



The Association of  
Accountants and  
Financial Professionals  
in Business



## President's Message July 2013

Greetings to all IMA members, leaders, and volunteers within the Mid-America Council's region. It is with great anticipation that I write this message to all of you as I begin my term as council president. I am on a plane to New Orleans to attend the IMA Annual Conference – I have not missed an annual conference since my first one in 1999 in Seattle. The Mid-America Council (MAC) is a very active council with engaged leaders. I would like to provide you with a glimpse of the past year, a hint of things to come this next year, and an introduction to your new council president.

The MAC has again been recognized with the prestigious Council Award of Excellence. Very few councils win this award and it is our seventh in a row. Congratulations to Bruce Hamilton, the 2012/2013 Council President, and the board for their desire to serve the membership in an extraordinary way!

If you did not attend the Leadership Training Session (LTS) last April in Rockford, you missed a huge opportunity for personal and professional education and networking. We had fantastic speakers on a variety of topics: soft skills (communications and business etiquette), lean/six sigma, and the 80/20 principle. Almost 150 participants were registered for this annual event. Be watching for details of the next LTS in the spring of 2014.

On to this next year. The new MAC board has been assembled and is hard at work this summer. Budgets are being prepared, chapter grant applications are being reviewed, student scholarship programs are being contemplated, and educational programs are being formulated. All of this in anticipation of our next MAC board meeting scheduled for July 27 at the Comfort Suites Milwaukee Airport Hotel in Milwaukee, Wisconsin. All IMA members are welcome to attend and participate. More details are in the newsletter and on the website.

So what are the council's plans and goals for this next year? Here are my thoughts.

1. Provide guidance and assistance to chapter leaders. This is primarily why the council exists. We will keep our eyes and ears open but it is easier if you contact us with questions and concerns. We need our chapters to be strong and relevant.
2. Regional Directors develop and maintain regular communications with chapter presidents on the status of the chapter. Our desire is that your chapter sees your regional director in-person at least once during the year. Get them on your distribution lists.
3. The Council President (me) visits each chapter once during the year. Fortunately, I am located in Madison so that no chapter is too far away for me to drive. This will be an interesting challenge and I will need to put my best planning hat on to meet this goal.
4. Double our educational efforts by adding a second technical program to our already popular LTS. You have been asking for a technical program and we intend to deliver. Additional corporate sponsors will be solicited to allow us to pursue top-notch speakers.
5. Improve our communication and interaction with accounting/finance students, IMA student chapters, and faculty advisors. Students are our future leaders. We need to help them enter the working world with both feet on the ground and running. IMA, the MAC, and the local chapters can play an important role in the maturation process for students.



The Association of  
Accountants and  
Financial Professionals  
in Business



If the MAC can accomplish these goals, then our chapters and the members will be professionally enhanced and the management accounting profession will be more visible.

Who am I? How did I end up in this position? Let me try to briefly answer these questions.

Family: Married 32 years to wife, Laurie (she is a registered nurse). Three grown children – Brian, 27 and married (also an IMA member); Amy, 25 (working in community health education); and Janelle, 20 (third-year student at UW-La Crosse). Also have a Bichon Frisé breed of dog named Sunny, just to keep us on our toes. Lives in DeForest, WI.

Employer: Fristam Pumps USA – a privately-held, German-owned sanitary pump manufacturing company located in Middleton, WI.

Position: Vice President – Finance & Administration. Followed a stereotypical career path for a management accountant – from cost accountant to controller to CFO level. 33 years of management accounting experience.

Certifications: CMA (1991) and CFM (2004).

Hobbies: Participative sports (I can be very competitive), watch all Wisconsin sports teams (Badgers, Brewers, Packers, etc.), traveling, gardening, fishing, model trains (Lionel).

Civic Involvement: Member of Door Creek Church in Madison for 32 years and served on numerous committees and boards in a variety of leadership roles. Currently serving as the board president for a local Christian camp. Was on the board of directors for a local bakery (I like sweets) for 10 years.

IMA Involvement: An IMA member for 26 years and over 20 years on the Madison Chapter board of directors in numerous positions. Had two stints as chapter president. Was a Regional Director for the MAC for 2 years and served 3 years as council treasurer.

