

THE READ INK

A Publication of the East Bay-Northern California Chapter of the IMA

President's Message

East Bay Chapter Members and Friends,

First and foremost, I hope that you, your family, and friends are safe and well. This is an unprecedented time in our lives to say the least. Many of us have suddenly found ourselves unemployed, sheltered in place, and our daily lives turned upside down. While it may be frustrating and maddening, it does offer each of us an opportunity to learn, grow, and do things we may not have had time to do before. Now more than ever, we need to embrace and master the technology that impacts us all. If you haven't had the chance before, now is the time to take advantage of what IMA has to offer (and much of it is delivered remotely!). It's just a click away. For example, did you know that:

IMA has expanded its offering of free courses, including the just-released Data Analytics and Visualization Fundamentals Certificate, the Certified in Strategy and Competitive Analysis Learning Series, and live and on-demand webinars (in total, worth about 125 free CPE credits),

And....

- For members who have been laid off or are in financial need, IMA offers a hardship dues waiver policy to ensure that your membership is not interrupted during these challenging times,

And....

- IMA has extended the timeframe for the CMA® (Certified Management Accountant) exam's May-June testing window to July 31, 2020,

And....

- Our chapter is offering technical meetings, like our award winning FMN sessions, online (click on the IMA East Bay – Northern California Chapter website link below for more information under Events & Education),

And much, much more....the learning doesn't stop!

Hang in there. Stay strong and stay safe. We will come out of this more resilient than before.

Mike Gorski, President
IMA East Bay – Northern California chapter
2019-2020

www.imanet.org

CMA® | You've got to earn it.

Did You Know!

Webinars On Demand: Leadership II



Highly rated IMA Leadership Academy (IMALA) webinars, packaged together as an exclusive member benefit, for 24/7 access to presentations in self-study CPE format. Three (3) previously recorded IMALA webinars for a total of 4.5 ICMA CPE.

Based on industry needs pertaining to the Leadership domain of IMA's Management Accounting Competency Framework, Webinars On Demand: Leadership II is another self-study package featuring several of

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The Association of
Accountants and
Financial Professionals
in Business

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IMA's Vision

Be the *resource* for developing, certifying, connecting, and supporting the world's best accountants and financial professionals within businesses

IMA's Mission

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's Strategic Goals

- Win additional market share with "*CMA First*", an aggressive pipeline building effort and expansion of the CMA® in the U.S. and globally
- *Drive member retention* and loyalty in all regions by delivering tangible value through relevant programs, products, and services
- *Raise awareness in the Student/Academic market* to expand the membership pipeline and reach the young CMA certified professionals of tomorrow
- *Master Technology* that directly impacts IMA members and our value proposition

East Bay - Northern California

Latest Information

About EB-NC

The Chapter was chartered July 1, 1966 as Alameda County – South Chapter (#207) with a charter membership of 82. In 1990, the Chapter went through a reorganization, moving its meeting locations and changed its name to Amador Valley. The new name reflected the new geographical location (South Contra Costa County and South Alameda County) of chapter members and meetings.

On July 1, 2014, the Amador Valley Chapter and the Oakland - East Bay Chapter merged. The Merged Chapter retained the Oakland - East Bay Chapter Number for historical significance. The Merged Chapter is named the East Bay - Northern California Chapter as there was an historical East Bay Chapter in IMA history and our members are located in Western and Southern Contra Costa County and Alameda County.

(Continued from page 1)

our recent highly rated IMA Leadership Academy (IMALA) webinars. In this second Leadership installment, the package includes three (3) IMALA presentations:

1. Global Leadership
2. Financial Leadership
3. Leading in the Digital Age

After passing the final exam following each webinar, 1.5 ICMA CPE will be awarded, for a total of 4.5 ICMA CPE for all three webinars. Webinars On Demand: Leadership II is the latest addition to IMA's member benefits and future-related packages. New webinar presentations will be created to continuously add value and build on the leadership skills management accountants need!

Free: Member Savings \$60.00

[Link to order](#)

Informational Articles to Assist Your Career!

Bay Works Recruiting has provided the following article on **"Crisis Communication"**



In these unprecedented times, one thing is clear, we need communication to help feel connected, involved and aware.

For your Accounting and Finance teams, there are four key areas to enhance communication during these difficult times:

1) The Individual Person

Set up one on one meetings with each member of your team. Discuss their concerns about employment, their specific work focus, expectations working virtually, etc. This is not a one-time discussion. Set a schedule with each person for ongoing talks. Let each person know they matter.

2) Daily/Weekly Game Plan

Depending on the size and workload of your team, it is important to set up daily/weekly check in points. Kick off the day with a game plan, set up weekly project updates, share accomplishments, set up training sessions or simply an hour to share how people are feeling. [Link for additional key areas](#)



Robert Half (Accountemps) has provided the following article on **"Common Breaches in Conference Call Etiquette"**.

Virtual meetings are on the rise, making conference call etiquette of utmost importance. Are you following the unwritten rules — or committing common faux pas?

Whether you're a manager or employee, there's a good chance conference calls are a weekly, if not daily, occurrence. How you handle them can have a big impact on your career and business.

Showing good manners in the workplace, even when you think no one is watching, can enhance your professional image. Conversely, displaying bad habits can irritate coworkers and undermine your credibility. While it can be tempting to let your guard down during conference calls, it's important to approach them with the same level of care as in-person gatherings.

Observing the rules of conference call etiquette will help you build more productive work relationships, promote teamwork in the workplace and make the most of virtual meetings. ...[Link](#)

Your Newsletter - Your Articles!

