



MID-AMERICA COUNCIL

THE ASSOCIATION OF ACCOUNTANTS AND FINANCIAL PROFESSIONALS IN BUSINESS



NEWSLETTER

OPENING MESSAGE

Spring is the perfect time for personal growth, and educational opportunities are tremendous for your career, or to pass on to your colleagues. Similar to a garden, we must all water and fertilize our network of connections and tend to our relationships with other professionals to insure we see the rewards of a bountiful harvest when we need it most, upon graduation, the loss of a job, or as we seek new opportunities in a different company or industry.



Spring = new growth (learning) opportunities

The Spring Educational Conference is on Thursday, April 20, 2017, and the Leadership Training Session (LTS) on Friday, April 21, 2017. These events have 16 hours of reasonably priced educational content, something that you can take back to your chapter or employer, and add value to your enterprise, whether professional or personal.

The LTS will be followed by a very short Mid-American Council board meeting. Please stay and discover what goes into creating activities for the year, and how the Council can be helpful to your personal development and/or chapter activities.

Sincerely,

Dana Riess
Director Newsletter

APRIL 2017

In this issue:

Opening Message	1
Proposed MAC 2017-2018 Board	2
MAC 2016-2017 Board	3
MAC Leadership Training Session	4
MAC April Board Meeting—Agenda	5
MAC January Meeting Minutes	6-10

JOIN US

Special points of interest:

Leadership Training Session (LTS):

When: Friday, April 21, 2017
8:00am – 4:00pm

Where: NIU Meeting & Conference Center
8500 East State Street
Rockford, IL 61108

[Click here to Register!](#)

Next Council Meeting: Follows LTS



The Association of
Accountants and
Financial Professionals
in Business



**MID-AMERICA COUNCIL
2017-2018 PROPOSED BOARD MEMBERS**

BOARD POSITION	NAME, CHAPTER
President	Rick Bellmore, Winnebagoland
President Elect	Erin Ankebrant, Greater Milwaukee
Secretary	Martha Paalman, Winnebagoland
Treasurer	Dana Riess, Chicago
VP - Communications	Eric Griffin, Madison
Director - Newsletter	William Ramsay, Winnebagoland
VP - Education	Sheryl Elliott, Fox River Valley
Director – Student Relations	Kathy Horton, Fox River Valley
Regional VP	Dave Skora, Madison
Regional Director - Calumet	TBD
Regional Director - Central Illinois	TBD
Regional Director - Chicago	TBD
Regional Director - Fox River Valley	TBD
Regional Director - Greater Milwaukee	TBD
Regional Director - Heart of WI	John Wieland, Winnebagoland
Regional Director - Illowa	TBD
Regional Director - NW Suburban Chicago	TBD
Regional Director - Madison	Connie Lusietto, Central Illinois
Regional Director - Packerland	John Wieland, Winnebagoland
Regional Director - Rockford	Connie Lusietto, Central Illinois
Regional Director - Winnebagoland	Bruce Hamilton, Madison
Nominating Committee	Bruce Hamilton, Madison
Council Bylaws Committee	Mary Strautmann, Greater Milwaukee
MAC Long-Range Planning Committee	Harlan Fuller, Central Illinois
Member Relations Committee (IMA Global)	Dave Skora, Madison



The Association of
Accountants and
Financial Professionals
in Business



MID-AMERICA COUNCIL 2016-2017 BOARD MEMBERS

BOARD POSITION

President

NAME, CHAPTER

Rotation of:

