

THE READ INK

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

President's Message

East Bay Chapter Members and Friends,

First, Happy Thanksgiving to all! Take a moment to recognize and thank those around you. I know I'd like to give a great big Thank You to our Chapter Board of Directors and all the incredible members we have for making our chapter such a success. Dedicated, smart, and hardworking folks that are making a difference for all of us. Thank You!



Second, don't forget to check out IMA's "Count Me In" podcasts that are posted on the IMA website at the following link: <https://podcast.imanet.org/>

Count me in!

These podcasts are great ways to learn more about all things affecting the accounting and finance world we live in. The latest trends in management accounting and how to effectively lead our FP&A teams are presented by engaging speakers. Recently, I listened to the conversation with Debbie Jacobs (CMA, MBA) who is a hands-on finance leader with great experience in improving the overall finance function. For more than 20 years, she has built strong relationships to drive change at Hewlett-Packard, Honeywell and Johnson & Johnson. She earned her Six Sigma green belt streamlining worldwide financial reporting. She encourages management accountants to cultivate cross-functional relationships to drive change by regularly meeting and engaging with business partners across the organization. Build these relationships by seeing the world through their eyes. Walk in their shoes and get their perspective on the business challenges that they (and you face). Great ideas and examples on how to do this....click on this link to listen to her podcast:

[Ep. 24: Debbie Jacobs - FP&A: Leadership and Relationships](http://http://podcast.imanet.org/)

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!

Does everyone remember....

The National Association of Accountants (NAA) was the former name of what is now the Institute of Management Accountants. The name change occurred in 1991. The original name of the organization was the National Association of Cost Accountants, which became the NAA in 1957. The organization was founded in Buffalo, N.Y., in 1919 as the National Association of Cost Accountants (NACA) to promote knowledge and professionalism among cost accountants and foster a wider understanding of their role in management.

Informational Articles to Assist Your Career!



One Foot in 2019 and One Foot in 2020:
The Top 3 Focus Areas for Next Year

The final calendar quarter for 2019 is here. And with that, brings the ominous thoughts of the new year: 2020. As Accounting and Finance executives, it is our responsibility to address the forecast for the upcoming year and what that means for each of our companies. Your company may be dealing with explosive growth or struggling to meet last year's revenue numbers. Even with different company sizes, structures and cultures, there are three areas everyone must face in the new calendar year.

Economy

We are still seeing a steady economy as we close out 2019. In 2020, we will be experiencing a transition toward a projected recession in 2021 (National Association for Business Economics – 72% of economists predict 2021 recession). It will be critical to focus on strategic planning, risk management and anticipated changes in an US election year. The key is to have contingency plans as uncertainty in domestic and global economies come to the forefront.

Technology

Remember when the buzz word was moving things to the “cloud”? That process is ancient history in technology time. We can no longer wait for the monthly financial statements to be completed; we need real time data to make business decisions quickly to maximize returns in this fast-paced data driven world. 2020 will see the advancement of artificial intelligence (AI), blockchain and continued app ease for the end user. About 38% (McKinsey & Company survey) manage the IT area and the relationship with the CTO has become key in managing technology and will continue in 2020.

People

The challenge of hiring in a tight candidate market will still carry over into 2020. The key to attracting, hiring and developing people within your company is engagement. We have to dive much deeper to determine what entices someone to join our company and what motivates them to be involved in the day to day focus their job. It's important to step away from the emails and conference calls and connect with individuals in person. First, start with yourself. What gives your purpose in your role? Then, determine with each team member what drives them to be fulfilled at work.

There is something refreshing about starting a new year. Take the time now to review the three key components for 2020: economy, technology and people. All the best as you step forward into 2020!!!

Tricia Scalzo, Executive Recruiter of Bayworks Recruiting has provided this article.

<http://bayworksrecruiting.com/>



Robert Half (Accountemps) has provided the following article on "Retaining Top Performers: Are You Doing Enough to Keep Your MVPs?"

Your most valuable players — your MVPs — contribute most heavily to making your business a success. They're also the employees who would get snapped up in a heartbeat by your competitors if given the chance.

Retaining top performers isn't easy in the current hiring environment. These professionals have options, and they know it. If they would decide to leave, replacing them — and their skills, experience and industry

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East Bay - Northern California

Latest Information Cont.