Why do I tell you all of this seemingly personal information? Because I started my career like many college graduates – shy, lacking confidence and practical experience, an uncertain career path, and lots of enthusiasm to put my book knowledge to work. If you would have asked me 30+ years ago if I would have been involved in all of the things I have mentioned above, the answer would have been an emphatic, “NO, NO WAY!” The point is this. A number of key people came along side of me in those early years to mentor, coach, and encourage me. Some were IMA leaders, some were church leaders, some were work colleagues, some were family and friends. As a result, I have developed a huge network of people that I can contact for whatever reason, any time. And IMA has become a huge part of my network.

So...my challenge to you this next year. Get involved – whether it is with IMA or some other volunteer organization. It will make you a better person, with benefits beyond your imagination. I know this from my own personal and professional experiences.

Enjoy your summer! Be safe and have fun! I look forward to meeting you at an IMA event this next year!

David Skora  
Mid-America Council President, 2013/2014



### IMA Mid-America Council Meeting Agenda

Date & Time	Teleconference Information	Location
Saturday, July 27, 2013 9:00am – 12:30pm	Dial-in number: 866-469-3239 Access Code: 22146202	Comfort Suites Milwaukee Airport 6362 S 13 <sup>th</sup> Street Oak Creek, WI 53154 414-570-1111

1. 9:00am – 9:05am	Welcome & Introductions	Dave	5 minutes
2. 9:05am – 9:15am	President's Report Award Presentation/Other Recognition Board Contact List Ethics/Core Value Agreements Strategic Plan	Dave	10 minutes
3. 9:15am – 9:20am	Secretary's Report Approve Minutes from 4/19/13 Mtg	Patricia	5 minutes
4. 9:20am – 9:30am	Treasurer's Report Year-End Financials/Bills Resolution Change Bank Acct Signers	Rick/ Michele	10 minutes
5. 9:30am – 9:40am	President-Elect's Report 2014 LTS – Date/Location MEF Grant Application Ideas Council Award of Excellence	John	10 minutes
6. 9:40am – 10:15am	Regional VP & Regional Directors IMA Board of Directors Update SCMS Mid-Year, October 20-22 Regional Director Chapter Reports	Harlan	35 minutes
7. 10:15am – 10:25am	BREAK		10 minutes
8. 10:25am – 10:35am	VP Communications Newsletter Due Date Council Website	Barb/Eric	10 minutes
9. 10:35am – 11:05am	VP Education Student Leadership Awards Program Student Conference, November 14-16 Student Chapter Communications Options for Educational Conference	Bruce & Jason	30 minutes
10. 11:05am – 11:15am	By-Laws Committee Report Review/Approve By-Laws Changes	Mary	10 minutes
11. 11:15am – 11:20am	Committee Reports Long Range Planning Committee on Academic Relations Member Relations Committee	Harlan	5 minutes
12. 11:20am – 11:25am	Old Business Status of Illowa Chapter Other	Dave	5 minutes



Agenda, Continued

13. 11:25am – 12:15pm	New Business Approve 2013/2014 Budget Chapter Grant Winners Status of Sangamon Valley Chapter Revised Chapter Compensation & Competition Guide	Rick Dave Dave Dave	50 minutes
14. 12:15pm – 12:20pm	Past Presidents		5 minutes
15. 12:20pm – 12:25pm	Meeting Adjournment	Dave	5 minutes
16. 12:25pm	Lunch Invitation		

Future Meeting Dates/Locations:

Saturday, October 19, 2013 or Saturday, October 26, 2013  
Location TBD (in Illinois)

### Chapter Spotlight

Congratulations to the **Chicago Chapter** for receiving silver medals in the Chapter Newsletter and Chapter Website competitions that were presented at the IMA Annual Conference in New Orleans on June 25, 2013.

Here is a link to a recently published article on associations with focus on the **Central Illinois Chapter** in a recent Interbusiness Issues Magazine (a staple business publication in the region)  
<http://www.peoriamagazines.com/ibi/2013/jun/professional-associations>



## Anatomy of an IMA Annual Conference

If you have never attended an IMA Annual Conference, you may be wondering, “Why do so many people attend this event and what am I missing?” In 1999, I was determined to find out.

