

# THE READ INK

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

## President's Message

### East Bay Chapter Members and Friends,

I hope that everyone is safe and well. As we work through the COVID-19 pandemic together, IMA wants to help those in the accounting and finance profession keep moving forward as best they can during this disruption. There are several select IMA resources available free to nonmembers for the next 90 days. Check them out by clicking on the links below....

- [CMA Resources](#),
- [Academic Resources](#),
- [CMA Scholarship for Students](#),

And there are many [Webinars](#) and [Continuing Education and Leadership](#) classes to take advantage of....

#### [Upcoming Webinars](#)

- Using Social Media to Improve Workplace Leadership (May 5<sup>th</sup>)
- Enterprise Risk Management: Essential to Organizational Success (May 7<sup>th</sup>)
- Optimizing Technology Investments to Drive Productivity (May 13<sup>th</sup>)
- Virtualizing Finance and Accounting - Ground Rules for Closing the Books from Anywhere (May 20<sup>th</sup>)

#### [Continuing Education and Leadership](#)

- [IMA Data Analytics & Visualization Fundamentals Certificate™](#): New! Now free through June 30\*, learn how emerging technologies are driving change across businesses and develop new skills in data analytics and visualization. Earn an IMA professional certificate, a digital badge, and 9 NASBA CPE credits.
- [IMA Strategy and Competitive Analysis Learning Series\\*](#): Exclusive opportunity to access this package for free through June 30\*\*. This series of five engaging, online courses and practice question bank is aligned to the content of the CSCA® (Certified in Strategy and Competitive Analysis) credential. Earn up to 21 NASBA CPE credits.
- [IMA's "Webinars on Demand"](#): This highly rated series covers key management accounting topics. Explore [Webinars on Demand: Technology](#), [Webinars On Demand: Technology II](#), [Webinars on Demand: Leadership](#), [Webinars on Demand: Leadership II](#), and [Webinars On Demand: Strategic Management](#).
- [IMA Leadership Academy](#): A resource for supporting leadership education to aid in career advancement.
- [Small Business Planning During COVID-19](#)

For more information, click on the following link....[IMA Resources](#)

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

[www.imanet.org](http://www.imanet.org)

CMA® | You've got to earn it.



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.

### Did You Know!

#### Blockchain 101 by IMA



Blockchain 101 by IMA, developed with contributing author Sean Stein Smith, DBA, is a gamified e-learning course designed to increase your foundational knowledge of blockchain technology.

Blockchain 101 by IMA® (Institute of Management Accountants) is a gamified e-learning course designed to help you develop a foundational level of knowledge in the area of blockchain technology. This course focuses on various elements of blockchain most relevant to management accountants.

The course features a personalized game in a blockchain complex comprised of four towers, each presenting new blockchain concepts on each floor. After completing the activities on each floor, you will continue to advance through the course until you reach the top of the tower, where you must answer knowledge-check questions. Finally, before you can exit the game, you must pass a rapid-fire final assessment, where correct answers will earn you coins that are needed to exit the blockchain complex. After earning enough coins to exit, 1 NASBA CPE credit will be awarded. Throughout the course, your progress will be tracked visually by building your own "knowledge blockchain," which will signify your understanding of blockchain topics. Blockchain has the potential to revolutionize and reshape accounting and finance. Before that occurs, however, management accountants need to understand what blockchain represents. Enroll in Blockchain 101 by IMA now to begin your journey into understanding the intrigue and value of blockchain technology!

Earn 1 NASBA CPE credit. Subscription expires one year from purchase date. [Link to order](#)

### Informational Articles to Assist Your Career!

**Bay Works Recruiting** has provided the following article on "Live Remote Office: Final Virtual Team Tip"



At this point, you are probably Zoomed out, sick of Skyping and you don't want to GoToMeeting. Here is one final tip to maximize your virtual connections.

In this pandemic, we are continuing to learn how to best manage our Accounting and Finance teams virtually. We have established all types of virtual meetings: morning game plan meetings, end of day wrap up meetings, month end meetings, Friday fun meetings, project meetings, etc.

