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**VP Engagement**  
 Mike Lovelace, CMA  
**VP Latin American Engagement**  
 Fernando Hernandez  
**VP Professional Education**  
 Lacee Stratemann ##  
**VP Student Outreach**  
 Addison Findley \*\*  
**VP Organization Management**  
 Tyler Najarian  
**Dir, Analytics & Special Projects**  
 Burhaan Khan  
 Stephen Daniel  
**Dir, Community Service**  
 Vic Dullas, CMA  
**Dir, Workforce Development**  
 Bruce Howard  
**Digital Ambassador**  
 Amanda Craig @@  
**Historian**  
 Andrew Polito  
**Photographer**  
 Thomas Mills ##  
**Directors At Large**  
 Ira Copple  
 Russell Gaines, CMA  
**Newsletter Editor**  
 Hope Harrell \*\* ##  
 ++Past President  
 \*\*Passed 1st CMA Exam  
 @@Passed both exams  
 ## Student member

**Contact All Officers at**  
[SanAntonioIMA@gmail.com](mailto:SanAntonioIMA@gmail.com)

**Annual sponsor:**  
[TCG Trusted Capital Group, LLP](#)

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# IMA San Antonio Chapter Newsletter



**Chartered 1947—Our 75th year!!**

## Chapter President's Message

Happy new year everyone!

Please pat yourself in the back as we all survived 2021 together. Did you know that the past year broke all the records of our attendance since 2014? Our cumulative attendance reached **932** and I can almost bet with certainty that it broke all the records in the history of our chapter.

I wish we had all the data or notes from the past. At least now, we have a Historian, **Andrew Polito**, who is now collecting and sharing some wonderful memories. And thanks to **Thomas**, we have captured our recent events in quality snapshots like never before. Stay tuned!

The next six months will be filled with a variety of activities. Please note a great line of speakers list from **Lacee**, more opportunities for community engagement by **Vic**, and Spring campus commitments offered by **Addison**. Our treasurer, **Torey**, is working on switching to Xero for chapter accounts and reporting. **Eric** and **Burhaan** will be enriching our website with more content. And **Tyler** is working on the state of the art document called "Roles and Responsibilities". It will allow us to track and improve Board activities methodically.

Please make every effort to attend the January 13 virtual board meeting at 6:00 pm. **Mike** will be discussing the strategic planning and chapter recognition qualification in depth. Although the chapter officers are expected to attend the board meeting, anyone is welcome. If you are Interested in attending it, please email me.

And finally, it is time to start thinking about **chapter elections for 2022-23**. If you are interested in serving, or, would like to nominate someone, start taking notes. I will send a separate email about offices qualifications, and expectations.

We are excited to announce the renewal of our annual sponsorship from [TCG Trusted Capital Group, LLP](#) and Ryan Canales.

I hope that your next year will be filled with joyful activities. :)

Farhana Khan



## 2022 Calendar by Lacey Stratemann, VP Professional Education

### Q1

Month/Date	Location	Topic	Speaker	Sponsor
Jan 13	San Antonio/Hybrid	Board Meeting	N/A	N/A
Jan 20 (2 hrs. CPE)	San Antonio/Hybrid	<b>CMA Appreciation Month!</b> Joint Meeting with Kansas City Chapter	N/A	N/A
		Revenue Management Fundamentals	Monte Swain (Accounting Professor at BYU)	TBD
		New Perspective on Compliance & Deterrence (Occupational Fraud Deterrence)	Lisa Lawler (Author)	
Feb 17 (2 hrs. CPE)	San Antonio/Hybrid	Datapoint: San Antonio's Original Tech Giant	Dave Gust (Former Executive at Datapoint)	TBD
		Employment Market Update	Kelly Powers (Powers Professional Partners, owner)	
		Student Internship Fair	N/A	
Mar 17 (2 hrs. CPE)	San Antonio/Hybrid	How to Navigate the Medicare Maze	Bob Wetesnik (Independent Medicare Broker)	TBD
		Procurement Mgt Client Success Stories & Coupa Software Demo	Maria Lisenko (Associate Director, CrossCountry Consulting)	
		Board Member Elections		
		Student Internship Fair	N/A	

### Q2

Apr 21 (2 hrs. CPE)	San Antonio/Hybrid	TBD	TBD	TBD
Apr TBD	San Antonio/Hybrid	Community Service Project	N/A	N/A
May 19 (2 hrs. CPE)	San Antonio/Hybrid	TBD	TBD	N/A
Jun 11 (12—4pm)	San Antonio/Hybrid	Board Meeting	N/A	N/A
Jun 16 (2 hrs. CPE)	San Antonio/Hybrid	Mission Impossible: When Benchmarks Undermine Ethics	TBD: Board Member #1	TBD

