



**Over Four Decades of Industry-led  
Collaborative Research**

CAM-I MEETING AND TRAINING

2021

September 13 - 15 2021

***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) Meeting and Training, September 13 - 15, 2021. You have the option to participate in person onsite in Alexandria, or virtually through Microsoft Teams.

Meeting details:

- All meetings, interest group sessions, and training will take place at Embassy Suites, 1900 Diagonal Road, Alexandria, VA 22314. For those who cannot travel we will send meeting login details.
- The Members Forum will follow the General Session on Tuesday 14th September (this is by invitation to members only)
- Awareness Training - How to Evaluate and Improve Organizational Performance will follow the General Session on Tuesday 14th September. This training is free to CAM-I members, non-member cost is \$250.00 per participant. For details, including the refund policy, please refer to the details outlined on the CAM-I Awareness Training page within this document.
- The Special Interest Group meetings will take place on Monday 13th September, and the remainder of Tuesday 14th September after the General Session, and Wednesday morning on 15th September. The login details will be sent to registrants one 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 maximum of 50 minutes of CPE credit hours for every hour attended for the two and a half days of meeting. Specific details on learning objectives, fields of study, applicable CPE credits, and knowledge levels please refer to the agenda and other detailed sections of this document.

Meeting evaluations will be sent out to all registrants via survey email.

[Click To Register For "CAM-I Meeting 2021"](#)

On Registration -

- Tuesday Morning Session  
This option is pre-selected for your convenience.
- Special Interest Groups  
When selecting options for registering please select one Interest Group in which you plan to participate.
- Awareness Training  
How to Evaluate and Improve Organizational Performance  
Free to CAM-I members, non-member cost is \$250.00 per participant.
- CAM-I Orientation  
Please select if you have not attended a CAM-I meeting previously.

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



Ashok Vadgama  
President, CAM-I

# Agenda

MONDAY, SEPTEMBER 13, 2021

ALL EASTERN TIME ZONE

At Embassy Suites, 1900 Diagonal Road, Alexandria, VA 22314 or virtually through Microsoft Teams.

8:00 AM - 9:00 AM CAM-I Orientation  
Please attend if you have not attended a CAM-I meeting previously.

## INTEREST GROUP SESSIONS

9:00 AM – 5:00 PM Value, Cost and Profitability Management  
Contact – Bob Misch (bob.misch@cbh.com)

9:00 AM - 5:00 PM\* Integrated Risk and Value Management  
Contact – Sean Catanese (Sean.Catanese@kingcounty.gov)

10:00 AM - 5:00 PM Supply Chain Management  
Contact – Jim Holman (jim.holman@cbh.com)

6:00 PM Networking Reception at the Embassy Suites, 1900 Diagonal Rd, Alexandria, VA 22314  
  
\* Risk Interest Group will be hosted virtually through MS Teams, conference space will be available for onsite attendees to participate. Meeting times subject to change.

A maximum of 8 hours of CPE Credit is available (based on length interest group meets and attendance during session), refer to each interest group page within this document for details on learning objectives, field of study, and required knowledge levels / prerequisites.

TUESDAY, SEPTEMBER 14, 2021

ALL EASTERN TIME ZONE

At Embassy Suites, 1900 Diagonal Road, Alexandria, VA 22314 or virtually through Microsoft Teams.

## GENERAL SESSIONS

9:00 AM Welcome  
Chauntelle Hellner, Deputy Director Business Resource Center, King County, CAM-I Industry Chair  
Ashok Vadgama, CAM-I President

9:15 AM “Improving Efficiency/Effectiveness in the Finance Function” Sonya Ball, CFO Land, Ministry of Defence, United Kingdom, Kelvin Marnar, Head of Improvement, Boeing Defence UK Limited  
1 hour of CPE Credit, Field of Study: Business Management & Organization, Knowledge level – Intermediate

10:15 AM “Cyber Security To Enable Digital Manufacturing” Tim Harris, Chief Digital Information Officer, Allegheny Technology Incorporated  
1 hour of CPE Credit, Field of Study: Business Management & Organization, Knowledge level – Intermediate

11:15 AM “Status on Value, Cost and Profitability Management” Bob Misch, Director - Digital Advisory Services, Cherry Bekaert  
1 hour of CPE Credit, Field of Study: Cost Management and Value Analysis, Knowledge level – Intermediate

12:15 PM Members Forum by Invitation only

For detailed narratives on the topic, speakers, learning objectives, CPE credits, fields of study, and required knowledge levels / prerequisites for the Tuesday morning session, please refer to the General Session presentation pages within this meeting notice.