If you come across an article or would like to submit an article that is of added value to one's career, please forward to the Webmaster at eastbaync@imachapter.org

East Bay - Northern California

Looking for Members to Serve on the Chapter Board of Directors

The East Bay - Northern California Chapter of the IMA is still seeking qualified members to serve on EB-NC's Board of Directors, with terms beginning on July 1, 2020. These esteemed volunteers have the crucial responsibility of overseeing the strategic direction of the local organization and its policies and procedures; monitoring the Chapter's financial health and committee activities; and supporting IMA's and EB-NC's mission, vision, and values.

By serving on the Chapter Board, you can become an active participant in setting IMA's and the local Chapter's agenda, advance and impact the management accounting profession, and represent IMA by working with external organizations and industry stakeholders. You can also nominate another member you feel would be a qualified candidate for the Chapter's Board.

The Chapter has many Leadership Positions available from a large role to a smaller role.

Time Commitment: Approximately 7-10 hours a month. The current Board of Directors and IMA's professional Community Relations team will help you succeed in your efforts by providing training, support, and guidance.

Benefits of Serving: Build leadership skills that you will need to advance in your career and be part of empowering the profession and helping others achieve their professional goals.

Requirement to serve: Be an IMA member in good standing, have high ethical standards, and able to work collaboratively with others.

We hope you will consider this exciting opportunity to serve IMA and broaden your leadership!

The following Member Volunteers are on the 2020-21 Board of Directors. All other positions are still open:

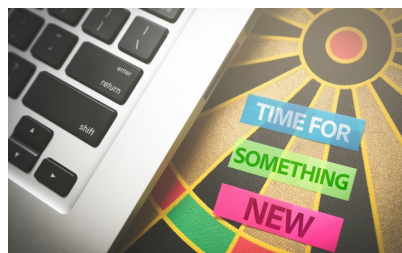
President	Mike Gorski
Vice President of Administration	Open
Director of Competition	Open
Director: Member Relations	Open
Secretary	Open (Temporarily filled by Mike Gorski)
Treasurer	Robert Hulin
Investment Committee Member (3)	William Sawyer
	Pankaj Pandey
Vice President of Professional Education	Sheela Chandrasekhara
Director: CMA Program	William Sievers
Director: FMN Program	Tricia Scalzo
Director: Ethics Program	Open
Director: Excel Program	Open
Director: Technical Meetings	Open
Vice President Communication	Open
Webmaster	Open (Temporarily filled by Robert Hulin)
Director: Newsletter	Open (Temporarily filled by Robert Hulin)
Director: Community Relations	Open
Director: Marketing	Open
Director: Social Media	Open
Vice President Membership	William Sievers
Director: Member Relations	Open
Vice President Young Professionals	Ken Shepard
Director: Student Services	Brian Carlson

Past Presidents may serve on the Chapter Board as Board Advisors

If you have an interest and willingness to serve and help deliver IMA's mission in your community, we encourage you to contact:

Mike Gorski, EB-NC President at eastbaync@imachapter.org, or

Robert Hulin at ima.eastbay.nc@gmail.com.



East Bay - Northern California

Chapter Calendar

<u>Date</u>	<u>Event</u>	<u>CPE</u>	<u>Time</u>	<u>Location</u>
2020				
01 Apr	The Rising Importance of Technology Integration	1.0	10:00 AM	Inside Talk
06 Apr	Implementing Sustainability into Strategic Planning and Analysis	1.0	10:00 AM	Strategic Management
07 Apr	Best Practices in Talent Management	1.5	10:00 AM	Leadership Academy
11 Apr	Financial Management Network	4.0	09:00 AM	Virtual Meeting
15 Apr	CFO 3.0: Digital Transformation Beyond Financial Management	1.0	10:00 AM	Inside Talk
16 Apr	EB-NC IMA Board Meeting	0	06:00 PM	Zoom
21 Apr	"Reinventing Organizations" for Finance Professionals (Presented at Japan Standard Time)	1.0	05:00 PM	Inside Talk
23-24 Apr	Women's Accounting Leadership Series	5.8		New York, NY
27 Apr	Navigating Growing ESG Expectations	1.0	08:00 AM	Inside Talk
28 Apr	The CMA Exam: Test-taking Tips and Strategies	1.0	07:00 AM	Inside Talk
05 May	Using Social Media to Improve Workplace Leadership (Revamp)	1.5	10:00 AM	Leadership Academy
16 May	GWC Quarterly Meeting	0	09:45 AM	Virtual Meeting
02 Jun	Storytelling (New)	1.5	10:00 AM	Leadership Academy
15-19 Jun	IMA's Annual Conference & Expo	30+		Atlanta, GA
07 Jul	Diversity and Inclusion	1.5	10:00 AM	Leadership Academy
04 Aug	Listening Skills	1.5	10:00 AM	Leadership Academy
01 Sep	(Guest Speaker)	1.5	10:00 AM	Leadership Academy
06 Oct	Leadership Networking (New)	1.5	10:00 AM	Leadership Academy
03 Nov	Leading Across Generations	1.5	10:00 AM	Leadership Academy
12-14 Nov	IMA's Student Conference			Pittsburg, PA
01 Dec	Presentation Skills	1.5	10:00 AM	Leadership Academy
2021				
27-29 Feb	REST 2021	22		Reno, NV