Harlan Fuller, Central Illinois

Michele Reagan, Rockford

Bruce Hamilton, Madison

John Wieland, Winnebagoland

Rick Bellmore, Winnebagoland

Martha Paalman, Winnebagoland

Dana Riess, Chicago

Eric Griffin, Madison

Dana Riess, Chicago

Sheryl Elliott, Fox River Valley

Kathy Horton, Fox River Valley

Dave Skora, Madison

Joel VanDerWeele, Chicago

Michele Reagan, Rockford

Pam Voorhees, Fox River Valley

Joel VanDerWeele, Chicago

OPEN

John Wieland, Winnebagoland

Bruce Hamilton, Madison

Connie Lusietto, Central Illinois

Pam Voorhees, Fox River Valley

John Wieland, Winnebagoland

Connie Lusietto, Central Illinois

Bruce Hamilton, Madison

Harlan Fuller, Central Illinois

Mary Strautmann, Greater Milwaukee

Bruce Hamilton, Madison

Harlan Fuller, Central Illinois

Mary Strautmann, Greater Milwaukee

Dave Skora, Madison

EMAIL ADDRESS

hjfulle@ilstu.edu

michele.reagan@CLAconnect.com

Bruce@bhamiltoncpallc.com

jwieland68@gmail.com

rab@sigmanlegal.com

mlPaalman@bemis.com

driess@laminargroup.com

ejgriffin@nglic.com

dana.riess@abbvie.com

Sheryl.Elliott@vffllc.com

kathy.horton@yahoo.com

dkora@fristampumps.com

Jvanderweele@deloitte.com

michele.reagan@CLAconnect.com

pvoorhees0201@gmail.com

Jvanderweele@deloitte.com

--

jwieland68@gmail.com

Bruce@bhamiltoncpallc.com

Connie.Lusietto@adm.com

pvoorhees0201@gmail.com

jwieland68@gmail.com

Connie.Lusietto@adm.com

Bruce@bhamiltoncpallc.com

hjfulle@ilstu.edu

mary.strautmann@gmail.com

Bruce@bhamiltoncpallc.com

hjfulle@ilstu.edu

mary.strautmann@gmail.com

dkora@fristampumps.com

President Elect

Secretary

Treasurer

VP - Communications

Director - Newsletter

VP - Education

Director - Student Relations

Regional VP

Regional Director - Calumet

Regional Director - Central Illinois

Regional Director - Chicago

Regional Director - Fox River Valley

Regional Director - Greater Milwaukee

Regional Director - Heart of WI

Regional Director - Illowa

Regional Director - Madison

Regional Director - NW Suburban Chicago

Regional Director - Packerland

Regional Director - Rockford

Regional Director - Winnebagoland

MAC Long-Range Planning Committee

Council Bylaws Committee

Nominating Committee

Committee on Academic Relations (IMA Global)

CLEW Development Committee (IMA Global)

Volunteer Leadership Committee (IMA Global)

CONTACT US

We're on the Web!

<http://midamerica.imanet.org>

GET CERTIFIED!

The Certified Management Accountant (CMA) and the Certified in Financial Management (CFM) Programs have been designed to recognize the unique qualifications and expertise of those professionals engaged in management accounting and financial management.

Expand Your Network!

Open Doors of Opportunity!

Increase Your Worth with Certification!

CMA®

IMA's Certification for
Accountants and
Financial Professionals
in Business



The Association of
Accountants and
Financial Professionals
in Business



LEADERSHIP TRAINING INFORMATION

IMA MID-AMERICA COUNCIL 2017 LEADERSHIP TRAINING SESSION

April 21, 2017

Each year the Mid-America Council holds a regional Leadership Training Session (LTS). The one-day workshop focuses on leadership development of IMA members. A portion of the program discusses leadership for the local chapter. However, the majority of the day is geared toward professional leadership and current accounting and finance issues. These programs provide practical information that attendees can use on the job or in their community leadership positions. The biggest attraction is the ability to exchange ideas and experiences with fellow professionals. Student members also gain the opportunity to learn more about the business environment in a non-classroom setting from professionals already in their future careers.

SPECIFICS...

WHEN: Friday, April 21, 2017

WHERE: NIU Rockford Meeting & Conference Center, 8500 E. State St., Rockford, IL 61108
[Link to Map/Directions](#)

COST: \$30 for IMA members, \$85 for non-IMA members, and **FREE** for full-time students.

CPE: The day's events qualify for 7.5 hours of CPE.

LTS SCHEDULE

7:45 – 8:15 Registration & continental breakfast. This is an excellent opportunity to begin networking with others in attendance.

