

**Institute of Management Accountants  
Ohio Regional Council  
Quarterly Meeting Minutes, Thursday, October 23, 2025, 4:30 – 6:00**

**Attendance, October 23, 2025**

Attendees:

Peter Dorff – Akron  
Ilona Daw-Krizman - Cleveland  
Honey Wess - Cleveland  
Sandy Brenner – Cleveland East  
Gaby Lahoud – Cleveland East  
Paul Myers – Dayton  
Jessica Pelini - Dayton  
Tanya Shell - Dayton  
Jennifer Halligan – Pittsburgh  
Cathy Schaefer - Pittsburgh

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

Gaby thanked everyone for participating today.

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

**Attendance:**

Peter took Attendance.

Peter announced that with 5 of 8 Chapters represented, we have a quorum.

**Approval of the minutes:**

Paul Myers moved to accept the minutes from July 17, 2025, after a few minor corrections. Jessica Pelini seconded.

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

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

Paul reviewed the Income Statement and Balance Sheet as of September 30, 2025.

There was not much activity in the first quarter of the fiscal year.

Paul noted the \$1,500.00 down payment for the Quest Center in Columbus for the Management Accounting Conference and the \$1,143.78 paid to Michigan for our share of the costs associated with the suite at the International IMA Conference.

On the Balance Sheet, Cash totaled \$182,130 as of September 30.

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

Illona Daw Kizman moved to approve the Treasurer's Report as presented. Tanya Shell seconded.

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

Following the approval of the Treasurer's report, there was a short discussion regarding the cash of \$182,130 that the Ohio Regional Council currently has at Key Bank. First, the new check signers will be Jessica Pelini and Honey Wess. This will become official in about two weeks after the required paperwork is signed by both Jessica and Honey. Secondly, there was a discussion regarding the type of account that should be used at Key Bank for our cash. The discussion brought up several questions that need to be answered by Key Bank. Paul will do the research and get back to the Board at our next meeting.

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

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

Paul has sent the files, ended June 30 to Pat Smith, in an attempt to get the audit done before he has to file the tax post card and charitable registration.

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

Honey Wess reported she has a request in 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: (position open) Gaby Lahoud – Cleveland Chapter East, covered.**

**Student Leadership Conference** is in Cleveland this year. Paul reported that he used the IMA email tool to send an announcement to students, academics, and Chapter leaders. He received responses from Stark State and Indiana University East. The deadline for registration has been extended to Monday, October 27.

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

Gaby reported that a contract has been signed with the Quest Conference Center. Sandy reported is arranging group rates at the Hampton and Fairfield hotels nearby the Conference Center.

**6. VP – Engagement: Open**

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

Sandy thanked Paul for posting the Agenda and Minutes from the July meeting. She

also said she will be updating the website for the Management Accounting Conference as information becomes available.

Gaby is working on a Board of Directors slide.

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

Once confirmed information is available for the Management Accounting Conference, Tanya will announce them on LinkedIn, Facebook and X (twitter).

### **7. Old Business**

Paul Myers plans to have the committee for By-Laws review meet in November.

#### **Student Chapter Support**

Paul suggested we wait until January 2026, after we have a chance to see how much we invested in Student Leadership Conference Grants, to determine how much support we will provide to the Student Chapters.

### **8. New Business**

#### **Creating an Advisory Board for the ORC**

Gaby presented a new effort on member engagement, communication, virtual events, and Board involvement. He presented a plan titled Creating an Advisory Board for ORC. The purpose is to generate greater awareness of IMA local Chapters, to help our Chapters to grow, and to provide help when Chapters are running a conference.

The plan also highlights the benefits to the Advisory Board members. Gaby received a listing of all IMA members within our Region and he then identified 158 high level (Vice-President, CFOs, etc.) individuals from the entire group. Gaby will reach out to these individuals and give them a personal invitation to join the Advisory Board. After he works through the 158, he will extend his efforts to the rest of Ohio Council members. The goal is to have the first meeting one month before the Conference in Columbus with the hope that some will then attend the conference. The first meeting will be on Friday, January 23, 2026, at 1:00PM.

There was some discussion whether this new Board should be called an "Advisory" Board. It was agreed that "Board of Industry Experts" may be more descriptive. Paul also mentioned that is important that when referring to the ORC, we specifically include the Ohio Regional Council, not simply the Ohio Council, in an effort to include and welcome the Pittsburgh Chapter.

#### **Leadership Training Workshop**

Paul suggested we pick a date for the Leadership Training Workshop. After a short discussion, May 2 or May 9 were identified as possibilities. No firm date was selected.

### **Key Bank Credit Card Program**

Paul explained a no cost credit card that is available through our Key Bank account. After a short discussion, it was agreed that the card would be useful.

Honey Wess moved that Treasurer, Paul Myers get the credit card from Key Bank for use as needed. Jessica Pelini seconded.

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

## **9. Council chapter reports**

### **a. Akron – Peter Dorff**

Peter noted that there was a recent virtual board meeting.

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

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

Just finalized a joint meeting with Cleveland East on 11/24 at the Independence library. Dana Whited will be the guest speaker on AP automation. The cost will be \$10 or \$15 for lunch and one hour of CPE.

They also have a CSU Student Chapter event on 11/11. The topic will be Quick Book automation.

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

They are having a Board planning meeting this evening.

They were unable to have a Controller Workshop in November but will probably have it in March.

As Honey mentioned above, they will be having a joint meeting with the Cleveland chapter in November.

### **e. Columbus – not on the call**

### **f. Dayton – Tanya Shell**

They had their Chapter meeting on Tuesday of this week. They had two good speakers. One from Young's Jersey Dairy and the other from the local Credit Union who spoke on fraud.

They met last month as well and used an IMA Leadership Academy presentation on negotiation.

They have a new meeting location, and the members seem happy with it.

They have a social next Thursday at a local brewery.

### **g. Pittsburgh - Cathy Schaefer**

Jenn Halligan is the new president of the Pittsburgh chapter and Cathy is now the Secretary.

They have a few new Board members. Jenn has brought a new energy to the Chapter.

They have a Social event in November at an historic private club in Pittsburgh and a Student

event on 11/18 – a career event for students.  
They will also be having a Zoom based ethics CPE event with a local speaker.

**h. Toledo – not on the call**

**11. Final remarks – Chair, Gaby Lahoud**

Paul reminded everyone that 990 filings and charitable registrations are due 11/15.

Gaby thanked everyone for attending and participating.

Paul moved to adjourn at 5:51PM.

Honey seconded

**Respectfully Submitted**

**Peter Dorff**

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

**Next Meeting on Thursday, January 22, 2026**

**Time: January 22, 2026, 04:30 PM Eastern Time (US and Canada)**