East Bay—Northern California Board Meeting

The East Bay Northern California usually holds a virtual Board Meeting on the Third (3rd) Thursday of the Month. As the Chapter Board values all members input regarding activities the Chapter is in, all Chapter Members are invited to these virtual meetings. During each meeting we discuss how the Chapter can support our members in accomplishing their goals and strategies

April 16, 2019: 5:30 PM to 6:30 PM

Please join us from your computer, tablet or smartphone if you not attending in person at:

<https://zoom.us/j/374705213>

Meeting ID: 374 705 213

One tap mobile

+16699006833,,374705213# US (San Jose)

+14086380968,,374705213# US (San Jose)

Dial by your location

+1 669 900 6833 US (San Jose)

+1 408 638 0968 US (San Jose)

+1 646 876 9923 US (New York)

Meeting ID: 374 705 213

Find your local number: <https://zoom.us/u/accawgDCOY>

East Bay - Northern California Education

Certification



IMA's Certification for
Accountants and
Financial Professionals
in Business

The CMA (Certified Management Accountant) is the advanced professional certification specifically designed to measure the accounting and financial management skills that drive business performance. To find out more from IMA click [here](#).



Certified in Strategy
and Competitive
Analysis

The CSCA™ (Certified in Strategy and Competitive Analysis) is a specialty credential designed specifically for CMAs*, which complements and expands upon the strategic planning and analysis skills developed through the CMA® (Certified Management Accountants) certification. To find out more from IMA click [here](#)



How does OBTAINING A CMA CREDENTIAL benefit you ?

- Why pursue the CMA?
- What are the benefits of getting it?
- How should one prepare for the examination?
- What is the outline of the test and what do sample questions look like?

The find out the answers to these questions and more, please look for our future announcement on attending the GoToMeeting Presentation . If interested please contact [William Sievers](#).

CMA Scholarship

Stand out as you graduate

With the CMA Scholarship, you can complete the CMA® (Certified Management Accountant) program at no cost. Take the exam while still in school and dazzle future employers with your management accounting skills

What's included?

Entrance fee to the CMA program

Exam support package with retired exam questions and a glossary of terms

Registration fees covering both parts of the exam (additional fees will apply for retakes)

Wiley CMAexcel Online Test Bank access for both exam parts for up to two years

Up to three years of IMA membership while pursuing the certification

[Download the Nomination Form](#)

For more information, click [here](#)!



East Bay - Northern California Education

Certification (Cont.)

Gleim Study Materials

Save up to \$650 when you order the 2020 edition of Gleim CMA Premium Review! Orders can be placed online at <http://Gleim.com/IMACHapter>. Discount will be displayed at check out.

The East Bay Northern California IMA Chapter has partnered with Gleim to ensure your success on the CMA exam!

Gleim recognizes the value of IMA Chapters and so they are providing IMA chapter members with a special offer now through **April 26, 2020**. As a Strategic Partner of IMA, we are also providing 30% off of CMA exam entrance fees!

Our latest edition covers 2020 CMA exam topics and is equipped with SmartAdapt™ technology which personalizes your review and eliminates the guesswork in studying.

In our latest edition, you'll also enjoy:

- Even more videos covering the toughest topics and providing question walkthroughs
- Enhanced books and online platform for a more accessible, intuitive experience
- The best bank of exam-quality questions and explanations
- Dedicated support from Personal Counselors and Accounting Experts
- +Access Until You Pass® guarantee

If interested contact via email Alexandra Graham at alexandra.graham@gleim.com or by phone at 1-800-874-5346 ext. 428. Orders can also be placed online at Gleim.com/IMACHapter or by using gleim.com/IMAEBNC. Please note that the \$650 discount will be displayed at check out and not on the initial welcome screen.

Wiley Study Materials

Flash!!

Access Wiley's CMA virtual classrooms

IMA® (Institute of Management Accountants) is committed to helping you as the global community contends with the increasing impact of COVID-19. We are pleased to share a special offer from our official partner Wiley, to help you with your CMA® (Certified Management Accountant) studies.

Starting today, you can get [free access](#) to Wiley CMAexcel Virtual Classrooms, including the entire archive of recorded classes and live lectures, through **April 2020**. CMAexcel online classes are led by expert instructors who discuss the most difficult CMA topics, while students get the opportunity to ask real-time questions.

Here's how to access the CMA Virtual Classrooms for free:

- Visit <https://www.efficientlearning.com/CMA/products/CMA-virtual-classroom-part-1/>
- Add the CMA Virtual Classes to your cart
- Enter code **FREECLASSES** at checkout
- You will be asked to create an account (or log in to your existing account). You will NOT be required to enter your credit card information.

**Your free Wiley
CMAexcel class**

Visit Wiley's [COVID-19 CMA Exam Updates resource page](#) to learn more about exam testing center closures, details on postponements and cancellations, and important information from strategic partners.

IMA and Wiley are working together to ensure that you have all the tools you need during this challenging time. We encourage you to take advantage of this valuable resource as you continue your CMA journey.

East Bay - Northern California Education

Financial Management Network

April 11, 2020: 9:00 AM to 1:00 PM

Due to COVID-19 this will be a Virtual Meeting

Continuing Professional Education: 4.0 Hour CPE



One of the most valuable products offered by the Institute of Management Accountants. The FMN (Financial Management Network) is a live DVD training program introducing and explaining up-to-the-minute accounting and finance issues. By viewing the DVD and participating in the group discussion you will earn four hours of CPE credit.

Overall, the program allows you to keep current with the changes and impacts in many facets of the Accounting and Finance industry.

Here are the April 2020 topics:

Disclosure Effectiveness: Who Tells Your Story?

