



**Homeland  
Security**

CAO Forum

**2010**

*Challenges and Opportunities*

**Tuesday, January 19**

**4:00 – 7:00 pm**

*Registration – West Registration Desk, Lobby Level*

**Wednesday, January 20**

**7:30 am – 5:00 pm**

*Registration – West Registration Desk, Lobby Level*

**8:00 – 9:00 am**

**Morning Refreshments**

**Birdcage Walk**

**9:00 – 11:00 am**

**Plenary Session**

**Regency Ballroom**

**9:00**

Call to Order / Presentation of Colors: USCG Honor Guard

**9:10 – 9:15**

Singing of the National Anthem:

**9:15 – 9:20**

Welcome: Donald G. Bathurst, Chief Administrative Officer

**9:20 – 9:45**

Jan Lesher, Chief of Staff, Operations

**9:45 – 10:10**

Sharie Bourbeau, Deputy Under Secretary for Management

**10:10 – 11:00**

Donald G. Bathurst, CAO, and Brad Cooper, Deputy CAO

**11:00 – 11:15 am**

**Break**

**Birdcage Walk**

**11:15 am – 12:15 pm**

**Components Meet with CAOs**

**Component**

CBP

DHS Headquarters

FEMA

FLETC

ICE

NPPD

S&T

TSA

USCG

USCIS

USSS

**CAO**

Eugene Schied

Gloria Eskridge

Michael Keegan

Marcus Hill

Michael Gibbs

Michael Capps

Dana Bouley

Karen Shelton-Waters

Jeffery Orner

Nancy Williams

Nelson Garabito

**Meeting Location**

Diplomat

Palladian

Cabinet

Senate

Congressional B

Regency – table

Forum

Executive

Ambassador

Congressional A

Regency – table

Wednesday, January 20 – continued

**12:15 – 1:30 pm**

**Lunch (on your own)**

**CAO Program Offices**

Asset & Logistics Management (**ALM**) – Director, Scott Myers  
Occupational Safety & Environmental Programs (**OSEP**) – Director, Dr. Teresa Pohlman  
Records, Publications & Mail Management (**RPM**) – Director, Karl Johnson

**1:30 – 2:30 pm**

**Breakout Sessions**

**OSEP – Program Status Report and Strategic Plans**

**Ambassador**

*Led by Dr. Teresa Pohlman*

**ALM – FY 2010 Objectives**

**Palladian**

*A joint session with Real Property, Personal Property, Mobile Assets and Capital Planning & Investments – led by Scott Myers.*

**RPM – RPM’s Core Focus to achieve one-DHS**

**Diplomat**

*Led by Karl Johnson*

**2:45 – 3:45 pm**

**Breakout Sessions**

**OSEP – Occupational Safety and Health Aspects of Contracting – Session 1**

**Ambassador**

*This session will present the fundamental aspects of developing and implementing occupational safety and health requirements in contracts and the role of the OSH professional in this process – Ellen Stewart and Karl Anderson – Army Corps of Engineers.*

**OSEP – Executive Order 13514 – Federal Leadership in Environmental, Energy and Economic Performance, Session 1**

**Executive**

*Michele Moore, the Federal Environmental Executive, discusses the objectives and goals of Executive Order 13514 Federal Leadership in Environmental, Energy, and Economic Performance. After the presentation, Ms. Moore will answer questions from the audience.*

Wednesday, January 20 – continued

## **ALM – Personal Property / Mobile Assets Roundtable**

**Diplomat**

*Join the staff of Personal Property and Mobile Assets for a more in-depth discussion of the FY 2010 Objectives identified in the previous ALM session. John Bartolomeo, Dionne Chisolm, Jim Rappa, Gus Jabbour, Holly Mathis and Jennifer Newton will be on-hand to discuss their priority projects and to answer questions from the participants.*

## **ALM – Real Property – DHS Space Standards – Office of the Future Palladian** **(Also take the 4:00 – 5:00 class for full content)**

*What is the optimal use of office space for a dynamic organization such as DHS? Come and visit with a forward-thinking expert who will speak about the future of space utilization in a way that will broaden your understanding of the importance of space standards in meeting our organization's success. To better serve our mission, increase our effectiveness and increase user satisfaction, DHS is moving to a more functional and flexible work space design based on "form follows function" - the concept that space is there to serve the dynamic nature of our work – Kevin Kelly, GSA Architect.*

## **RPM – Electronic Records Management System (ERMS)** **The DHS strategy for ERMS implementation (Policy, Training, Standardization, Governance, and Transparency)**

