

# THE READ INK

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

## President's Message

### East Bay Chapter Members and Friends,

As you know, IMA is a mission-driven organization that couldn't exist without the time, talent, and expertise of our volunteers. Members come from a variety of career levels and diverse backgrounds, and they serve in varying capacities on our Governing Boards, Technical Advisory Committees, as well as other short- and long-term roles. If you've been thinking about getting involved, now is the time to take that step forward.

Explore the many opportunities we have to offer. No contribution is too small. You can serve on the Board and help plan for events such as Technical Meetings and Guest Speakers. Or, you can be a Campus Influencer who can inspire students with real-world experience and insight. There are so many ways to volunteer and help.

For more information, click on the link below to view the "Volunteering with IMA" web page.

[Volunteer!](#)

Mike Gorski, President  
IMA East Bay – Northern California chapter  
2018-2019

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

CMA® | You've got to earn it.

## Latest Information

### Did You Know!

IMA membership and the CMA® (Certified Management Accountant) program continue to grow in Fiscal Year 2019 (*Metrics through March 31, 2019*)

- IMA membership reached 134,494 (up 25% year-over-year)
- 77,481 total CMA candidates are in the pipeline (up 34% year-over-year)
- 34,285 new candidates joined the CMA program FYTD (up 23% year-over-year)
  - The new candidate pipeline in The Americas is up 15% over last year and up 63% over three years ago
- 8,191 new CMAs awarded FYTD (up 80% year-over-year)
- IMA has a total of 357 active Professional and Student Chapters and CMA Elite Clubs.

IMA members can gain and share experience through volunteerism. Visit the [Volunteering with IMA](#) section of IMA's website to learn about short- and long-term opportunities.

The regularly updated [IMA Blog](#) shares perspectives and tips to help management accountants become more informed about topics such as technology, management, and career advancement.

[CareerDriver®](#), IMA's exclusive career-planning tool, was recently updated to reflect IMA's enhanced [Management Accounting Competency Framework](#).

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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 (cont.)

(Continued from page 1)

### 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.

### **Don't miss IMA's 100th Anniversary celebration at ACE2019**

Join us **June 15-19, 2019**, in beautiful San Diego for expert training, networking, an epic celebration, and spectacular keynote speakers headlined by the one and only...

### **JAY LENO!**

Registration is open [Now](#). We look forward to seeing you in June!

### **Informational Articles to Assist Your Career!**



#### **Onboarding – Before the Start Date – 3 Vital Tips [Link](#)**

I walked into the lobby of my new job – super excited and nervous. The person at the front desk asked if she could help me. I introduced myself and said that it was my first day. Her comment, “I didn’t know anyone was starting today.” I waited in the lobby for what seemed like an eternity. Another individual walked into the lobby and asked if I needed help. I introduced myself again. Another shock that I was a new employee. Finally, I’m greeted by my new boss. He walks me into a cubicle with no introductions to anyone. He told me that he was super busy and I could go through the welcome box that corporate sent and do my new hire paperwork. He also instructed me to clean out the desk from the last employee and set it up how I wanted. He’d check back with me at noon. That “unwelcomed” first day could have been different.

All of us are facing demands on our daily jobs and hiring can be the last thing we want on our to do list. Once you make the hire, it feels great to remove that “task” off of your plate. We move on with our days and then the person shows up and we start the onboarding process. Some companies will do a small amount of pre-start communication but many do not. Employee retention begins even before the individual starts their first day. Here are three suggestions to make a difference for a new employee before they even show up in your lobby.

#### **Mail**

Send a company brochure or press release with a simple note saying that you are looking forward to having them on your team. Huge impact!

#### **Email**

Send an email update to let them know that their work tools have been ordered (computer, cell phone, business cards, etc.). It lets them know that they are important.

#### **In Person**

Meet for a coffee/tea or lunch or invite them to a company event. This allows them to already feel engaged with you, the team and the company.

