

THE READ INK

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

President's Message

East Bay Chapter Members and Friends,

Welcome to the February edition of the chapter newsletter! Hope everyone is well and enduring the ongoing pandemic. There is hope that, with vaccinations underway, there is light at the end of the tunnel and life can soon return to some level of normalcy. The past year was certainly a bump in the road for many and now is as good a time as any for us to take a step back and assess where we are in our career goals. One way we can do that is with the exclusive IMA career management tool called CareerDriver.®

The foundation of CareerDriver® is known as the Competency Framework, and it is based on six key disciplines that IMA has identified that integrate the critical skills needed to excel in the finance and accounting profession....



To get started, click on this link and visit the [IMA Career Driver](#)

All it takes is three easy steps...

Assess skills by taking an easy self-assessment to measure strengths and identify areas for growth...next

Create a personalized development plan...and finally

Explore career options

Here's to a safe, happy, and knowledge filled new year!

Mike Gorski, President

IMA East Bay – Northern California chapter
2020-2021

mgorski1761@yahoo.com

[IMA East Bay - Northern California Chapter](#)

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

New Year Goal Race (January 19, 2021)



Happy New Year!!

Ready, Set, Goal!!

It is the time of year when we kick off our annual goals and go full throttle. The goals are posted so we can see what we are targeting. We let our inner circle know what we are planning to accomplish. We have chosen our "word" for the year. The emotion of a clean slate is intoxicating.

Then, reality hits. We get back into the routine of our lives. We get back to juggling work, kids, home, etc. The goals fade into the background. The months pass, and by June, only a faint amount of excitement over what you were going to accomplish remains.

An article by www.mindtools.com, "Eight Common Goal Setting Mistakes" helps to guide us on how to mitigate the challenge of going from goal frenzy to lack of completion.

Three key areas from the article are worth noting:

Click on this link to see what the three key areas are: [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



Robert Half®

"How to Create a Meaningful Career Map".

You wouldn't head out on a long road trip without first planning your route.

So why wouldn't you apply that same thoughtful approach to charting your professional advancement? Whether you're just starting out, feel as though your career is beginning to idle or you're clearly stuck in a rut, creating a career map can be highly beneficial.

What is a career map? It's a written plan outlining where you are in your career, where you ultimately want to go and the specific steps you could take to reach that objective.

Here are five navigation tips to put you on the path toward meaningful professional progression:

1. Pinpoint a destination
2. Know your starting point
3. Ask for directions
4. Pay attention to career map mile markers
5. Stay driven

Any trip worth taking likely includes some bumps and wrong turns along the way. Don't allow these inevitable disappointments to diminish your determination. When you run into a roadblock, regroup and move on. Career progress requires not only planning, but also drive and discipline. Focus on the lessons learned from your setback — then put your foot right back on the pedal.

Click on this link to further explore these 5 tips [Link](#)

Your Newsletter - Your Articles!

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

East Bay - Northern California

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, 2021. 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 2021-22 Board of Directors. All other positions are open:

President

Vice President of Administration

Director of Competition

Director: Member Relations

Secretary

Treasurer

Investment Committee Member (3)

Vice President of Professional Education

Director: CMA Program

Director: FMN Program

Director: Ethics Program

Director: Excel Program

Director: Technical Meetings

Vice President Communication

Webmaster

Director: Newsletter

Director: Community Relations

Director: Marketing

Director: Social Media

Vice President Membership

Director: Member Relations

Vice President Young Professionals

Director: Student Services

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 mgorski1761@yahoo.com or

Robert Hulin at ima.eastbay.nc@gmail.com.