What is missing when you go from an in-person office to virtual meetings is the casual time spent in the office. We typically used that time to share ideas with colleagues, bounce something off your boss, get that Excel shortcut from someone, etc.

The key to getting that office feel without being physically together is to set up a "Live Remote Office." This can be a block of time (2+ hours) where everyone just works together online.

This live remote office has several benefits: [Link to Benefits](#)



**Robert Half®** **Robert Half (Accountemps)** has provided the following article on "How To Find Remote Jobs Now".

From small businesses to corporations, organizations of all shapes and sizes are hiring remote workers like never before due to the ongoing impact of the COVID-19 pandemic. If you're seeking practical advice on how to find remote jobs, here are some steps you can take today:

1. **Connect with a specialized staffing firm**
2. **Search the web wisely**
3. **Tap your online network**
4. **Look far and wide**
5. **Recognize things can change**

The key to how to find remote jobs in the current market is to utilize a multipronged approach. A successful job search has always required determination, diligence and attention to detail. So, today, you'll

*(Continued on page 4)*

## 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](mailto:eastbaync@imachapter.org), or

Robert Hulin at [ima.eastbay.nc@gmail.com](mailto: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>
<b>2020</b>				
05 May	Using Social Media to Improve Workplace Leadership	1.5	10:00 AM	Leadership Academy
07 May	Enterprise Risk Management: Essential to Organizational Success	1.0	10:00 AM	Inside Talk
09 May	Financial Management Network	4.0	09:00 AM	Kaplan - Virtual Meeting
13 May	Optimizing Technology Investments to Drive Productivity	1.0	10:00 AM	Inside Talk
16 May	GWC Leadership Training and Annual Meeting	4.0	08:45 AM	Zoom - Virtual Meeting
20 May	Virtualizing Finance and Accounting - Ground Rules for Closing the Books from Anywhere	1.0	10:00 AM	Inside Talk
21 May	EB-NC IMA Board Meeting	0	06:00 PM	Zoom - Virtual Meeting
02 Jun	Storytelling Skills for Management Accountants	1.5	10:00 AM	Leadership Academy
10 Jun	ASC 842: Get your leases ready!	1.0	10:00 AM	Inside Talk
<del>15-19 Jun</del>	<del>IMA's Annual Conference &amp; Expo (Cancelled: COVID-19)</del>	<del>30+</del>		<del>Atlanta, GA</del>
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
<b>2021</b>				
27-29 Feb	REST 2021	22		Reno, NV
13-16 Jun	IMA's Annual Conference & Expo	30+		Scottsdale, AZ

## 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

May 21, 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)

Meeting ID: 374 705 213

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

## Latest Information

*(Continued from page 2)*

need a combination of elements from a traditional job search, intertwined with a bit of innovation.

To expand on each of the above points go to the article at this [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](mailto:eastbaync@imachapter.org)

# 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

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

Almost 40 years ago, Gleim set the standard for CMA exam review. Today, as an industry leader and IMA Strategic Partner, we continue to dedicate ourselves to preparing candidates to pass quickly and confidently. The 2020 Gleim CMA Review includes thousands of the most realistic CMA exam questions, the most comprehensive coverage, dedicated and reliable support, and more. More CMAs have passed with Gleim—we have the experience to guide you to exam success! IMA chapter members, order now and save up to 25% on our [Premium CMA Review System](#).

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

Place your order directly online by going to [gleim.com/IMAEBNC](http://gleim.com/IMAEBNC) or contact Alexandra Graham at 800.874.5346 ext. 428 or [imachapters@gleim.com](mailto:imachapters@gleim.com) to learn about the significant discounts you are eligible for as an IMA Chapter member.



## Wiley Study Materials

### Wiley CMAexcel™

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.

#### Don't wait – Focus on your future now

As the business world adjusts to a "new normal," it's more critical than ever to stand out from the pack. Stay focused and productive during these challenging times by starting your CMA® (Certified Management Accountant) journey today.

