

# THE READ INK

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

## President's Message

### East Bay Chapter Members and Friends,

Hope that everyone is continuing to be safe and well during this time. Many believe that we will soon begin to see more favorable trends related to the pandemic (i.e. lower number of cases, lower positivity rates, etc...) as a result of the social practices that have been put in to place as well as hope on the horizon for a vaccine. Until then, stay safe and remain diligent.

On the business front, not sure if you noticed, but there was an interesting article in the August issue of the IMA's Strategic Finance magazine. The title of the article is [Covid Bends Future Technology](#), written by Michael Castelluccio. The article speaks about an annual report that has been produced by Citigroup and Oxford since 2015 on the current state and future expectations for technology at work. This year's report (interestingly enough) was titled "A New World of Remote Work". And its central theme, of course, is how "COVID-19 is creating enormous societal disruptions but also new opportunities to experiment, both for business and for governments." The overriding question being asked is "what will the post-COVID-19 work environment look like?"

The study found that as we prepare to return to the "office", three out of five workers would prefer to remain at / work from home. Further, 24% of the occupations in the United States can now be performed remotely, and those occupations employ 52% of the workforce. Many key industries such as education technology, telecom services, and software are being transformed as we speak. If the shift to working from home were to become permanent, other related markets and industries could be affected as well (e.g. energy, commercial real estate, travel, etc...).

While no one can for certain predict what the future will hold for us, it is evident that the current pandemic has forced mass adoption of existing technologies. And, you can stay current with these changes in technology by exploring IMA's Technology & Analytics Center (see link below). The Center has many educational resources such as online courses, articles, webinars, research, blogs, and podcasts that are focused on key technology and data analytic trends affecting the accounting and finance profession. Start exploring today!

### [Technology & Analytics Center](#)

Mike Gorski, President  
IMA East Bay – Northern California chapter  
2019-2020  
[mgorski1761@yahoo.com](mailto:mgorski1761@yahoo.com)  
[IMA East Bay - Northern California Chapter](#)  
[www.imanet.org](http://www.imanet.org)

CMA® | You've got to earn it.



The Association of  
Accountants and  
Financial Professionals  
in Business

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## IMA's Vision

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

## IMA's Mission

Provide a *forum* for research, practice development, education, knowledge sharing, and the *advocacy* of the highest ethical and best business practices in management accounting and finance

## IMA's Strategic Goals

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

# East Bay - Northern California

## Latest Information

### About EB-NC

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

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

### Did You Know!

#### Informational Articles to Assist Your Career!

**Bay Works Recruiting** has provided the following article on

#### **Candidate Experience - It Matters!**



My niece has been engaged in a job search and I have been guiding her through the process. It has been eye opening to see how the process is handled from the job seeker's perspective. She has applied to sixteen different jobs and has completed four interviews. Following is a breakdown of her experience:

#### **Company #1**

She completed a telephone interview with a Corporate Recruiter, and she was passing her resume to the hiring manager at a different location. She promised to follow up the following Tuesday one way or the other if they were going to move forward. No response. My niece followed up to see if there was an update. No response. Finally, two weeks later, an email comes through thanking her for her time, but they have filled the role.

Takeaway: Do not commit to contacting a prospective employee and not follow through. Instead, have your hiring process set up to communicate automatically at certain intervals within the hiring process (scheduling interviews, no interest, etc.).

#### **Company #2 ...**

Click on this link to continue with the article: [Link](#)

Please feel free to reach out to our team at BayWorks Recruiting for additional market updates and recruiting services. Take care!



**Robert Half** (Accountemps) has provided the following article on **"How to Answer, 'Tell Me About Yourself,' in a Job Interview"**.

"Tell me about yourself." It's one of the most common (and tricky) job interview questions. Even so, many job seekers don't take the question seriously, thinking it's just an icebreaker meant to put them at ease.

But they should carefully consider their response, because "tell me about yourself" is more than a throwaway opener for most interviewers. When hiring managers pose this open-ended question, they're hoping candidates will offer insight about their goals and priorities, which gives them a better sense of who each job candidate really is.

And that's not all: Interviewers also ask this question to evaluate how confident interviewees are, which in turn gives them a view of how new hires might present themselves to customers, clients and colleagues if they get the job.

