



AZ Valley
of the Sun
Chapter

The Roadrunner

December 2017

Volume 19, Issue 7

Charity Navigator's Post-Giving Tuesday Breakdown

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With yet another #GivingTuesday behind us and Giving Season starting to ramp up, the Charity Navigator team wanted to share some of the data we collected yesterday.

One of the most exciting points is that donations to charities on our site via our Giving Basket were up 49% from #GivingTuesday 2016. With a donation growth this large, Charity Navigator is thrilled to see more individuals increasing their donations from last year. In addition to donations growing almost 50%, we saw an increase of 40% in donors using the Giving Basket and a 28% increase in dollars donated!

There are a few things that we can see having a positive impact on the difference in donations and users. The first is that we now rate over 9,000 charities! We also launched impact data on our website, through a partnership with Classy, GlobalGiving, and GuideStar. Both are crucial factors in this increased spread of donations to a larger number of charities. Of users who started seeing Impact data on our site on Tuesday, there were close to 300 requests for charities that don't already participate with our Partners to provide Impact-Related Data. We had 550 responses to our feedback survey, and 94% found the Results Information useful! Stay tuned for more scientific results on our inclusion of Impact data on our site after we collect further data through this giving season!

All of this growth in donations via the Giving Basket were even more impressive considering overall site visits were up almost 15%. This means that more of the users coming to our site and were able to find charities they wanted to support and decided to donate via our site. Mobile visits to our website increased 25% from last year and tablet users increased by 45%! This #GivingTuesday also represents a shift of donation activity away from desktop and into an increasingly on-the-go (or on-the-couch) environment. We're excited by this shift, as 45% of our visitors on #GivingTuesday 2017 were 55 and older.

Visit charitynavigator.org for more blog articles and resources for nonprofit organizations and donors.



The December issue of *The Roadrunner* newsletter focuses on nonprofit organizations. The IMA provides tools and resources for members to support local nonprofit organizations through community service projects. Take advantage of all IMA offers through education, leadership and community involvement.

AZ Valley of the Sun Chapter President's Message

Dear IMA AZ Valley of the Sun Chapter Members,

The holiday season is a time for giving and reflecting on the organizations that have made a difference in our lives. As accountants, I hope that list of organizations includes the Valley of the Sun Chapter of the Institute of Management Accountants, which is focused on advancing the management accounting profession and providing the best possible service to our members.

For a number of years, we have been recognized as one of the top chapters at the IMA Annual Conference. I believe your membership in our local chapter – an organization with over 500 members - and the fact that over half of our active members are CMAs is a testament to your confidence in this organization's ability to contribute to both the profession as well as your individual career aspirations.

Like other non-profit organizations, we rely heavily on volunteer members to drive the organization's success, volunteer speakers to create successful events for members, and member and corporate sponsorship contributions to provide for student participation in events and conferences. If the high level of service this organization provides is important to you, consider participating in the activities of this chapter &/or serving on our board in the coming year. There are still a few open board positions (Community Programs, Webmaster, CMA Program Director, VP-Membership) and plenty of other opportunities to contribute if you are not able to commit to a board position. Feel free to talk to me about what you can do to contribute.

By the way, I hope you can make time to join us for our Net-Tech dinner meeting this month on December 12th. The topic is Work/Life Balance. This is Spouse/Significant Other night with a topic we can all appreciate.

As always, your AZ Valley of the Sun Board is dedicated to providing our members great service. Please let us know if you have any suggestions or ideas.

Have a great holiday season!

Sincerely,

Tom Dopler, CMA, MBA

IMA AZ Valley of the Sun Chapter

2017-2018 President

GuideStar 2020 - Building the Scaffolding of Social Change

The first revolution of nonprofit transparency was quite simple: nonprofit transparency can help drive nonprofit accountability. Almost 20 years ago, GuideStar led this revolution by making nonprofit reporting forms available to the public. Now, it is time to complete a second revolution: nonprofit transparency that drives nonprofit effectiveness. This memorandum lays out a vision for that second revolution. It shows how GuideStar can build the information scaffolding for social change, and how it can help ensure that the nonprofit sector is capable of tackling the great challenges of our time.

In the United States, the nonprofit sector accounts for almost \$2 trillion in economic activity and employs nearly 10 percent of the workforce. It involves more than 1 million nonprofits, more than 80,000 foundations, thousands of vendors, and more than 100 million volunteers and donors. The sector's reach into the lives of communities is deep, lasting, and multifaceted. But, for us to create the thriving society we all imagine, nonprofits need to step up our collective game.