For a limited time, you can [save 25% on all Wiley CMAexcel products](#). PLUS, get a 25% discount on your CMA entrance fee and IMA® (Institute of Management Accountants) membership.\*

[Save 25% with code: WILEYOFFICIAL](#)

#### Wiley CMAexcel offers you:

- 100% coverage of all CMA Learning Outcome Statements
- More than 5,000 multiple-choice questions that mimic the actual exam
- Free course updates until you pass the exam

Use code **WILEYOFFICIAL** at checkout to take advantage of this timely deal. That's a \$2,200 total value for only \$1,700.\*\* Don't wait—your career deserves it.

*"Wiley's CMAexcel Learning System gave me all the tools I needed to succeed. My favorite feature was the online test bank, which totally prepared me for the testing environment on exam day."*

**Erin Donahue, Morris Plains, NJ**

\*Use code [CMASAVE25B](#) to get 25% off CMA entrance fee and IMA membership.

\*\*Savings may vary based on items purchased from both IMA and Wiley. Offer does not apply to exam registration fees.

# East Bay - Northern California Education

## Financial Management Network

May 09, 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 May 2020 topics:**

### **Covid-19: Worry About the Things You Can Control**

#### **Field of Study: Business Management & Organization**

On March 11, 2020 the World Health Organization (WHO) declared COVID-19 a pandemic. Currently, there are close to two million cases of the coronavirus illness in over 210 countries and territories around the world. The overall impact of the virus has already destroyed small businesses, particularly in entertainment, food and beverage, hospitality; almost every industry has suffered. The morning of September 11, 2001 changed the world, and we thought this was the worst we've seen. And now one night in March, we all went to sleep and woke up in a different type of world. Kimberly Dula, CPA and Managing Partner of the Philadelphia office of Friedman LLP, discusses the overall impact of the pandemic on business.

### **Pay Equity: The Tale of Two Genders - Part I**

#### **Field of Study: Accounting**

Discrimination, racism, inequality...big words with an even bigger meaning, words that even in the year 2020 impact our lives, one way or another. One of those words that is often on the sidelines is pay equity. The Equal Pay Act (EPA) of 1963 prohibits sex-based wage discrimination between men and women in the same establishment who perform jobs that require substantially equal skill, effort and responsibility under similar working conditions. Wells Miller, Counsel, Executive Compensation & Employee Benefits at Choate, Hall & Stewart and Josh Schaeffer, Director, Valuation Practice Leader at EquityMethods, discuss inequities in pay between genders and its implications for organizations.

### **Business Coaching - Hype or Necessity?**

#### **Field of Study: Management Services**

Today's business world is growing and changing at an extreme pace. Growing numbers of business leaders and organizations are embracing coaching as a way to support their employees so they can create business solutions and stay agile in a rapidly changing business environment. Coaching is a big buzz word that is gaining traction in today's business world. Coaches work hand in hand with their clients to help them achieve their personal and career goals. Jamie Lee discusses the value of coaching in today's business environment.

### **COVID-19: Financial Reporting and SEC Disclosure Considerations**

#### **Field of Study: Accounting**

The SEC has issued guidance on disclosure and other securities law obligations that companies should consider with respect to the coronavirus disease and related business and market disruptions. Eddie Wong, Partner-in-Charge of the Asia Practice at Friedman LLP, offers his views on which accounts are most impacted and what to look for in terms of financial statement disclosures. He explains the difference between Type 1 and Type 2 disclosures and also reviews a company's going concern reporting considerations.

