

# THE READ INK

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

## President's Message

### East Bay Chapter Members and Friends,

Happy New "IMA" Year! Indeed, another IMA year has passed and we are on to the next one. Quite a challenging 2<sup>nd</sup> half to the year that just ended. And with all that is going on, it's easy to see how one could feel hopeless. But, as our President and CEO Jeff Thomson said recently, *"We must choose hopefulness, but it must be accompanied by action on the ground."* And with that, he cites several examples of how IMA is doing its part to be hopeful, uplifting, inclusive, and actionable. For instance, did you know that....

- on June 20, IMA held its first-ever virtual Annual Meeting of Members with more than 1,400 members in attendance from more than 89 registered countries? And since IMA had to cancel the in-person event due to COVID-19, but instead converted it to a virtual event, they were able to seize the opportunity to include about double the number of attendees and triple the number of countries represented?
- you are invited to check out "Real Life Stories," a new section on IMA's [Diversity and Inclusion web page](#) that profiles people from our diverse membership? As well as attend the upcoming IMA Leadership Academy webinar, "[Embracing Diversity and Inclusion](#)," on July 7?
- IMA is extending the free trial period for three of its popular online courses – [Data Analytics & Visualization Fundamentals Certificate™](#), the [IMA Strategy and Competitive Analysis Learning Series](#), and [Blockchain 101 by IMA](#) – until August 31?

These are just a few ways that IMA is focused on serving the global community in these challenging times. In addition, don't forget these learning opportunities as well....

### 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.

### Communicating in the 21st Century

New [FREE member benefit](#)! The Digital Age has changed the way accounting and finance professionals communicate. This course examines some of the basics of communicating and how technology has changed how we communicate. Update your communication skills to stay competitive. Take this FREE 1 NASBA CPE online course to begin developing these skills now!

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

CMA® | You've got to earn it.



The Association of  
Accountants and  
Financial Professionals  
in Business

## Inside this issue

East Bay—Northern California ....	1
Latest Information .....	2
BOD 2020-21.....	3
Chapter Calendar .....	4
Chapter Board Meeting.....	4
Educational Opportunities .....	5-8
Community and Student Relations.....	9
Membership .....	11
Golden West Council .....	12-13
IMA.....	14-18
IMA Webinars .....	16
IMA Conferences .....	17-18
Chapters and Associate Organizations.....	19
EB-NC Board of Directors.....	20

## 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

#### **What Make's You Unique?**

#### **The Difference is ... YOU!!!**



With over 20 years in recruiting, I've reviewed resumes, prepped candidates for interviews, shared company insight, discussed company cultures, and more with hundreds of candidates seeking a new job opportunity. Even with all this preparation, there is always one thing that is missing. At the end of the day, the difference between you getting hired and someone else ... is YOU!!!

Everyone is unique. You have a way about you that is solely yours. It's easy to think of being a strong manager/leader, being a technical expert in your field, having exceptional interactive skills, etc. It's more difficult to articulate what makes you truly different in comparison to individuals with a similar skill set.

I always ask candidates that I'm screening, "As you look over your career, what would people say stands out about you?" The answer is very telling. Some people share their many attributes, some have to pause and think about it, and others have one key area that they are experts in. My suggestion would be to dive deeper and determine what makes you truly unique.

It's important to know who you are and what makes you an asset in the workplace. As an action step, take time to think through and answer: What is your unique differentiator?

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 "**7 Strategies for Improving Your Management Communication Skills**".

Effective management communication is essential for guiding teams and lifting morale during times of disruption and uncertainty — like right now. But what if communicating with employees has never been one of your top strengths? And what if your staff members are working remotely? For many managers, keeping employees informed and making them feel supported while working at a distance during the COVID-19 pandemic has been challenging.

Trying to muddle through the coming weeks and months without taking action to improve your management communication skills is not an option, however. The ability to deliver clear messaging — including through virtual communication — will be just as critical as your business transitions into the next new normal and uncertainty persists. Maybe your whole team will continue working remotely, or perhaps you'll need to manage a mix of off-site and on-site employees and contractors. Either way, they'll need a steady stream of reliable information — and reassurance, too.

