



The Association of
Accountants and
Financial Professionals
in Business

2019 – 2020

Annual Program Booklet

Winnebagoland Chapter

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Lakeland College
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About IMA

Vision:

To be the leading resource for developing, certifying, connecting, and supporting the world's best accountants and financial professionals in business. To achieve this, we endeavor to:

- Provide best-in-class certification—the Certified Management Accountant (CMA)—for critical internal financial management responsibilities, including planning, budgeting, business reporting, decision analysis, and risk management
- Support members' career development through access to an active professional community, continuing education, valuable information, and resources
- Support members and their organizations in driving business performance by promoting the highest ethical standards for internal financial management practices

Building successful careers and organizations requires the ability to rise above shifting business landscapes. At IMA, we are pleased to support the journey.

Attend a Meeting

To register for a meeting, click on the registration link for the meeting from within this program booklet, a monthly newsletter, or the chapter website.

Join the IMA

To become a member of the IMA, go to www.imanet.org/membership

Winnebagoland Chapter Number is 0389.

Any questions, please email our Meeting Director – Martha winnwire@gmail.com

President's Message

As we open a new program year, let's first reflect on the past year. The most-liked aspects of meetings are networking, camaraderie, and meeting new people, along with the topics and speakers. We have continued to incorporate these preferences into our 2019-2020 program year.

Our members shared that our Chapter emails are our best method of communication to obtain information about our Winnebagoland IMA chapter, so continue watching your email monthly. If you are not receiving our chapter emails, adjust your setting in your IMA global account. For assistance, or for nonmembers, please contact us at winnwire@gmail.com

This past year provided opportunity for social events, volunteering, annual ethics for CMA requirements, and a varied listing of monthly CPE held throughout the greater Fox Valley-area, serving the corridor from Fond du Lac to Appleton. This upcoming year will continue offering monthly meetings along with volunteering and bonus events.

On behalf of your Officers and Board of Directors, we look forward to connecting with you at an upcoming meeting!

Blessings & Kind Regards,

Patti Denton, CPA, MBA, CMAP

"Promise Yourself... To think only of the best, to work only for the best, and to expect only the best. To be just as enthusiastic about the success of others as you are about your own..." (Optimist Creed excerpt)

Mid-America Council



<http://www.midamerica.imanet.org/>

Did you know that the Winnebagoland Chapter is part of a regional council, the Mid-America Council, made up of eleven chapters? The geographical coverage for the MAC is Wisconsin, Illinois, and parts of Iowa and Indiana. Each chapter operates independently with the council overseeing their activities and providing support and guidance as needed. World-wide there are 24 councils with almost 150 active local IMA chapters!

You can be a part of the regional council activities by being a chapter delegate. Every chapter in the council is allowed up to three delegate votes at each quarterly council meeting (held in July, October, January, and April.) It's a great opportunity to share ideas, strategies, and learn about the work going on at the global level.

The council also coordinates two annual educational conferences, providing council members, guests, and students with a great source of CPE and an opportunity to network with other IMA members.

SAVE THE DATES!

Fall Educational Conference:

Friday, September 13, 2019
Rockford, IL

Spring Educational Conference:

Friday, April 24, 2020
Neenah, WI

The Winnebagoland Chapter will subsidize \$30 of the conference fee for up to 20 members to attend either conference!

The Winnebagoland Chapter currently has a number of members on the council board:

Martha Paalman – Council Secretary

Rick Bellmore – Council Regional Director and Past President

Bill Ramsay – Council Regional Director and Past President

John Wieland – Council Regional Director and Past President

If you are interested in attending a council meeting, becoming a council delegate, or learning more about the regional or global IMA organization, please contact one of the council members listed above by sending an email to winnwire@gmail.com which will be directed their way.

Fraud: A View from Law Enforcement

Fraud remains a key issue for business. More than three quarters of companies have been the victim of some form of fraud. A little closer to home for most of us, fraud and scams impact residents arguably more than traditional thefts, burglaries and robberies!

This presentation will cover the latest trends in fraud that law enforcement is seeing in Wisconsin. We will discuss what is occurring, how it is occurring, and what is being done.

The presenter is a 30-year veteran of law enforcement having investigated several fraud complaints from business fraud to credit card fraud to a variety of scams.



Date: Tuesday, September 17, 2019

Time: 5:00-5:30 Networking/Cocktails
5:30-6:00 Dinner
6:00-8:00 Speaker (2 HR CPE)

Location: Winncrest Banquet Hall (2788 Towne Ct., Neenah, WI 54956)

Speakers: Jason Weber – Northeast Wisconsin Technical College

Register: <https://www.eventbrite.com/e/september-2019-winnebagoland-ima-meeting-tickets-64800891210?aff=ebdssbdestsearch>



Jason Weber

Public Safety Training Coordinator Northeast Wisconsin Technical College

Jason Weber has worked in law enforcement since 1990. For 26 years Jason was employed by the Fox Crossing Police Department, having served as a patrol officer, detective and community policing officer. In 2008, Jason was elected to the WI Crime Prevention Practitioners Association Board of Directors and presently serves as the vice president.