As a job seeker, knowing how to answer, "tell me about yourself," gives you a great opportunity to spotlight the skills and experience that make you the ideal candidate for the job. And because it's a question that many hiring managers lead with, it's also your way to start off on the right foot. Here are a few more job interview tips to help you nail your response:

- *What you should not say*
- *Craft an elevator pitch*
- *A strong sample answer*
- *A final word on how to answer, 'tell me about yourself'*

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

### 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 Sep	Inside-Out Feedback: See and Do Feedback Differently through Coaching	1.5	10:00 AM	Leadership Academy
02 Sep	Getting the Most out of Pandemic-Related Technology Investments	1.0	10:00 AM	Inside Talk
09 Sep	Reinventing AP: How employing automation leads to scalable growth	1.0	10:00 AM	Inside Talk
11 Sep	Differentiate Your Accounting Curriculum Through IMA's Higher Education Endorsement Program	1.0	11:30 AM	Inside Talk
12 Sep	Financial Management Network	4.0	09:00 AM	Kaplan - Virtual Meeting
14 Sep	Tech Trek 2020: Trends for Accountants	1.0	11:30 AM	Inside Talk
17 Sep	EB-NC IMA Board Meeting	0	05:30 PM	Zoom - Virtual Meeting
18 Sep	CSU-EB "Meet the Firm"	0	01:00 PM	Virtual Booth
06 Oct	Unleash Your Peak Performance Potential	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
19 Nov	Golden West Council Board Meeting	0	06:30 PM	Virtual Meeting
01 Dec	Presentation Skills	1.5	10:00 AM	Leadership Academy
<b>2021</b>				
25 Feb	Golden West Council Board Meeting	0	5:30 PM	Reno, NV / Virtual Meeting
25-27 Feb	REST 2021	22		Reno, NV
15 May	Golden West Council Leadership Training	4	09:00 AM	Santa Clara, CA
15 May	Golden West Council Board Meeting	0	01:30 PM	Santa Clara, CA
13-16 Jun	IMA's Annual Conference & Expo	30+		Scottsdale, AZ



## East Bay—Northern California Board Meeting

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

September 17, 2020: 5:30 PM to 6:30 PM

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

<https://us02web.zoom.us/j/88531803825?pwd=T2p2ZURNQkRhQjRGWFJLNGEzd2Mvdz09>

Meeting ID: Meeting ID: 885 3180 3825

Passcode: 554095

# 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 30% off the Premium CMA Review System.

Orders can also be placed online at [Gleim.com/IMAChapter](https://www.gleim.com/IMAChapter) or by using your chapter's custom ordering link ([gleim.com/IMAEBNC](https://www.gleim.com/IMAEBNC)).

Please note that the 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.

Place your order directly online by going to [gleim.com/IMAEBNC](https://www.gleim.com/IMAEBNC) or contact Alexandra Graham at 800.874.5346 ext. 428 or [imachapters@gleim.com](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.

#### **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.

## Surgent Study Materials

### **What makes Surgent the best CMA Review course?**

An award-winning, AI-powered, personalized learning software is enabling exam candidates to study for—and pass—the CMA Exam faster and more effectively than ever before. Surgent customized all of the study programs from end to end to fit your unique needs, homing in on your weaker areas of comprehension, and let you know when you're ready to pass.

3 Programs to choose from:

- CMA Review Essentials Pass
- CMA Review Premier Pass
- CMA Review Ultimate Pass

Discounts are available.

Link: <https://www.surgent.com/cma-exam-review/>

# East Bay - Northern California Education

## Financial Management Network

September 12, 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 September 2020 topics:**

### **COVID-19 & Fraud Schemes: Do You Know Where Your Money Is?**

#### **Field of Study: Auditing**

COVID-19 not only finds its place in every conversation, regardless of the topic, but it also takes a leading role. It has affected our lives in more ways than we've ever imagined, and it is not over yet. We see its impact on our individual lives, our business and our wallets. Congress passed the CARES Act in an effort to provide financial assistance for both individuals and businesses, but whenever there is government relief, along comes fraud! Brian Sanvidge, CIG, CFE, Principal and Leader of Anchin's Regulatory Compliance and Investigations Group, starts our segment by discussing the current environment and how it makes businesses more susceptible to fraud.

### **Data Validation & Reporting Excellence – The Future of Corporate Responsibility**

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

Environmental, social and governance (ESG) criteria may not be a new set of standards but it is gaining more and more ground amongst private equity companies and investors as it helps screen potential investments. Modern investors reevaluate and challenge traditional investment approaches as the global environment evolves and becomes more complex. ESG criteria assess a company's values and behaviors and help investors see if these values match their own. Anthony DeCandido, financial services partner and senior financial services analyst for RSM US LLP, discusses the ESG criteria in further detail and its objectives.

