

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 and doing their best to endure this unprecedented time in our lives. A friendly reminder that while we might be somewhat confined to our "spaces", there is still an opportunity to learn and grow. Here's what IMA has in store for us this month;

IMA's Virtual Annual Meeting of Members

This virtual meeting is an opportunity for IMA members to connect with senior volunteer leaders and staff 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. All IMA members are welcome to attend this free event taking place on Saturday, June 20, at 10:00 a.m. EDT. [Register now](#)

#IMAWorksFromHome

IMA is kicking off a fun social initiative to showcase working from home. We are asking for pictures of "your workstation, your new 'coworkers,' or a screenshot from a virtual meeting." Post on your social platforms using the hashtag #IMAWorksFromHome or send it to us at socialmedia@imanet.org. We could feature your photo on social media or on a slide for the upcoming Virtual Annual Meeting of Members.

50% off CMA entrance fee

Start your tomorrow today and save 50% on the CMA entrance fee and IMA membership with discount code CMA50. Take advantage of this offer before it expires on June 5, 2020. Enroll in the CMA program and prepare yourself for the future!

Count Me In for CPE

New FREE member benefit and based on IMA podcasts about all things affecting the accounting and finance world. You can hear the latest insights on management accounting topics, as told by industry experts, in only 10-20 minutes. Earn 0.2 ICMA CPE credits for each conversation about technology and data analytics, business transformation, agile project management, accounting education, leadership, and more! New courses are added each month.

And...there are many webinars and Continuing Education and Leadership classes to take advantage of.....

For more information, click on the following link....IMA Resources

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

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!

Informational Articles to Assist Your Career!

Bay Works Recruiting has provided the following article on

"Pandemic: 3 Work Questions You Should Consider"

Surreal. Uncertain. Challenging. All words to describe the current pandemic – Covid-19.



Whether you are part of a layoff or running ragged covering work and kids, there are three questions that you have probably been thinking about.

Company

Do you agree with how your company has handled the pandemic?

With things changing daily, many companies have struggled to get their bearings. At some companies, the senior management has kept employees in the dark about employment decisions, cost cutting, etc. Conversely, some companies have championed this time with over communicating to employees and providing a sense of stability. Is your company a place you would like to continue to work?

Job

Are you reconsidering what your role should be?

Given the pre-Covid organizational structure and what things may look like in the future, how do you feel about your current role? Are you looking to take on more responsibility? Is your current role viable in the post-Covid structure? Has this time spurred you to follow a dream of owning your own business or taking a different career route?

Team

Are you happy with the individuals you have on your team?

Transitioning your team to work from home or making the hard decision to layoff or furlough may have you re-evaluating the individuals in your group. Who will still be an asset? Which employee needs extra focus being on their own? What will be the new expectations going forward for team members? Do you need to transition someone out?

Hidden in the challenges, is an amazing opportunity to make changes you may not have previously considered. You have the ability to adjust your career choices: Where? What? Who?

Please feel free to reach out to our team at BayWorks Recruiting for additional market updates and recruiting services. Take care! [Link](#)

Robert Half (Accountemps) has provided the following article on "Accounting Skills You Need to Succeed on the Job".



The hiring environment has become more uncertain in recent months, to say the least. However, the positive news is that many businesses are still staffing both on-site and remote positions, including in their accounting and finance departments. If you have a well-developed set of accounting skills, that could increase your chances of being a strong contender for jobs you are targeting.

Essential accounting skills encompass more than the ability to crunch numbers, complete expense sheets and depreciate fixed assets. In addition to traditional accounting knowledge, there are a number of hard and soft skills that every accounting professional needs, whether they are working in an office or remotely.

Following is an overview of seven sets of accounting skills — some technical, some not — that can help you to advance your accounting job search, as well as your accounting career.

1. **General business knowledge**
2. **Up-to-date technology expertise**

(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, 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 Jun	The Role of Upskilling and Change Management on Technology Adoption	1.5	10:00 AM	Inside Talk
02 Jun	Storytelling Skills for Management Accountants	1.5	10:00 AM	Leadership Academy
08 Jun	Consumption Taxes and E-Commerce in the Post-Wayfair Environment	1.0	10:00 AM	Inside Talk
13 Jun	Financial Management Network	4.0	09:00 AM	Kaplan - Virtual Meeting
10 Jun	ASC 842: Get your leases ready!	1.0	10:00 AM	Inside Talk
15-19 Jun	IMA's Annual Conference & Expo (Cancelled: COVID-19)	30+		Atlanta, GA
21 Jun	EB-NC IMA Board Meeting	0	06:00 PM	Zoom - Virtual Meeting
24 Jun	"Reperspectivizing": Adjusting to Our New Normal	1.0	10:00 AM	Inside Talk
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
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

June 18, 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

Latest Information

(Continued from page 2)

3. **Communication skills**
4. **Adaptability and flexibility**
5. **Creativity and a willingness to help others**
6. **Customer service orientation**
7. **Specialized experience**

Look for ways to boost your accounting skills

As you work to grow your career, consider earning in-demand accounting certifications. And always look for opportunities to get training that will make you more marketable as a job candidate, and more valuable as a team member.