# Agenda Continued

TUESDAY, SEPTEMBER 14, 2021

ALL EASTERN TIME ZONE

At Embassy Suites, 1900 Diagonal Road, Alexandria, VA 22314 or virtually through Microsoft Teams.

## AWARENESS TRAINING

1:30 PM - 4:30 PM      How to Evaluate and Improve Organizational Performance  
3 hours of CPE Credit, Field of Study: Management Services, Knowledge Level - Intermediate

## INTEREST GROUP SESSIONS

1:30 PM – 5:30 PM      Value, Cost and Profitability Management  
Contact – Bob Misch (bob.misch@cbh.com)

1:30 AM - 5:30 PM\*      Integrated Risk and Value Management  
Contact – Sean Catanese (Sean.Catanese@kingcounty.gov)

1:30 AM - 5:30 PM      Supply Chain Management  
Contact – Jim Holman (jim.holman@cbh.com)

*\* Risk Interest Group will be hosted virtually through MS Teams, conference space will be available for onsite attendees to participate. Meeting times subject to change.*

A maximum of 8 hours of CPE Credit is available (based on length interest group meets and attendance during session), refer to each interest group page within this document for details on learning objectives, field of study, and required knowledge levels / prerequisites.

WEDNESDAY, SEPTEMBER 15, 2021

ALL EASTERN TIME ZONE

At Embassy Suites, 1900 Diagonal Road, Alexandria, VA 22314 or virtually through Microsoft Teams.

## INTEREST GROUP SESSIONS

9:00 AM – 12:00 PM      Value, Cost and Profitability Management  
Contact – Bob Misch (bob.misch@cbh.com)

9:00 AM – 12:00 PM\*      Integrated Risk and Value Management  
Contact – Sean Catanese (Sean.Catanese@kingcounty.gov)

9:00 AM – 12:00 PM      Supply Chain Management  
Contact – Jim Holman (jim.holman@cbh.com)

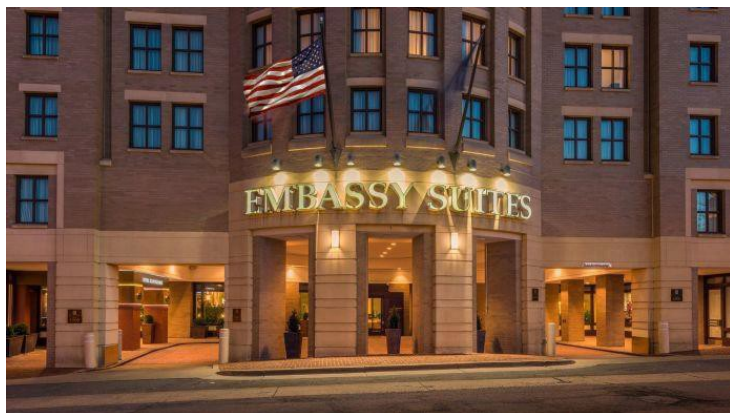
8:30 AM – 12:30 PM      Improving Efficiency/Effectiveness in the Finance Function  
Contact - Rob Young (Rob.Young252@mod.gov.uk),  
Sonya Ball (sonya.ball112@mod.gov.uk), or Kelvin P Marner (kelvin.p.marner@boeing.com)

*\* Risk Interest Group will be hosted virtually through MS Teams, conference space will be available for onsite attendees to participate. Meeting times subject to change.*

A maximum of 3 hours of CPE Credit is available (based on length interest group meets and attendance during session), refer to each interest group page within this document for details on learning objectives, field of study, and required knowledge levels / prerequisites.

# Hotel

## Embassy Suites



The Embassy Suites  
1900 Diagonal Road  
Alexandria, VA 22314  
1-703-684-5900

CAM-I has reserved a block of hotel rooms at the hotel at \$239 + tax per night. If you are a government employee, please request the government rate.

This rate is available for booking until August 27, 2021. Applicable current tax percentage in addition to the nightly rate is 14.5%.

Guests can use the following way:

Call our reservations center at 800-362-2779 and reference your group code, CAM;

or

Book via your group's personalized webpage:

<https://book.passkey.com/event/50204760/owner/1731/home>

# Registration

Register today at [www.cam-i.org](http://www.cam-i.org) and click on “Meetings” at the top of the page.