Everyone wants to feel like they matter. Let your new hires and current employees know how vital they are to the success of the company!

Tricia Scalzo, Executive Recruiter at BayWorks Recruiting



**Robert Half (Accountemps)** has provided the following articles on "**5 Tips on How to Boost Creativity on Your Team**". [Link](#)

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

# East Bay - Northern California

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

The Chapter's 2019-2020 Board of Director's Elections and Appointments document was been submitted to IMA Global on March 29, 2019.

The East Bay - Northern California Chapter of the IMA is still seeking qualified members to serve on EB-NC's Board of Directors, with terms beginning on July 1, 2019. These esteemed volunteers have the crucial responsibility of overseeing the strategic direction of the local organization and its policies and procedures; monitoring the Chapter's financial health and committee activities; and supporting IMA's and EB-NC's mission, vision, and values.

By serving on the Chapter Board, you can become an active participant in setting IMA's and the local Chapter's agenda, advance and impact the management accounting profession, and represent IMA by working with external organizations and industry stakeholders.

You can also nominate another member you feel would be a qualified candidate for the Chapter's Board.

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

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

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

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

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

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).

If you are interested in being on the Chapter Board of Directors, one may still submit your information (Include a short paragraph detailing why you would like to be on the Board), 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).

### **2019-2020 East Bay—Northern California Chapter Tentative Board of Directors:**

Mike Gorski	President
Mike Gorski	Past President
(Open)	Vice President of Administration
(Open)	Director of Competition
Robert Hulin	Treasurer
Pankaj Pandey	Director: Investment Committee
William Sawyer	Director: Investment Committee
Chung Bothwell	Director: Investment Committee
(Open) Mike Gorski (Acting)	Secretary
(Open)	Communication VP
(Open) Robert Hulin (Acting)	Webmaster
(Open) Robert Hulin (Acting)	Newsletter Director
Chung Bothwell	Director of Community Services
Kevin Clancy	Director of Social Media
(Open)	Vice President of Professional Education
Tricia Scalzo	Director of FMN Program
William Sievers	Director of CMA Program
William Sievers	Vice President of Membership
Ken Shepard	Vice President of Young Professionals and Students
(Open)	Director of Student Services
Sherry Morse	Director at Large (Advisory only)

# East Bay - Northern California

## Chapter Calendar

<u>Date</u>	<u>Event</u>	<u>CPE</u>	<u>Time</u>	<u>Location</u>
<b>2019</b>				
01 May	How to Prepare for a Successful System Implementation	1.0	10:00 AM	Inside Talk
04 May	Excel in Accounting: How to Pass Excel 2016 Specialist & Expert	2.0	9:00 AM	Oakland, CA
07 May	Facilitation Skills	1.5	10:00 AM	Leadership Academy
08 May	The New Role of Automation in Accounts Payable for 2019 and Beyond	1.0	10:00 AM	Inside Talk
11 May	Financial Management Network	4.0	9:00 AM	Pleasanton, CA
13 May	Linking Business Strategies to Functional Execution with the Hoshin Kanri Method	1.0	9:00 AM	Strategic Management
15 May	Maximize Accounting & Finance Resources for Finance Transformation Projects	1.0	10:00 AM	Inside Talk
16 May	EB-NC IMA Board Meeting	0	5:30 PM	Zoom
18 May	GWC Leadership Training Seminar and Annual Meeting	4	8:00 AM	Dublin, CA
06 Jun	Financial Leadership (New)	1.5	10:00 AM	Leadership Academy
15-19 Jun	IMA's Annual Conference & Expo	30+		San Diego, CA
22 Jun	EB-NC Ethics	2	9:00 AM	Pleasanton, CA
14-16 Nov	IMA's Student Conference			Charlotte, NC
<b>2020</b>				
20-22 Feb	REST 2020	22		Reno, NV

## 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

May 16, 2019: 5:30 PM to 6:30 PM

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

Join Zoom Meeting

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

One tap mobile

+16699006833,,5628614823# US (San Jose);

+14086380968,,5628614823# US (San Jose)

Dial by your location

+1 669 900 6833 US (San Jose);

+1 408 638 0968 US (San Jose);

+1 646 876 9923 US (New York)

Meeting ID: 562 861 4823

Please notify Mike Gorski at [eastbaync@imachapter.org](mailto:eastbaync@imachapter.org) if you plan on attending.