The conference that year was in Seattle, Washington and I was excited to be going to the Great Northwest (I had never been to this area of the U.S.). I remember registering and booking my hotel early in 1999 because someone said it will fill up fast. And they were right! The conference hotel was fully booked by April and they had to contract to two other hotels. When I arrived in early June with my wife, I learned that about 1,800 people were coming to the conference – I was shocked! I had no idea what I was about to experience.

Here are some of my memories of that first annual conference:

- Excellent speakers – engaging and energizing,
- Relevant topics – applicable to my job,
- Friendly participants who were sincere and excited to be there,
- A fun family event at the Boeing museum,
- Walking the streets of downtown Seattle in the evening with newfound friends for dinner and sightseeing,
- Networking opportunities around every corner, and
- The annual dinner celebrating chapter and council achievements.

Since 1999, I have had the thrill of traveling to Philadelphia, New Orleans (twice), San Diego, Nashville, Chicago, Boston, Las Vegas (twice), Phoenix, Tampa, Baltimore, Denver, and Orlando to attend annual conferences. So what keeps me coming back every year? A number of things:

- Seeing friends and acquaintances from other parts of our country and world every year. It is amazing how many people show up like me year after year. I can be sitting next to them at a session, having lunch together at the same table, or just chatting between sessions.
- A new conference location to explore every year.
- From 20-30 hours of CPE. I try to get my money’s worth. There are even breakfast and lunch sessions. As I said earlier, I wish there was more time to attend more sessions. I always learn something that can be immediately applied to my work.
- Camaraderie after a long day of sessions. This can be dinner with old and new friends at the local ethnic restaurants. Just enjoying all that the city has to offer – a Phillies or Orioles baseball game, a riverboat cruise, the San Diego Zoo, walking Boston’s historic streets, or Denver’s 16<sup>th</sup> Avenue Mall.
- A time to recharge my batteries. With all of the aforementioned activities, this may seem to be contradictory. Trust me – this is not work!

IMA works very hard to put on a top-notch conference every year. And having just returned from New Orleans (for us midwesterners, I learned it is pronounced “NEW Awlins”), IMA has done it again. Even in these more challenging economic times, almost 1,000 participants made it to the Emerald City.

I am already anticipating next year’s annual conference in Minneapolis. It WILL be a great time! Mark your calendars now for June 21-25, 2014. Try it, you’ll like it! It would be great to see you there.

David Skora



### 2013 - 2014 Board of Directors

BOARD POSITION	NAME, CHAPTER
President	<a href="#">Dave Skora</a> , Madison
President Elect	<a href="#">John Wieland</a> , Winnebagoland
Secretary	<a href="#">Patricia Cox</a> , Greater Milwaukee
Treasurer	<a href="#">Rick Bellmore</a> , Winnebagoland
VP - Communications	<a href="#">Barb Sheedy</a> , Greater Milwaukee
Webmaster	<a href="#">Eric Griffin</a> , Madison
Director - Social Media	OPEN
VP - Education	<a href="#">Bruce Hamilton</a> , Madison
Director - Student Relations	<a href="#">Jason Leabman</a> , Madison
VP - Corporate Development	OPEN
Regional VP	<a href="#">Harlan Fuller</a> , Central Illinois
Regional Director - Calumet	<a href="#">Sheryl Elliott</a> , Fox River Valley
Regional Director - Central Illinois	<a href="#">Sheryl Elliott</a> , Fox River Valley
Regional Director - Chicago	<a href="#">Mary Strautmann</a> , Greater Milwaukee
Regional Director - Fox River Valley	<a href="#">Mark Camerena</a> , Calumet
Regional Director - Greater Milwaukee	<a href="#">Bruce Hamilton</a> , Madison
Regional Director - Heart of WI	<a href="#">Dave Skora</a> , Madison
Regional Director - Illowa	Committee
Regional Director - NW Suburban Chicago	<a href="#">Michele Reagan</a> , Rockford
Regional Director - Madison	<a href="#">Michele Reagan</a> , Rockford
Regional Director - Packerland	<a href="#">Mary Strautmann</a> , Greater Milwaukee
Regional Director - Rockford	<a href="#">Bruce Hamilton</a> , Madison
Regional Director - Sangamon Valley	<a href="#">Harlan Fuller</a> , Central Illinois
Regional Director - Winnebagoland	<a href="#">Erin Ankebrant</a> , Greater Milwaukee
Regional Director - Wisconsin Lakeshore	<a href="#">Erin Ankebrant</a> , Greater Milwaukee
MAC Long-Range Planning Committee (Most Sr. Active Past President)	<a href="#">Harlan Fuller</a> , Central Illinois
Council By-Laws Committee	<a href="#">Mary Strautmann</a> , Greater Milwaukee
Committee on Academic Relations	<a href="#">Harlan Fuller</a> , Central Illinois
Member Relations Committee (National Board Standing Committee)	<a href="#">Harlan Fuller</a> , Central Illinois



