.Catanese@kingcounty.gov.

CAM-I Projects Continued

Forecasting for Procurement of Complex Acquisition and Support Projects

(Using Defence procurement as a case study)

Many organisations have large budgets to procure new capabilities and support existing capabilities. The lifespan of these acquisition/build and support/run projects can run from a single year to 25 years and beyond in some cases.

Often these projects have a reputation for cost and time overruns, and variability of forecasting that present a major challenge to the Finance function in trying to manage the overall budget in any given financial time period. The finance function has to apply its own professional judgement to try and ensure the summation of these projects does not result in a sub-optimal utilisation of the budget so that taxpayers/shareholders money is not wasted.

The aim of this project is to, using as a case study the MOD project, leverage knowledge across the defence sector end to end, including industry partners, international defence organisations and bodies that review Defence budgets, to identify common root cause problems. The intention is to also leverage the wider CAM-I network to highlight common issues and learning to aid the overall objective of improving the stability and quality of financial management and forecasting for such projects.

The interest group will then move on to proposing solutions by identifying skills, knowledge, tools and techniques that could be applied to eliminate unnecessary barriers to effective financial management. Some of the solutions could be “quick wins” exploiting better communication of existing knowledge and information end to end through looking at the problems from different perspectives. The outcome should be to improve the quality of financial management, provide better stability to forecasting, and that we maximise the capacity and capability available to our Armed Forces in a timely manner from the budget available.

Learning Objectives

Being involved in the interest group will:

- Understand the different drivers and perspectives, whether you are an industry supplier to other defence contractors, a direct supplier, a Government Defence Organisation responsible for procurement, or the end user as a Frontline Defence organisation or Department of State.
- Identify the challenges that face the Defence sector supporting our Armed Forces within constrained defence budgets
- Understand how different Defence organisations operate when involved in international procurement or collaborative projects
- Learn from experience of others and share best practice to avoid repeating common mistakes or pitfalls.
- Contribute and network with other finance and management professionals working in the defence sector

Chairs -

Rob Young, Phone 011-44-7826 510552 or Rob.Young252@mod.gov.uk

Thomas Demas: Phone: (703) 969-0970 or thomas.demas@navy.mil

CAM-I Projects Continued

CAM-I Higher Education Center of Excellence in Cost Management (CoE)

Higher Education is facing unprecedented economic pressures caused by increased operating costs, reductions in government funding, an increasingly competitive marketplace to attract & retain talented students, and push back from families on the actual value of Higher Education. Additionally, the emerging COVID19 pandemic will have profound impacts on the Higher Education industry – stemming from reduced numbers of students movement to online learning, and returned tuition fees and residential costs. Financial sustainability has never been more critical. Traditionally driven more by mission-based values, university leadership must now understand the impact of their decisions on the bottom line to move their organizations forward sustainably while also remaining true to their mission.

The CAM-I Higher Education Center of Excellence is focused on developing actionable training for practitioners to navigate the higher education cost management landscape. The training will focus on:

- Value Proposition – understanding why it is important to undertake cost management on campus, and how these objectives relate back to the mission of the institution
- Management Challenges – identifying the practical issues faced by the institution that inhibit reaching objectives, goals, and the mission
- Cost Management Enablement – after developing an understanding of how cost management can support the long-term sustainability of an institution, present a set of tools that can help manage cost on campus. These tools will focus on:
 - o Type of data required for cost management
 - o Reporting outputs that can help drive enhanced decision-making
 - o Best practices for interpreting reporting output, and how it can drive decision-making to ensure long-term sustainability of the institution

The CAM-I Higher Education Center of Excellence plans to host the first of these training sessions as part of the September 2020 CAM-I Quarterly Meeting in Alexandria, Virginia.

Learning Objectives:

After participating in the training, attendees will:

- Understand the importance of robust cost management in the Higher Education industry
- Learn techniques to link cost management objectives back to the core mission of a particular institution
- Be able to identify management challenges, and leverage particular cost management tools and techniques to address particular challenges
- Understand key cost management analysis tools
- Be able to draw insights from cost management reporting output