# East Bay - Northern California Education

## Financial Management Network

May 11, 2019: 9:00 AM to 1:00 PM

Continuing Professional Education: 4.0 Hour CPE



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

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

Location: ConXtech, Inc. Headquarters  
6701 Koll Center Pkwy, Suite 150  
Pleasanton, CA 94566 Time: 9:00 am to 1:00 pm

Cost: \$40.00 members / Non-members  
Full breakfast and lunch included in cost  
Registration: [Tricia Scalzo](#)

Sponsored By:



## Certification

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

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

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

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

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

These are the topics deleted from test

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

[\(More Information\)](#)

# East Bay - Northern California Education

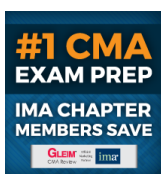
## Certification (cont.)

### 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](#).

## 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, Gleim continues to dedicate itself to preparing candidates to pass quickly and confidently. The 2019 Gleim CMA Review includes thousands of the most realistic CMA exam questions, the most comprehensive coverage, dedicated and reliable support, and more. IMA chapter members can save up to 25% on Premium CMA Review System.

To place order directly members can go online by going to [gleim.com/IMAEBNC](http://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

Premium Review System (SET): \$1,249.00 retail and \$936.75 with the 25% IMA Chapter Discount

Premium Review System (PART): \$750.00 retail and \$562.5 with the 25% IMA Chapter Discount

Traditional Review System (SET): \$1,049.00 retail and \$891.65 with the 15% IMA Chapter Discount

Traditional Review System (PART): \$625.00 retail and \$531.25 with the 15% IMA Chapter Discount

CPE is 15% off of 20 hours or more

## Wiley Study Materials

Wiley CMAexcel has teamed up with IMA® (Institute of Management Accountants) to offer you great savings to kick off the New Year! For a limited time, save 20% on any [Wiley CMAexcel product](#), including the popular [Wiley CMAexcel Platinum CMA Course](#), and also receive 25% off your CMA® (Certified Management Accountant) entrance fee and IMA membership\* — a potential savings of up to \$500!

Don't wait to save – this offer expires on **April 1**.

\*25% off applies to IMA membership and CMA entrance only. Offer not valid for IMA membership renewals or CMA exam registrations. A discount code for 25% off your CMA entrance fee and IMA membership will be sent after your purchase of Wiley CMAexcel products.



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](#)

# East Bay - Northern California Education

## Microsoft EXCEL

### 2010 Microsoft Excel Presentations



The Chapter continues its outreach program to our members by offering a one hour in-house Excel training session free. This is a benefit for the East Bay - Northern California Chapter membership. The Chapter member may include company associates, outside associates, and other guests.  
Session Criteria:

Interested: Contact John Hallett at [eastbaync@imachapter.org](mailto:eastbaync@imachapter.org). This is an member benefit to you as an active EB-NC Chapter member

### Consider Taking the Microsoft Excel Expert 77-728 Test!

I just took the Excel Expert 77-728 Exam. I flunked 1st time and got the minimum score of 700 on the makeup exam. Needless to say: It is a tough exam.

My Study Material included:

G-Metrix Test Program: [GMetrix Link](#).

The official Microsoft MOS 2016 Study Guide 77-728 Paul McFedries [Amazon Link](#)

An essential support tool for the MOS book is a series of YouTube videos by Carshalton Advisory .

The Carshalton YouTube site details each practice task objective question in the entire book. [Carshalton Link](#)

Please feel free to contact me to further discuss the exam. John Hallett at [eastbaync@imachapter.org](mailto:eastbaync@imachapter.org).