**Congressional A**

*(Information Session – Mark Peasley)*

## **RPM – The New Parking and Transit Subsidy** **PTSAS - Enrollee Application**

**Congressional B**

*The Parking and Transit Subsidy Automation System demonstration will display the new electronic parking and transit enrollment application. The session will show how DHS has streamlined processes using the Adobe ES LiveCycle and Workbench software applications. The system will also leverage our existing IT investments and communicate with our customers more effectively while fostering stronger customer relationships – Denise Ray*

## **RPM – Digital Mail: ServiceSource, Inc.**

**Forum**

**Note: This session is designed for all Forum attendees.**

*This presentation will be a panel discussion on Digital Mail and Document Management. The discussion will highlight the benefits of converting mail (and paper) into electronic documents, which are then easily accessible, archived, and retrieved. ServiceSource will introduce and discuss plans pertaining to the forthcoming Digital Mail Pilot Program at the DHS CRDS and demonstrate how Digital Document Management solutions can also reduce paper and storage costs, increase productivity, and enhance daily administrative operations – Linda Phillips, Ken Crum.*

**3:45 – 4:00 pm**

**Break**

**Bird Cage Walk**

Wednesday, January 20 – continued

**4:00 – 5:00 pm**

**Breakout Sessions**

**OSEP – Occupational Safety and Health Aspects of Contracting – Session 2**

**Ambassador**

*This is a continuation of the prior session, Occupational Safety and Health Aspects of Contracting-Session 1*

**OSEP – Executive Order 13514 – Federal Leadership in Environmental, Energy and Economic Performance, Session 2**

**Executive**

*After Ms. Moore's overview, Dr. Teresa Pohlman, Director Occupational Safety and Environmental Programs, will outline the Department's overall status with compliance with the new Executive Order, planned strategies to improve performance and challenges the Department and Components must overcome to be successful. A question and answer period will follow the discussion giving participants an opportunity to gain valuable insight into OSEP's vision for Department future plans and actions.*

**ALM – Real Property – DHS Space Standards (continued)  
(Also take the 2:45 – 3:45 class for full content)**

**Palladian**

*What is the optimal use of office space for a dynamic organization such as DHS? Come and visit with a forward-thinking expert who will speak about the future of space utilization in a way that will broaden your understanding of the importance of space standards in meeting our organization's success. To better serve our mission, increase our effectiveness and increase user satisfaction, DHS is moving to a more functional and flexible work space design based on "form follows function" - the concept that space is there to serve the dynamic nature of our work – Kevin Kelly, GSA Architect.*

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**RPM – Records Management 101**

**Congressional A**

*Planning... Controlling... Managing... The Lifecycle of Records – Kathy Schultz.*

**5:00 – 7:00 pm**

**Reception**

**Diplomat**



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CAO Forum

**2010**

*Challenges and Opportunities*

**Thursday, January 21**

**7:30 am – 5:00 pm**

*Registration – West Registration Desk, Lobby Level*

**8:00 – 9:00 am**

**Morning Refreshments**

**Birdcage Walk**

**Note: The two following OSEP training sessions will run all day: 9:00 am – 4:30 pm:**

**OSEP – LEED AP Training**

**Ambassador**

*Become a US Green Building Council Leadership in Energy and Environmental Design Accredited Professional (LEED-AP). Attendees at this one day workshop will gain a thorough understanding of LEED that prepares them for taking the LEED-AP exam.*

**OSEP – OSH Professional Development Class:  
Behavior Based Safety Management**

**Diplomat**

*Dr. Steve Roberts, a nationally recognized expert and frequent instructor for the American Society of Safety Engineers, will present a day-long class on behavior based safety management. Leadership and OSH professionals will gain a better understanding of the need for change in the current safety culture and their role in driving that change. The emphasis is on ways leaders can work to improve an organization's safety culture using behavior- and person-based psychology principles in their day-to-day practices. Dr. Steven Roberts-Safety Performance Solutions, Inc.*

**9:00 – 10:00 am**

**The DHS Headquarters Consolidation Program: St. Elizabeths      Palladian  
Development and DHS Consolidation in the National Capital Region**

*Richard McGruder, Director, Headquarters Management and Development, and Assistant Director Chris Mills will present an overview of the DHS Headquarters Consolidation Program. DHS will consolidate from 46 locations in the National Capital Region to about 8 by the end of Fiscal Year 2016. Attendees will learn the Department's plans for new federal construction and the adaptive reuse of more than 50 historic buildings at St. Elizabeths plus the effort to consolidate 175 leases in the NCR.*