Jason 'retired' in January of 2018 and has transitioned into higher education, serving as the Public Safety Training Coordinator at Northeast Wisconsin Technical College in Green Bay (WI).

In his time at the police department, Jason worked with many businesses, schools and organizations on target hardening their properties as well as addressing threats, including an active shooter incident in 2015. Jason continues to do some Active Threat contract work for businesses and school districts around Wisconsin and the United States in addition to working with a large design firm on site plan reviews for security.

Jason has been recognized for a variety of initiatives such as 2008 Sir Robert Peel finalist for Fox Crossing's Chronic Nuisance program; 2010 Law Enforcement Partner of the Year from the Wisconsin Prevention Network on Substance Abuse; 2010 Crime Prevention Practitioner of the Year from the Wisconsin Crime Prevention Practitioners Association; 2014 Fox Valley Technical College's Outstanding Alumni Award and 2015 Wisconsin Community Policing Project of the Year for Good Drugs Gone Bad.

Jason teaches a variety of policing and substance abuse topics for the National Criminal Justice Training Center, Wisconsin Safe and Healthy Schools, AFYA, Inc. as well through his position at Northeast Wisconsin Technical College. Jason is also a published author, having written books on the history of the Town of Menasha and the Village of Kimberly and also three on Active Shooter Incidents. Jason is presently working on his next history book, this one on the history of the Fox River Lock system.



Bonus Event!

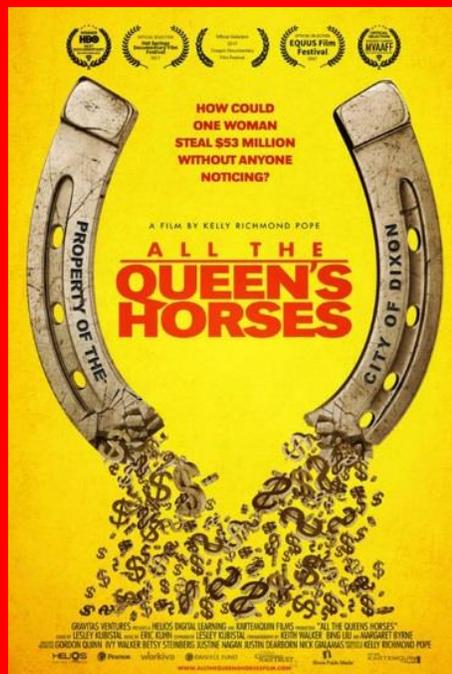
“All the Queen’s Horses” – Movie and Discussion

Join the Packerland and Winnebagoland IMA chapters for the movie/documentary of All the Queen’s Horses. Follow the link below to register and purchase tickets.

As city comptroller of Dixon, IL, Rita Crundwell stole \$53 million of public funds across 20 years—making her the perpetrator of the largest case of municipal fraud in American history. She used the funds to build one of the nation's leading quarter horse breeding empires, all while forcing staff cuts, police budget slashing, and neglect of public infrastructure.

ALL THE QUEEN'S HORSES investigates her crime, her lavish lifestyle and the small town she left in her wake.

See a trailer for the film at <https://www.allthequeenshorsesfilm.com/>



Date: Monday, September 23, 2019

Time: *Please note the slight change in timing from our normal events*
4:30-4:45 Registration/Networking
4:45-6:00 Movie
6:00-7:00 Dinner/Discussion (2 HR CPE)

Location: The Marq (3177 French Road, De Pere, WI 54115)

Register: <https://www.eventbrite.com/o/packerland-chapter-ima-4530423517>

Student Night

Panel Discussion: Technology in Accounting

You asked for it; we deliver!

At last year's Student Night, students stated they wanted to learn more technology in accounting. We have developed a world-class panel of experts in both information systems and accounting to answer questions from students and business people alike. Our panel represents a variety of fields and expertise, including representatives from two different sectors of manufacturing (heavy equipment as well as paper/consumer products), a university professor, and a small business consultant. Bring your questions!

Although this is our 'Student Night', the topics and information discussed in this meeting will be beneficial to individuals at any level of their career!



Date: Tuesday, October 15, 2019

Time: 5:00-6:00 Networking
6:00-6:30 Dinner
6:30-7:30 Panel Discussion (1 HR CPE)

Location: La Sure's (3125 S. Washburn Street, Oshkosh, WI 54901)

Register: <https://www.eventbrite.com/e/winnebagoland-student-night-2019-tickets-64805232194?aff=ebdssbdestsearch>

Panel Speakers:

Jenny Blank

Senior Manager of ERP Applications

Oshkosh Corporation – Fire & Emergency Segment

Jenny Blank has over 20 years of experience working in the field of information systems and digital technology. As Senior Manager of ERP Applications within the Fire & Emergency Segment of Oshkosh Corporation, she oversees a team that manages the architecture, software, integrations, and business relationships associated with ERP systems for her segment.