## Ethics Presentation



### Blinded by Pressure

June 22, 2019: 9:00 AM to 12:00 PM

Continuing Professional Education: 2.0 Hour CPE

Diamond Foods made the headlines when fraud was discovered. Now the company struggles with reestablishing its identity. How and why did these fraudulent activities begin? Overall, Diamond purportedly understated walnut costs in two fiscal years to falsify earnings in order to meet stock analysts' estimates. This course will take you through the events that unfolded because of the decisions made by Diamond's executives in reaction to the pressure to meet these estimates.

Location: ConXtech, Inc. Headquarters  
6701 Koll Center Pkwy, Suite 150  
Pleasanton, CA 94566 Time: 9:00 am to 1:00 pm

Cost: \$20.00 members / Non-members  
Full breakfast and lunch included in cost  
Registration: [John Hallett](#)

## 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

### 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

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 [John Hallett](#) or [Mike Gorski](#).

# East Bay - Northern California Community Relations / Student Relations

## Student Relations



**EAST BAY** Rising in the East



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

### IMA DAY

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

### SCHOLARSHIPS

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

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

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

### STUDENT SPEAKER TEAM

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

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

## EB-NC Scholarship Presentation CSU-EB

California State University-East Bay held their 43rd Annual Awards & Scholarship Presentation on Friday, April 26, 2019. Serving as master of ceremonies, Associate Dean Fricke, made opening remarks touting the school's responsibility in preparing the students for the business world. Dean Fricke also presented the Outstanding Academic Achievement Awards.

Over \$45 thousand dollars of scholarships were awarded this evening!

East Bay-Northern California IMA Chapter Annual Scholarship was presented by Ken Shepard, V.P. Young Professionals of the IMA East Bay-Northern California Chapter to **Arshdeep Khinda**, an international student who must pay his own tuition which amounts to \$10 thousand a quarter. We spoke to Arshdeep after the ceremony. He expressed his deep thanks and appreciation for the scholarship which would take a lot of pressure off him and his family.

Our chapter has long been a supporter and scholarship presenter to CSU-EB.

## EB-NC Student Scholarship Criteria

The intent of the Student Scholarship is to provide a monetary value to a deserving student within the University / College to further their education. Also included with the monetary the Chapter will sponsor either a 1(one) or 2(two) year membership depending on the Student Scholarship. The criteria for these scholarships are:

- Current College Student
- Enrolled full-time (12 Units)
- Accounting Major
- 3.00 GPA
- Completed 24 Units
- Demonstrated Leadership, school activity involvement, and community service, and
- An essay is required.



# East Bay - Northern California Membership

## MYIMA Profile

Please keep your contact information up to date so that you can continue to receive communications from the East Bay—Northern California Chapter or IMA.

If you would like update your information or change your membership into the East Bay—Northern California Chapter or to another chapter, contact IMA Customer Service at 800-638-4427 or go online to your profile at <http://www.imaonlinestore.com/PersonifyEbusiness/Default.aspx?TabId=61> (user ID and password are required).

## Member Recognition

### New Members April 2019

Mr. Patrick Karoga	Regular	04/05/2019
Ms. Lulu He	Regular	04/05/2019
Ms. Vivian Yolanda Garcia	Academic	04/10/2019
Ms. Bei Li	Regular	04/28/2019

### New Members (Transfers In) April 2019

### Members - Received CMA / CSCA

### Member Anniversaries Members Celebrating 50 Years in IMA Year 2018-19

### Members Celebrating 25 Years in IMA Year 2018-19

Mr. Jon Parkinson, CMA	08/18/1993
Ms. Mary-Ann E. Wolfenden, CMA	09/07/1993
Mr. Donald C. Phelps	01/20/1994