That said, for many of the above skills, on-the-job experience is the best method for learning. One way to gain that experience is by working in temporary accounting and finance positions while you build up your resume and search for a full-time role.

In this uncertain time, many businesses are looking to staff accounting and finance positions with temporary and part-time professionals who they can count on to get the job done — and perhaps, work remotely. And the experience could put you on the path to finding more permanent employment sooner.

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

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 are eligible for 40% off the Premium Review System, 35% off the Traditional Review System, and 30% off the Mega Test Bank until 6/5/20. Orders can also be placed online at [Gleim.com/IMAChapter](https://www.gleim.com/IMAChapter) or by using your chapter's custom ordering link ([gleim.com/IMAEBNC](https://www.gleim.com/IMAEBNC)).

Please note that the 40% discount will be displayed at check out and not on the initial welcome screen. Remember, this special offer is not available to the general public so please make sure your chapter members know they are getting the best deal we offer!

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](https://www.gleim.com/IMAEBNC) or contact Alexandra Graham at 800.874.5346 ext. 428 or 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 (**Ends June 5, 2020**), 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

June 13, 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 June 2020 topics:

Impact of Pandemics in U.S. and Global Economies – Part I

Field of Study: Economics

December 31, 2019, at midnight, we celebrated the start of a New Year! All over the world, fireworks went off to welcome a new beginning. Most of us made our resolutions, looking forward to a better year ahead, leaving the past behind, optimistic about new jobs, new opportunities, new chapters. The U.S. economy was in the longest economic expansion stage in its history, the job market was growing consistently, the impact of the expansionary fiscal policy was waning, monetary policy was historically accommodative and consumer sentiment remained high and then...COVID-19 happened, and our lives changed overnight. Dr. Robert McNab, professor of economics at Old Dominion University, Strome College of Business, discusses the impact of pandemics in U.S. and global economies.

Ethics and the Human Concern – Part I

Field of Study: Regulatory Ethics

The International Ethics Standards Board for Accountants (IESBA) is an independent global standard-setting board. On January 1, 2015, Dr. Stavros Thomadakis was appointed independent Chairman of the IESBA. His primary goal was to “lead the IESBA to produce high-quality ethics standards for the global accountancy profession in the form of the Code of Ethics for Professional Accountants (the Code).” On July 25, 2019, Dr. Thomadakis was reappointed as IESBA Chairman for a one-year renewable term that commenced January 1, 2020. Dr. Stavros Thomadakis discusses the major accomplishments of the board in restructuring and revising the Code, including International Independence Standards.

Chairman of the FASB: A Career in Review

Field of Study: Accounting

Running successful businesses in today’s fast-paced global environment has become increasingly costly and complex, and accounting standards are not immune to this. Financial statement preparers, as well as users, have expressed concerns that current generally accepted accounting principles (GAAP) can be unnecessarily complex. In an effort to address these concerns, in May 2014, the Financial Accounting Standards Board (FASB) launched what is known as the Simplification Initiative. Russell Golden, Chairman of the FASB, discusses more about this initiative and some of the highlights of FASB accomplishments during his career at FASB.

Pay Equity: The Tale of Two Genders – Part II

Field of Study: Accounting

On January 29, 2009, President Obama signed the first piece of legislation of his Administration: the Lilly Ledbetter Fair Pay Act of 2009 (“Act”). The Act states the Equal Employment Opportunity Commission’s (EEOC) longstanding position that each paycheck that contains discriminatory compensation is a separate violation regardless of when the discrimination began. Given pay equity legislation is progressing rapidly, more and more companies are performing pay equity studies. Wells Miller, Counsel, Executive Compensation & Employee Benefits Group at Choate, Hall & Stewart and Josh Schaeffer, Director, Valuation Practice Leader at EquityMethods, give us their insights.

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 it 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

May 2020

New Members

Ms. Tiffany Rasmussen	90 Day Membership	05/06/2020
Mr. Ren Li	Regular	05/13/2020
Mr. Daniel Kubo	Regular	05/27/2020

New Members (Transfers In)

Members - Received CMA / CSCA

Mr. Patrick David Wilkie, CMA	CMA	05/15/2020
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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

June 2020 Anniversaries

Mr. Mark A Starrett, CMA, CPA	06/14/2007
Ms. Karla M. Brauer, CPA	06/17/2008
Mr. Perry P. Choi, CMA, CSCA	06/25/2008
Ms. Gerald Anne DeRubeis, CMA	06/02/2009
Mr. Arshdeep S Khinda	06/28/2018



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.