East Bay - Northern California

Chapter Calendar

<u>Date</u>	<u>Event</u>	<u>CPE</u>	<u>Time</u>	<u>Location</u>
2021				
02 Feb	Essential Leadership Skills	1.5	10:00 AM	Leadership Academy
04 Feb	Reducing Digital Data Bias Risk through Diversity and Inclusion	1.0	10:00 AM	Inside Talk
10 Feb	Modernizing Financial Processes for Remote Accounting Teams	1.0	10:00 AM	Inside Talk
13 Feb	Financial Management Network	4.0	09:00 AM	Kaplan - Virtual Meeting
24 Feb	Forecasting & Budgeting Best Practices to Survive & Thrive Post-COVID-19	1.0	10:00 AM	Inside Talk
25 Feb	Golden West Council Board Meeting	0	5:30 PM	Reno, NV / Virtual Meeting
25-27 Feb	REST 2021 Postponed to 2022 due to COVID-19	22		Reno, NV
03 Mar	Global Leadership	1.5	10:00 AM	Leadership Academy
17 Mar	Finance Automation: Unleash Your Accountants to Become Exceptional	1.0	10:00 AM	Inside Talk
06 Apr	Listening Skills	1.5	10:00 AM	Leadership Academy
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

February 18, 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!

Gleim's current edition covers 2021 CMA exam topics and is equipped with SmartAdapt™ technology which personalizes your review and eliminates the guesswork in studying. The new 2021 Premium Review System will give our chapter members free updates to any changes. IMA Chapter Members will save up to 30% on Gleim CMA Review Systems.

You'll enjoy:

- 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

Orders can also be placed online at [Gleim.com/IMAChapter](https://www.gleim.com/IMAChapter). Please note that the savings discount will be displayed at check out and not on the initial welcome screen.

Our Gleim Representative can be reached via email at alexandra.graham@gleim.com or by phone at 1-800-874-5346 ext 428.

Wiley Study Materials

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

February 13, 2020: 9:00 AM to 1:00 PM

Due to COVID-19 this will be a Virtual Meeting

Continuing Professional Education: 4.0 Hour CPE



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

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

Here are the February 2021 topics:

A Second Round of PPP Loan & Forgiveness Requirements – Part I

Field of Study: Accounting

The Consolidated Appropriations Act 2021, like the 2020 Act, is a collection of a large number of separate bills, contained inside a 5,593 page complete Act. Edward Zollars, partner at Thomas, Zollars & Lynch, Ltd. discusses the Economic Aid to Hard-Hit Small Businesses, Non-profits, and Venues Act, in short the Economic Aid Act, that restarted the original Paycheck Protection Program (PPP) Loan system and established a new Second Draw PPP program, the time period for the restarted PPP and debt forgiveness.

A Second Round of PPP Loan & Forgiveness Requirements – Part II

Field of Study: Accounting

The Economic Aid Act modifies FTE (full time equivalent) Safe Harbor 2 as it is called on the forgiveness application form, which was the only FTE safe harbor found in the CARES Act, for loans made on or after the date of enactment (December 27, 2020) of the Economic Aid to Hard-Hit Small Businesses, Nonprofits, and Venues Act. Edward Zollars, partner at Thomas, Zollars & Lynch, Ltd. continues the discussion highlighting the modifications to FTE Safe Harbor 2, the gross receipts test and related calculations, how to navigate through the requirements of the second round of PPP loans, and provisions under the Interim Final Rule.

Chairman of the FASB: A Career in the Making

Field of Study: Accounting

On July 1, 2020, Richard Jones began his term as the eighth chairman of FASB, a very challenging role in and of itself, and starting in the midst of a global pandemic was certainly a curveball. In his remarks at the AICPA conference on SEC and PCAOB developments, in reference to standard setting, Rich quoted former Mets manager, Casey Stengel, who once said "Sometimes it's easier to understand things than to figure them out." Rich Jones discusses his new role, and the steps FASB is taking to make it easier for stakeholders, particularly private companies and nonprofit organizations to navigate standards during the pandemic and beyond. He also gives us an overview of the post-implementation review of standards on revenue recognition, leases, CECL and the Board's goodwill simplification project.

