

**Institute of Management Accountants  
Ohio Regional Council  
Quarterly Meeting Minutes, Thursday, January 22 2026 4:30 – 6:00**

**Attendance, January 22, 2026**

Attendees:

Peter Dorff – Akron  
Joe Richards - Akron  
Honey Wess - Cleveland  
Sandy Brenner – Cleveland East  
Gaby Lahoud – Cleveland East  
Paul Myers – Dayton  
Jessica Pelini - Dayton  
Tanya Shell – Dayton

**1.Introductory remarks – Gaby Lahoud, Chair, Cleveland East Chapter**

Gaby thanked everyone for attending and participating today.

**2. Secretary: Peter Dorff, Akron Chapter**

**Attendance:**

Peter took Attendance.

There was a short discussion regarding how many Chapters need to be present to have a quorum. Our By-Laws require 50% of the active chapters to be represented or four (4) members of the Executive Committee. We currently have six (6) active chapters, Akron, Cleveland, Cleveland East, Columbus, Dayton and Pittsburgh.

Peter announced that with 4 of 6 active Chapters represented, we had a quorum.

**Approval of the minutes:**

Paul Myers moved to accept the minutes from October 23, 2025, after a few minor corrections. Sandy Brenner seconded.

**All in favor, none opposed, no abstentions.**

**3. Treasurer: Paul Myers, Dayton Chapter**

Paul reviewed the Income Statement and Balance Sheet as of January 22, 2026.

On the **Income Statement**, Paul noted the \$7,000 under “Director – Management Accounting Conference is made up of \$4,500 paid to the Quest Center in Columbus for the Conference and \$2,500 paid to Kristie Stocker as one-half of her fee.

There was \$100 paid for the Chapter Registration filing in November.

An item that is missing is under Director – Student Relations. Paul Myers has to confirm who attended the conference and the appropriate payment. Participants

were from Stark State, Indiana University East, and Northern Kentucky University. There may be other schools as well. He anticipates 16 grants will be awarded for a total just short of \$5,000.

On the **Balance Sheet**, Cash totaled \$176,535 as of January 22, 2026, before payments for the Student Leadership Conference.

**Gaby asked for a motion to approve the treasurer's report**

Joe Richards moved to approve the Treasurer's Report as presented. Honey Wess seconded.

**All in favor, none opposed, no abstentions.**

Paul noted the transfer of check signers was completed after the last meeting. Jessica Pelini and Honey Wess are the new check signers. He is also following up with Key Bank on the type of account that should be used for our cash.

**4. VP – Administration & Strategic Planning: Open, covered by Gaby Lahoud, Cleveland East Chapter**

**Auditor – Pat Smith, Columbus Chapter (not on call)**

Paul reported that Pat Smith's firm has completed the audit for the year ended June 30 and submitted the report to Paul Myers before the filing deadlines.

**Co-Directors Meetings /Annual Conference – Honey Wess, Cleveland Chapter/Brent Smith, Columbus Chapter**

Honey Wess reported we are down for the hospitality suite at the annual conference beginning on June 14, 2026 through June 17, 2026, in Tampa. Michigan is going to co-host again with a 50/50 split.

**5. VP – Professional Development & Education: Gaby Lahoud – Cleveland Chapter East.**

**Director Student/Academic Relations – Cathy Schafer – Pittsburgh Chapter (not present)**

See notes in Treasurer's report related to 2025 Student Leadership Conference

**Director Management Accounting Conference – Steve McNally – Toledo Chapter**

Gaby reported that a contract has been signed with the Quest Conference Center. He reported that we will receive a 20% refund if we cancel by January 26. The Quest Conference Center will need a final head count by February 17. Gaby reported 37 are registered for the Conference and 29 have paid, 25 professionals and 4 students.

**Director Education/Certification – Open-No report**

## 6. VP – Engagement: Open

### **Director of Information Technology/Website – Sandy Brenner, Cleveland East**

Sandy Brenner has updated the website as she can. Sandy will post pictures and speaker thank you notes after the Conference.

### **Director of Social Media - Tanya Shell, Dayton Chapter**

Tanya asked that everyone forward information to share on social media. She will continue to support the Conference as best as possible.

## 7. Old Business

### **Updating By-Laws**

Paul reported the work on the Conference has preempted work on updating the By-Laws.

### **Student Chapter Support**

Paul put \$25,000 in the budget for Student Chapter support. There are 10 to 12 Student Chapters, but it is unclear how many are active. Honey suggested Mary Patterson can identify which chapters are active and we can confirm by contacting the faculty advisor. We can then award perhaps \$500 to each active chapter and monitor how it is used.

**Paul moved** we will provide \$500 funding payments to verified active Student Chapters identified by Mary Patterson and Student Chapter Board representatives. We will confirm activity with the faculty advisor and confirm where to send payment. Honey seconded.

**All in favor, none opposed, no abstentions.**

### **Leadership Training Workshop**

It was agreed that May 9<sup>th</sup> will be the date for our LTW.

## 8. New Business

There was a short discussion regarding the fact that we do not have a President (Chairperson) for the Ohio Regional Council for the year 2026 – 2027. Nothing was decided, but Board members were asked to reflect on possible candidates.

### **Chapter Grants**

After a short discussion,

**Paul moved** we send up to \$1,500, to the 5 active local chapters that are not needing to spend down, with verification with the chapter leader on the address to send the money.

.....Joe seconded

**All in favor, none opposed, no abstentions.**

## **9. Council chapter reports**

### **a. Akron – Joe Richards**

Virtual seminar is scheduled for March 11 on Artificial Intelligence and Excel. Wendy Tietz and a colleague from Columbus will be presenting.

### **b. Cincinnati North – not on call**

### **c. Cleveland - Honey Wess**

No plans right now. .

Honey has been working on promoting the Conference in Columbus

### **d. Cleveland East – Sandy Brenner**

Had a holiday Christmas dinner for the Board.

In March a presentation on the Big Beautiful Bill is scheduled for a lunchtime virtual meeting.

Enrico Vercio has accepted the position of Chapter President.

### **e. Columbus – not on the call**

### **f. Dayton – Tanya Shell**

Holiday social in December was a success.

Had January in-person session. Part I was a Tax update on the BBB. Part II was a session on business transition planning.

February 20 they have a student event planned.

CMA night planned for March.

### **g. Pittsburgh – Not on Call**

### **h. Toledo – not on the call**

## **10. Final remarks – Chair, Gaby Lahoud**

Gaby thanked everyone for attending and participating.

**Respectfully Submitted**

**Peter Dorff**

**Secretary, Ohio Regional Council of the IMA**

**Next Meeting on Friday, May 8, 2026**

**Hybrid meeting. In person at the**

**Columbus Library**

**4500 Hickory Chase Way**

**Hilliard, Ohio**

**4:00 – 5:30**

**ZOOM LINK**

Join Zoom Meeting

<https://us06web.zoom.us/j/83314116072?pwd=qg3GPb4fOsKxKYu2L2AU6eJ1dp2QFL.1>

Meeting ID: 833 1411 6072

Passcode: 134162

Dial by your location

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