To improve your communication abilities in the near term, and set yourself on the path to mastering management communication over time, consider the following strategies:

1. *Communicate more frequently*
2. *Promote virtual communication*
3. *Embrace transparency and straight talk*
4. *Listen actively — and with empathy*
5. *Make yourself available*
6. *Paint the big picture*
7. *Keep their future in focus*

*(Continued on page 4)*

## East Bay - Northern California

### Looking for Members to Serve on the Chapter Board of Directors

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

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

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

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

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

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

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

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

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

Past Presidents may serve on the Chapter Board as Board Advisors

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

Mike Gorski, EB-NC President at [eastbaync@imachapter.org](mailto:eastbaync@imachapter.org), or

Robert Hulin at [ima.eastbay.nc@gmail.com](mailto:ima.eastbay.nc@gmail.com).

# East Bay - Northern California

## Chapter Calendar

<u>Date</u>	<u>Event</u>	<u>CPE</u>	<u>Time</u>	<u>Location</u>
<b>2020</b>				
01 Jul	Planning Amid Rapidly Changing Business Conditions	1.5	10:00 AM	Inside Talk
07 Jul	Embracing Diversity and Inclusion	1.5	10:00 AM	Leadership Academy
08 Jul	Future of Finance: Maintaining Trust and Confidence in Audited Financial Statements	1.0	10:00 AM	Inside Talk
11 Jul	Financial Management Network	4.0	09:00 AM	Kaplan - Virtual Meeting
13 Jul	Remote Work and Cybersecurity	1.0	10:00 AM	Inside Talk
23 Jul	EB-NC IMA Planning Session and Board Meeting	0	05:30 PM	Zoom - Virtual Meeting
29 Jul	Building Business Resilience Through Real-Time Data	1.0	10:00 AM	Inside Talk
04 Aug	Listening Skills	1.5	10:00 AM	Leadership Academy
01 Sep	See and Do Feedback differently through Coaching	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
13 Nov	IMA's Student Conference		09:00 AM	Virtual
01 Dec	Presentation Skills	1.5	10:00 AM	Leadership Academy
<b>2021</b>				
27-29 Feb	REST 2021	22		Reno, NV
13-16 Jun	IMA's Annual Conference & Expo	30+		Scottsdale, AZ

## East Bay—Northern California Planning and 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

July 23, 2020: 5:30 PM to 8:00 PM

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

<https://us02web.zoom.us/j/5628614823>

Meeting ID: 562 861 4823

## Latest Information

*(Continued from page 2)*

Effective management communication is a requirement for business leaders [guiding their teams through any major change](#). It's also a skill set that many executives need to polish. So, don't be discouraged if your traditional and virtual communication abilities need some refinement. Now's an ideal moment to improve how you are communicating with your team. They need to have confidence in your words — and know that you are listening to what they have to say, too.

To expand on each of the above points go to the article at this [Link](#)

### **Your Newsletter - Your Articles!**

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

# East Bay - Northern California Education

## Certification



IMA's Certification for  
Accountants and  
Financial Professionals  
in Business

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



Certified in Strategy  
and Competitive  
Analysis

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



### How does OBTAINING A CMA CREDENTIAL benefit you ?

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

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

### CMA Scholarship

*Stand out as you graduate*

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

#### What's included?

Entrance fee to the CMA program

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

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

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

Up to three years of IMA membership while pursuing the certification

[Download the Nomination Form](#)

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



# East Bay - Northern California Education

## Certification (Cont.)

### Gleim Study Materials

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

Almost 40 years ago, Gleim set the standard for CMA exam review. Today, as an industry leader and IMA Strategic Partner, we continue to dedicate ourselves to preparing candidates to pass quickly and confidently. The 2020 Gleim CMA Review includes thousands of the most realistic CMA exam questions, the most comprehensive coverage, dedicated and reliable support, and more. More CMAs have passed with Gleim—we have the experience to guide you to exam success!

*IMA Chapter members are eligible for **25% to 30% off the Premium CMA Review System**. The every day IMA Chapter discount for the Traditional CMA Review System and all on-demand CPE will also increase from 15% to 20%.. Also until July 10 IMA Chapter members are eligible for a remarkable **35% off the Premium Review System**. Orders can also be placed online at [Gleim.com/IMAChapter](https://gleim.com/IMAChapter) or by using your chapter's custom ordering link ([gleim.com/IMAEBNC](https://gleim.com/IMAEBNC)).*

Please note that the discounts 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://gleim.com/IMAEBNC) or contact Alexandra Graham at 800.874.5346 ext. 428 or [imachapters@gleim.com](mailto:imachapters@gleim.com) to learn about the significant discounts you are eligible for as an IMA Chapter member.