### **Is Communication Ever Enough?**

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

George Bernard Shaw once said, "The single biggest problem in communication is the illusion that it has taken place." During the pandemic, companies seem to have to navigate two storms: the challenge of the pandemic itself and the challenge of effectively communicating, as almost overnight, they had to transition from their offices to their homes. COVID-19 not only changed the way we work and the space in which we work but also the way we communicate. We've all gone through various phases and luckily, the majority of us made it through to the other side. Gabe Zubizaretta, CEO of Silicon Valley Accountants, discusses some of the top characteristics of effective communication, especially during the crisis we are still facing.

### **Earnings Management: Cause & Effect**

#### **Field of Study: Auditing**

Earnings management is a method of manipulating financial records in order to present a positive outcome of a company's financial position and performance. It imposes a significant risk that investors, the Securities and Exchange Commission (SEC), and accounting standard setters have been aware of and are trying to find ways to minimize. In September 2019, the SEC charged Marvell Technology Group, Ltd with misleading disclosure violations to investors when it engaged in an undisclosed revenue management scheme in order to meet publicly issued revenue guidance. Charles Hecht, partner at Balestriere Fariello, starts our segment by giving us his thoughts on SEC crackdowns on earnings management.

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

**Virtual from your home:**

You need to 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—Northern California Chapter to be at CSU-EB “Meet the Firm”

On September 18<sup>th</sup> Our chapter will be participating in a virtual meeting of several hundred students and 50 to 100 companies in a **Meet the Firm** conference at California State University, East Bay from 1:00 PM to 4:00 PM.

Our chapter will have our own “booth”. If you are interested in participating, please call Ken Shepard at (408) 607-7866.

For an idea on how this will work, go to [https://support.brazenconnect.com/hc/en-us/articles/360044338714-University-Brazen-Virtual-Career-Fairs-Other-Online-Events-Everything-You-Need-to-Know#h\\_44a6788b-423f-4899-bdc7-0fe303d13dbc](https://support.brazenconnect.com/hc/en-us/articles/360044338714-University-Brazen-Virtual-Career-Fairs-Other-Online-Events-Everything-You-Need-to-Know#h_44a6788b-423f-4899-bdc7-0fe303d13dbc)

### 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 it relationships with students and that would like to assist in flushing out how the Chapter can implement this effort. If you are an Academic, you can really help in providing a win-win direction.*

#### SCHOLARSHIPS

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

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

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

#### STUDENT SPEAKER TEAM

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

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

### August 2020

#### New Members

Ms. Tawana Manique Nichols	Regular	08/11/2020
Ms. Emerald Yumang	Regular	08/19/2020

#### New Members (Transfers In)

Ms. Terri Hill	Regular	08/11/2020
Mr. Sidharth Ankush Dhunna	Regular	08/24/2020

#### Members - Received CMA / CSCA

Mr. Ryan Kane, CMA	Regular	08/14/2020
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### 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
Ms. Terri Hill	03/13/1996
Mr. Roland F. Brunner	03/13/1996

#### September 2020 Anniversaries

Ms. Chung T. Bothwell	09/01/1978
Mr. Karl F. Meyer, CMA	09/01/1981
Ms. Mary-Ann E. Wolfenden, CMA	09/07/1993
Mr. Miguel Zuliani, CMA, CFM	09/20/1995
Mr. Glen S. Uhland, CMA	09/04/1996
Ms. C. Chingyi Wu	09/18/1997
Mr. Lawrence Dodd	09/28/1997
Mr. Gregg Rubenstein, CMA, CPA	09/02/1999
Ms. Elizabeth (bebe) Bertolet Hillegass	09/20/2012
Mr. Bradley Steven Virchis	09/29/2016
Mr. Hughes Chiang, CMA	09/06/2017



# 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.**

### 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=RDlOZVNtZ1paa3NPWldlWkhiaDhZdz09>

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

## Be a Global Volunteer - Applications Due September 15, 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.

### Have you ever considered applying for a volunteer global board position?

IMA® (Institute of Management Accountants) is currently seeking qualified nominees for volunteer positions on its Global Board of Directors. IMA is now accepting applications for open positions, with two-year service terms beginning July 1, 2021.