**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](http://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](mailto: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

### April 2020

#### New Members

Mr. Anthony Fok	Regular	04/10/2020
Mr. Corey Phillips	90 Day Membership	04/11/2020
Ms. Karen Alexander	Regular	04/15/2020
Mr. Swati Bhoyarkar	90 Day Membership	04/19/2020

#### New Members (Transfers In)

#### 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

#### May 2020 Anniversaries

Mr. Ken L Shepard	05/01/1967
Ms. Dodi L Monti, CMA, CPA	05/01/1985
Ms. Bee Michelle C. Low, CMA	05/14/2004
Ms. Sugarna Prakash, CMA	05/13/2009
Mr. Joshua Ballard, CMA, CFA	05/01/2012
Dr. Ying Guo	05/24/2013
Ms. Kristine Ebner	05/14/2015
Mr. Salvador Cisneros	05/20/2015
Ms. Heather Ann Deagen	05/27/2015
Ms. Nareeya Nalivka	05/14/2019
Ms. Tania Bali	05/23/2019
Mr. Richard Carl Farrell, CMA	05/23/2019
Ms. Linda Kilmer	05/29/2019



# Golden West Council

## Board Meetings

### 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.

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

Meeting Agenda and Reports to be published on GWC Website when available under Council Library: Folders: Golden West Regional Council / Governance / Minutes and Reports / 2018 - 2020

**Council and Chapter Leaders: Please read Agenda and Reports prior to meeting.**

### May 16, 2020 - Annual Meeting and Leadership Training Seminar

**Due to COVID-19 this will be a Virtual Meeting**

08:45 AM - 03:30 PM

As you know, IMA is a mission-driven organization that couldn't exist without the time, talent, and expertise of our volunteers. Members come from a variety of career levels and diverse backgrounds, and they serve in varying capacities on our Governing Boards, Technical Advisory Committees, as well as other short- and long-term roles. If you've been thinking about getting involved, consider attending the Leadership Training Seminar and Annual Meeting to meet and interact with Council and Chapter Volunteers.

Now is the time to take that step forward.!

#### Agenda Topics (4 Hours of CPE):

- 2020 Tax Changes: Steve Rabin, CPA is the speaker
- Essential Team Skills, IMALA Course
- Transformational Leadership IMALA Course

08:45 AM - 01:00 PM Leadership Training Seminar

01:00 PM to 03:30 PM Annual Meeting

#### Join Zoom Meeting

<https://zoom.us/j/5705024681>

Meeting ID: 570 502 4681

One tap mobile

[+16699006833](tel:+16699006833), 5705024681# US (San Jose)

Dial by your location

+1 669 900 6833 US (San Jose)

+1 346 248 7799 US (Houston)

Meeting ID: 570 502 4681

Find your local number: <https://zoom.us/u/acnw5pYVbq>

# Golden West Council

## 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](mailto:pattmayer@earthlink.net)



# Institute of Management Accountants

## 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.

## Message to All IMA Stakeholders on the Coronavirus

Jeff Thomson

Updated May 1, 2020

IMA® (Institute of Management Accountants) offers our heartfelt support to those directly or indirectly affected by the coronavirus outbreak around the world. We hope everyone around the world is safe, healthy, and secure with their families. Our approach to this challenge has been simple: to demonstrate social responsibility for the safety and well-being of our stakeholders, including our staff, our professionals and students in 150 countries, and our partners.

With the world continuing to fight the global coronavirus pandemic, IMA employees across IMA offices around the world continue to work from home for business continuity and staying safe with their families and our offices in China have reopened on a staggered basis. Business continuity and taking care of our members at a time when they truly need us the most also are important priorities. We also made a sizable monetary donation for N-95 masks and other critical supplies in China and the U.S.

Our number-one priority at all times remains social responsibility for the safety of our global stakeholders, including staff, volunteers, CMAs, candidates and partners. As such, due to many unknowns about the virus, including how it is contracted and spread – all IMA in-person events, conferences, and meetings scheduled through May 31 are cancelled or postponed. This includes any group event and all chapter and council events. Virtual events are encouraged as an alternative.

Our Annual Conference & Expo (ACE) scheduled for June has been cancelled as well but we will be holding our 2020 Annual Meeting of Members virtually on Saturday, June 20 from 10-11 a.m. EDT. Members can register to attend the meeting here.