(Continued from page 2)

knowledge — would be a challenge. But how can you stop them from leaving when they could get a better offer at any time? Start by finding out, and then remaining in touch with, how these employees feel about their jobs at your company.

Here are six steps you can take to increase your firm's chances of retaining top performers...[Link](#)

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

Chapter Calendar

<u>Date</u>	<u>Event</u>	<u>CPE</u>	<u>Time</u>	<u>Location</u>
2019				
05 Nov	Time Management	1.5	10:00 AM	Leadership Academy
06 Nov	Top 5 Factors in Implementing a New ERP System	1.0	10:00 AM	Inside Talk
09 Nov	Financial Management Network	4.0	9:00 AM	ConXTech, Pleasanton, CA
19 Nov	Be Strategic! Enhance Your Decision-Making Skills with the CSCA!	1.0	10:00 AM	Inside Talk
21 Nov	EB-NC IMA Board Meeting	0	5:30 PM	Pleasanton CA, Zoom
23 Nov	Golden West Council Quarterly Meeting	0	10:00 AN	Zoom Call-in
14-16 Nov	IMA's Student Conference			Charlotte, NC
03 Dec	Male/Female Communication: Building Collaborative Relationships	1.5	10:00 AM	Leadership Academy
2020				
07 Jan	Mentoring the IMA Way	1.5	10:00 AM	Leadership Academy
02 Feb	Work Motivation (Revamp)	1.5	10:00 AM	Leadership Academy
27-29 Feb	REST 2020	22		Reno, NV
03 Mar	Leading in the Digital Age	1.5	10:00 AM	Leadership Academy
07 Apr	Talent Management	1.5	10:00 AM	Leadership Academy
05 May	The Impact of Social Media on Leadership (Revamp IP)	1.5	10:00 AM	Leadership Academy
15-19 Jun	IMA's Annual Conference & Expo	30+		Atlanta, GA
20 Jun	Storytelling (New IP)	1.5	10:00 AM	Leadership Academy

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

November 21, 2019: 5:30 PM to 6:30 PM

This is a Zoom meeting. Please contact Mike Gorski if you are attending

Please join us from your computer, tablet or smartphone at:

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

One tap mobile

+16699006833,,374705213# US (San Jose)

+14086380968,,374705213# US (San Jose)

Dial by your location

+1 669 900 6833 US (San Jose)

+1 408 638 0968 US (San Jose)

+1 646 876 9923 US (New York)

Meeting ID: 374 705 213

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

Work-life Balance In Accounting



How to gain a healthy work-life balance

The dream is to be satisfied with your career and happy with your life outside of work. The problem is that it can be difficult to turn that dream into reality.

Finding that balance between work and life is like walking a tight rope. The second you lose balance, you'll crash to the ground, burned out and unhappy.

We're here to help you walk a straighter line, to balance work and life without sacrificing one for the other. In this blog, learn whether you are being overworked, the consequences of overworking, and what you can do to improve your work-life balance. We'll also examine the rapidly-changing perception of work-life balance in the accounting industry.

How do I know if I'm being overworked?

You may be asking, "How do I know if I'm being overworked?" The first step is to find out whether a healthy work-life balance is something you're struggling to maintain. After all, you can't fix it if you don't know it's broken!

It's not always obvious if you're already accustomed to overworking. If you're uncertain whether overworking is actually just your normal routine, you'll need to take a step back to reflect on your daily schedule and your company's work policies.

Run through the following list to help you answer this question.

- Are you unable to relax, even when you're not at work?
- Do you routinely have more work than can be completed in a normal work week?
 - Are tasks being added to your to-do list faster than you can clear them?
 - Does catching up on your tasks feel hopeless?

Have tasks begun to slip through the cracks?

- Are you having difficulty sleeping or are you routinely sleeping too much?
- Do you feel isolated or alone?
- Has your mood recently begun to change?
 - Are you feeling anxious or stressed more frequently?
 - Do you find yourself becoming irritated more easily?

If you find yourself answering yes to many of the above questions, it may be because you're overworked.

What leads to being overworked?

Even if you're not currently feeling the strain of being overworked, it is important to watch out for the common causes of a poor work-life balance.