The Association of  
Accountants and  
Financial Professionals  
in Business



**IMA Mid-America Council Meeting**  
**NIU Outreach Center, Rockford, IL**  
**April 19, 2013**

**ATTENDANCE**

<b>NAME</b>	<b>CHAPTER</b>	<b>MAC POSITION</b>
Bruce Hamilton	Madison	President
Erin Ankebrant	Greater Milwaukee	Chapter President/Delegate
Harlan Fuller	Central Illinois	Past President
Barb Sheedy	Greater Milwaukee	VP Communication
Mary Strautmann	Greater Milwaukee	Past President/Regional VP
David Skora	Madison	President-Elect
Bill Ramsay	Winnebago	Past President
Michele Reagan	Rockford	Past President/Treasurer
John Wieland	Winnebago	Regional Director
Rick Bellmore	Winnebago	Dir Student Activities/Delegate
Sheryl Elliott	Fox River Valley	Past President/Secretary
Jenna Uszenski	Montvale Staff	
Kathy Horton	Fox River Valley	Delegate/Chapter VP Education
Susan Zabel	Winnebago	Delegate
Martha Paalman	Winnebago	
Ann Holmstrom	Fox River Valley	Chapter VP Admin
Dana Riess	Chicago	Chapter VP Communications

**VIA PHONE**

Bruce Hamilton called the meeting to order at 4:20PM. The meeting began with introductions of those present. It was determined that we do have a quorum present.

**PRESIDENT’S REPORT – Bruce Hamilton**

**SECRETARY’S REPORT – Sheryl Elliott**

Sheryl moved to approve the January 2013 minutes & Mary Strautmann seconded; motion was approved.

**TREASURER’S REPORT – Michele Reagan**

Michele reviewed financials & expenses. John Wieland moved to approve the treasurer’s report and Dave Skora seconded; motion approved. All chapter dues have been paid, but she has only received 2 post-event evaluations for chapter grants; thus she has only paid out two of them.

**REGIONAL VP AND REGIONAL DIRECTORS – Mary Strautmann**

**COMMITTEE REPORTS**



**GREATER MILWAUKEE** – Erin reported a really good year this year. Meeting Monday is “elevator speeches” presentation before dinner, then booths from 5 to 6, then etiquette speaker (dining) while they are dining. May there is a tour of the Lakefront Brewery. Board for next year is set and off to a running start.

**WISCONSIN LAKESHORE** – No report.

**SANGAMON VALLEY** – Harlan reported that they were unable to come up with a full board. They have approached the Central Illinois Chapter regarding merging with them. Central Illinois has not yet decided as they already have enough issues with geographical size. If Central Illinois votes no, then the chapter will go inactive.

**NORTHWEST SUBURBAN** – No report.

**MADISON** – Dave went to the meeting last week; tour of Epic Systems. President is repeating next year as he had made a 2 year commitment.

**ROCKFORD** – Michele reported that they have had a fairly good year. Michele has not been to past three meetings due to tax season. Tour recently was well attended. May meeting Harlan will be doing an Excel class. Board is set up for next year.

**ILLOWA** – Michele reported that she has been unable to make contact with Dallon. Jenna stated that someone who had moved away had contacted her about wanting to re-activate the chapter.