**Ethics Training – Office of General Counsel**

**Forum**

*Presentation will highlight the logical alignment and shared efficiencies that result from the Administrative Offices and the Ethics Offices throughout DHS working in tandem in furtherance of the Secretary's Efficiency Review initiative to optimize department coordination to better accomplish the DHS mission – Maureen Gilmore, Deputy Ethics Official, Office of General Counsel.*

Thursday, January 21 – continued

## **OSEP – NEPAassist – EPA**

**Cabinet**

*A presentation on EPA's web-based application that provides access to EPA databases to assist in establishing baseline environmental information. Aimee Hessert is the EPA's manager for the application.*

**10:00 – 10:15 am**

**Break**

**Birdcage Walk**

**10:15 – 11:15 am**

**Breakout Sessions**

## **OSEP – Environmental Planning and Historic Preservation Decision Support System**

**Cabinet**

*Significant changes have been made from the prototype Environmental Planning and Historic Preservation Decision Support System (EP&HP DSS). The Environmental Impact Evaluation Process in the current version of the EP&HP DSS is very different from the prototype. Deployment of the EP&HP DSS throughout DHS is in process to occur during the first half of calendar year 2010. This is one of two sessions to present and explain the system.*

## **OSEP – Commissioning, O&M and Low-cost Energy Efficiency Roundtable**

**Forum**

*Join small table-top discussions about opportunities for improvements in building operations and maintenance and low-cost, fast-payback energy conservation projects and commissioning opportunities.*

## **ALM – Personal Property / Mobile Assets – AMP/PP Manual**

**Executive**

*A discussion of the Asset Management Plan and Personal Property/Mobile Assets Manual currently under development – Jim Rappa and John Bartolomeo.*

## **ALM – Real Property – Condition Index – Lessons Learned**

**Palladian**

*Are your real property assets in the right condition and prepared to support your mission? CBP recently completed physical assessments on their portfolio of assets. Join us as we learn from their assessment experience on the challenges encountered and the results of their review. In addition, hear what HQ is doing to assist the department with this very important process – Gail Okleson, Senior Realty Specialist, Sanjeev Sharma, Parsons.*

***(Please consider taking the next session at 1:15: Decision Support Tool, for a follow-on discussion)***

## **RPM – USGPO Overview**

**Congressional A**

*Mr. Bradley is the Managing Director, Official Journals of Government – he has held this position for the past two years at The Government Printing Office. Prior to that he was the Managing Director, Customer Service; he also worked for the Congressional Joint Committee on Printing as well as several other government agencies printing operations; Department of Energy; Internal Revenue Service; and the Department of the Treasury. He will share with the audience the latest advances and innovations taking place at the GPO and how the Department of Homeland Security's Printing Professionals can benefit from these exciting advance technological additions.*

Thursday, January 21 – continued

## **RPM – Library – DHS Library and Research Services**

**Congressional B**

*This information sharing session by the Library and Research Services section will cover the following areas; a re-introduction of “who we are”; library purpose; homepage directions – how to maneuver through the E-Journal Portal Link, Group Catalog, NHSDL, and News Paper Direct; DHS Form 506. This session will conclude with a Q&A Session by the HQ Library and Research Services team: Geneva Gilliard, Dustin Bitterman, Pat Szarek and Karl Johnson.*

**11:30 am – 1:00 pm**

### **Luncheon**

**Regency**

*(Please be seated before 11:30)*

**Keynote Speaker: Keith L. Prewitt, Deputy Director  
United States Secret Service**

**1:15 – 2:15 pm**

### **Breakout Sessions**

**OSEP – Basics of Economic Analysis: Life Cycle Costing  
and Return on Investment**

**Cabinet**

**ALM – Personal Property – TASC**

**Executive**

*Update on the Transformation and Systems Consolidation Effort – Avie Snow, Director, Resource Management Transformation Office.*

**ALM – Real Property – Decision Support Tool II**

**Palladian**

*Having a consistent and reliable system for analyzing building assets for either investment or disposal is critical to managing a large real property asset portfolio such as DHS'. Join us as a major federal consultant walks us through the process they recently developed for DHS – Gail Oklesson, Senior Realty Specialist, Sanjeev Sharma, Parsons*