### May 2019 Anniversaries

Mr. Ken L Shepard	05/01/1967
Ms. Dodi L Monti, CMA, CPA	05/01/1985
Ms. Bee Michelle C. Low, CMA	05/01/2004
Ms. Sugarna Prakash, CMA	05/01/2009
Mr. Joshua Ballard, CMA, CFA	05/01/2012
Dr. Ying Guo	05/24/2013
Ms. Kristine Ebner	05/14/2015
Mr. Salvador Cisneros	05/20/2015
Ms. Heather Ann Deagen	05/27/2015
Mr. Ditter Alexis Salvador Guillermo Perez Oroz	05/04/2018
Mr. Ronald Catahimican	05/10/2018

# Golden West Council

## About the GWC

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

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

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

## Board Meetings

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

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

### May 18, 2019 - Leadership Training Seminar and Annual Meeting

8:30 AM - 12:30 PM LTS ; 12:45 PM - 2:45 PM Annual Meeting

Agenda Topic:

- CMA exam changes effective January 2020
- Chapter web site creation and update
- Chapter & Council board succession planning
- Breakout groups by Chapter Presidents, VP Membership, VP Communications, Treasurer, Secretary and VP Education to discuss best practices, challenges, etc.

**LOCATION:** Holiday Inn, Dublin-Pleasanton, 6680 Regional St, Dublin, CA 94568 [Map](#)

If lost - call (408) 309-1333

**Cost:** \$40.00 per person for Training & Lunch

Please contact [Scott Berry](#) of your meeting attendance.

## Reno Educational Seminar and Training

### February 27-29, 2020

Continuing Professional Education: 22.0 Hours CPE

The Golden West Council and the Pacific Northwest Council of IMA, representing 28 chapters in eight states, is pleased to present the premier educational event in the Western U.S. - REST 2020. This two and a half day program ear of offering high quality, leading edge programs geared to accounting and finance professionals.

Prior year attendees have been impressed with the quality of topics and speakers, combined with a low cost destination served by airlines, and offering low cost transportation. This type of seminar is an excellent opportunity for both business and personal networking not available through other CPE delivery mediums.

**Location: Peppermill Reno**  
2707 S Virginia St, Reno, NV 89502

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

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

### REST Scholarships

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

Scholarship Committee  
Golden West Council of the Institute of Management Accountants  
C/O: TBA  
Golden West Council VP Education

## ABOUT IMA

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

Management accountants belong at IMA.

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

## IMA Nominating Committee Announces Paul E. Juras, CMA, CPA, Ph.D., Fiscal 2019-2020 Chair-Elect



The Nominating Committee of IMA® (Institute of Management Accountants) is pleased to announce that **Paul E. Juras, CMA, CPA, Ph.D.**, has been named Chair-Elect for IMA's fiscal 2019-2020 period (July 1, 2019 to June 30, 2020).

Juras is the Vander Wolk Professor of Managerial Accounting and Operational Performance at Babson College, where he teaches managerial accounting and strategic cost management courses in the M.B.A. and undergraduate programs. Before joining the Babson faculty, Juras taught at Wake Forest University. He earned his Ph.D. from Syracuse University and both his B.B.A. and M.B.A. from Pace University.

Juras' area of expertise is strategic management accounting. He has published articles in numerous periodicals, including the *Journal of Corporate Accounting and Finance*, *Issues in Accounting Education*, *The CPA Journal*, and *Strategic Finance*, and his current research interests focus on contemporary cost management systems. Juras also has co-authored a cost management textbook as well as numerous case studies with a cost management perspective. In addition, he has consulted with various corporations and public accounting firms.

Juras has provided service to IMA in various roles, including as a member of the Global Board of Directors, chair of the ICMA Board of Regents, chair of the IMA Research Foundation, and chair of the Performance Oversight and Audit Board Committee. He also spent 10 years as associate editor of the IECJ® (IMA Educational Case Journal). In 2015, he received IMA's R. Lee Brummet Award for Distinguished Accounting Educators.