Field of Study: Accounting

Public companies are quickly adapting their disclosures to provide better information as regulations and investor sentiments evolve. Traditionally, financial reporting professionals often interpreted "better" to mean "more"...more narrative and more tables, in many cases. That has led to narrative losing its nuance, turning into boilerplate or repetitive language, and tables failing to bring value to the reader. Ultimately, disclosure effectiveness has suffered. April Brady, a Senior Director of Product Marketing with Workiva explains why it is becoming increasingly important for companies to tell their own story through disclosure.

Embracing Emerging Technologies

Field of Study: Management Services

Accounting and finance leaders are bombarded with information about how technology can facilitate and transform their entire organization. And there is no time like now to put words into actions, plan for immediate changes and look ahead for future potential. Our video crew was on hand at a recent Financial Executive International conference where they videotaped a high level panel discussion on this topic. The panel featured three senior finance executives from major US companies. Thanks to them, you can join the conversation about the importance of embracing emerging technology in finance and accounting organizations and discover how you can empower your employees to incorporate technology into their roles.

Rising Healthcare Costs: Cause & Effect

Field of Study: Business Management & Organization

In recent years, healthcare costs have been increasing exponentially for employers, and the burden on the workforce has reached a point where health benefits are losing ground in the hiring and retention process. Even though the affordability of healthcare may have a direct correlation with one's salary, annual salary increases, if any, are not nearly enough to absorb the even faster growing healthcare costs. In addition to the rising costs, annual deductibles are often north of \$1,500, and as a result, lower income workers and families opt out of insurance coverage. Matt Wolf, Director, Health Care Senior Analyst with RSM US LLP discusses some of the key factors driving those increases.

Federal Income Tax Withholding on Foreign Persons: Forms 1042 and 1042-S

Field of Study: Taxes

Forms 1042 and 1042-S are U.S. IRS tax forms related to payments to foreign persons, including non-resident aliens, foreign partnerships, foreign corporations, foreign estates, and foreign trusts. Last year the IRS announced a new campaign to target "Withholding and International Individual Compliance" regarding Forms 1042 and 1042-S. Those who make payments of certain U.S. source income to foreign persons must comply with withholding, deposit, and reporting requirements. Kelli Wooten, CPA, Tax Managing Director at KPMG shares with us the differences between the two forms and their reporting and filing requirements.

Time: 9:00 am to 1:00 pm

Virtual from your home:

You will receive a login from Kaplan (our video vendor) by email to access the virtual classroom.

Note: You will be asked to validate that you are online automatically throughout the sessions to make sure you are NSBA compliant.

Cost: \$40.00 (Payment thru PayPal: www.paypal.me/IMA112)

Registration: [Tricia Scalzo](#)

Sponsored By:



East Bay - Northern California Education

Ethics



Ethics Courses

The Chapter is looking forward to engaging members in the future with additional Ethics Case Studies that IMA offers:

IMA Case Studies:

- Blinded by Pressure (Chapter has purchased this course)
- The Slippery Slope of Greed
- Misplaced Trust / Devastating Fraud
- The House Out of Control
- Action Required—Navigating Ethical Dilemmas

Individual Ethics Courses:

- Blinded by Pressure
- The Slippery Slope of Greed
- Whistleblowers Wanted
- When Silence Is Not Golden
- Earnings Management and a Case of Ethics
- Corporate Ethics: From Policy to Practice
- Web of Deception
- A Pathway to Excellence
- A Prescription for Prevention
- Embracing Ethics
- House Out of Control
- Action Required—Navigating Ethical Dilemmas

Individual IMA Members may order these courses online from the IMA Course Catalog [here](#).

If any member is interested in attending (or even presenting) one the above Facilitator Led Case Studies courses, please contact [Mike Gorski](#).



Act as if what you do makes a difference. It Does! - Quote by William James

East Bay - Northern California Community Relations / Student Relations

Student Relations



EAST BAY Rising in the East



The East Bay-Northern California Chapter has been active making contact with the local colleges in our area. The purpose of this alignment is to support the schools' finance and accounting education with actual industry practices, situations, and environment.

IMA DAY

The Chapter has been looking at implementing an out-reach concept to the local Universities and Colleges. We are in need of members that are enthusiastic about the Industry and its relationships with students and that would like to assist in flushing out how the Chapter can implement this effort. If you are an Academic, you can really help in providing a win-win direction.

SCHOLARSHIPS

The Chapter presents annual Scholarships to: California State University—East Bay (Business Department), Chabot College, Las Positas College, and Ohlone College.

The Chapter presents to the Scholarship Foundations of Chabot College, Las Positas College, and Ohlone College a \$500.00 and 1 Year IMA membership to a deserving student. The Colleges provide information to the Chapter upon identification of the recipients.

The Chapter also presents to the California State University—East Bay (Business Department) a Scholarship Award to a deserving student with a \$1,000.00 and 2 year IMA membership.

STUDENT SPEAKER TEAM

For those of you who would like to help young students learn more about accounting and finance, we have a solution! We're putting together a small team of four or five professionals from the chapter who can visit community colleges as a team. This team will interact with the students in a very informal non-threatening atmosphere to answer all the questions new young students have about the profession of accounting and finance, but do not have the opportunity to ask!

Here's your chance to participate in any of the above endeavors. Contact Ken Shepard 408-607-7866 or eastbaync@imachapter.org.

Take Charge of Your Future

Student membership in IMA gives you a competitive edge as you prepare for life after graduation. As a vibrant association of more than 100,000 professionals, students, and academics around the world, our mission is to support members at every stage of their career journeys.