Employment Law & COVID-19: The Aftermath

Field of Study: Business Law

In September 2020, the DOL's Wage and Hour Division (WHD) announced revisions to regulations that implement the paid sick leave and expanded family and medical leave provisions of the Families First Coronavirus Response Act (FFCRA). The revisions reaffirmed and provided additional explanations on certain requirements, clarifications as to the required documentation from employees to support their need for FFCRA leave and changes to the definition of "healthcare provider." We are approaching a year since the pandemic started and the workplace has evolved in a new direction. Randi Kochman, member at Cole Schotz, P.C discusses how businesses and employee lives were reshaped due to the pandemic.

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)

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

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.

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

January 2021

New Members

Ms. Deborah Lamadrid	Regular	01/18/2021
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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
Ms. Terri Hill	03/13/1996
Mr. Roland F. Brunner	03/13/1996

February 2021 Anniversaries

Mr. C S. Mccammon	02/01/1960
Mr. Roger R Weidoff	02/01/1966
Ms Constance Coughlan, CMA, CPA	02/01/1985
Ms. Laura F. Carson	02/01/1988
Mr George W. McElroy, CMA	02/08/1995
Mr Michael J Kelly, CMA, CFM	02/27/2002
Ms. Kripalakshmi Sooryanarayana, CMA	02/28/2012
Mr. Gary Zyla	02/25/2015
Mr. Michael W. Gorski	02/23/2016
Mr. Ela Jaszczak	02/28/2019
Ms. Emily Chin	02/26/2020



Golden West Council

Board Meetings

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

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

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.

February 27, 2021 - Quarterly Board of Directors Meeting

This is a virtual meeting as REST has been cancelled for 2021.

05:30 PM to 07:30 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

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, has cancelled 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. The Council looks forward to presenting this Conference in 2022.

REST Scholarships

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

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

About 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.

Institute of Management Accountants

ABOUT IMA

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

Management accountants belong at IMA.

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

Message to All IMA Stakeholders on the Coronavirus

Updated December 16, 2020

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

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

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

In addition, our English CMA® (Certified Management Accountant) exam testing window for May/June is opening early on April 1, 2021. Testing is subject to the availability of local Prometric Testing Centers. More information on the impact to CMA candidates is available [here](#).

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

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

Important Notice to All CMA Candidate

Updated on December 16, 2020

As we continue to monitor the global coronavirus outbreak, our top priority remains the health and safety of all CMA® (Certified Management Accountant) candidates and our staff. Given the current outlook, please note the following schedule and process changes:

Extension of May/June exam window

We have extended the May-June testing window to include the month of April. This testing window will now run from April 1, 2021, through June 30, 2021.

This change applies to the English language exam only.

Registration for this April-June testing window will remain open until June 15, 2021.

Prometric testing centers are open

Virtually all Prometric testing centers around the world are open, many at full capacity.

Review the complete list of [open Prometric testing centers](#). *Note: This list is subject to change.*

Masks required – Until further notice, test takers are required to bring and wear a mask during the entirety of their time at the test center. Both medical masks or cloth face coverings are acceptable. **Masks with exhale valves are prohibited to use at the test center.** Any test taker that comes to the test center without a mask will not be allowed to test, marked as a "no show," and will not be eligible for a free reschedule. Candidates should check for additional details by visiting Prometric's [coronavirus update page](#).

Have more questions regarding testing sites and COVID-19? Go to the [Prometric FAQ page now](#).

[What to expect on test day](#): This video will provide you with a detailed overview of what to expect during your visit to a Prometric test center.

(Continued on page 13)

Institute of Management Accountants

Important Notice to All CMA Candidate

(Continued from page 12)

Change to submission process for education transcripts

CMA candidates must submit all required educational transcripts to ICMA electronically on a temporary basis.

Please email all documents in PDF format and make sure to include your IMA membership number. Send to:

For candidates in China: cmarenzheng@imanet.org.cn

For all other regions: aleuc@imanet.org

If you have already submitted your educational documents by mail, please resubmit a scanned copy of your documents to the above email address.