8:15 – 8:20 Welcome and Logistics

8:20 – 10:00 *Metrics That Matter*, presented by Brian Maskell

10:00 – 10:15 Refreshment Break

10:15 – 11:55 *Ethics*, presented by Dr. Kelly Pope

11:55 – 12:40 Lunch Break

12:40 – 1:55 Breakout Sessions

- *Automated Excel Commands via Push-Button Macros* by Harlan Fuller
- Chapter Leadership Session

1:55 – 2:10 Refreshment Break

2:10 – 3:50 *Secrets to Employee Retention*, presented by Jeff Kortes

3:50 – 3:55 Closing Remarks

Registration INFO: Go to www.midamerica.imanet.org/events for the registration link & payment details.



The Association of
Accountants and
Financial Professionals
in Business



UPCOMING MEETING INFORMATION

**IMA MID-AMERICA COUNCIL
MEETING AGENDA**

Date & Time		Teleconference Information	Location	
Friday, April 21, 2017 4:15pm – 5:00pm (After LTS)		None Available	NIU Meeting & Conf. Center 8500 East State Street Rockford, IL 61108 (map)	
1.	4:15pm – 4:20pm	Welcome & Introductions	Bruce	5 minutes
2.	4:20pm – 4:25pm	President's Report	Bruce	5 minutes
3.	4:25pm – 4:26pm	Secretary's Report Approve minutes from 1/21/17 meeting	Martha	1 minute
4.	4:26pm – 4:30pm	Treasurer's Report Financial statements / Bills	Dana	4 minutes
5.	4:30pm – 4:35pm	President Elect's Report Nominating Committee 2017-2018 Council Board of Directors Council Award of Excellence	Rick	5 minutes
6.	4:35pm – 4:49pm	Regional VP & Regional Directors IMA Board of Directors Update Regional Director Chapter Reports	Dave	14 minutes
7.	4:49pm – 4:50pm	VP Communications Newsletter Due Date	Eric	1 minute
8.	4:50pm – 4:54pm	VP Education Preliminary recap of MAC Conferences	Bruce/ Sheryl	4 minutes
9.	4:54pm – 4:56pm	Committee Reports		2 minutes
10.	4:56pm – 4:58pm	Old and/or New Business		2 minutes
11.	4:58pm – 5:00pm	Past Presidents		2 minutes
12.	5:00pm	Meeting Adjournment		



MEETING MINUTES

**IMA Mid-America Council Board Meeting
Serafino Square Apartments, Wauwatosa, WI
January 21, 2017**

ATTENDANCE

NAME	CHAPTER	MAC POSITION
Martha Paalman	Winnebago	Secretary
Bill Ramsay	Winnebago	Past President
Dave Skora	Madison	Global Director/Past President
Mary Strautmman	Greater Milwaukee	Past President
John Wieland	Winnebago	Regional Director/Past President
Erin Ankebrant	Greater Milwaukee	Delegate
Harlan Fuller	Central Illinois	Past President
Bruce Hamilton	Madison	Past President
Brian Wetters	Fox River Valley	Delegate
On the Phone:		
Sheryl Elliott	Fox River Valley	VP Education
Michele Reagan	Rockford	Regional Director/Past President
Dana Riess	Chicago	Director-Newsletter

Harlan called the meeting to order at 9:28 am.

PRESIDENT – Harlan Fuller (Interim)
No Report

SECRETARY – Martha Paalman
The minutes from the October 29, 2016 Mid-America Council board meeting were previously included in the newsletter. Motion to approve the October minutes was made by Mary and seconded by Dave. Motion passed.

TREASURER – Stephen Craig (absent)
Stephen has resigned as council treasurer effective January 20th. Discussion was had on the path forward and the time commitment of the position. Dana volunteered to take on the position for the remainder of the program year. She also offered to remain in the treasurer position going into next year but would want someone else to take over the newsletter position she also currently holds. One of the four recipients of Stephen’s email will respond to inform him that Dana has taken over the position. Dana to arrange picking up the council records. Martha to prepare resolution to switch authorized signers on the council’s account.

No treasurer report to review. Will review at next meeting.

Bruce emailed Stephen the council’s acceptance of his resignation on Sunday, January 22, 2017.