**CHICAGO** – Mary reported that they have been having regular meetings. They have their board set up for next year. She feels that they are becoming a cohesive board. Dana stated that there are a number of new members. Mary reported that William Kernan resigned as Chapter President and Chase Thomson has stepped up as Chapter President. Michele asked for Chase’s contact information.

**CALUMET** – Sheryl reported that there are banking issues and Ed Guzman (IMA Controller) is working with IMA legal and the bank to try to clarify the issues.

**FOX RIVER VALLEY** – Sheryl reported that they cancelled due to floods, board for next year is put together.

**PACKERLAND** – John reported on chapter visit; it was good information for a number of different areas. He had also attended their January meeting. Attendance has been a little disappointing in his view; 15-20.

**WINNEBAGOLAND** – Bill reported that the chapter seems to be doing pretty well. Had a lot of student attendance at the last meeting. Other than students, normally getting about 30 attendees to meetings. He thinks they have the board pretty much set for next year and continuity with the board.

**CENTRAL IL** – Harlan reported that their March meeting they were able to publicly acknowledge the Gold Medal CMA recipient. Had an Excel meeting in April and a hospital plant tour in April.

**HEART OF WISCONSIN** – John reported that he is receiving information from them; plans on attending their chapter meeting next week. It seems like things have been going fairly well based on financial statements. Attendance down since Janet left; she was a big portion of their success.





The Association of  
Accountants and  
Financial Professionals  
in Business



### **PRESIDENT-ELECT – Dave Skora**

He survived! Heard very good comments, had some learning items for future. \$3,750 in donations; Robert Half donation was \$1,000 (biggest donor). Estimating we will be about \$1,800 in the hole. Better than budgeted loss.

Dave presented the nominating committee report. Bruce asked for unanimous consent for acceptance of the nominating report. Accepted.

### **VP COMMUNICATIONS – Barb Sheedy**

No report.

### **WEBMASTER – Eric Griffin**

No report.

### **VP EDUCATION – open**

Bruce reported that he & Mary had put out some feelers for potential speakers for the fall conference. Would like to keep costs down; now that he is past tax season he can really throw himself into it.

### **LONG RANGE PLANNING AND BY-LAWS – Harlan Fuller**

Bruce brought up the By-Laws, as approved at the January meeting, with some tweaking by Mary Strautmann. Comments received were positive until the “certified delegate” was reached. Mary stated that the reason she put that in was that you would want someone to be “certified” in order to vote. Sheryl moved to table the discussion; Erin seconded. Bruce stated that he wasn’t sure that a motion needed to be made.

### **GLOBAL BOARD/COMMITTEE – Mary Strautmann**

### **OLD BUSINESS**

### **NEW BUSINESS**

Student Leadership Award – Rick Bellmore handed out the awards program. Mary discussed what she had put in as criteria for the application. Bruce asked if it needed to be decided upon at this meeting; Mary stated that it needs to be voted on in July. Program needs to be sent out to the entire board. Vote to be tabled until the next meeting in the interest of time.

Dave mentioned chapter grant program. Stated that information will be out shortly so that chapters can work on that and get it voted on prior to the July meeting.

### **COMMITTEES**



The Association of  
Accountants and  
Financial Professionals  
in Business



## **PAST PRESIDENTS**

Harlan – 140 attendees at LTS today – spectacular!

Mary – Kudos to Bruce for a great year. Great year, great LTS. Good board going into next year.

Would like to have more involvement from other past chapter presidents should be a goal for next year.

Bill – Great program today; very good speakers. Taking away a good portion of knowledge; good board set up for next year.

Sheryl – Excellent job today; has it from a good source that the Wild West Council will be jealous when they hear the attendance number.

Michele – Bruce, great job this year; Dave great job on LTS. She had heard lots of good comments today.

Jenna stated that she had a great time today. Thanked us for inviting her.

## **MOTION TO ADJOURN – meeting adjourned at 5:03pm**

Future meeting dates tentatively scheduled for July 13th or July 27th.

Respectfully submitted,  
Sheryl Elliott, Secretary