

Sharon Edmundson, MPA, CPA

Sharon Edmundson is currently the Director of the Fiscal Management Section of the State and Local Government Finance Division of the North Carolina Department of State Treasurer. She previously served as one of the Assistant Directors of this section, a position she held for 2 years, and was a staff member in the section for six years. Her other work experience includes ten years in public accounting and four years as an internal auditor.

Ms. Edmundson received her BS in Business Administration with a concentration in accounting from the University of North Carolina at Chapel Hill, and a Masters in Public Administration at North Carolina State University. She is a member of the North Carolina Association of Certified Public Accountants and currently chairs the Governmental Accounting and Auditing Committee. She also served two terms on the Committee on Accounting, Auditing, and Financial Reporting for the Government Finance Officers Association.

## Robert Johnston Shea

Robert is a Principal in Grant Thornton's Global Public Sector (GPS) practice, with over 20 years of federal government experience. He leads the Public Sector's communications and public policy team and is a member of the Performance Transformation Group. Robert joined Grant Thornton from the U.S. Office of Management and Budget, where he was Associate Director for Administration and Government Performance. In addition to managing OMB's internal operations, Robert led the President's Performance Improvement Initiative and administered the Program Assessment Rating Tool. Robert made numerous presentations on best practices in performance management under the auspices of the Organization for Economic Co-Operation and Development (OECD) and co-edited the volume, *Performance Management and Budgeting: How Governments Can Learn from Experience*. Before joining OMB, Robert served as Counsel to the Senate Committee on Governmental Affairs where, in addition to general oversight of Executive Branch management, he advised Committee leadership on the status of implementation of the statutory framework for performance-based government, including the Government Performance and Results Act and the Chief Financial Officers Act. He was Legislative Director for Congressman Pete Sessions (TX) from 1997 to 1999, where he organized the Results Caucus, a group of Members of Congress dedicated to results-based management and solving many of the government's major management problems. Robert was a Professional Staff Member with the House Committee on Government Reform from 1995 through 1996. There he had responsibility for examining the economy and efficiency of government programs, and acted as liaison with the government's Inspectors General.

## James L. Taylor

James L. Taylor recently joined Grant Thornton as managing director, following over 30 years of public service. Just prior to his retirement, Mr. Taylor served as the senior advisor to the IRS Commissioner, charged with integrating the IRS' complex requirements in support of the Affordable Care Act. In 2010, Mr. Taylor was confirmed by the United States Senate as the Chief Financial Officer for the Department of Labor, a position he held for nearly four years. Prior to this position, he served as Deputy Inspector General for the Department of Homeland Security, where he assisted the Inspector General in managing over 600 auditors, inspectors, and investigators. From 1999-2005, Mr. Taylor was the Deputy Chief Financial Officer for the Department of Commerce, where he successfully implemented the department's first integrated financial management system, and earned its first clean audit opinion. Prior to his position at Commerce, Mr. Taylor served as the Deputy Chief Financial Officer for the Federal Emergency Management Agency, where he helped transform FEMA's financial operations to more effectively support the agency's disaster response activities, and achieved its first clean audit opinion. Mr. Taylor has received the Donald E. Scantlebury Award for Excellence in Federal Financial Management, and the Presidential Rank Award of Distinguished Executive. He received his BA from Old Dominion University and an MPA from the University of Delaware, where he was a Public Service Fellow.

## Biographical Information

### North Carolina State Auditor Beth A. Wood, CPA

Beth Wood is in her second term as North Carolina's elected State Auditor. She is a Certified Public Accountant and long-time public servant with nearly 25 years of auditing experience.

Beth served in the State Auditor's Office for more than a decade before being elected into this position. Before joining the State Auditor's Office, she served in the State Treasurer's Office and in the private sector. She is the first woman elected to the position of State Auditor in North Carolina.