Her areas of expertise include IT support of all major business functions, but she has spent the last nine years with a special focus on Finance with an aim to provide versatile, intelligent Financial solutions that comply with industry best practices and general accounting standards.

Jenny Blank has received both her Bachelor's degree and her MBA from the University of Wisconsin Oshkosh. She currently lives in Neenah with her husband and three children and enjoys boating, reading, and volunteering through her church.



Erika Braun

Tax Analyst

Kimberly-Clark

Erika Braun is a Tax Analyst at Kimberly-Clark, focusing mainly on international and federal tax. Prior to working at Kimberly-Clark, she spent about a year and a half working in public accounting. The programs she uses the most in her current role are Excel, Corptax, and CCH Integrator.



Beth Ehlers

Co-Owner

E&S Entrepreneur Advisors, LLC

Beth is co-owner of E&S Entrepreneur Advisors, LLC. She works as an outsourced CFO and Business Financial Advisor to her clients in the small to mid-size business range. Beth works on a variety of accounting and operations systems and is well versed in the challenges facing small businesses.

Beth Ehlers received a BBA in finance from the University of Notre Dame. She is a licensed Certified Management Accountant (CMA). She gained her Financial Management experience working for General Mills in Minneapolis, Gorton's of Gloucester in Massachusetts, and Kimberly Clark in Appleton, working in both the staff and plant settings. Beth gained her Operations Management experience while working at Kimberly Clark managing a team of 120 employees in the plant setting. Beth has served the small business segment for the past 23 years.



Dr. Juergen Sidgman

Assistant Professor of Accounting

University of Wisconsin-Oshkosh

Prior to beginning his career in academia, Juergen worked as a financial auditor for Grant Thornton (Chile). Juergen has taught accounting courses at the University of Wisconsin Milwaukee and the University of Nebraska – Lincoln. Currently, Juergen is part of the accounting faculty at the University of Wisconsin-Oshkosh (UWO). His primary teaching interests are accounting information systems and auditing.

Juergen's research interests lie at the intersection of accounting and technology involving a variety of topics that include privacy, computer mediated communication, information accuracy, and new technologies such as blockchain. Expertise: Information Systems, Financial Auditing, Internal Controls. Education: Universidad Diego Portales – BS, Accounting; University of Nebraska – Kearney – Master of Business Administration; University of Nebraska – Lincoln – Ph.D.



October Bonus Event!

We will be hosting a bonus event in October!

Details will be announced in the coming months.

All attendees of the October monthly meeting held on the 15th will receive free admission to the October bonus event!

This will be a guest event as well.

Watch for more details to follow!





Steve Engmann, MBA, CMA **President, Competitive Strategies, Inc.**

Steve Engmann co-founded Competitive Strategies, Inc. (CSI) in 1997 in Appleton, Wisconsin. The CSI tagline of Planning, Systems, Success has guided the company since its inception. Steve has over twenty years of business management experience helping top executives and business owners improve sales, profitability, process flow, reporting and analysis.

Prior to starting CSI, Steve worked in the management consulting arena with a local regional CPA firm for eight years as a business consultant for the Minority Business Development Center in San Jose, California, and as a cost analyst for a division of Litton Industries in Silicon Valley California.

He earned his undergraduate in Agricultural Education from UW-River Falls and received his MBA from Santa Clara University.

His favorite local volunteer activities include having served on the Wisconsin Timber Rattlers board for nine years, two years as Chairman of the Board, coaching youth basketball in Kimberly and serving as the President of the Kimberly Area Youth Basketball Club for several years.

Having lived long enough to remember working without computers and cell phones, Steve brings a unique perspective to how technology and the cloud continue to impact our lives!



Volunteer Opportunity

Salvation Army Red Kettle Money Sorting

Save the Date!

Additional information to follow, but we will once again be volunteering to sort money from the Red Kettle holiday collection for the Salvation Army.

Dates:

- Tuesday, November 26, 2019 at 8:00pm
- Wednesday, December 4, 2019 at 8:00pm

Location: 1525 Appleton Road, Menasha, WI 54952

For additional information, please contact Craig Gloudemans at winwire@gmail.com

*Sign-up information will be shared closer to the event.



Top 10 Tips for the Aging

This mother and daughter attorney duo will present answers to the 10 most common questions they receive from clients regarding aging issues. These questions can arise regarding a parent or a spouse. This will include answers regarding Medicaid/Medicare, nursing home issues, and estate questions.

*This is our December Holiday meeting! Please feel free to bring/register guests as well! We will also have a raffle and present awards from the prior program year.



Date: Wednesday, December 18, 2019

Time: 5:00-5:30 Networking/Cocktails
5:30-6:00 Dinner
6:00-7:00 Speaker (1HR CPE)
7:00-7:30 Awards/Raffles

Location: Stone Toad (1109 Oneida Street, Menasha, WI 54952)

Register: <https://www.eventbrite.com/e/december-2019-winnebagoland-ima-meeting-tickets-64804256275?aff=ebdssbdestsearch>



Jeanne Baivier

Senior Partner

Reff Baivier Lim Muza Sundet & Dunham, S.C.

