

“Past, Present and Future Challenges in Auditing” FINAL AGENDA

Tuesday, April 26

Location: Grand Ballroom I (Ballroom Level)

7:00 - 8:00 **Registration and Continental Breakfast**
Location: Grand Ballroom Foyer (Ballroom Level)

8:00 – 8:20 **Welcome and Announcements**
Tim Schindler, PhD, Chair, PNIAF; Assistant Director/Field Office Manager, U.S. Government Accountability Office

Opening Remarks

Steve March, Vice-Chair, PNIAF, Multnomah County Auditor, Portland Oregon on behalf of the PNIAF Portland Conference Advisory Committee – setting the stage with the theme: Past, Present & Future Challenges in Auditing

8:20 – 9:15 **Future Challenges for Government Auditing: Technological Disruption and Implications for the Accountability Community**
Dr. Timothy M. Persons, Chief Scientist, U.S. Government Accountability Office
Moderator: Steve March, Multnomah County Auditor

Learning Objectives

This talk will discuss the challenges and opportunities from the ongoing disruption to the practice of auditing by various technologies, including artificial intelligence, machine learning, and data analytics. The rise of these technologies will continue to improve public sector effectiveness, efficiency, and accountability and will require revised thinking in terms of business models, human capital strategies, and data access and management.

9:15 – 9:25 **Networking and Break**

9:25 – 10:40 **The Art of Presenting Data**
Barbara Felver, Senior Communications Manager for Program Research and Evaluation , Washington State Department of Social and Health Services
Moderator: Suzanna Pratt, Research Analyst, Joint Legislative Audit and Review Committee, Washington State Legislature

Learning Objectives

Participants will learn techniques that will bring your data to life. Barbara Felver will provide practical guidelines gleaned over a lifetime of government service that will make your graphics look better and prompt decision makers to act. The presentation will offer redesigns of bar charts, pie charts, line charts, Gantt charts, timelines, tables, Venn diagrams, and flow charts, as well as tips on working with complex, analytical data. Barbara will share all of her secrets for making you look good as you generate your findings.

10:40 – 10:55 **Networking and Break**

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10:55 – 12:15

Beyond the Written Report: Alternative Communication Techniques

- Blogs – **Bonnie Crawford**, Staff Auditor, Oregon Audits Division
- Videos – **Jessica Kiney**, New Media Manager, State Auditor’s Office, Washington
- Web only reports – **Rebecca Connolly**, Research Analyst, Joint Legislative Audit and Review Committee, Washington State Legislature
- PowerPoint video – **Nicole Dewees**, Senior Management Auditor and **Jennifer McGuirk**, Senior Management Auditor, Multnomah County Auditor’s Office

Moderator: Will Garber, Deputy Director, Oregon Audits Division

Learning Objectives

Participants will learn about strategies audit shops use to communicate results. A panel of auditors will discuss how they are using new technologies and techniques to communicate results, such as blogs, short summary videos, and web-based reports. They will talk about how they use these communication types, advantages, challenges, and response from their audience. Their insights can help auditors learn about advantages and disadvantages of using these communication strategies.

12:15 - 1:25

Lunch

Location: Grand Ballroom I (Ballroom Level)

1:25 – 2:35

Changing Media Dynamics – Panel of Journalists

- **Therese Bottomly**, Director of News, Oregonian
- **Hillary Borrud**, Capital Bureau Reporter, EO Media Group
- **John Schrag**, Executive Editor, Pamplin Media Group
- **Nigel Jaquiss**, News Reporter, Willamette Week

Moderator: Brian Evans, Metro Auditor

Learning Objectives

Participants will learn about changes to the news media industry and its effect on communicating audit results to the public. A panel of journalists will discuss how their work has evolved in recent years including what types of stories, graphics and messages are important to newspaper editors. Their insights can help auditors learn how to structure audit messages to effectively communicate results.