August 15, 2020 - Quarterly Board of Directors Meeting

Due to COVID-19 this will be a Virtual Meeting

12:00 PM to 02:00 PM

Join Zoom Meeting

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

Meeting ID: 570 502 4681

November 19, 2020 - Quarterly Board of Directors Meeting

Due to COVID-19 this will be a Virtual Meeting

06:30 PM to 08:30 PM

Join Zoom Meeting

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

February 27, 2021 - Quarterly Board of Directors Meeting

This tentatively is a in-person meeting after the first day of REST with call-in capabilities.

05:30 PM to 04:30 PM

Join Zoom Meeting

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

May 15, 2021 - Leadership Training Seminar

09:00 AM to 01:00 PM

LOCATION: Biltmore Hotel and Suites, Santa Clara California
2151 Laurelwood Rd, Santa Clara, CA 95054 [Map](#)

Cost: \$40.00 per person for Continental Breakfast and Lunch
Please contact [Nicole Sheets](#) of your meeting attendance.

May 15, 2021 - Annual Board of Directors Meeting

01:30 PM to 03:30 PM

In Person and Zoom Meeting

LOCATION: Biltmore Hotel and Suites, Santa Clara California
2151 Laurelwood Rd, Santa Clara, CA 95054 [Map](#)

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

Zoom

<https://us02web.zoom.us/j/89776672979?pwd=RDlQZVNtZ1paa3NPWldlWkhiaDhZdz09>

Meeting ID: 897 7667 2979

Password: 669841

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



Institute of Management Accountants

Message from the President and CEO

Jeff Thomson

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.

May 28, 2020

I hope you, your families, and your communities are staying healthy as the world slowly and safely unlocks its economies and unleashes the passion and innovation of its people. I am so proud of IMA's staff and volunteers for taking care of themselves, of their families and of you – our loyal and resilient professionals, exam candidates, students and academics. I hope we are making you proud.

We consider it our obligation to serve you even better in this time of need, through free resources, relaxed hardship rules, and a spirit of compassion. Despite the economic uncertainty that lies ahead, IMA continues to weather the coronavirus storm with a strong balance sheet and the will and resolve of its people. We plan to invest in our future, which is your future, as we finalize our budget for fiscal 2021. And, while the world largely contracts, IMA is still growing in some areas. Membership is up 6% and the number of new CMAs awarded is up by 47% (year-over-year for the first 10 months of Fiscal Year 2020).

With economies beginning to safely open, I'm confident that the demand for CMA certification will return to previous growth levels, although it will take time. Many CMA candidates have resumed their studies and are sitting for the exams at many of the reopened [Prometric testing centers](#) in China, the U.S., and around the world. Demand for the new CMA exam, launched in January with new domains including Technology and Analytics, remains strong around the world as candidates and employers continue to see value in the program - especially in these disruptive times.

Your future remains IMA's top priority. We continually add to IMA's suite of [free learning resources](#) (which includes some of our leading courses that normally cost hundreds of dollars). We've recently added a new member benefit, [Count Me In for CPE](#), IMA's popular podcast about all things affecting the accounting and finance world, which now offers ICMA Continuing Professional Education (CPE) credits.

In the interest of keeping everyone safe, all IMA live events are suspended until further notice. IMA Global and many of our volunteer committees, chapters, and councils have been finding innovative ways to deliver learning and networking to you virtually.

IMA Global is also planning a major virtual event. We're looking forward to holding IMA's Annual Meeting of Members virtually on Saturday, June 20, from 10 a.m. to 11 a.m. EDT. Here you can meet IMA's senior leaders, hear about how IMA is enduring this challenging time, and learn about our plans for the future. This meeting is open to members only and [preregistration](#) is required.

Perseverance, innovation, and creativity have been important themes for IMA. How are you managing COVID-19? [Share your story](#) on myIMA Network.



Sincerely,

Jeff Thomson, CMA, CSCA, CAE
President and CEO

"I think that when the dust settles, we will realize how little we need, how very much we actually have, and the true value of human connection." - Anonymous