Jeanne specializes in probate, estate planning, elder law, guardianship, and adoption. She holds a Bachelor of Arts and law degree from Marquette University and has been practicing law for 44 years.



Annie Elmer

Associate Attorney

Reff Baivier Lim Muza Sundet & Dunham, S.C.

Annie specializes in probate, estate planning, and elder law. She holds a Bachelor of Science degree from the University of Wisconsin-Madison, a Master of Public Health from the University of Wisconsin-Madison, and a law degree from Marquette University. She has been practicing law for four years and also serves as a Board Member for Clarity Care and the Oshkosh Area United Way.



**Reff Baivier Lim Muza
Sundet & Dunham, S.C.**

Tax Update: How has reform impacted you and your business?

- How has tax reform evolved since last year and what are still some big unknowns?
- What benefits can the Wisconsin Pass-through entity level tax provide?
- Do you qualify for the qualified business income deduction; if not, why not?
- What can you expect on your personal return if you converted from an S to C Corporation or C to S Corporation?
- What did a change in rate mean for you personally?
- What would cause you to itemize over taking the standard deduction and what to track during the year?

While a lot of tax law changes occurred last year, there are still many moving parts. Be informed on how you and your business may be impacted.



Date: Wednesday, January 15, 2020

Time: 5:00-5:30 Networking/Cocktails
5:30-6:00 Dinner
6:00-7:30 Speaker (1.5 HR CPE)

Location: Baker Tilly (2201 E. Enterprise Avenue, Appleton, WI 54912)

Register: <https://www.eventbrite.com/e/january-2020-winnebagoland-ima-meeting-tickets-64802853078?aff=ebdssbdestsearch>



Abby Liebergen, CPA

Manager – Baker Tilly

Abby specializes in retail automobile, truck, implement and equipment, boat, motorcycle, recreational dealerships and related industries. She provides tax planning, preparation and accounting services for businesses and shareholders/owners in the retail industry.

Specific experience:

- Provides dealer-specific tax experience including LIFO, Unicap, sales tax, and cash reporting requirements and procedures
- Specializes in corporate, partnership, individual and S corporation taxation, including consolidated and multistate returns
- Analyzes dealer financial statements and benchmark comparisons
- Analyzes tax planning opportunities for business and individual taxpayers
- Resolves and responds to IRS and state tax notices
- Assists clients in maximizing tax benefits related to repairs and maintenance regulations

Industry involvement:

- American Institute of Certified Public Accountants (AICPA)
- Presents at Controller Conference & Office Manager Conference on behalf of WATDA
- Wisconsin Institute of Certified Public Accountants (WICPA)
- Wisconsin Auto and Truck Dealers Association (WATDA)



Internal Audits – Privately Held & Publicly Traded

Joint presentation on internal auditing representing both privately held organizations and publicly traded companies.

- Debunk the myths and misperceptions. Learn why internal audits are done.
- COSO – How COSO fits in with internal audits.
- SOX – How SOX fits in with internal audits. Who's responsible for SOX.
- Differences between privately held and publicly traded internal audit.
- Advice on how to maximize the value generated from your internal audit team in a non-SOX environment.
- How to prepare for a successful internal audit.



Date: Tuesday, February 18, 2020

Time: 5:00-5:30 Networking/Cocktails
5:30-6:00 Dinner
6:00-7:30 Speaker (1.5 HR CPE)

Location: Bridgewood Resort (100 Cameron Way, Neenah, WI 54956)

Register: <https://www.eventbrite.com/e/february-2020-winnebagoland-ima-meeting-tickets-64803167017?aff=ebdssbdestsearch>



LARRY RUEDINGER, MBA, CPA, CMA, CFM **Vice President & Corporate Controller** **Menasha Corporation**

Larry joined Menasha Corporation on February 29, 2016, from VF Corporation of Appleton, Wisconsin, where he served as the Director of Accounting and Financial Reporting since 2013. Prior to that, Larry was the Director of Finance and Operations at US Venture of Appleton, Wisconsin, and spent several years at Oshkosh Corporation as Director of Finance and Operations-Airport Products. Larry's 18+ years of experience also includes financial leadership positions at Charter Communications and GE.

Larry received his MBA from the University of Wisconsin-Oshkosh, in addition to his BBA in Accounting and BBA in Finance. He is a former adjunct faculty at Fox Valley Technical College and UW-Madison. Larry also served on the Boards of the UW-Oshkosh College of Business Alumni Association and the Madison chapter of the IMA for several years, including two as President.

Larry resides in Oshkosh with his wife and three children. In addition to spending time with his family, Larry enjoys training for ultra-endurance events and has completed three ultra-marathons as well as a four-day bike race from Denver, Colorado, to Salt Lake City, Utah.