The key qualities of a highly qualified candidate include, but are not limited to, the following:

- Strategic and innovative thinker
- Global perspective
- Volunteer nonprofit board leadership experience
- Understanding of board governance fiduciary responsibilities
- Executive temperament and emotional intelligence
- CMA preferred

In addition to these key qualities, the successful candidate must have a proven passion for IMA and the management accounting profession.

The estimated time commitment for a director of the IMA Global Board is 100 to 200 hours per year, including three face-to-face meetings.

If you qualify and want to serve IMA and the profession, please apply by visiting our Governing Boards web page. **Applications are due by September 15, 2020.**

## Free Educational Resources For Members

### COSO Enterprise Risk Management: Essential to Organizational Success

Learn how Integrating [enterprise risk management \(ERM\)](#) better positions organizations to execute on their missions and achieve strategic goals. Based on the COSO Enterprise Risk Management Executive Summary and IMA's May 2020 webinar, this new e-learning course provides an insightful overview on applying the COSO ERM Framework's 5 components and 20 supporting principles to drive organizational success. This course supports enhancing the Strategy, Planning & Performance and Reporting & Control domains of the IMA Management Accounting Competency Framework.

### Cybersecurity Alert!

Management accountants asked for more information on this critical issue and we have listened. Explore the [fundamentals of cybersecurity](#) in just 30 minutes and earn 0.5 NASBA CPE credits! Learn the importance of cybersecurity, key terms associated with cyber-attackers, types of attacks, forms of malware, and common defensive measures used. Gain critical insight into the threats and opportunities needed to protect the integrity and security of your business and valued customers. Members can access this course for free.

### Emotional Intelligence

[Emotional intelligence](#) is an often-discussed topic, but do you really know what it means? Explore the four domains and 12 competencies of Emotional Intelligence in this new course. Learn how to strengthen each competency and how emotional intelligence impacts leadership capabilities. As technology continues to evolve and new skills are needed, "soft skills" and emotional intelligence remain invaluable for becoming an organizational leader. Assess your own abilities and learn specific actions to strengthen your emotional intelligence. Earn 1 NASBA CPE credit with this free member benefit!

## IMA Hardship Policy

If you or any of your members are experiencing financial difficulties due to the COVID-19 pandemic, please send an email to the IMA Member Services team for assistance at [ima@imanet.org](mailto:ima@imanet.org). Please see the attached policy for additional information.

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

- Ep. 80: Michael High - Digitalization and Business Transformation
- Ep. 81: Andrew Royer - Choosing the Right Accounting Software
- Ep. 82: Ben Jackson - Do Your Company's Internal Controls Mitigate the Risk of AI?
- Ep. 83: Sandhya Sriram - Strategic Planning, Prioritization, and Motivation
- Ep. 84: Jason Krantz - Data and Analytics | Driving Business Strategy
- Ep. 85: Russell Porter - Adapting Leadership and Management Strategies in a Crisis

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.*

**September 01, 2020**

**Inside-Out Feedback: See and Do Feedback differently through Coaching**

Leadership Academy

10:00 AM - 11:30 AM PT

**September 02, 2020**

**Getting the Most out of Pandemic-Related Technology Investments**

Inside Talk

10:00 AM - 11:00 AM PT

**September 09, 2020**

**Reinventing AP: How employing automation leads to scalable growth**

Inside Talk

10:00 AM - 11:00 AM PT

**September 11, 2020**

**Differentiate Your Accounting Curriculum Through  
IMA's Higher Education Endorsement Program**

Inside Talk

11:30 AM - 12:00 AM PT

**September 14, 2020**

**Tech Trek 2020: Trends for Accountants**

Inside Talk

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 are examples of the topics:

### Webinars

[Accountancy in The Digital Age – Relevance Gained and The Call to Action](#)

[The Rising Importance of Technology Integration](#)

[Transforming the Finance Function with RPA](#)

### Articles

[The Bots Are Coming....To Intro Accounting](#)

[CFO to CFO: Evolving Finance Technology](#)

[Choosing Your Zoom Room](#)

### Online Courses

[Beyond the Basics: Data Analytics and Visualization for Accounting Professionals](#)

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

[IMA's RPA Series](#)

### 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. 80: Michael High - Digitalization and Business Transformation](#)

[Ep. 77: Ron Guymon - The Evolution of Accounting Education](#)

[Ep. 76: Shaila Bettadapur - Future of Work](#)

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.

### September 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.

### September 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.

### September 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