PRESIDENT-ELECT – Rick Bellmore (absent)

John provided an update: Please send Rick an email by Jan 31st if you're interested in a position on the council board for the 2017-18 year. Rick will be contacting people through the middle of February to get the slate ready for next year. He could probably use some help since he's out of town until the end of the month due to a death in the family. Proposed the creation of a nominating committee: John, Mary, Bruce volunteered.

Council Award of Excellence: Rick will prepare the entry. John will send him his forms as an example.

REGIONAL VP – David Skora

Global Director – IMA Board Update:

CMA First Program – have any of us seen the TV ads? They've been well received in their target market. We've also heard their ads on public radio, in print publications, and on Facebook. Tagline of "The Certification you've got to earn" is a nice touch.

February council leader webinar – global wants to ensure at least one council member attends. Date is Feb 9th at 2PM CST.

Regional Director Reports:

Calumet: Joel (absent) – no report

Central Illinois: Michele/Harlan

- Michele did finally get an email to their president, have not had a response yet

Harlan reported:

- Two hour excel program and two hour ethics program
- Working on a spring program of 4-8 hours
- Board is working on finding their own replacement to refresh a board that's not changed in 5 years
- Speakers are hard to find – catch-22 low attendance = good speakers not interested in speaking vs bad speaker = low attendance .

Chicago: Pam (absent)

Dana reported:

- Have had several resignations recently: treasurer resigned two months ago. Last week Joel (VP membership) submitted his resignation (council implications?) Board is getting sparse – meeting quorum is difficult.
- Last event was last Thursday, downtown. Marketing for the event was held up by information about the event, though the intention was to advertise before the holidays.
- Things are looking tough



Fox River Valley: Joel (absent)

Brian reported:

- Have had four meetings so far, most recent was a tax update last week.
- Gearing up for LTS. Have secured \$200 for a raffle to encourage attendance at SEC and LTS.
- Board is discussing the future of the chapter. They don't see the young professions attending monthly meetings. Membership Director did an analysis of the chapter membership. They have 90 CMAs and only 18 have attended a meeting in the last 5 years. Member locations are wide-spread across the Chicago area, meetings aren't held centrally located in terms of the member's geographic location. Other feedback on technical meetings are about time commitment. Standard meetings are 3 hours long versus webinar related CPE. What changes can the chapter make to engage with the young professions involved? Are asking a question each month to the chapter membership to review during planning for the 2017-18 program year. Expectation is that the meeting format will be changing
- Director of Student Activities put together a video about the Student Conference – will show at LTS. Had 5 students from Robert Morris attend. Council also received a thank you card from the students that included pictures.
- CMA director has reached out to Benedictine accounting club to do a presentation
- Lost another board member
- Recently revamped the website, but are preparing to integrate to Global's standard and got onto Facebook

Greater Milwaukee: OPEN

Mary reported:

- Things have been slow – it's a rebuilding year
- Have been meeting every other month
- Last month was a webinar – not sure how that ended up
- This month is student night. Invitations have been sent to local faculty and reminders will be sent in the coming weeks. Students can attend free and all attendees will receive a book.
- Panel discussion coming up – benefits
- Board planning for next year is being discussed at next board meeting
- Presentation is planned at Marquette, working on getting into Carthage College as well

Heart of WI: John

Last meeting was on Tuesday. Board meeting agenda indicated they were concerned about loss on meal spend. May need to up the dinner fee charged or look at different locations

Madison: Connie

- *Joe Keyes, Chapter President, reported the January meeting, an Economic Update, took place as planned even with the bad weather. Attendance was about half of what it was 2 years ago.*
- *I did not make the meeting as I had planned due to the bad weather.*
- *Joe provided a link in case the council didn't have it for the Federal Reserve Bank of Chicago speaker's bureau to pass on. <https://www.chicagofed.org/people/speakers-bureau>*
- *Upcoming meetings include*
 - *Jan 20 Tax Update*
 - *Feb 15 Labor Law*
 - *March 15 Ethics Meeting*
 - *April 26 Restaurant Start-up & Operations*
 - *May 17 Badger Honor Flight: Operations and Expenses*



NW Suburban Chicago: Pam (absent)

Dave commented he's been trying to get in touch with their president. No report apart from that.