***(Please consider taking the previous session at 10:15: Condition Index - Lessons Learned)***

**RPM – Digital Mail: ServiceSource, Inc.**

**Forum**

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**RPM – Printing Efficiency Review**

**Congressional A**

*The lead Program Managers; Deborah Moore and Marianne Linger of the S1 Efficiency Review Team will discuss and answer questions relative the processes and specifically; help further explain the quarterly data reporting process and procedures.*

**2:30 – 3:30 pm**

**Breakout Sessions**

**OSEP – Environmental Planning and Historic Preservation  
Decision Support System**

**Cabinet**

*Significant changes have been made from the prototype Environmental Planning and Historic Preservation Decision Support System (EP&HP DSS). The Environmental Impact Evaluation Process in the current version of the EP&HP DSS is very different from the prototype. Deployment of the EP&HP DSS throughout DHS is in process to occur during the first half of calendar year 2010. This session is a repeat of the morning session to present and explain the system.*

**OSEP – Renewable Energy Technologies: A Review of  
Opportunities for DHS**

**Forum**

*A representative from the National Renewable Energy Laboratory will present a summary of the Renewable Energy Round Table event held on Tuesday. Findings from the renewable energy optimization study will be highlighted – Andrea Watson, National Renewable Energy Laboratory.*

**ALM – Personal Property – Sunflower**

**Executive**

*Sunflower Asset Management System (SAMS) Training – Tips, Techniques and Best Practices – Gus Jabbour.*

**ALM – Real Property – National Co-Location**

**Palladian**

*What is co-location? What is co-location with a national perspective and how does the department view that concept? Come and visit with a major federal consultant who will educate us on the co-location concept and how DHS is assessing the process and the considerations for implementation – Gerald Brown, Portfolio Manager, Rob Coulson, Deloitte Consulting.*

**RPM – Printing Management Committee Meeting**

**Congressional A**

**Component Printing Officers and Printing Professionals Only**

*Kick-off committee meeting for FY 2010. Areas of discussion; a printing management scorecard; site visits from HQ Printing Officer; “One DHS” and how our programs fit within that concept; the McKinsey Data Call from the OCAO; and highlights from your successes and challenges during FY '09 – Keith M. Lee, DHS Senior Printing Officer.*

**RPM – Digital Mail: ServiceSource, Inc.**

**Congressional B**

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Thursday, January 21 – continued

**3:30 – 3:45 pm**

**Break**

**Bird Cage Walk**

**3:45 – 4:45 pm**

**Breakout Sessions**

**OSEP – DHS Green House Gas Emission Inventory**

**Cabinet**

*The Department recently completed a greenhouse gas emission inventory. This session provides an introduction to greenhouse gas emissions and discusses the process used for completing the inventory and sequestration analysis. There will also be a discussion about the gaps in the inventory that must be closed in order to comply with Executive Order 13514 inventory requirements. A question and answer period will follow the discussion.- Vincent Bonifera, Program Manager, Booze, Allen, Hamilton*

**ALM – Personal Property – Sunflower Inventory Process**

**Executive**

*Utilizing Sunflower for Inventory – Herb Pruitt, Immigration and Customs Enforcement.*

**ALM – Mobile Assets – FMVRS**

**Forum**

*A presentation of the Federal Motor Vehicle Registration System – Karl Wolfe, General Services Administration.*

**ALM – Real Property – Federal Portfolio Management**

**Palladian**

*What is Federal Portfolio Management? A top Director at GSA will present the Federal perspective at this session targeted to those responsible for managing, tracking and reporting the condition, utilization and costs of the real estate assets used in supporting the DHS mission – David Foley, Deputy Assistant Commissioner, Portfolio Management, GSA.*

**RPM – Mail Management – PowderSafe**

**Congressional A**

*Mail borne threats using unknown substances in envelopes continue to be a safety and security problem for all organizations. CFR 41 requires all agencies with a one man mail handling facility upwards to implement security plans and procedures for incoming mail. The Powdersafe system is a product that creates a safe system of work for dealing with suspicious mail. Come and learn more about the unique characteristics of this solution and how it can assist you in your compliance requirements. – Tim Roberts, Managing Director, PowderSafe Pty Ltd, and Steve Cumberbatch.*