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

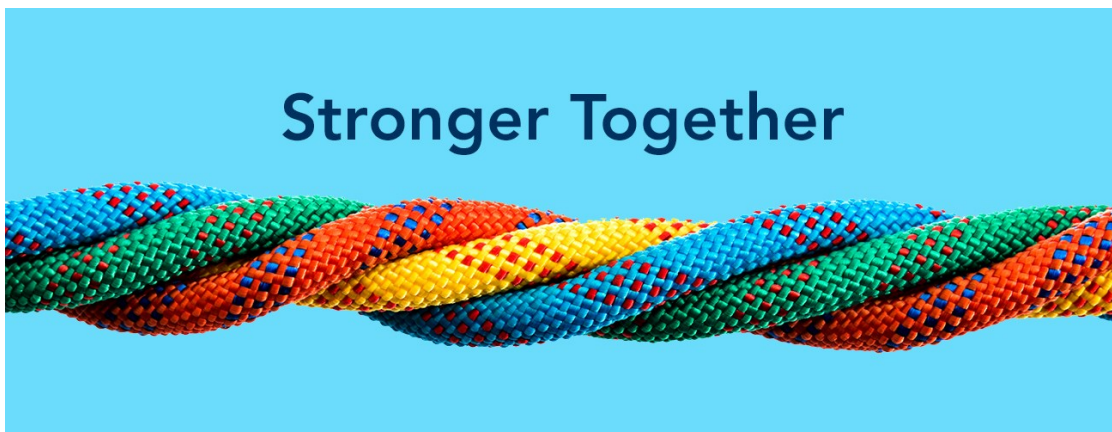
The IMA® (Institute of Management Accountants) Global Board of Directors has voted to hold its 2020 Annual Meeting of Members virtually due to the COVID-19 crisis. All IMA members are welcome to attend this free event, which will take place on Saturday, June 20, 2020, from 10 a.m. to 11 a.m. EDT

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](#)



Become Part of IMA's Global Leadership

IMA is currently accepting applications for the IMA Small Business Committee. Applications will be accepted through [June 15, 2020](#). Being a volunteer leader can help you build your leadership skills and is a great way to engage with IMA members. Please click [here](#) to submit an application and upload your cover letter, resume, and/or bio. Note: to apply, your IMA member login is required. Please note that IMA does not reimburse committee members for travel to meetings. Volunteers, therefore, should have the financial means and/or the support of their employers to participate in face-to-face meetings.

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

- Ep. 63: Ray Hutchins & Mitch Tanenbaum - How You Can Leverage Cybersecurity to Increase Your Value to Any Organization
- BONUS | International Management Accounting Day: Jeff Thomson - Creating Value in Critical Times (with Rouba Zeidan)
- BONUS | Richard Li - Business Continuity in China (with Rouba Zeidan)
- Ep. 64: Rohit Thakkar - The Business Partner as a Co-Pilot
- Ep. 65: Patricia Werhane - The Ethics of Commerce During Crisis
- Ep. 66: John Stretch - Stakeholder Capitalism
- BONUS | Alain Mulder and Bernardin Generalao - Business Continuity in Europe
- Ep. 67: Gordon Hofman - How Can I Improve My Organizational Culture for Better Productivity?
- Ep. 68: Paul Miller - Tax Implications and Planning due to COVID-19
- Ep. 69: Sandra Clarke - Finance & Innovation -- The Perfect Partnership

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.

June 01, 2020

The Role of Upskilling and Change Management on Technology Adoption

Inside Talk

10:00 AM - 11:30 AM PT

June 02, 2020

Storytelling Skills For Management Accountants

Leadership Academy

10:00 AM - 11:30 AM PT

June 08, 2020

Consumption Taxes and E-Commerce in the Post-Wayfair Environment

Inside Talk

10:00 AM - 11:00 AM PT

June 10, 2020

ASC 842: Get your leases ready!

Inside Talk

10:00 AM - 11:00 AM PT

June 24, 2020

"Reperspectivizing": Adjusting to Our New Normal

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

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

Articles

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

Online Courses

[Beyond the Basics: Data Analytics and Visualization for Accounting Professionals](#)
[IMA Data Analytics & Visualization Fundamentals Certificate™](#)

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. 69: Sandra Clarke - Finance & Innovation -- The Perfect Partnership](#)
[Ep. 68: Paul Miller - Tax Implications and Planning due to COVID-19](#)

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.

June 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.

June 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.

June 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. .

June 2020 Program and Social

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	Open
Director: Competition	Open
Secretary	Open
Treasurer	Robert Hulin
Investment Committee	
	Bill Sawyer
	Pankaj Pandey
	Chung Bothwell
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Director: CMA Program	William Sievers
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Director: Ethics Program	Open
Director: Excel Program	Open
Director: Technical Meetings	Open
VP of Communications	Open
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Director: Marketing	Open
Director: Social Media	Open
Director: Newsletter	Robert Hulin (Acting)
Webmaster	Robert Hulin
VP of Membership	William Sievers
Director of Member Relations	Open
VP of Young Professionals	Ken Shepard
Director of Student Services	Brian Carlson
Board Advisors	Sherry Morse

Please contact Board Members via eastbaync@imachapter.org.



The Association of
Accountants and
Financial Professionals
in Business

EAST BAY-NORTHERN CALIFORNIA CHAPTER