- Long work hours with few breaks
- High pressure to meet the demands of clients or stakeholders regardless of time constraints
- Stress of having a high-stakes role with significant repercussions for mistakes
- Needing to be available outside normal work hours (i.e., being on-call)
- Long vacation "black-out periods" where time-off requests aren't permitted
- Having many unrelated high-priority projects with competing deadlines

It's no surprise that these factors are typical for professionals working in the accounting industry, and the consequences can be significant. Often, the result is that accountants feel like they're juggling too much at once. When that happens, something is bound to drop.

What are the consequences of overworking?

Constantly overworking leads to an unhealthy imbalance of work and life. Common consequences of overworking are:

- Fatigue
- Job burnout
- Reduced memory
- Poor sleep patterns
- Increased irritability
- Poor job performance
- Weakened immune system
- Damage to interpersonal relationships
- Lower job satisfaction and overall happiness
- Reliance on mood-altering chemicals (such as caffeine, nicotine, or alcohol)

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Work-life Balance In Accounting (Cont.)

(Continued from page 4)

Take some time to check in with yourself to see whether overworking has had any of these effects on you. If you discover that you're overworked, we're here to help you turn things around!

What can I do to improve my work-life balance?

Juggling everything can be tough, but the ball is in your court! There are many things you can do to improve your work-life balance without waiting on company policies to change. Start small, and you'll soon notice the scale start tipping toward the middle; creating a healthier balance between your work and life.

Apply these tips to get you back on track toward a healthy work-life balance:

Prioritize your time

Raise your hand if you have 1,000 tasks on your to-do list. Don't worry, we won't ask you to throw out your list. Instead, break your tasks up into categories that allow you to see what's urgent and important. If the task is neither urgent nor important, move it to the bottom of the list.

If you find yourself buried in high-priority projects or have unclear priorities, it may be time to involve your teammates or manager.

Stick to your work schedule

Determine what you want your day to look like by scheduling work hours that will still accommodate life outside of the job. As much as possible, don't let these work hours budge! Set an alarm if you need to in order to remind yourself that it's time to clock out of work. You can get easily sucked into working longer hours if you make it a habit to stay later than the schedule you set for yourself.

If you're the "go-to" problem solver for your team, consider scheduling some productive hours at a time or location that your team members can't easily interrupt you.

Take breaks during work and during the year

You're not a robot; you need to eat, drink, sleep, stretch, and refuel. It's easy to let the workday carry you away without taking enough breaks to let your mind and body breathe and recharge. If you don't make time for breaks, you may find that a few days, weeks, or a busy season has turn into an entire year of overworking.

You're not always going to have time to take enough daily breaks, depending on your priorities at work that day. However, find time to fit in a short lunch break. Stand up while working when you can. This will give your body time to stretch and can increase your productivity.

Take a five or ten minute walk outside or around the office. Changing up the scenery and getting blood circulating back into your body can boost your energy and attitude.

Don't forget to take a real vacation. Take advantage of long weekends and holidays to get away from emails and client calls. Just make sure you give your team and clients notice in advance.

Practice self-care

Don't wait until you have to take time off for when you're actually sick. Make time now to practice preventing illnesses. It may be important to make appointments so that self-care feels as important as other tasks, so add them to your calendar well in advance if you just can't find them time.

- Spend a few minutes a day checking in with yourself mentally and physically.
 - Are you eating right?
 - When is the last time you exercised?
 - Are you tuning into your mental health?
- Take a few minutes a day to practice mindfulness meditation. This is an excellent way to practice disengaging those stressful thoughts when you're trying to relax.
- Eat food that will boost your energy; pack a healthy lunch to avoid eating unhealthy meals.
- Set a workout schedule that is realistic.
 - Even 10-15 minutes of exercise a day, or a few hours a week will help you maintain a healthy lifestyle.

Avoid passive entertainment when relaxing

It is easy to focus on relaxing your body without giving your mind the time and attention it needs.

- Reading a book, exercising, or watching an engaging show or movie are great ways to recharge.
 - If you are dozing off or disengaging from your entertainment, it is important to step away and find something that will fulfill your mind while also allowing you to relax.

Maintain your social and family connections

Take time each month to nurture your social life, which will also nurture your mental health.

- Set quality time for yourself and for your family and friends.

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East Bay - Northern California

Work-life Balance In Accounting (Cont.)

(Continued from page 5)

- Unplug and unwind. Turn off your phone or set an “away” message on your text and emails so that people know this is your quality time to focus on priorities outside of work.
- If you socialize with co-workers, avoid discussing work while you’re out of the office.