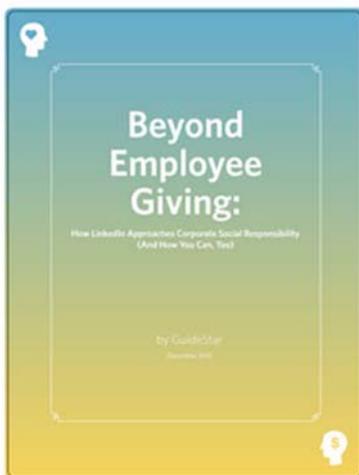
We need to squeeze more impact out of our work and our roles, acting like a thriving archipelago, not a mere collection of islands. We see four drivers of greater impact in the social sector:

- (1) more giving —the financial capital that fuels the work of nonprofits;
- (2) smarter giving —a system that rewards performance;
- (3) reduced waste —less redundancy, busywork, and distraction; and
- (4) higher performance/effectiveness —greater results per dollar.

GuideStar's opportunity is this: the organization of data can strengthen the factors that lead to social impact.



Beyond Employee Giving



How LinkedIn Approaches Corporate Social Responsibility (and How You Can, Too)

Corporate social responsibility (CSR) is more than a PR exercise that makes people like your company. It is a sound business strategy that strengthens customer loyalty, increases employee satisfaction, and improves the bottom line.

"Beyond Employee Giving" explores the different faces of corporate social responsibility, looks at LinkedIn's overwhelmingly successful CSR strategy, and defines how you can start or enhance your own CSR program.

Download the full report along with other resources for nonprofit organizations and donors at guidestar.org.



Christmas Angels Distribution will take place at the November Tech Session for December Drop-off

The IMA Valley of the Sun will be participating in The Salvation Army's annual Christmas Angel Program again this year to help make the holidays brighter for the less fortunate.

To participate simply take a tag at November's meeting, purchase the indicated items, and return unwrapped at the December technical session.



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The Association of
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IMA Research Foundation

IMA's Research Foundation is dedicated to funding relevant, thought-provoking research that furthers the knowledge and scope of accounting and financial management. To date, the Foundation has bestowed more than \$1,000,000 in research grants to academics and doctoral students.

Applied Research Track

This track helps bridge the gap between academics and management accounting professionals while encouraging knowledge development in the profession.

Submissions due by January 20th

IMA Incubator Grant Program

The Incubator Grant Program awards grants of up to \$5,000 for small Proof of Concept projects that will lead to more in-depth research.

Submissions due January 15th

Emerging Scholar Manuscript Award

This award recognizes the accomplishments of the newest members of the management accounting academic community.

Submission Date: January 31st

Doctoral Summer Research Scholarship Program

This program provides stipends to doctoral students, allowing them to pursue research projects during the summer.

Submission Due: April 15th (earlier preferred)

Research Grant Program

The Research Grant Program awards grants for innovative research proposals relating to primary management accounting activities such as decision support, planning, and control.

Submissions: Ongoing

Doctoral Student Grant Program

The Doctoral Student Grant Program assists accounting doctoral students who are pursuing research that has the potential to contribute to the management accounting profession.

Submissions: Ongoing

Siegel Lifetime Achievement Award

This award recognizes excellence in funded research. Nominations will be reviewed based on the nominee's body of research, relevance to the mission of the IMA Research Foundation, and contribution to the management accounting body of knowledge. The winning submission must demonstrate practical value to accounting and financial professionals. Nominations Due: March 1st

Visit www.imanet.org/educators/research-foundation for more information and grant applications.

Leadership Academy Webinar

Essential Leadership

December 5, 2017

Presenters: Susan P. Edwards, CMA, CPA, CGMA Founder Enlighten Management Consulting, Inc.

Event Description This webinar explores what leadership means, how it differs from management, and how management and leadership can be combined. Participants will take an assessment to identify their own preferred leadership style, as well as look at different styles of leadership and when each is appropriate to use in order to get a well-rounded picture of essential leadership.

Learning Objectives After this webinar, you will be able to:

1. Define leadership.
2. Identify the characteristics of an effective leader.
3. Differentiate between management and leadership.
4. Identify ways that leadership can enhance management.
5. Describe appropriate leadership styles for different situations.

Price: Free

CPE Credit: 1.5 hour

Field of Study: Personal Development

Research Area: Business Performance Management

Program Level: Basic

Prerequisite: None

Advanced Preparation: Download Participant Guide

Instruction Method: Group Internet

Visit the IMA Global Website www.imanet.org for more webinars and registration.