In addition, our CMA® (Certified Management Accountant) Chinese language exams have been postponed from May 10, 2020 to Sunday, July 26, 2020 and from November 7, 2020 to December 6, 2020. Our July 25 Chinese language CMA exam remains unchanged. Should conditions change and if safety remains a concern or government regulations limit site availability, we will reschedule the exams to a later date.

Our English exam testing window for May/June has been extended to July 31, 2020 and our September/October testing window is opening early on August 1, 2020. Testing is subject to the availability of local Prometric Testing Centers. For both testing windows, we are waiving all fees for transferring from one testing window to the next or rescheduling appointments within a testing window. More information on the impact to CMA candidates is available [here](#).

We at IMA are making the most of remote learning, and we've expanded our offering of free courses to members, including the just-released Data Analytics and Visualization Fundamentals Certificate TM, the IMA Strategy and Competitive Analysis Learning Series®, and Blockchain 101 by IMA (all free of charge until June 30), and our live and on-demand webinars.

The IMA leadership team is monitoring the outbreak daily and its impacts on our stakeholders. We will communicate any changes we feel members should know about. Times like these make us all realize how interconnected and interdependent we are. We are asking that you please stay safe and take care of your family. We will come out of this emergency more resilient than before if we all commit to being members of a true learning organization and exemplify a genuine people-first philosophy. Let's demonstrate courage, care, and conviction of purpose.

# Institute of Management Accountants

## IMA's Annual Meeting of Members

### Connect with IMA senior volunteers as they share their vision for the future

You are invited to join this important event, free for members

The IMA® (Institute of Management Accountants) Global Board of Directors has voted to hold its 2020 Annual Meeting of Members virtually due to the COVID-19 crisis. All IMA members are welcome to attend this free event, which will take place on Saturday, June 20, 2020, from 10 a.m. to 11 a.m. EDT

This is an opportunity to connect with senior volunteer leaders who will share stories about supporting the IMA community during the COVID-19 crisis. IMA Chair Christian Cuzick, CMA, will recap his year as Chair and introduce IMA's Incoming Chair, Paul Juras, Ph.D., CMA, CPA, who will share his vision for IMA's future.

Hear directly from IMA President and CEO Jeff Thomson, CMA, CSCA, CAE, about IMA's focus on business continuity during COVID-19 and IMA's commitment to emerging stronger than ever for members.

[Register Now](#)

We look forward to seeing you (virtually) at the [Annual Meeting of Members](#)



## Stronger Together



# 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:

- BONUS | Hanadi Khalife - Business Continuity in the Middle East & India (with Rouba Zeidan)
- Ep. 58: Stephen Rivera - Leadership in Crisis: A Frontline Perspective
- BONUS | Dr. Talal Abu Ghazaleh - The Godfather of Arab Accounting (with Rouba Zeidan)
- Ep. 59: Danetha Doe - Entrepreneurial Mindset with Accounting Skills
- Ep. 60: Chris Clulow - Embracing Technology to Lead in Accounting
- Ep. 61: Jose Zavala - Cloud Accounting: What does that mean to me?
- Ep. 62: Doug Boyle - The Emotionally Intelligent Accountant

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 4<sup>th</sup> 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.*

[May 05, 2020](#)

**Using Social Media to Improve Workplace Leadership**

Leadership Academy

10:00 AM - 11:30 AM PT

[May 07, 2020](#)

**Enterprise Risk Management: Essential to Organizational Success**

Inside Talk

10:00 AM - 11:30 AM PT

[May 13, 2020](#)

**Optimizing Technology Investments to Drive Productivity**

Inside Talk

10:00 AM - 11:00 AM PT

[May 20, 2020](#)

**Virtualizing Finance and Accounting - Ground Rules for Closing the Books from Anywhere**

Inside Talk

10:00 AM - 11:00 AM PT

[June 02, 2020](#)

**Storytelling (New)**

Leadership Academy

10:00 AM - 11:30 AM PT

[June 10, 2020](#)

**ASC 842: Get your leases ready!**

Inside Talk

10:00 AM - 11:00 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

[Applying Data Ethics Principles of AI Across the Organization](#)  
[AI and the Future of Financial Management](#)