Delegate tasks and set expectations

You’re not a robot, you’re human, and humans are not meant to be perfect. You are your harshest critic.

- Don’t try to do everything all at once. Focus on your skills and what you’re good at doing.
- Set realistic expectations for your tasks at work and clearly communicate those expectations.
- Enlist the help of your team when they offer and trust your team. Don’t delegate tasks just to redo it because you “want to make sure it was done right.”
- Speak up when you know the project deadline is unrealistic or if help will be needed.

To see other steps that you and your job can take to improve your work-life balance please click on this [link](#) for the rest of the Article.

www.gleim.com/cma-review

Still 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, 2019. 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!

Open Positions:

Vice President of Administration

Director of Competition

Director: Member Relations

Secretary

Vice President Communication

Webmaster

Director: Newsletter

Director: Ethics Program

Director: Excel Program

Director: Technical Meetings

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 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](#)



CMA (Certified Management Accountant) Certification Exam to Be Updated With an Increased Focus on Technology in January 2020

ICMA® (The Institute of Certified Management Accountants), the certification division of [IMA](#)® (The Institute of Management Accountants), announced that it is making changes to its CMA® (Certified Management Accountant) exam. The updates to the exam are being made to ensure the CMA remains relevant in the ever-evolving environment of the management accounting profession. The changes will be effective January 1, 2020.

The new CMA exam will be changed in both parts but remain a two-part exam. Each part will be a four-hour test with 100 multiple-choice questions and two essays. IMCA is saying that what will change is some of the content:

- Part 1 of the exam will contain a new section called Technology and Analytics. This section, which will comprise 15% of Part 1, will test new topics like information systems, data governance, technology-enabled finance transformation, and data analytics. To accommodate this new material, content from other sections will be reduced. Part 1 of the exam will also have a new title: "Financial Planning, Performance, and Analytics."
- Part 2 of the exam will also be revised and include greater emphasis on ethics and strategic decision making. It will have a new title as well: "Strategic Financial Management."

The Strategic Finance Magazine has an article "[KEEPING THE CMA RELEVANT](#)" which provides background on why the CMA Exam is changing.

These are the topics deleted from test

- * Internal auditing
- * Off balance sheet financing
- * Tax implications of transfer pricing
- * Real options

[\(More Information\)](#)

Final testing window for current CMA exam

The upcoming September/October testing window is your final opportunity before the new exam, [CMA 2020](#), takes effect next January. Boost your career outlook by [enrolling](#) in the CMA® (Certified Management Accountant) program today.

The CMA requires commitment and hard work, but the process is very manageable. Did you know that it takes only 12-18 months on average to complete the CMA program? Career growth and better earning potential are closer than you ever imagined.

Watch this "[How to become a CMA](#)" video to see how to manage the path to getting certified.

East Bay - Northern California Education

Certification (Cont.)

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](#)!

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?

To 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](#).

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. Save up to \$475 when you pre-order the 2020 edition of Gleim CMA Review! Chapter members will receive a remarkable 32% discount on the Gleim Premium Review System until September 14th. As a Strategic Partner of IMA we have arranged to be able to provide a special for 30% off the CMA exam entrance fees!

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

And in our latest edition you'll also enjoy:

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

If you plan to sit for any part(s) of the exam this year, our 2019 edition is still available, and if you need to switch to the 2020 edition, we have you covered! Our Access Until You Pass® guarantee makes sure you have up-to-date materials as long as you're studying, no matter when you plan to take your exam. To place order directly members can go online by going to 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

Get ready to pass the 2020 CMA® (Certified Management Accountant) Exam when you study with the all-new Wiley

This comprehensive update covers all of the exam content changes introduced for the CMA exams starting January 1, including major changes and a new section on technology and analytics.

In advance of the changes coming in January, Wiley has added:

- **More Questions** - Wiley CMAexcel has 5,500+ multiple-choice questions
- **More Videos** - Over 65 hours of video lectures
- **More Essays** - There are now 120 essays to help hone your skills
- **Updated Content** - Revamped lessons, questions, flashcards, and study guides that mirror the exam's updated 2020 Learning Outcome Statements
- **Completely New Lessons** - Brand new, crystal-clear lessons by top university instructors impart the skills and advice you need to make exam day successful
- **Session Assessment Questions** - New session assessment questions provide an additional self-assessment to ensure that you fully grasp material before moving forward

All of these features and content are available now.