Jason Garland, CPA, CMA, MBA

Lead Financial Analyst – Oshkosh Corporation

Jason Garland is a Lead Financial Analyst at Oshkosh Corporation, serving Corporate Accounting Financial Reporting functions, a position he assumed July 2019. He is primarily responsible for supporting the close process and facilitating transactions in the areas of executive compensation, pension, equity, derivatives, product liability, PTO and employee benefits while performing financial analysis and leading projects as needed. Previously, Jason was an Internal Audit Lead responsible for SOX testing, internal audits, site visits and direct assistance since joining Oshkosh Corporation in January 2015 and was primarily responsible for the Company's Access equipment segment. As an ambassador for the COSO 2013 framework, Jason worked with process owners in developing and implementing controls over information used to ensure completeness and accuracy while strengthening overall control design.

Jason joined Oshkosh Corporation after 4 years in public accounting with Hawkins Ash CPAs and Wipfli. He has over 8 years of experience in accounting/finance in addition to 5 years of experience at a lending brokerage in the Twin Cities. Jason earned his Bachelor of Business Administration at University of Wisconsin-Oshkosh and a Master of Business Administration from Marquette University. He and his wife Stephanie reside in Greenville with their two children Nolan and Isabelle and enjoy camping, taking family trips and watching them grow.



Tour – Menasha Water Plant & Presentation on Sustainability

Menasha Utilities

Menasha Utilities is a municipally owned and operated electric and water utility, serving more than 9,000 customers for electric and 5,000 water customers. They provide their customers with clean, high-quality water that meets or exceeds all state and federal standards. Their water quality and capacity are monitored every day by well-trained system operators 24/7. Their water source is taken from Lake Winnebago. It is then filtered and treated at the Water Filtration Treatment Plant located on Manitowoc Street in Menasha. In 2006 they started a \$12.8 million dollar water treatment plant addition designed to meet Safe Drinking Water Standards. The project included the addition of new water filters, granular activated carbon filtering, and ultraviolet disinfection. The plant runs very efficiently, and during the tour you will get to see many of the processes once the water gets to the plant.





Menasha Water Plant Tour Guide: Adam Smith Water Utility Manager – Menasha Utilities

Adam Smith is the Water Utility Manager for Menasha Utilities. He manages all operations at the Water Treatment Plant as well as the Water Distribution department which works on all infrastructure in the ground. He has a passion for the outdoors and the environment in general. He went to Bay College in his hometown of Escanaba, Michigan, and received Associate Degrees in Environmental Management and Water Resource Management. He later attended the University of Wisconsin-Stout where he obtained a bachelor's degree in Operations Management.

He moved to Wisconsin after college and became a water and wastewater operator for a small city. He spent several years moving from small towns such as Markesan, Wisconsin, to larger cities like Milwaukee as a water plant operator. He started at Menasha Utilities as a water plant operator. He then was promoted to Lab Foreman, followed by Water Utility Manager in October 2017. He gained a lot of experience and learned several treatment techniques along the way. He absorbed a lot of his knowledge learning from co-workers and reading industry journals. He is heavily involved in organizations within the water treatment field. Some of the organizations he is currently involved in are the American Water Works Association, Wisconsin Rural Water Association, and the West Shore Water Producers Association. He enjoys teaching new water professionals and working with colleagues to protect one of our most valuable resources: water.



How to Save the Environment... and Some Money, Through Sustainability Efforts

The formal definition of sustainability is the ability to exist constantly. Focus on Energy will discuss resources they have to provide companies and residential customers cost-effective energy efficiency programs. Come learn what companies are doing to reduce energy consumption as well as some success stories!

Focus on Energy empowers the people and businesses of Wisconsin to make smart energy decisions with enduring economic benefits. They work with 107 of Wisconsin's electric and natural gas utilities to benefit all Wisconsinites by implementing energy efficiency and renewable energy projects. Since 2011 Focus on Energy has delivered more than \$1 billion worth of net economic benefits to Wisconsin.

- In 2018, 113,600 homeowners and 5,100 businesses participated in Focus on Energy programs.
- The 721 million kilowatt hours and 20.7 million therms saved by Focus on Energy in 2016 could power nearly 69,000 homes for one year.
- Every \$1 invested in Focus on Energy projects gives \$5.93 in benefits back to the state.



Date: Wednesday, March 11, 2020

Time: 5:00-6:00 Tour – Menasha Water Plant
6:20-6:50 Dinner
6:50-7:50 Speaker (1 HR CPE)

Location: Tour: Menasha Utilities Water Plant (57 Manitowoc Street, Menasha, WI 54952)
Dinner/Presentation: Stone Toad (1109 Oneida Street, Menasha, WI 54952)

Register: <https://www.eventbrite.com/e/march-2020-winnebagoland-ima-meeting-tickets-64803497004?aff=ebdssbdestsearch>

Presenters from Focus on Energy:



focus on energy[®]

Partnering with Wisconsin utilities



Joe Kottwitz

Energy Advisor –Agriculture, Schools & Government Programs

Joe is an Energy Advisor for Wisconsin's Focus on Energy Program, serving customers in northeastern Wisconsin. He has worked with Focus on Energy since 2011, providing customer service and financial incentives to agriculture, school and government organizations. Prior to joining Focus on Energy, he was an Energy Manager for Portage County and the City of Stevens Point. Joe holds a degree in Natural Resource Management from UW-Stevens Point. He is a professional Certified Energy Manager registered with the Association of Energy Engineers.