IMA Wild West Council

2017-2018 Board

President	Camille Cook	ccookie2179@aol.com
Past President	Deb Michalowski	debmichalowski@gmail.com
President-Elect	Stuart Gibb	sgibb@srnatre.com
Global Director	Nancy McCleary	nancy.mccleary@ga.com
Treasurer	Patrick Wilson	patrickkwilson@hotmail.com
Secretary	Di Wu	dwu2@csub.edu
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VP Chapter Relations	Pem Smith	pem.smith64@gmail.com
Director - Webmaster	Pem Smith	pem.smith64@gmail.com
Associate Webmaster	Nancy McCleary	nancy.mccleary@ga.com
Associate Webmaster	Deb Michalowski	debmichalowski@gmail.com
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Director - Meetings	Kelly Benner	kbtrain@msn.com
Director - Meetings	Open	
Director - CMA Promotion	Derek Heijmans	heijmansdc@gmail.com
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Director at Large	Bob Gove	robert.gove@cox.net
Director at Large	Carolyn Reis	carolyn.reis@cox.net

Get Social with the IMA Wild West Council



www.facebook.com/imawildwestcouncil

@IMAWWC

Wild West Council Calendar

Oct 27 & 28 - Tucson
 Feb 16 & 17 - San Diego
 Apr 20 & 21 - Phoenix

Friday, February 16 - Saturday, February 17, 2018
 Our winter Council Meeting will be held concurrently with the IMA Global Board of Directors at the Sheraton Harbor Island Hotel in San Diego, CA. In addition to the usual CPE, IMA updates and social/networking events, Council members will be invited to join selected Global Board networking activities. Expect more details in November or December.

Friday, April 20 - Saturday, April 21, 2018
 Our last Council Meeting of 2017-18 will be in Phoenix, AZ. Expect CPE opportunities, Chapter Leadership Training and plenty of Arizona spring weather for our social/networking events.

Thank you to everyone who attended the October Wild West Council meeting in Tucson. Plan to join us in San Diego in February.



Note the new website: www.imanet.org

Volunteer Leader Training

If you are looking to volunteer your time with a local non-profit organization, Volunteer Match is a great resource to find opportunities to give back. If your organization relies on volunteers, check out the resources available through Volunteer Match.

What Does it Take to Be a Great Volunteer Leader?

You're about to find out! With more than 26 free webinar topics for volunteer managers and nonprofit professionals, the VolunteerMatch Learning Center is chock-full of volunteer engagement tips, industry insight, and management best practices.

Whether you're new to the field or looking for a refresher, get started by spending some time browsing our trainings, sign up for a free upcoming webinar (or two), and join in the conversation on Twitter using "#VMLearn." Begin learning how to effectively involve volunteers in the important work your organization does, today!

Upcoming Webinars:

12/7/17 Engaging Pro Bono and Skills-Based Volunteers

12/12/17 Developing a Strategic Plan for Volunteer Engagement

12/13/17 Re-Energize your Volunteer Program by Designing Mission-Driven Opportunities

For webinars and other resources, visit learn.volunteermatch.org



IMA AZ Valley of the Sun Chapter
Net Tech Session
December 12, 2017

Date: Tuesday, December 12, 2017

Time: Networking 5:30pm - 6:00pm / Dinner 6:00pm - 6:40pm / Session: 6:40pm - 7:30pm

Topic: Work Life Balance

Session Description: Join us as we learn about how to attain Work/Life Balance from Colleen Hitchcock, BCH, CCHt, a Life Coach and Hypnotist of Scottsdale Hypnosis, in Scottsdale. Per an October 2014 Forbes article, "Experts agree: the compounding stress from the never-ending workday is damaging. It can hurt relationships, health and overall happiness. Work-life balance means something different to every individual...". This is Spouse and Significant Other Night with a topic we can all appreciate.

Speaker: Colleen Hitchcock, BCH, CCHt

Amount of CPE: 1 hour

Evening Location: Phoenix Airport Marriott 1101 N. 44th St. Phoenix, AZ

Cost: \$37 Members, \$42 Guest, \$5 Student

Register online at azvots.imanet.org and use our credit card payment option. Please register by the Friday before the meeting to assist in our planning. Monthly board meeting to be held immediately following the technical session.