[Save 25% on IMA's only Official CMA Test Prep](#)

East Bay - Northern California Education

Financial Management Network

November 09, 2019: 9:00 AM to 1:00 PM

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.

Time: 9:00 am to 1:00 pm

Location: ConXtech, Inc. Headquarters
6701 Koll Center Pkwy, Suite 150
Pleasanton, CA 94566

Cost: \$40.00 members / Non-members

Full breakfast and lunch included in cost

Registration: [Tricia Scalzo](#)

Sponsored By:



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
- Misplaced Trust / Devastating Fraud
- 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](#).

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.

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

New Members October 2019

Ms. Jenna Gudritz	Regular	10/23/2019
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New Members (Transfers In / Reinstated) October 2019

Mr. Lawrence Dodd (Reinstated)		10/20/2019
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Members - Received CMA / CSCA

Member Anniversaries

Members Celebrating 50 Years in IMA Year 2019-20

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

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

November 2019 Anniversaries

Mr. Rubin Greenberg		11/01/1958
Mr. Charles K. Seeman		11/01/1965
Mr. Charles R Hitchcock		11/01/1967
Ms. Dorothy A Bilek		11/01/1971
Mr. Gilbert E Kufahl		11/01/1978
Ms. Sandra L Giberson		11/01/1991
Mr. Stephen B. Carter		11/01/1992
Mr. John D. Talbot, CMA, CFM		11/19/1997
Ms. Stefanie L. Gran, CMA, PMP		11/30/1999
Ms. Rita S. Bhayani, CMA		11/21/2001
Mr. Liangchao Zhang, CMA		11/10/2008
Ms. Luann M Keefe		11/06/2012
Mr. Raymond Anthony Low, CPA		11/19/2015
Ms. Nghi Hoang Thi Tran		11/13/2018
Ms. Reanna Bradford		11/25/2018
Ms. Kathy Jones		11/26/2018
Ms. Amber K Leon		11/26/2018

Golden West Council

About the GWC

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

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

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

Board Meetings

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

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

Nov 23, 2019 - Quarterly Meeting

10:00 AM - 12:00 PM

LOCATION: Zoom Conference

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

+1 669 900 6833 US

Meeting ID: 570 502 4681

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

Feb 27, 2020 - Quarterly Meeting

05:30 PM - 07:30 PM

LOCATION: Peppermill Reno, 2707 S Virginia St, Reno, NV 89502

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

May 16, 2020 - Annual Meeting and Leadership Training Seminar

08:30 AM - 04:00 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.

Reno Educational Seminar and Training

February 27-29, 2020

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 2020. 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. This type of seminar is an excellent opportunity for both business and personal networking not available through other CPE delivery mediums.

Location: **Peppermill Reno**

2707 S Virginia St, Reno, NV 89502

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

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

REST Scholarships

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

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

ABOUT IMA

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

Management accountants belong at IMA.

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

IMA Launches Global Ad Campaign to Highlight Importance of Certification in Today's Business Landscape

IMA® (Institute of Management Accountants), launched on September 16, 2019 a new global, integrated advertising campaign in support of the CMA® (Certified Management Accountant) certification program. The advertisements emphasize how accounting and finance professionals who earn the CMA are better positioned to advance their careers and obtain more strategic roles, through greater expertise and confidence.

[Link to Announcement](#)



Be the most valuable voice in the room - CMA commercial 2019

What good is having a seat at the table if you don't have the confidence to speak? Get the Certified Management Accountant and you'll be the most valuable voice in the room. Once you've mastered the 12 most critical practice areas in management accounting, you'll have the one thing leadership wants most: the ability to turn information into insight.

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 will feature 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 October episodes of "Count Me In" ([Podcast Link](#)) featuring various experts discussing timely topics including:

- Ep. 24: Debbie Jacobs - FP&A: Leadership and Relationships
- Ep. 23: Lorenzo Patelli - AI and Its Ethical Considerations
- Ep. 22: Amy Vetter - Work-Life Balance with Technology & Innovation
- BONUS | Linda Devonish-Mills - IMA's Commitment to Diversity & Inclusion
- Ep. 21: Dr. Paul Juras - Industry 4.0 & Management Accounting
- Ep. 20: Sandy Richtermeyer - Enterprise Risk Management
- Ep. 19: Ben Wann - Business Partnering

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/>.

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.