## Wiley Study Materials

### Wiley CMAexcel™

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

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

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

For a limited time, you can [save 20% on all Wiley CMAexcel products](#).

[Save 20% with code: CMA20](#)

#### 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 **CMA20** at checkout to take advantage of this timely deal. That's a \$1,800 total value for only \$1,440.\*\* 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*

\*\*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

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

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

Continuing Professional Education: 4.0 Hour CPE



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

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

**Here are the July 2020 topics:**

### Enhancing Trust in Global Audit and Assurance Engagements

#### Field of Study: Auditing

The International Auditing and Assurance Standards Board (IAASB) is an independent standard-setting body that was founded in March 1978. IAASB's mission is to, "serve the public interest by setting high quality international standards for auditing, quality control, review, other assurance, and related services, and by facilitating the convergence of international and national standards." Tom Seidenstein, chairman of the IAASB, discusses his role and his priorities during his tenure.

### Along Came the PPPFA

#### Field of Study: Accounting

A common theme in this pandemic is questions. We all have them – questions about the virus itself, life after the virus, the "new normal." But not all questions are about our lives. The AICPA is also bombarded with questions about accounting and auditing standards as well as the CARES Act, PPP and PPPFA. Kristy Illuzzi, CPA, staff liaison for the PCPS Technical Issues Committee at the AICPA, starts our segment by telling us about one of the most frequently asked questions relating to audit and accounting due to this pandemic.

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

#### Field of Study: Economics

We are currently in a time where the future is uncertain, and economic forecasts are unpredictable. Much like projections of where COVID-19 is going to go, looking at the situation objectively, this is the greatest variance in economic forecasting since World War II. As states start opening up businesses, the recovery stage can have many shapes and forms. The economic models refer to different recovery types known as the "V," the "W," the "L" shape and the "Swoosh." Dr. Robert McNab, professor of economics at Old Dominion University, Strome College of Business, continues our prior month's segment by explaining the correlation between the shape of recovery, the GDP growth and the unemployment rate.

### Ethics and the Human Concern – Part II

#### Field of Study: Regulatory Ethics

The COVID-19 pandemic poses unprecedented risks to the world economy. The International Auditing and Assurance Standards Board (IAASB) and the International Ethics Standards Board for Accountants (IESBA) are committed to doing their part in support of a global response. In addition to transitioning to fully digital platforms to facilitate stakeholder outreach, they developed, commissioned or sourced reference materials to each Board to help their stakeholders continue their work. Dr. Stavros Thomadakis, Chairman of IESBA, continues our prior month's segment and starts by sharing his perspectives on the Coronavirus pandemic and how the economic crisis may impact the application of the Code of Ethics and the International Independence Standard.

**Time:** 9:00 am to 1:00 pm

**Virtual from your home:**

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

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

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

**Registration:** [Tricia Scalzo](#)

Sponsored By:





# East Bay - Northern California Education

## Ethics



### Ethics Courses

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

#### IMA Case Studies:

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

#### Individual Ethics Courses:

- Blinded by Pressure
- The Slippery Slope of Greed
- Whistleblowers Wanted
- When Silence Is Not Golden
- Earnings Management and a Case of Ethics
- Corporate Ethics: From Policy to Practice
- 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](#).



***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



## EB-NC Student Scholarship Awards



### **Issac Rafferty**

California State University, East Bay Scholarship Winner

Thank you again for this scholarship.... I am truly grateful for this scholarship and it will help me get situated for the next semester that will be entirely held online.

Issac has spent the last decade in customer service and received his certified sommelier achievement in 2017. Over the last four years, he has been making wine in various styles and locations which has helped a new passion grow. Currently, he is a full time student at CSUEB pursuing a degree in Business Administrations with a focus on Accounting. Issac has taken his determination and passion for details and merged it with his new field of accounting.

## Community College Scholarship Recipients

### **Jieye Fang**

Ohlone College Scholarship Winner

### **Tingting Chen**

Chabot College Scholarship Winner

### **Unknown At The Time Of Publication**

Las Positas College Scholarship Winner

## 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 Community Relations / Student Relations

## Student Relations

### 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

## IMA Student Ambassador Program

How can you further help IMA increase its awareness on campuses across the U.S.? Become an IMA Student Ambassador!

IMA's Student Ambassador Program provides a challenging and rewarding leadership opportunity for select accounting and finance majors. As an ambassador, students will help grow awareness of IMA and the CMA® (Certified Management Accountant) certification on their campuses.

