



## Guest Panel Speakers



**David A. Shive**

*Chief Information Officer, U.S. General Services Administration.*

David A. Shive is the Chief Information Officer for the U.S. General Services Administration.

Shive oversees GSA IT - formerly known as the Office of the Chief Information Officer (OCIO) - and information technology operations and budget, ensuring its alignment with agency and administration strategic objectives and priorities.

Shive joined the U.S. General Services Administration's Office of the Chief Information Officer in November 2012. Prior to being named CIO, he was the Director of the Office of Enterprise Infrastructure, responsible for the enterprise information technology infrastructure platforms and capability that support the GSA business enterprise. He was also the Acting Director of HR and FM Systems for the GSA CFO and CPO offices.

Prior to joining GSA, he served in the District of Columbia government as a Chief Information Officer. In this role, Shive had executive responsibility for agency IT operations including financial systems, security and privacy programs, internal controls and compliance, strategic planning, enterprise architecture and performance management and measurement programs and directed the transformation of enterprise systems and processes, to public/private cloud hybrid. Shive was the recipient of the 2012 Washington, D.C., CFO Meritorious Service Award.

Shive began his career at Lockheed Martin Corporation in management and consulting roles overseeing large, customer-centric, IT organizations serving state and local, federal and international government customers. He is the recipient of numerous sector awards including the 2006 State & Local Government Executive Management award and the 2003 Management Award for Transformational Technology

Shive is a member of the National Law Enforcement Telecommunications System Alumni Association; American Meteorological Society, DC Chapter;



Project Management Institute, DC Chapter; the Air Force Association and the Government Finance Officers Association.

He holds an undergraduate degree in physics from California State University, Fresno; a master's degree in research meteorology from the University of Maryland College Park; and a post-graduate management certificate from the Carnegie Mellon Graduate School of Industrial Management.



**James Gfrerer**

*Principal for Fidelis Technology LLC*

Jim is currently the Principal for Fidelis Technology LLC, providing Advisory and Consulting services to commercial technology partners doing business in the Federal and Public Sectors.

As the past Assistant Secretary for the Office of Information and Technology (OIT), and Chief Information Officer of the Department of Veterans Affairs, Jim led the largest single centralized IT portfolio in the Federal Government.

During his tenure, he and his team of 8,000 IT professionals implemented a Digital Transformation strategy of the nearly \$6B portfolio which modernized the massive VA Enterprise physical infrastructure, developed a software modernization plan and product line management methodology, and matured VA's cybersecurity posture. He guided OIT through the chaotic COVID pandemic of 2020, ensuring business continuity of 400,000 VA employees throughout the once-in-a-century crisis. In addition, he focused on VA business outcomes across major health care and financial services implementations, return on investment (ROI), and reinstating an IT investment review board (IRB) and capital planning and investment controls (CPIC) process.

Prior to VA, Jim was an Executive Director with Ernst & Young (EY) in their commercial Cybersecurity Practice. In this role, he worked with Fortune100 clients in Health, Manufacturing, Chemicals, Aerospace and Defense, and other sectors, to provide cybersecurity strategy, product implementation, and managed service offerings. Also, he worked directly



with the Practice SME to bring clients Internet of Things (IoT) and Operational Technology (OT) cybersecurity offerings.

Jim previously served at the Department of State (DoS) in Cybersecurity roles, working international norms and standards, U.S. Cybersecurity policy, as well as Export review of commercial products. Also, he served as a Senior Executive and DoS representative in a number of diplomatic venues representing U.S. interests in cybersecurity, technology, and counter terrorism.

Finally, Jim served a full career as a Marine Officer working in Information Technology, Cybersecurity, and in multiple assignments at Headquarters, U.S. Marine Corps. This included mobile and web applications, as well as other enterprise and operational capabilities to support the Marine Corps and the deployed warfighter.



**Philip Armstrong**

*Chairman, TBM Council Board of Directors*

With 40+ years of global business and technology experience, Phil is a recognized digital transformation leader and value creator. Phil serves as an Independent Corporate Director, Board Chair and Board Advisor.