### Articles

[Technology in the New Decade](#)  
[Upskilling Management Accountants](#)

### Online Courses

[IMA Data Analytics & Visualization Fundamentals Certificate™](#)  
[Blockchain 101 by IMA](#)

### 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. 57: Richard Starkey - Digital Nomads](#)  
[Ep. 54: Efrain Rivera - How Have Tech Trends Affected Accounting Services and HR?](#)

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

## Conferences

### ~~Annual Conference Exposition (ACE2020), Atlanta, GA - June 20-24, 2020~~ **CANCELLED**

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 approves 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 Conference Exposition (ACE2021), Scottsdale, AZ - June 13-16, 2021**

### **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.

### Philadelphia, PA

**Friday, October 9, 2020**

9 a.m. – 5 p.m. followed by a networking reception

Temple University - Fox School of Business

1801 Liacouras Walk, Philadelphia, PA 19122

**SAVE THE DATE**

## COSO Certificate Programs

### The Expertise You Need

Drive business performance through risk management and internal control. Offered as either live workshops or self-study online courses, these resources show you how to implement effective ERM and internal control systems using the COSO frameworks.

#### COSO Enterprise Risk Management

**NEW!**

Learn how to manage risk more effectively and strengthen strategic achievements through integration of the 2017 updated COSO ERM Framework concepts and principles.

#### COSO Internal Control—Integrated Framework

Develop your expertise in designing, implementing, and conducting an effective internal control system to help your organization gain operational efficiencies, deter fraud, make better business decisions, and positively influence better risk management practices.

## COSO Enterprise Risk Management Online Self-Study



This course offers the same topics presented in the ERM workshops, in a convenient online course. Learn the concepts and principles of the newly updated ERM Framework and how to integrate these essential concepts into your organization's strategy-setting process to drive business performance. Earn 13.5 NASBA CPE credits, a COSO Certificate, and a digital badge.

[Link to Register](#)

## COSO Internal Control – Integrated Framework Online Self-Study



For those who prefer a self-study option, this COSO Internal Control—Integrated Framework product offers the same topics presented in the COSO workshops, in a convenient online course. Successful course and exam completion earns 16.5 NASBA CPE credits and the COSO Certificate of Educational Achievement.

[Link to Register](#)

# 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.

**May 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.

**May 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.

**May 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. .

### May 2020 Program and Social

Event Type: Speaker Presentation

Start Date/Time: 5/28/2020 2:00 PM

End Date/Time: 5/28/2020 4:00 PM

Location: TBD | California

Save the date for our May program and social! More details to come.

Website: <https://chapters.theiia.org/northern-california-east-bay/Pages/default.aspx>

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

President	Michael Gorski
VP of Administration	<a href="#">Open</a>
Director: Competition	<a href="#">Open</a>
Secretary	<a href="#">Open</a>
Treasurer	Robert Hulin
Investment Committee	
	Bill Sawyer
	Pankaj Pandey
	Chung Bothwell
VP of Professional Education	Sheela Chandrasekhara
Director: CMA Program	William Sievers
Director: FMN Program	Tricia Scalzo
Director: Ethics Program	<a href="#">Open</a>
Director: Excel Program	<a href="#">Open</a>
Director: Technical Meetings	<a href="#">Open</a>
VP of Communications	<a href="#">Open</a>
Director: Community Services	Chung Bothwell
Director: Marketing	<a href="#">Open</a>
Director: Social Media	<a href="#">Open</a>
Director: Newsletter	Robert Hulin (Acting)
Webmaster	Robert Hulin
VP of Membership	William Sievers
Director of Member Relations	<a href="#">Open</a>
VP of Young Professionals	Ken Shepard
Director of Student Services	Brian Carlson
Board Advisors	Sherry Morse

Please contact Board Members via [eastbaync@imachapter.org](mailto:eastbaync@imachapter.org).



The Association of  
Accountants and  
Financial Professionals  
in Business

EAST BAY-NORTHERN CALIFORNIA CHAPTER