Student will benefit from the program by:

- Receive a CMA Scholarship to take the exam at no cost
- Receiving a free one-year IMA Student membership
- Gaining valuable leadership and entrepreneurial experience to add to their resume
- Opportunity to develop written and verbal communication skills needed to be successful in their career
- High performing Ambassadors get special bonus perks including a LinkedIn recommendation from IMA, a special certificate & digital badge, and a shout out in Strategic Finance Magazine!

We are looking for outgoing, digitally savvy students to join the program. **Have the perfect student(s) in mind? Please have them [apply here](#)** to take advantage of this great opportunity.

## Be Part of the Student Relations Team

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

### **IMA DAY**

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

### **SCHOLARSHIPS**

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

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

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

### **STUDENT SPEAKER TEAM**

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

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

# 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. Chandrani Mukhopadhyay, CPA, MS	Regular	06/03/2020
Ms. Lynn Tsao	Regular	06/04/2020
Ms. Patty Ketchum, MBA	Regular	06/05/2020
Ms. Eunkyong Won	Regular	06/06/2020
Ms. Jackline Cheves	Regular	06/29/2020

#### New Members (Transfers In)

#### Members - Received CMA / CSCA

#### Member Anniversaries

#### Members Celebrating 50 Years in IMA Year 2020-21

#### Members Celebrating 25 Years in IMA Year 2020-21

Mr. Miguel Zuliani, CMA, CFM	09/20/1995
Mr. Tim L. Gregory, CMA	12/12/1995
Ms. Cecilia B. Hewett, CMA, CPA	01/25/1996
Mr. Roland F. Brunner	03/13/1996

#### July 2020 Anniversaries

Mr. William F. Baer	07/01/1966
Mr. Thomas A. Rubin, CMA, CFM, CPA	07/01/1974
Mr. John C. Hardin	07/01/1982
Mr. Michael E. Compton, CPA	07/01/1989
Mr Grant E. Marston, CMA	07/01/1989
Ms. Amy W Lee, CMA, CPA	07/01/1989
Mr. Thomas C. Tang, CMA, CPA	07/01/1989
Mr. Timothy J. Young, CMA	07/01/1989
Mr. Leung Y. Ma, CMA	07/01/1989
Mr. Daniel E. Wehrle, CMA, CFM	07/14/1998
Mr. Adam A. Khouri, CMA	07/14/2004
Ms Elizabeth C Lee, CPA	07/01/2013
Mr. Ryan Kane	07/12/2013
Ms. Gina Samalca Gozo, CMA	07/31/2014
Mr. Talin Wauchope, CMA, CPA	07/01/2017
Ms. Dorothy Zhu	07/09/2019
Mr. Manu Dhanwantri	07/18/2019
Ms. Liuyi Pan	07/18/2019



# Golden West Council

## Board Meetings

### About the GWC

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

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

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

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

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

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

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

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



# Institute of Management Accountants

## Message from the President and CEO

Jeff Thomson

June 30, 2020

### 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.

"I choose hopefulness over hopelessness" are the uplifting words spoken recently by a senior IMA volunteer. There are certainly reasons to feel hopeless with recent pandemics involving loss of livelihoods, and loss of life, continued murders of African-Americans, and other forms of racial bias and social injustice around the world. COVID-19 has now claimed 500,000 lives and reached 10 million cases, with disproportionate impacts on minority communities. We must choose hopefulness, but it must be accompanied by action on the ground. I am offering several examples of how IMA is doing its part to be hopeful, uplifting, inclusive, and actionable.

On June 20, IMA held its first-ever virtual Annual Meeting of Members with more than 1,400 members in attendance from more than 89 registered countries. We had to cancel our in-person event due to COVID-19, but in converting to a virtual event, we were able to seize the opportunity to include about double the number of attendees and triple the number of countries represented. We were happy to be able to connect with many of you virtually and have a truly "global" meeting. IMA's Global Board of Directors meeting was also held virtually later the same day, at which the Board approved IMA's operating budget for Fiscal Year 2021. This budget is risk intelligent and invests heavily in IMA's future, YOUR future, with new programs, products, and services, including a mobile-first website and increased educational and research emphasis on DE&I (Diversity, Equity, and Inclusion). If you didn't get a chance to attend the Annual Meeting, I welcome you to [view the recording](#) and hear from IMA's leaders.