Phil retired as the EVP & Global CIO, Great West Lifeco in March 2021, concluding a distinguished award winning global career that spanned 49 countries. Phil brings invaluable experience and skills in supporting strategic digital transformations, evaluating ongoing cyber security protection, establishing technology risk and governance frameworks, and ensuring the pragmatic execution and delivery of sustained operational excellence.

Phil has led numerous large scale strategic business transformations globally leveraging powerful new technologies to re-define ineffective business models, create new products and services, launch new customer centric channels and improve service and profitability. Phil offers a leading edge perspective on the usage of cloud, artificial intelligence, machine learning, data analytics, robotics, cyber and digital innovation used to secure and delight customers.



As companies increase their reliance upon technology, boards and executive teams face new and increasingly complex risks. Phil is a recognized thought leader in the advancement of strategic technology risk management and governance frameworks.

Phil has an impressive track record of delivering operational excellence required to stand out with a differentiated experience. He brings insights and practical experience in digitally based customer engagement tools and employee productivity and collaboration practices. These disciplines will undoubtedly emerge as a board and executive priority for companies trying to pivot and adapt to a post-Covid world.

With the introduction of cloud, new emerging providers and consumption models, coupled with traditional data centers, managing hybrid technology costs, investments, and value is an increasingly challenging endeavor. As a Global CIO that managed billions of dollars in annual spend, Phil saw the benefits of TBM and the ability to consolidate and analyze spend across the portfolio in real time. TBM allowed competitive benchmarking and provided the ability to redirect operational expense towards innovative transformative investments. Phil is proud to serve as the Chairman of the Board for the TBM Council, a cause that he is passionate about and regards as a mandatory tool for any organization wanting to leverage their technology investments.

Previously, as Chief Digital Technology Officer for Sun Life Financial and Global Chief Technology Officer for Manulife Financial/John Hancock, Phil led large digital transformations with P&L responsibility across Insurance, wealth management, fintec, corporate and capital market functions. Phil holds a B.Comm from York University (Canada) and a B/Tec in Engineering from Leeds University (England).

Phil is a CIO Hall of Fame Inductee (2020) and was recognized in the Top 5 Global InsurTech Leaders by InsurTech Magazine (2020). He currently serves on the Canadian CIO Strategy Council board. Previously, Phil served as the Chairman of the Board for the Sun Life Asian Business Center – a Financial Services company based in India and the Philippines, Board Member of the Canadian Capital Markets Association, and Board Member for the Dean's Advisory Board at York University, Canada, among other numerous industry boards and associations.



**Todd Tucker**

*General Manager & Vice President of Standards and Education, TBM Council*

As General Manager and Vice President of Standards and Education for the TBM Council, Todd directs all aspects of both methodology creation, standards development and member education. Todd is also the author of the book, [Technology Business Management: The Four Value Conversations CIOs Have with their Business](#).

To fulfill key mandates for the TBM Council, Todd collaborates with his board of directors (the CIOs and CTOs of State Farm, Mastercard, Intuit, Enbridge, Verizon, Marshfield Clinic Health Systems, Stanley Black & Decker, University of Pennsylvania and many more), principal members (hundreds of CIOs and TBM leaders from mostly Fortune 1000 companies), partners (executives at KPMG, ISG, Deloitte, Bain, Accenture, Maryville, Advocate, and more), and general members (thousands of IT, business and finance executives). Todd also leans on the Council's Technical Advisor (Apptio) for significant contributions of intellectual capital such as the industry's first TBM taxonomy, TBM KPIs and metrics, cloud billing standards and more.

After helping launch the TBM Council in 2012, Todd served in various roles including Research Director and General Manager. Prior to the Council, Todd held senior product management and marketing roles for Apptio and enterprise software vendors NetIQ, PentaSafe and e-Security. Todd began his career as a financial and IT audit manager for Ernst & Young.