During her tenure, the office has performed audits that would help state leaders cope with the worst economic conditions since the Great Depression. Those audits have focused on contracting practices that favored vendors at the expense of taxpayers and changes in agency procedures that have saved the state hundreds of millions of dollars. Her office has also produced several audits pointing out the flaws with the state's information technology projects.

Beth intends to continue producing audits that will help the governor and legislators streamline state government. Audit teams across the state are watching every area of state government for potential savings that help make the best use of taxpayer dollars.

Additionally, under her leadership during the next term, the office will perform follow-up audits, evaluate the use of best practices by state agencies and will work to attract and retain highly skilled auditors.

## **Sarah Means Smith**

Director of Sponsored Programs  
UNC General Administration  
Division of Research and Graduate Education

### **Responsibilities:**

Direct all facets of pre- and post-award administration for contracts and grants awarded to UNC-General Administration, including proposal and budget development, award negotiations, regulatory compliance, post-award functions and financial compliance, and is primary liaison between UNC program directors and sponsors. Serve as the contract and grant process advisory lead for the UNC Business Process Compliance Program. Lead the UNC Sponsored Programs and Research Council providing a venue for policy and emerging trend discussions and content area training.

### **Previous Professional Positions:**

Sarah has over 21 years of experience in the research administration arena. Sarah has been in her current position at UNC-General Administration since September 2001. Previously, she served as the Manager of NCSU Sponsored Programs from 1998 through September 2001, and was with the NCSU College of Humanities and Social Sciences from 1991 through 1998, serving as Research Associate from 1994-1998. She was also associated with the NCSU Division of Transportation from 1984-1990, serving as Parking Services Manager at from 1986-1990.

### **Education:**

B.A. Business Management, NCSU - 1994  
Certified Public Manager – 2001  
Certified Research Administrator - Spring 2002, Spring 2008, Spring 2013

## MICHAEL L. WALDEN

Dr. Michael L. Walden is a William Neal Reynolds Distinguished Professor and Extension Economist at North Carolina State University and a member of the Graduate Economics faculty with The Poole College of Management. His Ph.D. degree is from Cornell University and he has been at N.C. State since 1978. He has also been a Visiting Professor at Duke University.

Dr. Walden has teaching, research, and extension responsibilities at NCSU in the areas of consumer economics, economic outlook, and public policy. He has published eight books and over 250 articles and reports, including the book *North Carolina in the Connected Age*, published by the UNC Press. He has served on several local and state level commissions. With his wife, he is the co-author of three “economic thrillers”, *Macro Mayhem*, *Micro Mischief*, and *Fiscal Fiasco*, designed to teach economics in an entertaining way.

Dr. Walden can be frequently seen, heard, and read in the media. He has daily radio programs aired on stations around North Carolina for which he has won two national awards. He is often interviewed on local TV and radio news broadcasts, has appeared on *NBC*, *CBS*, *The Fox Report*, and the *Newshour With Jim Lehrer*, and is frequently quoted in such newspapers as *USA Today*, *The News and Observer*, *The Charlotte Observer*, *The Boston Globe*, *The Wall Street Journal*, and *The Washington Post*. His biweekly column, *You Decide*, is carried by over forty newspapers in the state. He has made over 2500 personal presentations.

Dr. Walden directs the semiannual economic forecast, *The North Carolina Economic Outlook*. He has won numerous academic and public awards, including two Champion-Tuck Awards for Excellence in Broadcasting, the UNC Board of Governor’s Award for Excellence in Public Service in 2010, the Order of the Long Leaf Pine in 2013, and the Holladay Medal for Excellence from North Carolina State University in 2014.