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Friday, January 22

7:00 am – 12:00 pm

Registration – West Registration Desk, Lobby Level

7:30 – 8:30 am

Morning Refreshments

Birdcage Walk

8:30 – 9:15 am

Plenary Session

Regency Ballroom

8:30 – 8:55

The Honorable Elaine C. Duke, Under Secretary for Management

9:00 – 9:15

Donald G. Bathurst, Chief Administrative Officer

9:15 – 9:30 am

Break

Birdcage Walk

9:30 – 10:30 am

Breakout Sessions

OSEP – (OSH) Noise and Hearing Conservation Programs, Session 1

Executive

Lee Hager will present a DHS customized hearing conservation class based on his multi-time Top Ten American Industrial Hygiene Association professional development classes. Particular emphasis will be placed on the noise encountered in DHS workplaces, its measurement, and control. Lee Hager-EAR

OSEP – ICE Centralized Power Management for Information Technology

Ambassador

OSEP – Current Legal Issues in Environmental Stewardship

Cabinet

A panel of lawyers from DHS HQ and components will be presenting and discussing current issues and perspectives in environmental law and practice. The panel will be facilitated by Bill Bresnick, environmental lawyer from the Office of General Counsel.

ALM – Personal Property – Personal Property Committee Meeting

Diplomat

Join Component and Headquarters Committee members for a discussion of the latest developments that will impact the way we manage our property and our program.

Friday, January 22 – continued

**ALM – Mobile Assets – FMARS Presentation**

**Forum**

*A presentation on the new Fleet Fuel Card Business Intelligence Tool – Fleet Management Analysis and Reporting System – Tim Fleming, Debrah Little and Lynn DeFazio.*

**ALM – Real Property – Furniture Procurement**

**Palladian**

*Furniture is a hot topic at DHS. Have we been able to leverage the buying power inherent in having 22 components under one roof? This presentation will explore options for this to happen – GSA, Federal Acquisition Service, IWAC.*

**RPM – Mail Management – Proper Addressing**

**Congressional B**

*This session will cover how to properly address DHS mail (incoming / outgoing; FedEx & UPS) to enable our Consolidate Remote Delivery Site (CRDS) to receive, process, and deliver mail faster and more efficiently. It will include why and what Mail Stops to use, as well as understanding unique zip-codes – Ron Boatwright.*

**10:45 – 11:45 am**

**Breakout Sessions**

**OSEP – (OSH) Noise and Hearing Conservation Programs,  
Session 2**

**Executive**

*Continuation of Session 1*

**OSEP – GSA Energy Commodity Contracting in Deregulated  
Markets, Part 1**

**Ambassador**

**OSEP – Endangered Species: Integrated Planning and Consultation  
(IPaC) System – USFWS**

**Cabinet**

*Michael Horton, the IPaC Coordinator from the USFWS, will be describing the USFWS web-based application and recent improvements in functionality. IPaC automates the compliance process for Section 7 of the Endangered Species Act. CBP funded a very large portion of the system development effort.*

**ALM – Personal Property – Property Custodian Training**

**Diplomat**

*A training session for Property Custodians presented by the award-winning Property Management Division from the Federal Law Enforcement Training Center (FLETC). Jayne Huvar and Mark Boswell will talk about inventory management procedures, including sensitive assets such as weapons.*

**ALM – Mobile Assets – Best Practices**

**Forum**

*FLETC will lead a discussion on best practices in alternative fuel vehicle management – Steve Brooks, Federal Law Enforcement Training Center.*

Friday, January 22 – continued

**ALM – Real Property – Furniture Procurement**

**Palladian**

*Furniture is a hot topic at DHS. Have we been able to leverage the buying power inherent in having 22 components under one roof? This presentation will explore options for this to happen – GSA, Federal Acquisition Service, IWAC.*

**12:00 – 1:00 pm**

**Breakout Sessions**

**OSEP – (OSH) Noise and Hearing Conservation Programs, Session 3**

**Executive**

*Continuation of Sessions 1 and 2.*

**OSEP – GSA Energy Commodity Contracting in Deregulated Markets, Part 2**

**Ambassador**

*Continuation of Part 1. A GSA Contracting Officer will detail how commodities contracts work for the buying groups and roles and responsibilities for customer (DHS) accounts. There will be a question and answer session*

**OSEP – EP&HP Issues and Best Practices from the Field**

**Cabinet**

*This is a session for EP&HP professionals to discuss issues in performing EP&HP compliance activities and to share best practices. This session will be led by a panel of representatives from CBP field offices.*

**ALM – Personal Property – FACTS**

**Diplomat**

*A demonstration of the Firearms, Armor and Credentials Tracking System (FACTS) – Bert Medina, Director, National Firearms and Tactical Training Unit, ICE.*