November 05, 2019

Time Management Advantage

Leadership Academy

10:00 AM - 11:30 AM PT

November 06, 2019

Top 5 Factors in Implementing a New ERP System

Inside Talk

10:00 AM - 11:00 AM PT

November 19, 2019

Be Strategic! Enhance Your Decision-Making Skills with the CSCA!

Inside Talk

10:00 AM - 11:00 AM PT

December 03, 2019

Male/Female Communication: Building Collaborative Relationships

Leadership Academy

10:00 AM - 11:30 AM PT

January 07, 2020

Mentoring the IMA Way

Leadership Academy

10:00 AM - 11:30 AM PT

February 04, 2020

Work Motivation (Revamp)

Leadership Academy

10:00 AM - 11:30 AM PT

March 03, 2020

Leading in the Digital Age

Leadership Academy

10:00 AM - 11:30 AM PT

April 07, 2020

Talent Management e

Leadership Academy

10:00 AM - 11:30 AM PT

May 05, 2020

The Impact of Social Media on Leadership (Revamp IP)

Leadership Academy

10:00 AM - 11:30 AM PT

June 05, 2020

Storytelling (New IP)

Leadership Academy

10:00 AM - 11:30 AM PT

Click here to register for the webinars:

[IMA Webinars](#)



Institute of Management Accountants

Carl Menconi Ethics Case Writing Competition Call for Submissions

IMA (Institute of Management Accountants) Committee on Ethics, in cooperation with IMA's Professor-in-Residence, is proud to announce the Carl Menconi Ethics Case Writing Competition. This annual program is named in memory of Carl Menconi who held leadership positions within IMA for many years and also served as chair of IMA's Committee on Ethics. He also valued education and taught part time at his alma mater, Northern Illinois University.

The overall goal of this program is to develop and distribute teaching cases focused on business ethics with specific application to management accounting and finance issues. Specifically, the program's objectives are to:

- Increase awareness of ethical issues in today's business environment among management accounting students..
- Increase awareness and the importance of the [IMA Statement of Ethical Professional Practice](#) (*the IMA Statement*) and other IMA ethics initiatives.
- Provide management accounting educators the opportunity to synthesize ethical situations and help students better understand ethical situations through additional teaching material.
- Provide a publishing opportunity for the winning case author(s).

The winning case will be featured in Strategic Finance magazine, and the case author or team will be recognized at IMA's Annual Conference in June. The winner also will receive one complimentary conference registration and a \$500 cash prize.

General Submission Guidelines

Cases must: •

- Utilize the IMA Statement as an integral guidance tool/reference in both the case and the teaching notes.
- Be suitable for either graduate or undergraduate classroom use and/or IMA chapter continuing education programs.
- Be suitable for feature publication in Strategic Finance magazine.
- Be submitted in English.
- Be original and not have been previously published.

Format Guidelines Cases should be submitted in three files:

1. **Cover Page** – Include the case title, contact information for all contributing authors (including name, title, academic affiliation, mailing address, phone, fax, e-mail, and IMA membership status). If there is more than one author, please designate a primary contact author. Do not give any author-identifying information except on the cover sheet as the cases are blind reviewed. 2.
2. **Case Study** – The case, including a description of the ethical situation and discussion questions, should be approximately five to six pages in length. Cases must utilize the IMA Statement, as noted above. The case length should follow the editorial guidelines for Strategic Finance articles (2,500 to 3,000 words). 3.
3. **Teaching Note** – Cases must include an accompanying Teaching Note. The Teaching Note must reference the IMA Statement and should follow the guidelines provided on IMA's Educational Case Journal website: (www.imanet.org/IECJ).

Deadline for Submissions

Submissions are due by **January 26**. Submissions should be sent to IMA's Professor-in-Residence, Raef Lawson at research@imanet.org.

Please note: Carl Menconi Ethics Case Writing in Subject Line. The winner(s) will be notified by March 1st .

Conferences

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

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

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

[Click here to Register](#)

Annual Student Leadership Conference, Charlotte, NC - November 14-16, 2019

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](#)

Associate Organizations

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.

November 2019

No Technical Program Scheduled

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.

November 2019

No Technical Program Scheduled

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.

November 2019

No Technical Program Scheduled

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
VP 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
VP of Communications	Open
Director: Community Services	Chung Bothwell
Director: Marketing	Open
Director: Social Media	Kevin Clancy
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