Save the Date - Upcoming Net-Tech Session Topics

Dec 12th - Work/Life Balance / Spouse's Night

Jan 16th - Federal & State Tax Update

Feb 20th - IMA Global Update / President's Night

Mar 20th - Capital Budgeting Tour

Apr 24th—Cyber Fraud Update / CMA Night

Ethics 4 hrs CPE for AZ CPA January 20, 2018

Need Ethics Continuing Professional Education? Want to get it finished early? Or have you waited until the very last minute to finish your ethics CPE? Want to have fun doing it and learn something new as well? Then this workshop is just for you. There are significant updates to both Arizona and AICPA codes this year. Learn what they are in a fun, creative setting.

Join us for this Ethics Workshop 4 Hours for AZ CPA instructed by Marcy Maslov, CEO of eFactor. The workshop will be held at the Dignity Health Corporate Office, 3033 N 3rd Ave, Phoenix, AZ 85013.

The workshop is limited to 20 attendees, so please sign up early. Arrive at 7:30 a.m. for the continental breakfast and to check-in.

Ethics 4 hrs CPE for AZ CPA - Workshop Overview

Tour Topic: "Ethics 4 hrs CPE for AZ CPA"

Speaker: Marcy Maslov, CEO of eFactor!

Date: January 20, 2018

Time: 7:30 am for 8:00 am to 12:00 pm

Continental Breakfast included

Register online at <http://azvots.imanet.org>



The logo for the Certified Management Accountant (CMA) certification, featuring the letters "CMA" in a serif font with a registered trademark symbol.

*IMA's Certification for
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Financial Professionals
in Business*

The
CMA
Corner

CMA Video Contest 2018 - You've Got to Earn It

Showcase your talents and help promote the value of the CMA. Shoot your video (30 seconds to 2 minutes) and submit it to IMA by January 31, 2018. The theme of the contest is "You've Got to Earn It." We're inviting you to explore the future of the management accounting profession as we enter the age of AI and automation in the workplace. In what ways does the CMA prepare you for the future and how does the certification make careers "future-proof?" Unleash your creativity, think outside the box, and have fun! Finalist videos will be shared on Facebook for voting.

Winners will receive recognition and prizes. First \$2,500 plus travel costs for up to 5 team members to attend IMA's Annual Conference. All team members will also receive the Wiley CMAexcel CMA Review Course Scholarship. Second \$1,500 and team members (up to five) will also receive the Wiley CMAexcel Online Intensive Review with CMA Test Bank Scholarship. Third \$1,000 and team members (up to five) will also receive the Wiley CMAexcel Online Intensive Review with CMA Test Bank Scholarship. Up to 5 Honorable Mention prizes - \$100 Visa Gift Card.

Get the contest details and check out the latest CMA Commercial on the IMA website www.imanet.org/cma-certification/getting-started/cma-video-contest-2018



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IMA AZ Valley of the Sun Chapter 2017 - 2018 Board of Directors

President	Tom Dopler	VP Communications	Julie Rossignoi
President-Elect	Kendall Argust	Email Distribution	Trey Ballard (P)
VP Administration	Kendall Argust	Asst Email Distribution	Diane Hewlett (P)
Treasurer	Brian Haberlin	Newsletter	Laura Mangan
Assistant Treasurer	Sean Baenziger	Publicity	Trey Ballard (P)
Secretary	Kerstin Hancock	Webmaster	Deb Michalowski (P)
		Asst Webmaster	Diane Hewlett (P)
		Asst Webmaster	Nick Stefaniak (P)
VP Education	Camille Cook (P)	VP Membership	open
Co-Director	Greg Gilstrap (P)	Member Relations	Travis Melham
Co-Director	Nick Stefaniak (P)	Member Acquisition	Scott Johns
Co-Director	Tom Dopler	Community Service	Chris Fritsch
Co-Director	Pam Zanzucchi (P)	Corporate Development	Travis Magneson (P)
Co-Director	Deb Michalowski (P)	Asst Corp Development	Deb Michalowski (P)
CMA Program	Yaman Nass	Asst Corp Development	Russell Gardner
Education Reporting	Greg Gilstrap	Employment	Chris Stich
Webcast Director	Kathleen Moren (P)	Student Relations	open
Meetings	Kendall Argust	SCST Scholarship	Donna DeMilia
		SCST ASU	Nick Stefaniak
		SCST Support	Mike Yost

Please contact Tom Dopler if you are interested in serving on the chapter board, on a committee or volunteering for an event. Email Tom at tomdopler@cox.net. Members are welcome to join us at monthly board meetings being held following the monthly net-tech sessions.