### Save the Dates for Q3 & Q4!!

Jul 21	San Antonio/Hybrid	Board Meeting		
Aug 18	San Antonio/Hybrid	TBD	TBD	TBD
Sep 15	San Antonio/Hybrid	TBD	TBD	TBD
Oct 20	San Antonio/Hybrid	TBD	TBD	TBD
Nov 17	San Antonio/Hybrid	TBD	TBD	TBD
Nov TBD	San Antonio/Hybrid	Community Service Project	N/A	N/A
Dec 15	San Antonio/Hybrid	TBD	TBD	TBD

## Tech Update by Burhaan Khan, Dir, Analytics & Special Projects

We have added 4 Microsoft 365 Business Basic licenses, costing us \$21 per month total. This allows us to use the same email domain @[sanantonio-ima.org](mailto:info@sanantonio-ima.org), all board members are able to communicate on Teams, free of charge. The email licenses we pay for provide access to email ([outlook.com](https://outlook.com)) and the web versions of all Office 365 applications ([office.com](https://office.com)). The accounts that are currently configured with paid email licenses include [campusoutreach@sanantonio-ima.org](mailto:campusoutreach@sanantonio-ima.org) (Addison Findley), [Treasurer@sanantonio-ima.org](mailto:Treasurer@sanantonio-ima.org) (Farhana Khan), [info@sanantonio-ima.org](mailto:info@sanantonio-ima.org) (Shared), and [pro-education@sanantonio-ima.org](mailto:pro-education@sanantonio-ima.org) (Lacee Stratemann). Teams is a free add-on, any user signed into an existing email address under the domain @[sanantonio-ima.org](mailto:info@sanantonio-ima.org) will be able to share files and attend meetings within Teams (desktop version and online version).

## Chapter History by Andrew Polito, Historian

Calling all current and former members of the IMA San Antonio Chapter!

As many of you may know, 2022 marks our 75th anniversary as a chapter! To commemorate this milestone year in our history we will be creating a presentation to share photos and stories from our chapter from over the years. In addition to this presentation, we will be producing an emblem of our chapters history by creating a plaque that displays a list of all of the chapters former Presidents and their years of service.

### What We Need from You:

If you have any photos or stories from your time with IMA, please reach out to Chapter Historian Andrew Polito ([politoaj@outlook.com](mailto:politoaj@outlook.com)). We could also use your help by spreading the word of these new initiatives to any former members you may be connected with that have photos or stories they can share. If you can, please have these items submitted by the end of February 2022.

We look forward to celebrating the history of our chapter in the coming months. We'll be in touch about these initiatives again soon early in 2022!



## Community Service Update by Vic Dullas, CMA, Dir, Community Service



November 13, 2021, Saturday (**Landscaping Event at Habitat for Humanity of San Antonio**) – More than 50 volunteers joined in the Landscaping Event for the first joint community service of **IMA San Antonio Chapter** and **TXCPA-San Antonio Business & Industry Committee**. The success of the event was participated by our energetic and enthusiastic colleagues, family, friends, and students. The activities were preparing the yard by cleaning and flattening the land area and planting the sod. The said event was not only for community service but also an avenue for networking. It was great to witness volunteers interact not just to complete the landscaping but also connecting on a professional level that serve as a coaching or mentoring.

Thank you to all the volunteers that made the landscaping event successful. Here is a group picture of some of the volunteers.

For 2022, we are planning to conduct two volunteering events in the month of April and October/November. Watch out for the further details and we are hoping you will be part of our 2022 volunteers.

## Chapter Organization Update by Tyler Najarian, VP Organization Management

As VP of Chapter Organization, I have had the opportunity to work with every board member to continue to enhance the teamwork and efficiency of our board. This has led to me working with the board to create a spread sheet that will keep track of board member's responsibilities as well as give a perspective of each role to the other chapter members.

This process started with me interviewing each board member to gain a perspective on each role that led to responsibilities and tasks being added to the spreadsheet. This was also linked to the responsibilities of every board member such as meeting attendance. With combining responsibilities that are the same for each board member and unique responsibilities, we can measure the activity of every board member. Overall, I believe this will help our chapter become even more organized and could potentially be a tool to enhance chapters globally.

## Campus Outreach Update by Addison Findley, VP Campus Outreach

During 2021, our IMA San Antonio volunteer campus presenters completed **18** presentations at **9** different universities and were able to reach over **320** students.