## Connect. Network, and Grow

### Welcome to myIMA Network

#### Great benefits for members

Are you taking advantage of the exclusive IMA® (Institute of Management Accountants) member platform? **LinkUp IMA is now myIMA Network.** IMA recently updated the experience to help you:

Connect with a community of more than 100,000 professionals around the globe on a platform designed exclusively for IMA members.

Join discussions and ask questions on a variety of topics, from challenges you face on the job to accounting and finance trends, technology, career forums, and more!

Find a study partner and preparation tips for the CMA® (Certified Management Accountant) exam in our CMA study group.

See upcoming IMA events in your local area. Currently, there are more than 200 events listed that you can explore.

[Visit MyIMA Network Now](#)

Take this opportunity to update your profile and start using myIMA Network today!

# 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.*

[May 01, 2019](#)

**How to Prepare for a Successful System Implementation** Inside Talk  
10:00 AM - 11:00 AM PT

[May 07, 2019](#)

**Facilitation Skills** Leadership Academy  
10:00 AM - 11:30 AM PT

[May 08, 2019](#)

**The New Role of Automation in Accounts Payable for 2019 and Beyond** Inside Talk  
10:00 AM - 11:00 AM PT

[May 13, 2019](#)

**The Linking Business Strategies to Functional Execution with the Hoshin Kanri Method** Strategic Management  
10:00 AM - 11:00 AM PT

[May 15, 2019](#)

**Maximize Accounting & Finance Resources for Finance Transformation Projects** Inside Talk  
10:00 AM - 11:00 AM PT

[June 06, 2019](#)

**Financial Leadership (New)** Leadership Academy  
10:00 AM - 11:30 AM PT

Click here to register for the webinars:

[IMA Webinars](#)

## Conferences

**Annual Conference Exposition (ACE18), San Diego, CA - June 15-19, 2019**

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

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

[Click here to Register](#)

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

It's time to think differently and create your own opportunity for career success. In this age of social networking, there is nothing online that has yet to replace the importance of meeting people in person. Learn how to position yourself for future success.

As in past years, students will have an excellent opportunity to network with accountants and finance professionals, fellow students, and educators from across the country. Learn from leading experts about career opportunities, the value of the Certified Management Accountant (CMA®) certification, IFRS, environmental accounting, leadership, job search techniques, and more

[Click here to Register](#)

# Associate Organizations

## Excel In Accounting

Excel in Accounting is a community of finance and accounting professionals in and around San Francisco who want to learn and share advanced Excel spreadsheet techniques used specifically for finance and accounting. We promote Excel mastery through training sessions, users group meetings and online media discussion.

May 04, 2019

How to Pass Excel 2016 Specialist & Expert Certification Test

Presented by: John Hallet - Certified Excel Expert

Session will cover how to prepare for the Excel Expert Certification Exam

Click [here](#) to register.

**Time:** 9:00 AM - 11:30 AM

**Cost:** Free

**Location:**

Robert Half

1999 Harrison Street #1000, Oakland, 94612

[map](#)

Excel in Accounting Page: [Click Here](#)

Sat Jun 22, 2019

[Pivot Tables/Pivot Charts](#)

Sat Jul 27, 2019

[Dashboards, Charts & Graphs](#)

Sat Aug 24, 2019

[Functions & Formulas](#)

Sat Sep 28, 2019

[Intro to Macros, Macro Recorder](#)

Sat Oct 26, 2019

[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.

May 2019

**No Technical Program Scheduled**

## Diablo Valley Chapter of the IMA

The Diablo Valley Chapter (#0356) of the Institute of Management Accountants was chartered in 1980. The chapter is part of the Golden West Regional Council and the Warner Division which contains chapters that have less than 125 competition members. We exist to serve local accounting and finance professionals with continuing education programs and networking opportunities. If you are a college student, young professional or seasoned professional, we have services that will help you in your career.

May 2019

**No Technical Program Scheduled**

East Bay-Northern California  
Chapter of the IMA

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

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

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The Association of  
Accountants and  
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EAST BAY-NORTHERN CALIFORNIA CHAPTER