IMA AZ Valley of the Sun Chapter Member December Anniversaries

1-10 Years

Joseph Caruso
Christine Dew
Anthony Collentine-Mclean
Cindy Dierken
Eric James Brady
Scott Stone, CPA
Anthony Regan Conyers, CMA
Don Whitehead, CPA
Swetha Krishnan, CMA
Melissa K. King
Nicole M Koenes
Matthew Morris, CMA
Nisso Akparovna Alimova, CMA
Timothy Morris, CPA
Robert Roe, CMA
Scott M. Crist
Michael R Metzler, CMA
Veronica V. Sas
Pierre W. Bollert

11-20 Years

Yu Mei Lin
Peter Harris, CMA, CPA

21-30 Years

Camille Cook, CPA
Ronnie L. Jett
Richard W. Wamhoff, CMA
Sean T. Wright, CMA, CPA
Daria A. Pace

31-40 Years

W. Jeffrey Stoddard
Sandy F. Burton
Stephen R. Peterson, CPA
Michael M. Horwitz
William E. Craig
J G. Speer
Dorothy M. Hird

50+ Years

A J. Hardy
John E Horan, CMA

Strategic Finance: Nonprofit Fraud How Good Are Your Internal Controls?

In the March 2017 issue of Strategic Finance, Herbert Snyder, Margaret Andersen, and Jill Zuber discuss how nonprofit organizations can reduce fraud risk through internal controls.

Nonprofits face potentially greater risks of becoming victims of fraud. Studies have found that nonprofits may be at higher risk for fraud than for-profit organizations because of the nature of their mission and their management structure. For example:

- Governing boards are often composed of volunteers who lack expertise in financial management.
- Directors of nonprofits frequently lack the skills for effective financial management.
- Daily financial management is frequently under the control of a single individual who isn't otherwise subject to the financial controls and oversight normally found in profit-making entities.
- Organizational culture of nonprofits leads them to believe that their charitable purpose is sufficient to protect them against fraud.
- Revenue streams are difficult to control or verify.

In light of the potential damages from fraud and the inherent risk that nonprofit culture creates, prudent management accountants would advocate for stronger internal controls to mitigate the risk. Research in nonprofit fraud suggests that the presence of internal controls influences losses and that many incidents of fraud could be prevented through the application of well-known principles of internal control.

The takeaway from this is that many frauds, even in major organizations, aren't very sophisticated. Catching Aramony's conduct wouldn't have required a deep knowledge of accounting, merely the will to look closely at how large sums of money were being spent and whether they seemed reasonable. In Aramony's case, if United Way had even rudimentary internal controls, or if the board of directors had performed its oversight duties, the fraud might never have taken place, or at least might have been caught early.

Good internal controls can reduce the occurrence of fraud and, if fraud occurs, can help discover the incident. Read the full article and issues of IMA's Strategic Finance Magazine at sfmagazine.com.

Upcoming Chapter Event

Dec 4th

Holiday Board Meeting
University Club of Phoenix

Dec 12th

Work Life Balance
Phoenix Airport Marriott

Jan 16th

Federal & State Tax Update
Phoenix Airport Marriott

Jan 25th

Winter Social - Beers with Peers
Macayo's Depot Cantina - Tempe

Feb 20th

IMA Global Update
Phoenix Airport Marriott

Mar 20th

Capital Budgeting & Tour
Phoenix Airport Marriott

Vision Statement

Our vision is to be the resource for developing, certifying, connecting, and supporting the world's best accountants and financial professionals within business.

AZ Valley of the Sun Chapter

azvots.imanet.org

azvots.imanet@gmail.com



The Association of Accountants and Financial Professionals in Business

Mission Statement

IMA's mission is to provide a forum for research, practice development, education, knowledge sharing, and the advocacy of the highest ethical and best business practices in management accounting and finance. IMA currently represents more than 80,000 accountants and financial professionals in business. The participation of each of our members makes the success of our mission possible.

December 2017

Sun Mon Tue Wed Thu Fri Sat

					1	2
3	4 Board Meeting	5 Webinar	6 Webinar	7	8	9
10	11	12 Webinar Net Tech	13 Webinar	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Reminders :

- Take advantage of free CPE, sign up for the monthly IMA webinars.
- The Holiday Board Meetings will be Monday December 4th.
- CMAs reminder to complete 30 hours of CPE and report on your IMA account by Dec 31st
- Bring your Gift and Tag for our Holiday Adopt a Family Project to the December meeting