Last week, I was happy to see many of our employees from around the world share their experiences and feelings at our first Diversity Spotlight Live webcast. This is one of many ways IMA can do its part to promote diversity and inclusion awareness, beginning with our employees. Storytelling, empathetic listening and doing our part to advance DE&I in our profession and society at large is the goal we have in mind.

For our members, I invite you to check out "Real Life Stories," a new section on IMA's [Diversity and Inclusion web page](#) that profiles people from our diverse membership. I also hope you will attend our upcoming IMA Leadership Academy webinar, "[Embracing Diversity and Inclusion](#)," on July 7.

I'm happy to announce that IMA is extending the free trial period for three of our popular online courses – [Data Analytics & Visualization Fundamentals Certificate](#), the [IMA Strategy and Competitive Analysis Learning Series](#), and [Blockchain 101 by IMA](#) – until August 31.

IMA enters Fiscal Year 2021 with hope, pride, and inspiration in serving you and our wonderful global community in these challenging times. Please know that you can count on us.



Sincerely,

A handwritten signature in black ink that reads "Jeff Thomson". The signature is fluid and cursive, with a long horizontal line extending from the end.

Jeff Thomson, CMA, CSCA, CAE  
President and CEO



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

- Ep. 69: Sandra Clarke - Finance & Innovation -- The Perfect Partnership
- Ep. 70: Vidal Espinosa - Everyone is Broke! They Just Don't Know it Yet...
- Ep. 71: Jeremy Belhar - Leading for Innovation and Change
- Ep. 72: Marwan Al Suwaidi - Khalifa Fund Supporting Small- to Mid-Sized Enterprises
- Ep. 73 - Mazars USA: CARES Act, PPP, and Business Planning
- Ep. 74: Karim Ghandour - The Effects of COVID-19 on Family Businesses
- Ep. 75: Shifra Kolsky - The Effective Roll Out of RPA Implementation

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

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



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

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

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

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

**Facebook:** @IMANetORG

**Twitter:** @IMA\_News

**Instagram:** @IMAGlobal

**LinkedIn:** Search for IMA Institute of Management Accountants

**YouTube:** Institute of Management Accountants



# Institute of Management Accountants

## Webinars

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

*Webinars are open to IMA Members Only.*

July 01, 2020

**Planning Amid Rapidly Changing Business Conditions**

Inside Talk

10:00 AM - 11:00 AM PT

July 07, 2020

**Embracing Diversity and Inclusion**

Leadership Academy

10:00 AM - 11:30 AM PT

July 08, 2020

**Future of Finance: Maintaining Trust and Confidence in Audited Financial Statements**

Inside Talk

08:00 AM - 09:00 AM PT

July 13, 2020

**Remote Work and Cybersecurity**

Inside Talk

10:00 AM - 11:00 AM PT

July 29, 2020

**Building Business Resilience Through Real-Time Data**

Inside Talk

10:00 AM - 11:00 AM PT

August 04, 2020

**Listening Skills**

Leadership Academy

10:00 AM - 11:30 AM PT

September 01, 2020

**See and Do Feedback differently through Coaching**

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](#)  
[The Rising Importance of Technology Integration](#)

### Articles

[The Path to Industry 4.0 Implementation](#)  
[CFO to CFO: Evolving Finance Technology](#)

### 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. 75: Shifra Kolsky - The Effective Roll Out of RPA Implementation](#)  
[Ep. 74: Karim Ghandour - The Effects of COVID-19 on Family Businesses](#)

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

## Conferences

### Annual Conference Exposition (ACE2021), Scottsdale, AZ - June 13-16, 2021

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 (Now Virtual) - "Power Your Potential", Pittsburg, PA - November 13, 2020

The IMA Student Leadership Conference is going virtual! Join us on Friday, November 13 as IMA hosts a can't-miss one-day virtual event, designed exclusively for students and academics. This Conference is packed with inspiring speakers, including a kickoff keynote speech by a Fortune 500 CEO, a session on career success in the digital age, a Virtual Career Expo, and more! Visit [www.imasc.org](http://www.imasc.org) for more information. Registration opens September 8.

[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.

**July 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.

**July 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.

**July 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. .

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

East Bay-Northern California  
Chapter of the IMA

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

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

## East Bay - Northern California 2019-20 Board of Directors

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

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



The Association of  
Accountants and  
Financial Professionals  
in Business

EAST BAY-NORTHERN CALIFORNIA CHAPTER