On Registration -

- **Tuesday Morning Session**

This option is pre-selected for your convenience.

- **Special Interest Groups**

When selecting options for registering please make sure to select one (1) **Interest Group** in which you plan to participate.

- **Awareness Training**

How to Evaluate and Improve Organizational Performance  
Non-member cost = \$250.00 per participant.

- **CAM-I Orientation**

Please select if you have not attended a CAM-I meeting previously.

Be sure to block out the time on your calendar, you may do so by opening the email with the ICS file from CAM-I upon registration.

- **ICS Calendar File**

The email that you receive after registering has a ICS calendar file that can be used to update your calendar.

If you need help understanding the calendar file attached CAM-I has a [Calendar ICS Help Page](#).

## Contact Info

CAM-I, Consortium for Advanced Management International

Ashok Vadgama

108 Wild Basin Road South, Suite 250

Austin, TX 78746

[www.cam-i.org](http://www.cam-i.org)

Phone: 512-617-6428

Cell Phone: 512-296-6872

# General Information

## CPE Credits

NASBA  
NATIONAL REGISTRY OF CPE SPONSORS

### **CPE Credits:**

The 3-day program qualifies for a maximum of 18 CPE credits.

**Program Level:** The knowledge level for CAM-I sessions is "Intermediate", meaning that participants should have at least 5 years of relevant work experience and should have a basic knowledge of cost, process, and/or performance management.

**Preparation:** Generally, no advanced preparation is required. However, please refer to the details in subsequent sections of this document for specific exceptions should they occur.

**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](http://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

- September 13 -15, 2021, Alexandria, Virginia
- December 6 - 8 2021, Virtual
- February 7 - 8 2022, United Kingdom
- March 7 - 9 2022, Alexandria, Virginia
- June 6 - 8 2022, Seattle, Washington
- September 12 - 14 2022, Tysons Coner, Virginia



# CAM-I General Session Presentations

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## Speaker 1

**TITLE:** "Improving Efficiency/Effectiveness in the Finance Function" Sonya Ball, CFO Land, Ministry of Defence, United Kingdom, Kelvin Marner, Head of Improvement, Boeing Defence UK Limited

**Field of Study** Business Management & Organization

**CPE Level** – Intermediate

### Learning Objectives

- Understand leading practices on the automation/elimination of processes to remove non-value add activity.
- Understand how to extract the most value from a variety of different business partnering models.
- Learn improvement and leading practice recommendations related to improving the efficiency and effectiveness of the finance function through participation in case studies and other analysis.

**CPE Credit hours – 50 Minutes**

## Speaker 2

**TITLE:** "Cyber Security To Enable Digital Manufacturing" Tim Harris, Chief Digital Information Officer, Allegheny Technology Incorporated

**Field of Study** Business Management & Organization

**CPE Level** – Intermediate

### Learning Objectives

Leveraging a Cyber Security transformation program to also accelerate Digital Capabilities, particularly Digital Manufacturing.

Historically, many organizations have had to decide between strong cyber security or a good user experience. Sharing some of the the lessons learned by ATI.

Including -

- Cloud First strategies accelerate Cyber strengths and Digital Manufacturing
- IT and OT convergence
- Basic Cyber hygiene and digital infrastructure modernization
- ATI's view on Digital Manufacturing

**CPE Credit hours – 50 Minutes**

# CAM-I General Session Presentations

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## **Speaker 3**

**TITLE:** "Status on Value, Cost and Profitability Management" Bob Misch, Director - Digital Advisory Services,  
Cherry Bekaert

**Field of Study** - Cost Management and Value Analysis

**CPE Level** – Intermediate

### **Learning Objectives**

- Understand the key values and principles that business support functions need to embrace in order to demonstrate value to their stakeholders.
- Understand the alignments between cost management and stakeholder value.
- How are capacity utilization, Target Costing, Activity Based Management, and profitability management is changing.
- New role of value analysis.

**CPE Credit hours – 50 Minutes**

# CAM-I Awareness Training

## How to Evaluate and Improve Organizational Performance using CAM-I's Performance Management Framework

### Description

The constant demand for improved strategy execution, even more relevant in today's business environment, has led to an increase in expectation around the management and improvement of organizational performance. Recognizing these challenges, research conducted by CAM-I's Performance Management Interest Group led to the development of a standardized and integrated Performance Management Framework (PMF) applicable to both private and public sector organizations.