Packerland: John

- Nov meeting was an interesting tour and Q&A with ARMS (shredding, physical and data storage/security) – potential advertiser for spring conference?
- December meeting was cancelled – encouraged their members to do charitable work in its place

Rockford: Connie

- Todd Hilliard, Chapter President
- The chapter had their January tax update meeting on Jan 17
- The February 28th meeting will be a friends and family night at the Rockford Ice Hogs. Ice Hogs management will discuss team financials followed by a game
- March 21 Tour of the UW Heath Sports Facility in Rockford
- April 25 Tour of the Woodward Rock Cut Campus
- May 16th Rob Clewer of the Rockford Housing Authority
- All sound like very interesting meetings
- Board is getting a little thin

Winnebago: Bruce

- Last meeting was on Tuesday. Have begun working on next year's board. Also need to work on cycling people through the board. Have had good student attendance on the board.
- Sometimes the president has to give a gentle nudge to encourage people to be involved.

VP-COMMUNICATIONS and DIRECTOR OF NEWSLETTER – Eric Griffin (absent) and Dana Riess

- The next council meeting will be on April 21st, 2017 in Rockford at LTS.
- The newsletter deadline will be April 3rd.
- Bruce will serve as President for the April meeting.

VP-EDUCATION – Sheryl Elliott/Bruce Hamilton/Dave Skora

Student Grants: No report

Student chapter outreach: No report

Spring Educational Conference & LTS:

- All the speakers for SEC and LTS are set and confirmed
- Dave is working on securing sponsors. He is well on the way to \$4,000 being raised - commitments are at \$2,000 today. Working on 6 new sponsors in addition to previous sponsors. Speaker fee commitment is \$6,000 and we have the Global grant of \$2,000. We seem to have the best connection with CPA firms, insurance, and staffing agencies. Any other ideas – send a connection to Dave.
- Eric is ready to get the promotional materials published – still waiting on some bio information, registration link is live. Plan to send speaker material to attendees ahead of time similar to last year.
- Attendance to be tracked via barcoding w/Bruce coordinating the logistics of that process. Plan is to scan at auditorium doors before each session. Propose finding some students to be our scanners. Bruce will contact UW-Whitewater and Robert Morris.
- Process seems to work well with a divide-and-conquer effort, in terms of securing speakers and planning.



BY-LAWS COMMITTEE — Mary Strautmann

Does someone have an electronic version of the council's by-laws?

Proposed changes were passed out at the last meeting. Change was related to nomination process for Global Director based on changes made by Global.

Mary motioned, John seconded. Motion passed.

Mary will revise, send to global, and to Eric to post on the council's website. She will also send copies of the revisions and the revised copy of the bylaws to those who weren't at the meeting in October.

VOLUNTEER LEADERSHIP COMMITTEE – David Skora & Sheryl Elliot

- Diversity and inclusion: there's a sub-committee working on this. They want boards (chapter, council, global) to look like their membership.
- (Global) Board member self-assessment: is a best practice for boards. Along with a mentor or committee chair, look at how you're doing, expectations.

OLD BUSINESS

Reminder that chapters need to complete the post-evaluation form and submit to the indicated email in order to receive the funds they were awarded. That form can be found on the council website.

NEW BUSINESS

None

PAST PRESIDENTS

John – we made it through the meeting! Concerned that the usual suspects are here and not anyone new.

Bill – glad to have the meeting here. Too close to the quorum number needed. Need to recruit for next year.

Good tone for the meeting

Bruce – good meeting, concerned that some of the people you'd expect weren't here. Need some fresh blood moving forward.

Dave – good meeting, concerned about Chicago chapter, not knowing much about Calumet chapter

Mary – good meeting, tried to get the chapter president here but he had a conflict. Pleased to see progress, glad president-elect is set for upcoming year

Harlan – thanks to Mary for hosting the meeting

MOTION TO ADJOURN – meeting adjourned at 11:11AM

Motion to adjourn by Dave and seconded by Mary. Motion passed.

Respectfully Submitted,
Martha Paalman, Council Secretary