Austin Community College  
Texas A&M University  
Texas State University

Baylor University  
Texas A&M University San Antonio  
Texas A&M International University

Trinity University  
Texas A&M University Kingsville  
University of Texas at San Antonio

We have campus presentations that we give to regional universities where we educate students about IMA and the CMA. If you have never participated in one of these, we encourage you to join one! We have a standard deck that we present, and we split up the speaking responsibilities by comfort zone. If you would like to join and watch one of these presentations before becoming a speaker, you can come along and be present. We give the students as many perspectives as possible to help them understand the opportunities they can earn from IMA and CMA, and what other options there are besides the Big 4. We have already begun lining up Spring 2022 campus presentations, so if you would like to join our wonderful campus presenters and reach out to students, please email [campusoutreach@sanantonio-ima.org](mailto:campusoutreach@sanantonio-ima.org)!

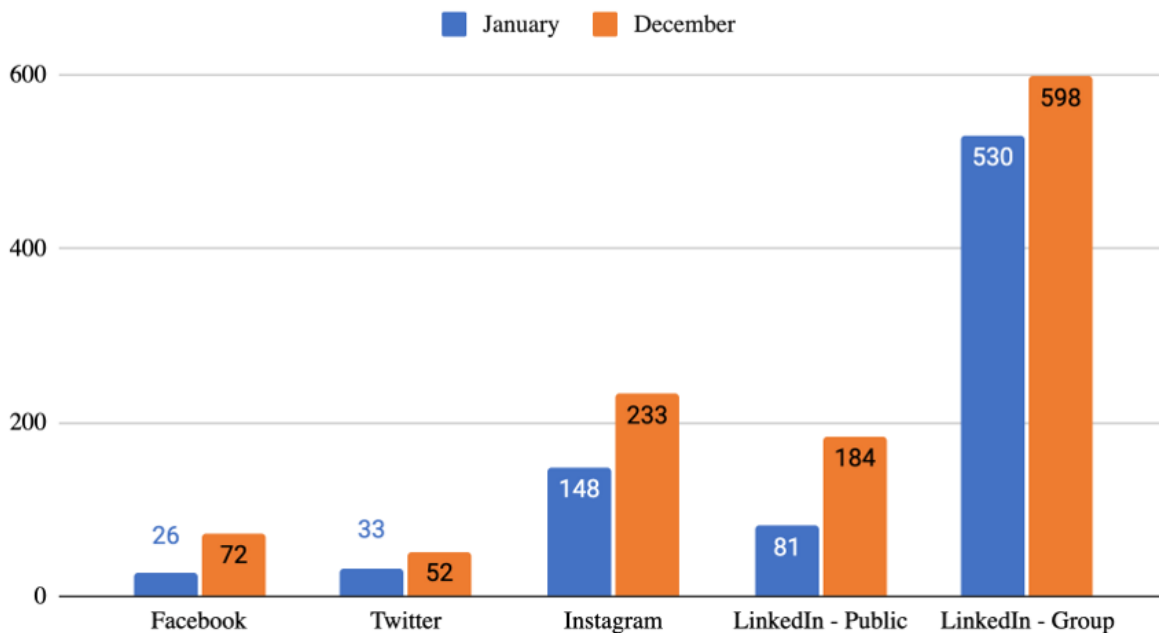
## Social Media News by Amanda Craig, Digital Ambassador

### Follower YTD Growth

Facebook	177%
Twitter	59%
Instagram	57%
LinkedIn – Public	127%
LinkedIn – Group	13%

The San Antonio Chapter of the IMA is still active on social media! We are posting regular updates about meetings and other great opportunities for our members from other chapters and IMA Global. Please follow us, to stay updated and get reminders about important events involving the chapter. If you would like to join our exclusive, controlled access LinkedIn group (IMA – San Antonio Chapter), [click here and request to get added](#). We have also established a new social media reference landing page called “Linktree”, which allows us to list all our social media and links to other important resources. To access the Chapter’s Linktree, [click here](#) or scan the QR code on this page.

### San Antonio Chapter of the IMA - YTD Follower Growth



## Membership Update by Mike Lovelace, CMA, VP Engagement

While our chapter did not turn 75 until 2022, 2021 was a year of records! What better way to celebrate a Diamond Jubilee than to build on a solid heritage and program with LOTS of momentum!