2:35 – 2:45

Networking and Break

2:45 – 3:45

Developing, Maintaining and Improving Stakeholder Relationships

- **Joel Neimeyer**- Federal Co-Chair of the Denali Commission
- **David A. Sheppard** – Inspector General of the Denali Commission, Regional Inspector General (Seattle) U.S. Department of Commerce

Moderator: Gillian Brinkman, Auditor, Denali Commission Office of Inspector General

Learning Objectives

Participants will learn how to identify stakeholders, understand the changing relationship between audit and stakeholders, and learn how to meet the expectations of internal and external stakeholders. In addition, participants will learn how to determine the necessary frequency and format of audit communication, how the culture of the organization changes the audit approach, and managing conflict of interest between the audit function and stakeholders.

3:45 – 3:55

Networking and Break

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3:55 – 4:55

Auditing Over the Years: A Look Back and a Peek Forward

Gary Blackmer, Former Oregon Audits Division Director; Portland City Auditor; Multnomah County Auditor

Moderator: Steve March, Multnomah County Auditor

Learning Objectives

Participants will better understand some of the historical context of auditing, important lessons Gary's learned, and emerging audit issues.

4:55 – 5:00

Day 1 Closing Remarks

5:00 – 6:30

Reception

Location: Skyline I/II (23rd Floor)

“Past, Present and Future Challenges in Auditing” FINAL AGENDA

Wednesday, April 27

Location: Grand Ballroom I (Ballroom Level)

7:15 - 8:00 **Continental Breakfast**
Location: Grand Ballroom Foyer (Ballroom Level)

8:00 – 8:55 **Construction Audits: High Payback Construction Audit Tips**

Curtis Matthews, CPA, Partner, Moss-Adams

Moderator: Drummond Kahn, Director of Audit Services, City of Portland

Learning Objectives

Learn how to achieve high payback from your construction project through real life examples and practical construction audit tips. This discussion will provide important information on significant construction program exposures and audit techniques that will help you uncover project overcharges and costly practices. Methods to enhance the credibility of your construction audits will be provided. Participants will learn must have controls that will help them achieve cost, schedule, scope and quality construction program and project goals.

8:55 – 9:05 **Networking and Break**

9:05 – 10:45 **Staff Development: Training, Developing and Retaining Staff for the Challenges**

- Large audit office with established training program – **Terri Russell**, Managing Director, Professional Development Program, U.S. Government Accountability Office
- Small audit office representative – **Jacqueline McDonald**, Senior Manager, Performance Audit, Office of the Auditor General of British Columbia
- Representative new to auditing – **Natalie Block**, Analyst, U.S. Government Accountability Office
- Representative conducting audits for a few years – **Sohara Monaghan**, Senior Performance Auditor, Washington State Auditor’s Office

Moderator: Jennine Griffo, State Auditor’s Office, Washington

Learning Objectives

Participants will have a better understanding of training programs offered by different offices, and what training employees feel is needed to enhance engagement, professional development, and retention.

10:45 – 11:00 **Networking and Break**

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11:00 – 12:10

Concurrent Sessions Based on Topic Area

<p>New Auditors: Everything you wanted to know about auditing but were afraid to ask</p> <p>Moderator: Terri Russell, Managing Director, and Natalie Block, Analyst, U.S. Government Accountability Office</p> <p>Location: <i>Galleria North (Ballroom Level)</i></p>	<p>Audit Reporting Strategies: Innovative strategies for efficiencies and effectiveness</p> <p>Moderator: Drummond Kahn, Director of Audit Services, City of Portland</p> <p>Location: <i>Galleria South (Ballroom Level)</i></p>	<p>Staff Development Continue the discussion</p> <p>Moderator: Larry Stafford, Audit Services Manager, Clark County Auditor’s Office</p> <p>Location: <i>Forum Suite (Third Floor)</i></p>	<p>Extreme Statistics A perspective on risk and risk analysis</p> <p>Presented by: Latham Stack, Internal Auditor, Oregon Department of Education</p> <p><i>Learning Objectives: *</i></p> <p>Moderator: Fran Davison, Senior Management Auditor, Multnomah County Auditor’s Office</p> <p>Location: <i>Grand Ballroom I (Ballroom Level)</i></p>
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** Attendees will come away with: a fuller understanding of high-exposure risks; an appreciation of ways that foundational auditing principles are challenged by findings from safety engineering, accident investigation, and complex systems science; and the conceptual foundations of extreme value statistics, a method for more-accurate quantification of risk from high-exposure/low-frequency events.*