Todd possesses financial, business and technology skills and knowledge, including standards such as GAAP/IFRS, ITIL, COBIT, ISO 17799 and more. Todd has earned several certifications, including CPA, CISA, and CISSP, reflecting his expertise in accounting, finance, B2B technology marketing and product management.



**Zahid Arain**

*Finance Executive, eHealth New South Wales, Australia*

Senior TBM (Technology Business Management) Executive with over 25 years' experience managing IT Finance across top tier ASX and multinational organizations with large and complex IT spend.

Track record of delivering value through change programs focusing on optimization, productivity and efficiency across IT and Enterprise. Expert in developing business processes and team capabilities to deliver enhanced Cost transparency, Financial Acuity and Commercial decision support.

An in depth knowledge of the major TBM platforms (incl. Apptio, VMware, etc) at operational and commercial levels.

Proven TBM leader with a track record of driving and embedding TBM capability in complex multi dimensional organisations. Now available to leverage skills and experiences and know how to help deliver first class Finance and Business Management for IT.

**Dr. Mkabi Walcott**

*Vice President, Standards and International Relations, Standards Council of Canada*

[Mkabi O. Walcott | Standards Council of Canada - Conseil canadien des normes \(scc.ca\)](https://www.scc.ca)



**Francis Bilodeau**

*Senior Assistant Deputy Minister, Strategy and Innovation Policy Sector, Innovation, Science and Economic Development Canada*

Francis Bilodeau is Senior Assistant Deputy Minister, Strategy and Innovation Policy Sector, at the department of Innovation, Science and Economic Development Canada (ISED). Prior to joining ISED, Francis held several senior positions in the Government of Canada, including servings as the Government of Canada’s Chief Information Officer of Canada, the Assistant Secretary of Digital Policy and Services at the Treasury Board Secretariat, and the founding Assistant Deputy Minister for the Privy Council Office’s Results and Delivery Unit. Francis has also previously held positions at the Treasury Board Secretariat, where he was Executive Director in the Government Operations Sector, and Infrastructure Canada, where he held various executive positions and helped lead the development and implementation of multiple generations of federal infrastructure programming. Francis holds a degree in mechanical engineering as well as a master’s degree in business administration.



**Jordan Zed**

*Director General, External and Trade Policy Branch, Innovation, Science and Economic Development Canada*

Jordan Zed is a lawyer by training and current member of the Ontario Bar. He is also currently the Director General responsible for international affairs, internal trade and intergovernmental affairs in the Department of Innovation, Science and Economic Development. Immediately prior, he served as Director of Open Government at the Treasury Board Secretariat in the Government of Canada and led Canada’s successful campaign for a seat on the Steering Committee of the Open Government Partnership. From 2015 to 2016, he served as Chief of Staff to the Deputy Minister at Environment and Climate Change Canada during Canada’s signing and ratification of the Paris climate change agreement.

Jordan developed an interest in international relations in 2004 while representing clients before the Immigration and Refugee Board in Toronto. In 2005, he co-founded the International Legal Partnership, a



non-profit international legal assistance clinic based at Osgoode Hall Law School, which remains active, and whose mission is to provide global policy and legal assistance in low-income economy countries.

In 2007, while earning his dual Masters of Laws degrees from New York University (in Law and the Global Economy) and the National University of Singapore (in International and Comparative Law), he founded the Global Forum on Peace and Security, which held regular global discussions on matters addressed by the United Nations Security Council. Following a year working with Nelson Mandela's lawyer, George Bizos, at the Legal Resources Centre in Johannesburg, South Africa, Jordan joined the Government of Canada in 2008. He has since worked in the Government of Canada's Privy Council Office, covering Canada-US relations, and went on to lead teams in the International Security and Strategic Policy Bureau at Global Affairs Canada.

In 2012, he founded the PANEL, an Ottawa-based non-profit aimed at connecting and mobilizing Canadians at home and abroad, including government and civil society, to advance innovative solutions to international challenges.