This interactive workshop introduces a proven methodology for implementing a Performance Management Framework in your organization within a 2-day timeframe.

**What is it?** A 3-hour on-line workshop demonstrating the use of the PMF methodology

**Who should attend?** Cross functional senior managers responsible for monitoring and improving their organization's performance

**What is the value to your organization?** Learn how your organization can determine:

- WHAT initiatives to focus on to improve performance
- WHERE to best deploy scarce resources
- HOW to measure improvement to validate success

### Learning Objectives

After participating in this interest group, you will:

- Learn the Performance Management Framework methodology
  - Organizational Readiness
  - Business Capability Maturity
  - Improvement Techniques
  - Performance Measures
  - Focused Initiatives
- Follow the implementation steps using the application guide and case study
- Review application tips from real implementations
- Discuss the applicability of PMF in your organization

**Field of Study:** Management Services

### Required Knowledge / Prerequisites:

Knowledge level – Intermediate: Participants should have at least 5 years of relevant work experience and should have a basic knowledge of cost, process, and performance management. prior to workshop read the provided Application Guide and Case Study for use in the workshop.

### CPE Credits

4 hours of CPE credits are awarded for completing the advanced reading and attending the workshop

### Course Fee

The workshop is free for CAM-I members. The fee for non-members is US\$250 per participant. CAM-I will refund any cancellations if notice is provided at least seven (7) days before the course.

### Contact:

For more information regarding administrative policies such as complaint or refund, please contact the CAM -I office at 512- 617-6428.

# CAM-I Projects

## Value, Cost and Profitability Management

**Strategic Cost and Profitability Value Management Roadmap** – Over the years 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 further innovate the application of traditional cost models by putting more emphasis on additional stakeholders beyond the shareholder. Specific targets of study include costing methodologies such as Activity Based Costing and Target Costing, and the CAM-I's capacity models. The objective of this research is to expand current thinking in order to help organizations understand and quantify their impact on employees, society, the environment, as well as customers.

**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 including developing standards approaches and methods for measuring value.

**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 and to help improve a function's ability to deliver value. The principle-based framework has 9 value principles which enable member organizations to consistently define the value business support functions bring to an organization. The framework allows cost and value trade-offs to be quantified.

**Future Focus** - The interest group plans to continuously review methodologies and recent work to ensure relevance to organizations in light of the rapid changes that are occurring across industries today. By focusing on understanding additional stakeholders and their importance to an organization, along with a redefinition of value, we are re-aligning existing CAM-I methodologies and models to help organizations deliver sustainable stakeholder value.

An additional focus for this group is evaluating how Industry 4.0 impacts CAM-I's body of knowledge. CAM-I understands the importance of Industry 4.0, and as a first step in contributing to industry 4.0 learning and body of knowledge, we will focus on linking CAM-I's existing Target Costing methodologies to Industry 4.0.

### **Learning Objectives:**

After participating in this interest group, you will:

- Understand the key values and principles that business support functions need to embrace in order to demonstrate value to their stakeholders.
- Understand the alignments between cost management and stakeholder value.
- Learn how to identify 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 approach and roadmap that can be scaled and customized for your organization.
- Understand how Target Costing is impacted by, and can support, organizations as they mature into an Industry 4.0 era.

**Field of Study:** Management Services - credits earned 9.5

### **Required Knowledge / Prerequisites:**

Knowledge level – Intermediate: Participants should have at least 5 years of relevant work experience and should have a basic knowledge of cost, process, and performance management. Generally, no advanced preparation is required. However, the interest group chair will inform registered participants of any prerequisite work prior to the meeting.

### **Contact:**

For more details on the special interest group please contact the group chairs: Bob Misch, Phone (703) 548-8346 or bob.misch@cbh.com; Carmel Call (206) 240-1617 or carmel.call@kingcounty.gov

# 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

**Field of Study:** Management Services

### Required Knowledge / Prerequisites:

Knowledge level – Intermediate: Participants should have at least 5 years of relevant work experience and should have a basic knowledge of cost, process, and performance management. Generally, no advanced preparation is required. However, the interest group chair will inform registered participants of any prerequisite work prior to the meeting.