IMA offers a variety of [programs and resources](#) for students:

Differentiate Yourself

Take the CMA® (Certified Management Accountant) exam while you're still in school.

Be Recognized for Academic Excellence

Participate in academic scholarships and competitions offering significant cash awards.

Gain Valuable Leadership Experience

Join or start an IMA student chapter on your campus.

Launch Your Professional Network

Connect with IMA's 100,000+ members around the globe

EB-NC Student Scholarship Criteria

The intent of the Student Scholarship is to provide a monetary value to a deserving student within the University / College to further their education. Also included with the monetary the Chapter will sponsor either a 1(one) or 2(two) year membership depending on the Student Scholarship. The criteria for these scholarships are:

- Current College Student
- Enrolled full-time (12 Units)
- Accounting Major
- 3.00 GPA
- Completed 24 Units
- Demonstrated Leadership, school activity involvement, and community service, and
- An essay is required.

East Bay - Northern California Membership

MYIMA Profile

Please keep your contact information up to date so that you can continue to receive communications from the East Bay—Northern California Chapter or IMA.

If you would like update your information or change your membership into the East Bay—Northern California Chapter or to another chapter, contact IMA Customer Service at 800-638-4427 or go online to your profile at <http://www.imaonlinestore.com/PersonifyEbusiness/Default.aspx?TabId=61> (user ID and password are required).

Member Recognition

March 2020

New Members

Ms. Fran Iyer	Student	03/01/2020
Ms. Dinh Quach	Student	03/03/2020
Mr. Garwin Ching	Regular	03/17/2020

New Members (Transfers In)

Mr. Eric T. Street, CMA	Regular	03/01/2020
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Members - Received CMA / CSCA

Member Anniversaries

Members Celebrating 50 Years in IMA Year 2019-20

Mr. Harlan E Kann	04/01/1970
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Members Celebrating 25 Years in IMA Year 2019-20

Mr. Robert F. Hulin, Jr	08/22/1994
Ms. Tracy T. Ling	10/07/1994
Mr Sudhanshu R. Parikh, CMA	12/28/1994
Mr. James D. Peterson, CMA	12/28/1994
Mr George W. McElroy, CMA	02/08/1995
Mr. William R. Sawyer, CMA, CFA	03/16/1995

April 2020 Anniversaries

Mr. James W. Partridge	04/01/1956
Mr. Stanley Rosch	04/01/1959
Mr. Harlan E Kann	04/01/1970
Ms. Sherry A Morse	04/01/1980
Mr. James A. Habegger	04/01/1982
Ms. Bobbi V. Mattos, CMA	04/01/1982
Mr. Jack L. Krasner, CMA	04/01/1983
Ms. Robyn A. Hegarty	04/01/1990
Mr. John M. Zukoski, CMA, CFM	04/27/1999
Mr. John L. Hallett	04/26/2002
Ms. Yu Chih H. Cooley, CMA	04/30/2002
Mr. Tad C. Miller, CMA, RTRP	04/29/2009
Mr. Keith A. Darby, CMA, CSCA, CAE, CFE	04/29/2010
Ms. Uma Iswarya Shalini Irulappan Natarajan	04/18/2012
Mr. Christian Earl Edoria, CMA	04/25/2013
Ms. Esther Cho, CMA	04/22/2015
Ms. Madhura Joshi, CMA	04/30/2015
Mr. Jeremy Joseph Nau, CMA	04/12/2016
Mr. Patrick David Wilkie	04/04/2017
Mr. Patrick Karoga	04/05/2019
Ms. Lulu He	04/05/2019
Ms. Vivian Yolanda Garcia	04/10/2019
Ms. Elizabeth Massie	04/17/2019
Ms. Bei Li	04/28/2019

Golden West Council

About the GWC

The Golden West Council is one of twenty-four USA Regional Councils within the Institute of Management Accountants. Its purpose is to provide a pool of resources to assist the local IMA Chapter in attaining the objectives of the national and local organizations. Our Council brings together Eleven Chapters in Northern California, Northern Nevada, and Hawaii to participate in activities that may be too large for a Chapter alone to sponsor.

The council activities include participation in and sponsorship of Leadership Training Sessions, Chapter Management Seminars (CMS) for officers and directors, Regional Educational Seminar and Training (REST), hospitality suites at the Annual International Conference, social events, and formation of new chapters.

The Council teams with chapter leaders and members to share successful chapter strategies and experiences that will assist chapter leaders in moving their chapters ahead with a positive direction. Regional Directors are assigned to chapters to provide advice, counsel, and assistance of their respective Chapter.

Board Meetings

All IMA Members in good standing may attend the Board Meetings and the Leadership Training Seminar. In addition, if IMA Members have associates or potential members who are interested in the Meeting, please invite them.

Board Members and Chapter Presidents please submit a Position and Chapter reports of your activities and any Future plans to the Council President and the Webmaster by one (1) week prior to meeting

May 16, 2020 - Annual Meeting and Leadership Training Seminar

Due to COVID-19 this will be a Virtual Meeting

08:30 AM - 04:00 PM

Virtual Meeting Information to be announced

Cost: \$40.00 per person

Please contact [Nicole Sheets](#) of your meeting attendance.

Reno Educational Seminar and Training

February 25-27, 2021

Continuing Professional Education: 22.0 Hours CPE

The Golden West Council and the Pacific Northwest Council of IMA, representing 28 chapters in eight states, is pleased to present the premier educational event in the Western U.S. - REST 2021. This two and a half day program ear of offering high quality, leading edge programs geared to accounting and finance professionals.