Frank Barth

Stakeholder Manager

Frank has served as Stakeholder Manager with the statewide Focus on Energy program since May of 2018. Frank works closely with Wisconsin's participating Municipal Utilities and Electric Cooperatives on collaboration efforts to help educate residents and businesses about available Focus programs and resources. Previously, he spent nine years as an Energy Services Representative for WPPI Energy and has more than twenty years of experience in industrial account management and customer service. Frank holds a BA in Business Administration from UW-Milwaukee as well as Association of Energy Engineers CEM and Key Account Management certificates.



Pat Stepanik

Energy Advisor – Residential Market Outreach

Patrick has worked as a Market Outreach Specialist in Northeast Wisconsin with the Home Performance with Energy Star Program in the residential HVAC and “Whole Home” programs for over seven years, and he is a certified professional with the Building Performance Institute. Prior to joining Focus on Energy in June of 2012, Patrick worked on both the contracting and distribution side of the HVAC industry. Throughout his 30 plus year career in the HVAC industry, Patrick has promoted high efficiency and energy savings and has worked with Focus on Energy as both a Trade Ally, and now Energy Advisor, since the program’s inception in 2001.



Richard Feustel

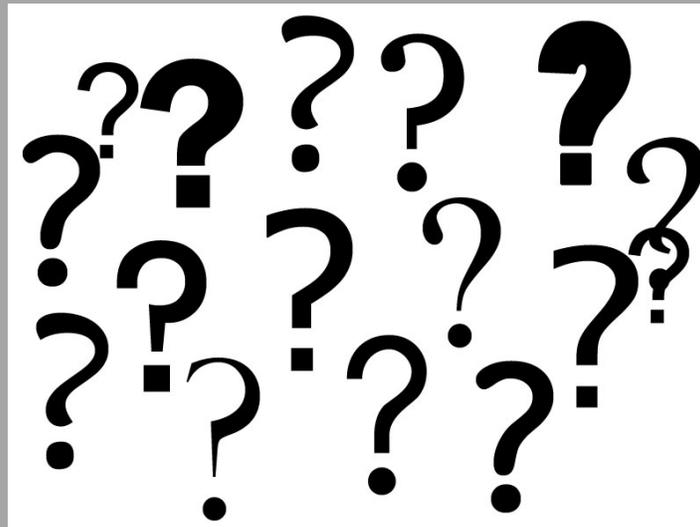
Energy Advisor – Large Energy Users

Richard works closely with industrial, health care, and other large companies to help them reduce their energy spend. Prior to joining Focus on Energy, he had been an Energy Manager and Engineer with 25 years of experience in energy strategies and engineering operations. He initiated, developed and led the energy departments for both Mercury Marine and Briggs & Stratton. Richard was recognized as the 2011 International Energy Manager of the Year and the 2013 Renewable Energy Innovator of the Year by the Association of Energy Engineers. He is also the current Vice President of the Wisconsin Association of Energy Engineers.

A Question of Questions

The cost of hiring an employee can be significant, but the cost of hiring the wrong person for the job is worse. How do you ensure you get all the information you need from your candidates to make a good hiring decision?

What questions should you ask and how should you ask them? How do you ensure you're getting the complete story? Join us for an interactive and educational session to learn some techniques you can take back and apply to your daily life.



Date: Tuesday, April 21, 2020

Time: 5:00-5:30 Networking/Cocktails
5:30-6:00 Dinner
6:00-7:00 Speaker (1 HR CPE)

Location: La Sure's (3125 S. Washburn St, Oshkosh, WI)

Register: <https://www.eventbrite.com/e/april-2020-winnebagoland-ima-meeting-tickets-64803981453>



Jill Nielsen

Senior Director of Talent & Learning Amcor Flexibles North America

Jill is the Senior Director of Talent and Learning at Amcor Flexibles North America where she leads the strategy in areas such as Learning & Development, Talent Acquisition, Talent Management, and Senior Succession Planning. To create a culture that consistently delivers results, it's important to ensure the right people are in the right roles and the right actions are being taken to develop our future leaders.

Prior to joining Bemis, Jill lived in the Chicagoland area, working for Owens Corning, Sara Lee and PepsiAmericas in a variety of roles in human resources. Jill received a Bachelor of Business Administration degree from UW-Eau Claire and has participated in additional courses at UW-Madison.



Volunteer Activity & Understanding the New Not-for-Profit Financial Statements

Jake's Diapers –Tour & Packing Party Family-friendly Event (feel free to bring guests!)