**Eric Hunley**  
**Senior Manager, State and Local Government Practice**

Eric currently serves as a Senior Manager at SAS in the State and Local Government Practice. His primary role is helping solve business problems for the State of North Carolina and across the country in areas such as reducing Fraud, Waste and Abuse, Criminal Justice & Law Enforcement, Improving Education and other opportunities across state agencies. Over the past 21+ years at SAS he has worked in various roles ranging from Technical Support, Systems Engineer/Systems Engineer Manager and Manager of Product Management. Throughout his career at SAS he has been involved with a wide range of technologies including enterprise data management, enterprise architectures, high-performance computing, data storage, data warehousing and data quality. The majority of his tenure at SAS has been dedicated to data management/data integration and data quality; basically Big Data before Big Data was a common term or phrase. He has authored various technical documents and white papers at SAS on various product and solution areas presenting to audience as small as 1 and as large as 3,000.

Eric has a BS from East Carolina University in Computer Science. He spends his time away from the office coaching youth baseball at the West Raleigh Exchange Club. He has served as the Co-Chairman for the Racing Heroes Charity Auction in the past that has raised in excess of \$150,000 for the Family Support Program at the Duke Children's Hospital Pediatric Bone Marrow Transplant Unit. He serves on the NC Technology Association Advisory Board, Middle Creek High School Digital Media Academy and is the Vice President of the Stampede Club, which is a booster club for student athletes at Middle Creek High School.

**Chris Swecker, Esq.**  
**Assistant Director, FBI, (Retired) 1982-2006**  
**Global Security Director, Bank of America, 2006-2009**  
**Attorney/Fraud and Security Consultant 2006-present**  
**Former Board Member, Allied Barton Security Company**  
**Chairman NC Governor's Crime Commission**

**Swecker served 24 years as a Special Agent with the Federal Bureau of Investigation (FBI) retiring in 2006 as Assistant Director, Criminal Investigations Division, with oversight over all FBI Criminal and Cyber Investigations. Swecker also served as the FBI's Special Agent in Charge in North Carolina, the Assistant Special Agent in Charge in Miami and Houston and the On Scene Commander in Iraq in 2003 where he led a team of FBI Agents conducting counter-intelligence, terror financing and international terrorism investigations including investigating suicide bombing attacks on the UN headquarters and other civilian occupied facilities. Prior to joining the FBI he was an Assistant District Attorney in The First District of NC. He currently Chairs the NC Governor's Crime Commission in Raleigh.**

**As CSO for Bank of America from July 2006 to January 2009 Swecker led components that were responsible for all fraud investigations; physical security; international security, employment screening, some Anti Money Laundering functions and executive protection. He provided strategic direction and overall management for over 600 proprietary associates and over 3800 contract security guards with an annual budget of over \$250 million spanning 6100 bank branches, 18,000 ATMs and 450 administrative facilities.**

**Swecker has testified before US Congress on topics such as identity theft, crimes against children, mortgage fraud, human trafficking, financial crimes, information privacy, terrorism, data compromise, crimes on the internet, drug trafficking on the southwest border and gangs. He has also appeared on 60 Minutes, CBS This Morning, Oprah Winfrey, Good Morning America, CSPAN Washington Journal, CNN, CNBC and North Carolina People. He is a frequent public speaker and author of articles on Financial Crimes, Money Laundering, Security, Human Trafficking and Cyber Crimes.**

**Swecker is a graduate of Appalachian State University where he was a 4 year varsity football letterman, graduating in 1978. He attended Wake Forest School of Law receiving his Juris Doctor in 1981. He is a member of both the North Carolina and Virginia State Bars. Swecker received the prestigious Presidential Rank Award in 2003 for his service in Iraq and as Special Agent in Charge of the NC Office. Swecker currently manages his own law practice and founded a successful security and financial crimes consulting firm, Chris Swecker Enterprises.**



Meet the Instructor...  
**Holly A. Basso, M. Ed**

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Holly Basso is a seasoned veteran in the field of corporate training, offering computer software consulting and instruction, productivity seminars and motivational seminars. As Assistant Director of Technology Training Solutions (TTS) at NC State University, Basso offers a host of courses that allow North Carolina members of business and industry to stay abreast of technology.