Prior year attendees have been impressed with the quality of topics and speakers, combined with a low cost destination served by airlines, and offering low cost transportation.

Examples of topics from Rest 2020 were:

- GAAP Updates & Other Pronouncements 2020,
- Time's Up for Change: Are You Keeping Up With The World Of Employment Law?,
- Audigators! Using Auditing & Investigative Techniques for Synergy,
- Build a Complete Management Reporting System in Excel in 3 Hours,
- And more!

This type of seminar is an excellent opportunity for both business and personal networking that is not normally available through other CPE delivery mediums.

Location: **Peppermill Reno**

2707 S Virginia St, Reno, NV 89502

Registration: REST-IMA website: <http://rest-ima.org/>

"This website most compatible on Google Chrome, IE 8+, Mozilla Firefox and Safari"

REST Scholarships

Any chapter member may apply for this scholarship. Chapter Members should complete the [REST Scholarship Application](#) and email the application to:

Scholarship Committee
Golden West Council of the Institute of Management Accountants
C/O: Patricia J. Mayer, CMA, CPA
Golden West Council Past President,
pattmayer@earthlink.net

ABOUT IMA

Management accountants are vital to the financial health of organizations. They make critical decisions, safeguard a company's integrity, and plan for business sustainability. They might be CFOs and controllers, budget analysts and treasurers, or one of many other game changers on internal teams. Most of all, as the majority of the accounting and financial workforce, they help drive an organization's strategy and value amid an unpredictable market.

Management accountants belong at IMA.

IMA® (Institute of Management Accountants) is the worldwide association of accountants and financial professionals in business. Founded in 1919, we are one of the largest and most respected associations focused exclusively on advancing the management accounting profession. We are committed to empowering our 85,000+ members—and those throughout the rest of the profession—to strengthen on-the-job skills, better manage companies, and accelerate careers. We invite our members to discover the myriad possibilities within the profession and build an actionable future in management accounting.

IMA's New Chair-Elect Steve McNally



J. Stephen McNally, CMA, CPA, CFO of the Plastic Technologies Inc. (PTI) family of companies, was recently named Chair-Elect of IMA's Global Board of Directors for the fiscal 2020-2021 period. Steve will begin his term on July 1, 2020, and will take the helm as Chair of IMA® (Institute of Management Accountants) one year later.

At PTI, Steve oversees all financial and information technology operations. Previously, he was the finance executive for Campbell Soup Company's Napoleon & Flavor Operations, including Campbell's premier soup, sauce, and beverage manufacturing facilities in northwest Ohio and Campbell's flavor opera-

tion in Milwaukee, Wis.

Steve, a member of IMA's Toledo Chapter, is currently serving on the IMA Global Board of Directors and is the board liaison to the IMA Committee on Ethics. Steve also served on the IMA Leadership Academy faculty and the IMA Accounting Honor Society advisory board. He is a former chair of the IMA Member Relations, Performance Oversight and Audit, and Annual Conference Program Committees.

Here's the [link](#) to a brief Q&A to help members get to know Steve better:

IMA Data Analytics & Visualization Fundamentals Certificate™



Earn an IMA professional certificate, a digital badge, and 9 NASBA CPE in data analytics and visualization fundamentals.

Learn how the power of data can be harnessed to gain deeper insight into business performance and make informed strategic decisions. This online course offers hands-on, experiential learning through case scenarios and practical exercises. The content is based on IMA's thought leadership found in its various research and publications. You'll hear straight from industry experts who share their proficiencies and perspectives on emerging technologies, data analytics, and data visualization. Earn an IMA professional certificate, a digital badge, and 9 NASBA CPE in data analytics and visualization fundamentals.

Free Through April 30, 2020: Member Savings \$199.00

[Link to order](#)

IMA's Assess, Build, and Communicate (ABC) Model Helps Address Cash Flow Considerations

A new report by the IMA® (Institute of Management Accountants) Small Business Committee shares professional insights to help small businesses respond to the coronavirus emergency.

With an emphasis on cash flow considerations, the report provides guidance on how small businesses can apply a three-step assess-build-communicate (ABC) recovery planning framework that includes:

- A: Assess the current situation, preferably with a team of experts
- B: Build a plan by brainstorming with your team of experts (and an alternative plan B if resources are available)
- C: Communicate calmly, clearly, and continuously

"We are making history in these unprecedented times. The Small Business Committee is pleased to provide guidance on the issues that impact small businesses around the world. We will release updates to our COVID-19 report as circumstances evolve and new information becomes available. In the meantime, continue your resilience and resourcefulness and be courageous!" Heather Bain, Chair, IMA Small Business Committee

[Download The Report Here](#)

Institute of Management Accountants

IMA Continues “Count Me In” Podcast

IMA® (Institute of Management Accountants), the association of accountants and financial professionals in business, continues its “Count Me In” podcast series.

The series features the latest perspectives on accounting and finance from industry experts. Topics include emerging technologies, business innovation, and the future of the profession. The podcast, produced by IMA’s Education and Career Services, aims to deliver actionable information to accounting, finance, and business professionals.

“With the rapid changes we are seeing in the management accounting profession, we wanted to create a platform where professionals can more readily receive information and act on it,” said Debbie Warner, CAE, CPLP, Vice President, Education and Career Services at IMA. “Our podcast is the perfect medium to deliver expertise to individuals as they are easily accessible and digestible in our 24/7 news culture.”