12:10 – 1:20

Lunch
Location: *Grand Ballroom I (Ballroom Level)*

1:20 – 2:20

Working with the Media: Panel Discussion with Audit Managers

- **Drummond Kahn**, Director of Audit Services, City of Portland
- **Colleen Rose**, Communications Manager, Office of the Auditor General of British Columbia
- **Adam Wilson**, Deputy Director for Communications, Washington State Auditor’s Office

Moderator: Jacqueline McDonald, Senior Manager, Performance Audit, Office of the Auditor General of British Columbia

Learning Objectives

Participants will learn about what techniques have been most effective to get the media to focus on the main message(s) from the audit – what are the takeaways. The panel of audit managers and other key personnel will talk about how they work to keep the audit message and recommendations as the center-point of “the story.” They may also discuss relationships with media and how they may approach different types of media, and what may work for your audit.

2:20 – 2:30

Networking and Break

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2:30 – 3:30

Concurrent Sessions Based on Shop Size/R Presentation/Principals’ Meeting

<p>Small – Medium Shop Size (1-14)</p> <p>Moderators: Mark Ulanowicz, Principal Auditor and Fran Davison, Senior Management Auditor, Multnomah County Auditor’s Office</p> <p>Location: Galleria South (Ballroom Level)</p>	<p>Large Shop Size (15+) Last Name A-L</p> <p>Moderator: John Bowden, Research Analyst, Joint Legislative Audit and Review Committee, Washington State Legislature</p> <p>Location: Council Suite (Third Floor)</p>	<p>Large Shop Size (15+) Last Name M-Z</p> <p>Moderators: Jeff Larson, Senior Analyst, U.S. Government Accountability Office and Jeff Fillmore, Analyst, University of Washington Office of Organizational Excellence</p> <p>Location: Forum Suite (Third Floor)</p>	<p>Introduction to R Statistical Software</p> <p>Presented by: Zane Kelly, Research Analyst, Joint Legislative Audit and Review Committee, Washington State Legislature</p> <p><i>Learning Objectives:</i> **</p> <p>Moderator: Natalie Block, Analyst, U.S. Government Accountability Office</p> <p>Location: Grand Ballroom (Ballroom Level)</p>	<p>Principals’ Meeting</p> <p>Moderator: Tim Schindler, Chair, PNIAF; Assistant Director/Field Office Manager, U.S. Government Accountability Office</p> <p>(A principal is the head of a governmental organization officially responsible for the conduct of audits.)</p> <p>Location: Galleria North (Ballroom Level)</p>
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*** Participants should leave this session with an idea of some of the different capabilities of the R language and how they can be applied for auditors. Participants should gain a high-level overview of R syntax, plotting, report creation, and different tools to extend the basic functionality.*

3:30 – 3:45

Networking and Break

3:45 – 4:50

Indicia of Fraud: High Risk Areas

Brian D. Miller, Former Inspector General, Government Services Administration; Fraud Prosecutor and Vice Chair of the National Procurement Fraud Task Force

Moderator: Brian Nava, Internal Auditor, Clackamas County

Learning Objective

To help the audience identify fraud indicators and areas of high risk. Mr. Miller will go through the conditions that may lead to fraud or misconduct and will highlight the fraud triangle using examples of fraud, waste and abuse.

4:50 – 5:00

Closing Remarks

Tim Schindler, PhD, Chair, PNIAF; Assistant Director/Field Office Manager, U.S. Government Accountability Office