### Contact:

For more details on the special interest group please contact the group chair: Sean Catanese, Phone (314) 378-9611 or [Sean.Catanese@kingcounty.gov](mailto:Sean.Catanese@kingcounty.gov).

# CAM-I Projects Continued

## Improving Efficiency/Effectiveness in the Finance Function

### Description:

Organizations are being continuously challenged by customers, shareholders, governing bodies and internal business partners to develop and implement new ways of working that improve effectiveness and productivity to maximize value creation. National Governments, Defense and Commercial customers have never been more challenged with budget constraints as a result of the Global pandemic therefore it's an imperative for organizations to develop more agile, less bureaucratic processes and revised ways of working.

Project Purpose - To examine methods of benefit realisation and embedding a culture of effectiveness through sharing and collaborating with CAM-I members and extended Industry and Academic partners.

### Learning Objectives

After participating in this interest group, you will:

- Be familiar with academic research related to the project - what does the theory say and how has it evolved over time?
- Understand leading practices on the automation/elimination of processes to remove non-value add activity.
- Understand how to extract the most value from a variety of different business partnering models.
- Learn improvement and leading practice recommendations related to improving the efficiency and effectiveness of the finance function through participation in case studies and other analysis.

**Field of Study:** Business Management & Organization

### Required Knowledge / Prerequisites:

Knowledge level – Intermediate: Participants should have at least 5 years of relevant work experience and should have a basic knowledge of cost, process, and performance management. Generally, no advanced preparation is required. However, the interest group chair will inform registered participants of any prerequisite work prior to the meeting.

### Contact:

For more details on the special interest group please contact one of the following group chairs:

- Sonya Ball, Phone 011-44-030 679 37727 or Sonya.Ball112@mod.gov.uk
- Kelvin Marner, Phone 011-44-1935 383678 or Kelvin.P.Marner@boeing.com
- Rob Young, Phone 011-44-7826 510552 or Rob.Young252@mod.gov.uk

# CAM-I Projects Continued

## Supply Chain Management

Multiple shifts in the world of supply chain, transportation, and logistics pose challenges to the leaders of supply chain in the private and public sectors. By utilizing the latest technological solutions together with other physical and digital assets to redesign logistics practices, supply chains can adjust better to the fast-paced, highly competitive, omnichannel business environment. The increasing outsourcing practices, off-shoring, product versatility, supply chain security, and substantial interdependence throughout the supply chain further accentuate the importance of dealing with risks, resiliency, sustainability in the supply chain. Modern logistics practices focus on the circular supply chain concept, involving previously used products as raw materials. This “reverse logistics” can improve sustainability and resiliency when managed well and the potential to be a cash and resource-consuming quagmire when managed poorly.

How well are global supply chains able to withstand disruptive events?

Digitization of the supply chain featured prominently in the ongoing automation of Industry 4.0 improves the speed, dynamics, and resiliency of the supply chain operations, leading to an improved ability to respond to customer demands and ultimately higher delivered value. By embracing digitalization, organizations can drive up resiliency and sustainability efforts and reduce operating costs of the supply chain.

### Learning Objectives:

After participating in this interest group, you will:

- Understand how organizational responses to global disruptive events have introduced new methodology and approaches to anticipate and react to future interruptions in the global supply chain.
- Study how organizations create a supply chain that can provide goods and services while maintaining and improving sustainability goals and objectives.
- Appreciate how to design supply chains that can cope with the policy environment's fluid nature and how policy changes offer new constraints and new opportunities.
- Learn how new potential global alliances and trade agreements can provide increased opportunities for supply chain resiliency and mitigating risks.
- Study how the integrated, automated, and digital "Smart Factory" of Industry 4.0 can help organizations respond and recover from global changes more effectively.
- Know how increased cybersecurity breaches the global supply chain and the increased digital interconnectedness has led to increased risk of cyber threats and outcomes.

**Field of Study:** Specialized Knowledge

### Required Knowledge / Prerequisites:

Knowledge level – Intermediate: Participants should have at least 5 years of relevant work experience and should have a basic knowledge of cost, process, and performance management. Generally, no advanced preparation is required. However, the interest group chair will inform registered participants of any prerequisite work prior to the meeting.

### Contact:

For more details on the special interest group please contact group chair: Jim Holman, Phone (404) 733-9611 or [jim.holman@cbh.com](mailto:jim.holman@cbh.com)