IMA’s March episodes of “Count Me In” ([Podcast Link](#)) featuring various experts discussing timely topics including:

- Ep. 52: Mike Wallace - ESG Related Metrics for Accounting and Finance Professionals
- Ep. 53: Rachel Druckenmiller - Invest in Yourself | Self-Care & Self-Leadership
- Ep. 54: Efrain Rivera - How Have Tech Trends Affected Accounting Services and HR?
- Ep. 55: Alessia Falsarone - 2020: The Year of ESG Data
- BONUS | Working Remotely? | Jordan Hirsch - Tips for Working Remotely from an Experienced Remote Worker
- Ep. 56: Peter Margaritas - Storytelling in the Foreign Language of Accounting
- BONUS | Heather Fletcher - Quick Tips for those New to Remote Work
- BONUS | Wendy Tietz - Leading Online Learning
- Ep. 57: Richard Starkey - Digital Nomads

New episodes will be added on an ongoing basis with guests spanning multiple industries and disciplines.

“Count Me In” is available for listening and subscribing on iTunes, Spotify, RSS, Google Play, and on the IMA website. For more information, please visit IMA’s “Count Me In” page at <https://podcast.imanet.org/>.



IMA needs you to spread the word: CMA’s official ad campaign

This past September IMA officially launched our 4th CMA campaign year and successfully created 4 new CMA commercials! That’s at least 4 times as many ways for you to have fun sharing your CMA story, practical CMA advice, and our relevant, humorous, and inspiring new CMA ads. YOU can help someone in need of advancing their career! See the campaign [here](#).

We are asking that you share, like, and post about the CMA. When you share information on your social accounts like LinkedIn, post and answer questions on Reddit and Quora, or like the commercial on YouTube, you lend credibility to the CMA. The success of this campaign and the CMA program depends on extending IMA’s reach and voice, and we rely on volunteers like you in making that happen.

Please see below how and where you find us if you don’t already follow IMA online

Facebook: @IMAnetORG

Twitter: @IMA_News

Instagram: @IMAGlobal

LinkedIn: Search for IMA Institute of Management Accountants

YouTube: Institute of Management Accountants

Institute of Management Accountants

Webinars

IMA's webinar program enhances your career by bringing you the latest thought leadership and developments in the profession. IMA conducts more than 50 webinars every year at no cost to our members. Each qualifies for 1 to 1.5 hours of NASBA-approved CPE credits.

Webinars are open to IMA Members Only.

[April 01, 2020](#)

The Rising Importance of Technology Integration

Inside Talk

10:00 AM - 11:30 AM PT

[April 06, 2020](#)

Implementing Sustainability into Strategic Planning and Analysis

Strategic Management

10:00 AM - 11:30 AM PT

[April 07, 2020](#)

Best Practices in Talent Management

Leadership Academy

10:00 AM - 11:30 AM PT

[April 15, 2020](#)

CFO 3.0: Digital Transformation Beyond Financial Management

Inside Talk

10:00 AM - 11:00 AM PT

[April 21, 2020](#)

**"Reinventing Organizations" for Finance Professionals
(Presented at Japan Standard Time)**

Inside Talk

05:00 PM - 06:00 PM PT

[April 27, 2020](#)

Navigating Growing ESG Expectations

Inside Talk

08:00 AM - 09:00 AM PT

[April 28, 2020](#)

The CMA Exam: Test-taking Tips and Strategies

Inside Talk

07:00 AM - 08:00 AM PT

[May 05, 2020](#)

Using Social Media to Improve Workplace Leadership (Revamp)

Leadership Academy

10:00 AM - 11:30 AM PT

[June 02, 2020](#)

Storytelling (New)

Leadership Academy

10:00 AM - 11:30 AM PT

[July 07, 2020](#)

Diversity and Inclusion

Leadership Academy

10:00 AM - 11:30 AM PT

[August 04, 2020](#)

Listening Skills

Leadership Academy

10:00 AM - 11:30 AM PT

[September 01, 2020](#)

(Guest Speaker)

Leadership Academy

10:00 AM - 11:30 AM PT

[October 06, 2020](#)

Leadership Networking (New)

Leadership Academy

10:00 AM - 11:30 AM PT

[November 03, 2020](#)

Leading Across Generations

Leadership Academy

10:00 AM - 11:30 AM PT

[December 01, 2020](#)

Presentation Skills

Leadership Academy

10:00 AM - 11:30 AM PT

Click here to register for the webinars:

[IMA Webinars](#)

Institute of Management Accountants

Have You Looked at IMA's "Technology and Analytics Center" Webpage

Empowering You with Technology & Analytics

The IMA's center for educational resources focuses on key technology and data analytic trends affecting the accounting and finance profession. From webinars to research, IMA is dedicated to providing a relevant and robust portfolio of resources to better serve your technology needs.

Included on this page with examples:

Webinars

[Accountancy in The Digital Age – Relevance Gained and The Call to Action](#)
[Applying Data Ethics Principles of AI Across the Organization](#)

Articles

[Govern Your Bots](#)
[Mastering Technology](#)

Online Courses

[IMA Data Analytics & Visualization Fundamentals Certificate™](#)
[IMA Excel: Data Analytics - Combo Package](#)

Research

[Impact of Big Data on Finance: Now and in the Future](#)
[How to Embrace Data Analytics to Be Successful](#)

Blogs

[Upskill The Workforce You Have Instead of Waiting for The One You Want](#)
[We Are All Futurists Now](#)

Podcasts

[Ep. 51: Dr. Kelly Richmond Pope - Fraud, Film, and Lifelong Learning](#)
[Ep. 50: Blake Oliver – So what's the big deal about the Cloud?](#)

Visit the [WEBPAGE](#) often for updated content

Conferences

Annual Conference Exposition (ACE2020), Atlanta, GA - June 20-24, 2020

Plan now to attend IMA's next conference and create your own magical opportunity.