To register to take the CMA exam, please visit the [exam registration page](#).

We will continue to update you as we work through this challenging period. Thank you for your cooperation and patience.

Sincerely,
Dennis Whitney, CMA
Senior Vice President, ICMA

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. Please see the attached policy for additional information.

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

- Ep. 104: Ed Lam - Building a Continuous Improvement Culture
- Ep. 105: Roland Abi Najem - Cybersecurity Practices
- Ep. 106: Loreal Jiles - An Agile Approach to Finance Transformation
- Ep. 107: Clive Webb - The Skills for the CFO of the Future
- BONUS | Neil Baier - CMAs Making a Difference

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

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



Institute of Management Accountants

Webinars

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

Webinars are open to IMA Members Only.

[February 02, 2021](#)

Essential Leadership Skills

10:00 AM - 11:30 AM PT

Leadership Academy

[February 04, 2021](#)

Reducing Digital Data Bias Risk through Diversity and Inclusion

10:00 AM - 11:00 AM PT

Inside Talk

[February 10, 2021](#)

Modernizing Financial Processes for Remote Accounting Teams

10:00 AM - 11:00 AM PT

Inside Talk

[February 24, 2021](#)

Forecasting & Budgeting Best Practices to Survive & Thrive Post-COVID-19

10:00 AM - 11:00 AM PT

Inside Talk

[March 02, 2021](#)

Global Leadership

10:00 AM - 11:30 AM PT

Leadership Academy

[March 17, 2021](#)

Finance Automation: Unleash Your Accountants to Become Exceptional

10:00 AM - 11:00 AM PT

Inside Talk

[April 06, 2021](#)

Listening Skills

10:00 AM - 11:30 AM PT

Leadership Academy

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

[Agile and Scrum-Based Value Delivery](#)
[Ethics Maps for AI Analytics](#)
[Quantum Fintech](#)

Online Courses

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

Research

[From Mirage to Reality: Bringing Finance into Focus in a Digital World](#)
[Transforming the Finance Function with RPA](#)
[Impact of Big Data on Finance: Now and in the Future](#)

Blogs

[Upskill The Workforce You Have Instead of Waiting for The One You Want](#)
[We Are All Futurists Now](#)
[Explainable AI: Is It Even Possible?](#)

Podcasts

[Ep. 108: Gary Piscatelli - Business Transformation for Today's Business Leaders](#)
[Ep. 106: Loreal Jiles - An Agile Approach to Finance Transformation](#)
[Ep. 105: Roland Abi Najem - Cybersecurity Practices](#)

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

Conferences

Annual Conference Exposition (ACE2021), (Virtual) - June 14-16, 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 - "Power Your Potential", Anaheim, CA - November 4-6, 2021

We hope to be back in person for SLC2021 in Anaheim, California, November 4 – 6! Check back this summer for updates. Registration opens September 2021.

[Click here to Register](#)

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.

Virtual IMA's Women's Leadership Summit - 2021

Friday, April 23, 2021
10:00 a.m. – 5:00 p.m. EST
Registration opens March 2021

[LEARN MORE](#) about past events

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.

February 2021

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.

February 2021

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.

February 2021

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. .

Seminar Day #1: The 21st Century Successful Auditor

Wednesday, February 24, 2021 8:30 am - Wednesday, February 24, 2021 12:30 pm

[New Registration](#) 

Seminar Day #2: Auditor's Tool Kit: Resolving Conflict While Successfully Holding People Accountable, Whether They Report to You Or Not

Thursday, February 25, 2021 8:30 am - Thursday, February 25, 2021 12:30 pm

[New Registration](#) 

Event Details

Virtual Zoom

4 CPE Hours

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

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The Association of
Accountants and
Financial Professionals
in Business

EAST BAY-NORTHERN CALIFORNIA CHAPTER