While many people recognize food, shelter and water as basic needs, Jake's Diapers supports needs often overlooked. They focus on hygiene essentials within their mission to revolutionize global health with community-driven efforts and supplies that empower people to live clean, healthy and prosperous lives.

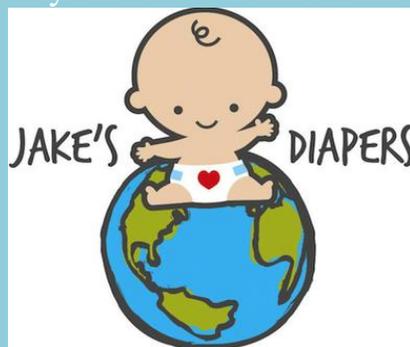
Right now, they actively manage programs to provide diapers, period products and adult care essentials (A.C.E.) to economically disadvantaged families around the world. Meeting hygiene needs are essential for clean, healthy and prosperous lives and creates a sense of dignity for those they serve. When they alleviate the ongoing financial burden of these products' costs, they empower recipients to pursue a higher quality of life and remove themselves and future generations from the vicious cycle of poverty.

Their founder Stephanie Bowers started Jake's Diapers with a goal of helping only 15 babies at an orphanage in Peru, who had been re-using disposable diapers to stretch its supply. After the birth of her son and her experience with cloth diapers, she saw an opportunity to make a difference - sending some of Jake's Diapers to the orphanage.

They're grateful for their growth and local support in their efforts to revolutionize access to healthy, quality living around the world.

What's a Packing Party? At Jake's Diapers, they see a lot of hygiene essential products in and out their doors. This means there's a lot of handling products in between as they prepare kits and packages for recipients.

You'll get a behind-the-scenes look at all the work they do to make this happen at their Hope Factory in Little Chute, and then they'll invite you to join in the fun! Many of their volunteer hours are spent prepping and packing diaper kits, assembling boxes, sorting the warehouse and other various hands-on activities as relevant to their needs that day. They look forward to your help and always have a fun time with volunteers at their Hope Factory.



Understanding the New Not-for-Profit Financial Statements

Most of us are familiar with standard financial reports – income statement, balance sheet, cash flow – and how to interpret and analyze them. But how much do we know about the financial reporting and analysis for not-for-profit entities – Statement of Activities, Statement of Financial Position – if we haven't had much experience with them since our one-semester course in college? Understanding the inner workings of these statements is invaluable when making decisions about where to invest your time (by volunteering on a board) or money (by donating). Join Dale Glen of CLA as he covers items to consider when working with not-for-profits and the changes to not-for-profit financial statements as a result of Accounting Standards Update (ASU) 2016-14, Not-for-Profit Entities (Topic 958): Presentation of Financial Statements of Not-for-Profit Entities.



Date: Tuesday, May 19, 2020

Time: 5:00-6:00 Volunteering Activity at Jake's Diapers
6:30-7:00 Dinner
7:00-8:00 Speaker (1 HR CPE)

Location: Volunteer Activity: Jake's Diapers (1775 Bohm Drive, Little Chute, WI 54140)
Dinner/Presentation: Liberty Hall (800 Eisenhower Drive, Kimberly, WI 54914)

Register: <https://www.eventbrite.com/e/may-2020-winnebagoland-ima-meeting-tickets-64803797904?aff=ebdssbdestsearch>



Dale R. Glen, CPA
Principal, CliftonLarsonAllen LLP

Dale R. Glen is a principal and Certified Public Accountant with CLA and has extensive experience serving not-for-profit entities including social service organizations, associations, private schools and foundations. His experience includes assisting organizations with budgeting and major capital campaigns, identification and resolution of complex accounting and business issues, implementation of accounting pronouncements, and assisting clients with strategic mergers. Dale is a member of CLA's Wisconsin Public Sector industry team.



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Committee Member - Program Booklet	Emily Nettesheim
Committee Member - Roster	Martha Paalman
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Websites

Chapter	www.winnebagoland.imanet.org
LinkedIn	www.linkedin.com/groups/3197794
Facebook	https://www.facebook.com/pages/Institute-of-Management-Accountants-IMA-Winnebagoland-Chapter/134944876526330
Regional	www.midamerica.imanet.org
Global	www.imanet.org

Officers & Directors (cont'd)

Put a Face to the Name – Meet this program year's board of directors!