Demonstrate to your employer that you are committed to the highest levels of professionalism, willing to take on new challenges, and eager to stretch beyond your current responsibilities by building valuable skills and knowledge to improve performance immediately. Earn NASBA-approved 30+ CPE while sharing your future through highly focused educational sessions, panel discussions, and inspiring discussions with the profession's leaders. Don't be left out.

[Click here to Register](#)

Annual Student Leadership Conference - "Power Your Potential", Pittsburg, PA - November 12-14, 2020

It's time to think differently and create your own opportunity for career success. In this age of social networking, there is nothing online that has yet to replace the importance of meeting people in person. Learn how to position yourself for future success.

As in past years, students will have an excellent opportunity to network with accountants and finance professionals, fellow students, and educators from across the country. Learn from leading experts about career opportunities, the value of the Certified Management Accountant (CMA®) certification, IFRS, environmental accounting, leadership, job search techniques, and more

[Click here to Register](#)

Institute of Management Accountants

Women's Accounting Leadership Series

All are invited to join like-minded colleagues in an engaging discussion on how to navigate opportunities to improve your career success. Expand your business network while sharpening leadership skills at the Women's Accounting Leadership Series.

New York City

Friday, April 24, 2020

9 a.m. – 3 p.m.

5.8 CPE

[Register now](#)

To register for both events, please click on the "Register Now" link and add the movie to your cart during checkout!

Free Movie Screening and Discussion of *All the Queen's Horses*

Thursday, April 23, 2020

6 p.m. – 9 p.m.

2.0 CPE

We are excited to offer a free movie screening and discussion with the director of the award-winning documentary *All the Queen's Horses*, which investigates how a city comptroller was able to steal \$37,000 a day for two decades. Light refreshments will be served.

This event will be held at **EY Times Square** (5 Times Square, 22nd Floor Café, New York, NY 10036).

[Register now](#)

For more details on the Women's Accounting Leadership Series, view our full agenda and bios [here](#).

For more details on the Movie Screening and Discussion, view our full agenda [here](#).

For more information on NASBA CPE policies, click [here](#).



Associate Organizations

Diablo Valley Chapter of the IMA

The Diablo Valley Chapter (#0356) of the Institute of Management Accountants was chartered in 1980. The chapter is part of the Golden West Regional Council and the Warner Division which contains chapters that have less than 125 competition members. We exist to serve local accounting and finance professionals with continuing education programs and networking opportunities. If you are a college student, young professional or seasoned professional, we have services that will help you in your career.

April 2020

No Technical Program Scheduled

Excel In Accounting

Excel in Accounting is a community of finance and accounting professionals in and around San Francisco who want to learn and share advanced Excel spreadsheet techniques used specifically for finance and accounting. We promote Excel mastery through training sessions, users group meetings and online media discussion.

April 2020

No Technical Program Scheduled

Typical Programs:

Pivot Tables & Pivot Charts
Dashboards, Charts & Graphs
Functions & Formulas
Tools, Tips, Tricks and Traps
Lookups
Intro to Macros, Macro Recorder
Power Query

AFWA

The Accounting and Financial Women's Alliance represents professional women in accounting and finance and provides them an opportunity for networking and continuing professional education (CPE) with peers at the local, regional and national level. Networking, continuing education and leadership opportunities are essential building blocks for professional women and AFWA East Bay provides ongoing opportunities for members to participate and develop powerful business skills. With meetings conveniently located in San Ramon and Walnut Creek, online resources and webinars, AFWA offers a place for exchanging ideas, learning new skills and making great career and personal connections.

April 2020

No Technical Program Scheduled

IIA

Internal auditing is an independent, objective assurance and consulting activity designed to add value and improve an organization's operations. It helps an organization accomplish its objectives by bringing a systematic, disciplined approach to evaluate and improve the effectiveness of risk management, control, and governance processes. .

April 2020 Seminar

Event Type: Speaker Presentation

Start Date/Time: 4/23/2020 @ 8:30 AM

End Date/Time: 4/23/2020 @4:30 PM

Location: Bio-Rad (2000 Alfred Nobel Dr, Hercules, CA 9454) | California

Please join us for our April seminar: Three-lines of Defense, Ethical Risk Management, and IT Governance (non-technical) presented by Jay Ranade.

This seminar will be a multi topic presentation covering:

3 lines of defense - understanding roles and responsibilities to harmonize value creation and internal mobility within an organization

Ethical risk management - defining, discussing and addressing the unique regulatory, cultural, and personal ethical dilemmas confronted by managers

IT governance - Alignment, value delivery, risk management, performance management, and resource utilization

This event offers 8 CPEs and will be hosted by Bio-Rad in Hercules, CA. [More information, including registration, will be posted soon.](#)

East Bay-Northern California
Chapter of the IMA

The Institute of Management Accountants (IMA®) is the world's leading organization dedicated to empowering management accounting and finance professionals to drive business performance.

The East Bay Chapter (Chapter # 112) serves the Alameda and Southern Contra Costa Counties Area in Northern California.

East Bay - Northern California 2019-20 Board of Directors

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The Association of
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