Basso's experience in this field spans over 25 years. During that time, she has managed five different training centers, run her own consulting business, trained various levels of computer users in different areas of technology, and created effective, technology-driven business solutions. She combines an in-depth knowledge of business and industry with adult-education techniques, allowing her to bring unparalleled knowledge and assistance to TTS customers and her class participants.

Basso is currently a PhD student at NC State University in the field of Leadership, Policy and Adult and Higher Education.

## **Bios for speakers for the Enterprise Systems/Program Update – 12.16.2014**

**Jim Dolan** is the Chief Deputy State Controller at the Office of State Controller (OSC). Jim oversees the day to day operations for the accounting and reporting of the state's finances and cash management, managing the payroll for approximately 75,000 state employees, and oversight of the State's risk management efforts and eCommerce activities. Jim has extensive private sector experience that covers accounting, planning, budgeting, forecasting and pricing and management. Jim has worked for the state for almost 10 years in IT oversight and Operations Management positions. Jim has an undergraduate degree in Accounting from Bryant University and an MBA from Rider University. He is also a graduate of the Government Chief Information Officer program at UNC Chapel Hill's School of Government.

**Amber Young** is the Central Compliance Manager for the Office of the State Controller. Amber has been a state government employee for 32 years including 25 years of service with Office of the State Controller and 7 years as a financial auditor with the Office of the State Auditor. Amber has spent numerous years in the management of Statewide General Fund activities for the State of North Carolina and compliance of statewide cash management legislation. Amber also manages the Statewide Accounts Receivable Program, Statewide eCommerce Program, Federal Cash Management and Statewide Accounts for the Office of State Controller. She received a BA in Accounting from North Carolina State University.

**Luke Harris** is a Financial Specialist with the North Carolina Office of the State Controller. Luke Harris has been employed with the North Carolina Office of the State Controller for 16 years. For the past 11 ½ years, he has been working with the Statewide Electronic Commerce Program. Luke graduated from Western Carolina University with a BS in Business Administration with a major in Accounting.

**Jim Tulenko** is the Deputy State Controller for Information Technology (CIO) for the Office of the State Controller. Jim has extensive private sector experience in software development, project management, account & marketing management and ROI analysis. Jim has been working for the State for almost ten years, initially with the Office of Information Technology Services as Project Portfolio Manager for the State and more recently as the Program Director for the BEACON HR/Payroll system. Jim has an undergraduate degree in Computer Science from Penn State University and an MBA from Duke University. He is also a graduate of the Government Chief Information Officer program at UNC Chapel Hill's School of Government.

**Andrew Whalen** is the Deputy CIO for the NC Office of State Budget & Management (OSBM). He has worked for the State for 8 years, most recently for OSBM. Andrew has supported many technical projects like NCRcovery.gov, the early stages of State Portal refresh, and the IBIS (Integrated Budget Information System) project. Andrew is a graduate of NC State University.

**Brandon Watson** serves as Banking Director for the North Carolina Department of State Treasurer where he oversees the Banking Operations and Bank Reconciliation Units. Brandon is a fourteen year veteran of the financial services industry and has experience in investments, commercial banking, and lending. He received his B.A. in Economics from Duke University.

**Brian Smith** is the Interim Assistant Vice Chancellor for Financial Accounting Operations at The University of North Carolina at Chapel Hill. Brian oversees the day-to-day operations for the University in the areas of Accounting Services, Financial Reporting, Internal Controls, Payroll, Procurement, Student Accounts, and Treasury. Brian is also the Chair of the Finance Stakeholders Committee for the University's ConnectCarolina (ERP) Project. He has been with the University for a little over ten years, primarily in the role of Director of Treasury and Risk Management Services. Brian graduated from The University of North Carolina at Chapel Hill with a degree in Economics. He is also a Chartered Financial Analyst and a Certified Treasury Professional.