Amber Beistle



Rick Bellmore



Gayle Brown



Patti Denton



Curt Esser



Craig Gloudemans



Jill Halverson



Ann Keller



Emily Nettesheim



Martha Paalman



Bill Ramsay



Ashley Rieder



Colleen Srnka



John Wieland

Past Presidents

(10 most recent)

2018 – 2019	Patti Denton	8 th Place
2017 – 2018	Craig Gloudemans	4 th Place, Newsletter (2 nd), 3-Year Retention (1 st)
2016 – 2017	Craig Gloudemans	1 st Place, Newsletter (3 rd), Website (2 nd)
2015 – 2016	Mayur (Mo) Ranpara	15 th Place, Banner
2014 – 2015	Craig Gloudemans	
2013 – 2014	Tina Krueger	
2012 – 2013	Cynthia Kopesky	
2011 – 2012	Rick Bellmore	
2010 – 2011	Tina Krueger	
2009 – 2010	Gary Streich	14 th Place, Banner

Outstanding Members

(10 most recent)

2018 – 2019	Martha Paalman
2017 – 2018	Jill Halverson
2016 – 2017	Emily Nettesheim
2015 – 2016	Martha Paalman
2014 – 2015	Gayle Brown
2013 – 2014	Curt Esser
2012 – 2013	Martha Paalman
2011 – 2012	Deb Hansen
2010 – 2011	Martha Paalman
2009 – 2010	Linda Geiger, Ann Keller
2008 – 2009	Martha Paalman

Perfect Attendance

Rick Bellmore	25 years	Ann Keller	11 years	Emily Nettesheim	2 years
Curt Esser	18 years	Colleen Srnka	3 years	Amber Beistle	2 years
Martha Paalman	13 years	Patti Denton	2 years		

1000 Point Club

10 years perfect attendance – not necessarily consecutive.

William Zorr	26 years	Paul Brusky	15 years	William Ramsay	12 years
Rick Bellmore	26 years	Raymond Rewalt	15 years	Ann Keller	11 years
Larry Koeppen	25 years	James Wacker	15 years	Darrel Luebke	11 years
John Ponczoch	21 years	Martha Paalman	13 years	Al Walschinski	11 years
Donald Tremel	21 years	Richard Hillebrandt	13 years	James Brockhaus	10 years
John Wieland	20 years	Harry Ostendorf	13 years	Robert Nackers	10 years
Curt Esser	18 years	James Smits	13 years	Keith Siebers	10 years
Gary Streich	17 years	James Wrase	13 years		
William Barribeau	15 years	Donald Peotter	12 years		

UWO Accounting Club Meetings

Information on UWO Accounting Club Meetings can be found on their LinkedIn and Facebook pages:

LinkedIn: <https://www.linkedin.com/in/uwocobaccountingclub>

Facebook: <https://www.facebook.com/UWOaccountingclub/>

For more info on the UW-Oshkosh Accounting Club Meetings, please contact Ashley Rieder at winnwire@gmail.com

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*According to Accounting.com

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The Association of
Accountants and
Financial Professionals
in Business

Meetings at a Glance

Day	Date	Place	Time	Program	Registration Link
Tues	9/17/2019	Winncrest Banquet Hall	5:30-6:00 6:00-8:00	Dinner Speaker - Ethics topic	https://www.eventbrite.com/e/september-2019-winnebagoland-ima-meeting-tickets-64800891210
Mon	9/23/2019	The Marq	4:45-6:00 6:00-7:00	Movie Dinner/Discussion	https://www.eventbrite.com/o/packerland-chapter-ima-4530423517
Tues	10/15/2019	La Sure's	5:00-6:00 6:00-6:30 6:30-7:30	Networking Dinner Panel Discussion	https://www.eventbrite.com/e/winnebagoland-student-night-2019-tickets-64805232194
Wed	11/20/2019	Liberty Hall	5:30-6:00 6:00-8:00	Dinner Speaker	https://www.eventbrite.com/e/november-2019-winnebagoland-ima-meeting-tickets-64802054690
Wed	12/18/2019	Stone Toad	5:30-6:00 6:00-7:00 7:00-7:30	Dinner Speaker Raffles/Awards	https://www.eventbrite.com/e/december-2019-winnebagoland-ima-meeting-tickets-64804256275
Wed	1/15/2020	Baker Tilly	5:30-6:00 6:00-7:30	Dinner Speaker	https://www.eventbrite.com/e/january-2020-winnebagoland-ima-meeting-tickets-64802853078
Tues	2/18/2020	Bridgewood	5:30-6:00 6:00-7:30	Dinner Speaker	https://www.eventbrite.com/e/february-2020-winnebagoland-ima-meeting-tickets-64803167017
Wed	3/11/2020	Menasha Water Plant & Stone Toad	5:00-6:00 6:20-6:50 6:50-7:50	Tour @ Menasha Water Plant Dinner Speaker	https://www.eventbrite.com/e/march-2020-winnebagoland-ima-meeting-tickets-64803497004
Tues	4/21/2020	La Sure's	5:30-6:00 6:00-7:00	Dinner Speaker	https://www.eventbrite.com/e/april-2020-winnebagoland-ima-meeting-tickets-64803981453
Tues	5/19/2020	Liberty Hall	5:00-6:00 6:30-7:00 7:00-8:00	Volunteering @ Jake's Diapers Dinner Speaker	https://www.eventbrite.com/e/may-2020-winnebagoland-ima-meeting-tickets-64803797904