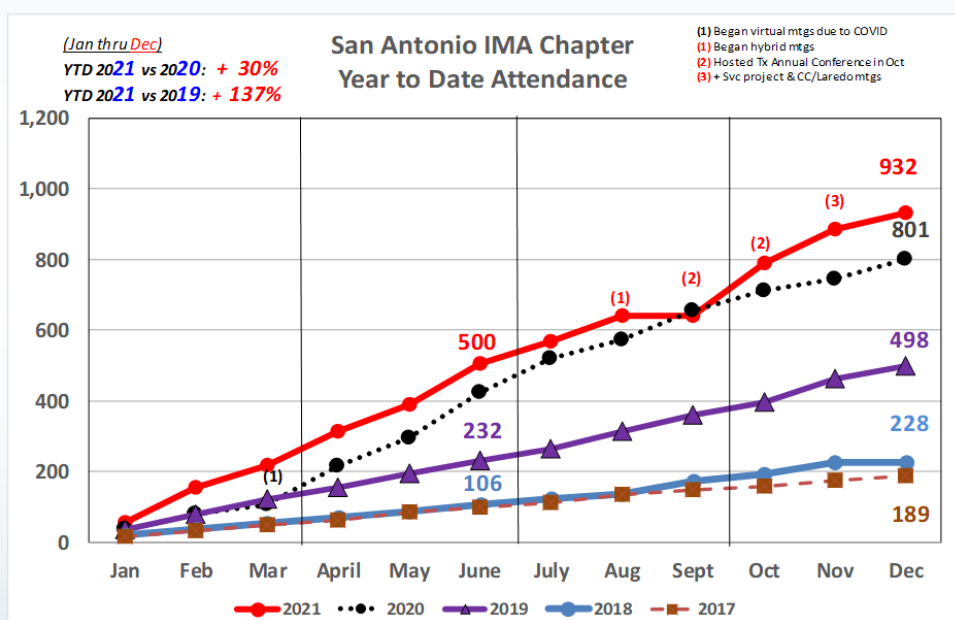
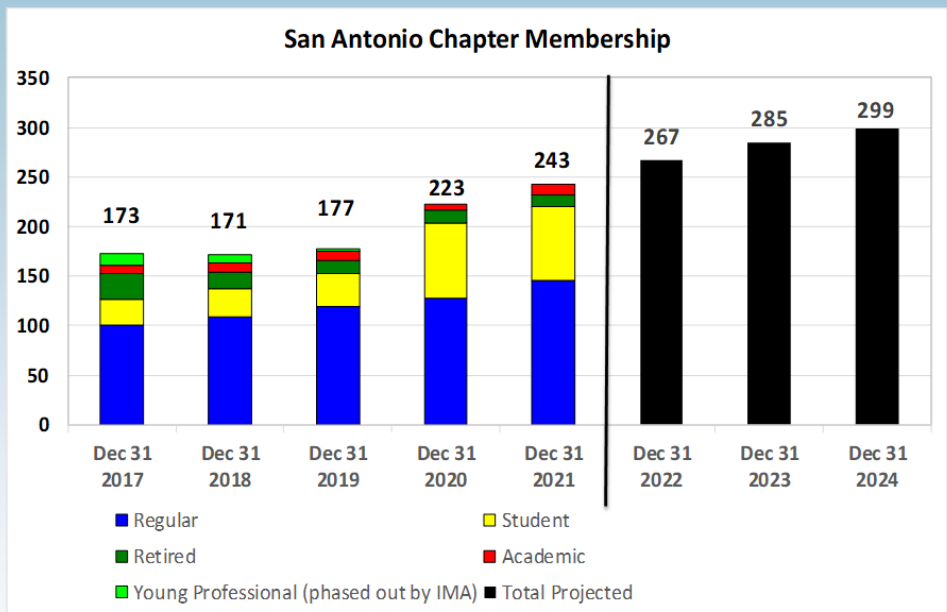
Many chapters across the US used COVID as an excuse to curl up into a ball, but San Antonio just put the pedal to the metal: Total Membership was up **9%** vs a year ago to **243**. Total Attendance for the year was up **30%** vs 2020 to **932** and up **137%** vs 2019 (pre-COVID).

We returned to in person meetings in August. And due to our growing geographic footprint, we opted to offer these meetings virtually as well. During 2021, we routinely had virtual attendees from Houston, Corpus Christi, Laredo, Austin and San Marcos. But we also had the occasional attendee from Europe, the Middle East, South America, India, and The Philippines!

We also added chapter members this year who STILL live in Ohio, New Mexico, Arizona, Washington state, South Dakota, Arkansas as well as Mexico and Columbia.

We hosted our first ever Texas Annual Conference at the amazing Hyatt Hill Country Resort and Spa in October. Hundreds of hours from a committee of fantastic chapter members (led initially by former President Yolanda Solano and ultimately led by current President Farhana Khan) went into the planning and preparations for an eye-popping weekend.

Under the able leadership of **Addison LePere Findley**, we gave **18** campus presentations – including **3** in person in November alone (A&M Corpus Christi, A&M International in Laredo and closer to home at UTSA).



Thanks to our 1<sup>st</sup> year VP of Community Service, **Vic Dullas**, CMA, we hosted our 1<sup>st</sup> in recent memory community service project in November for Habitat for Humanity. Look for another project opportunity in the Spring.

Thanks to our 1<sup>st</sup> year VP of Latin American Engagement, **Fernando Hernandez**, we expanded our outreach beyond Texas!

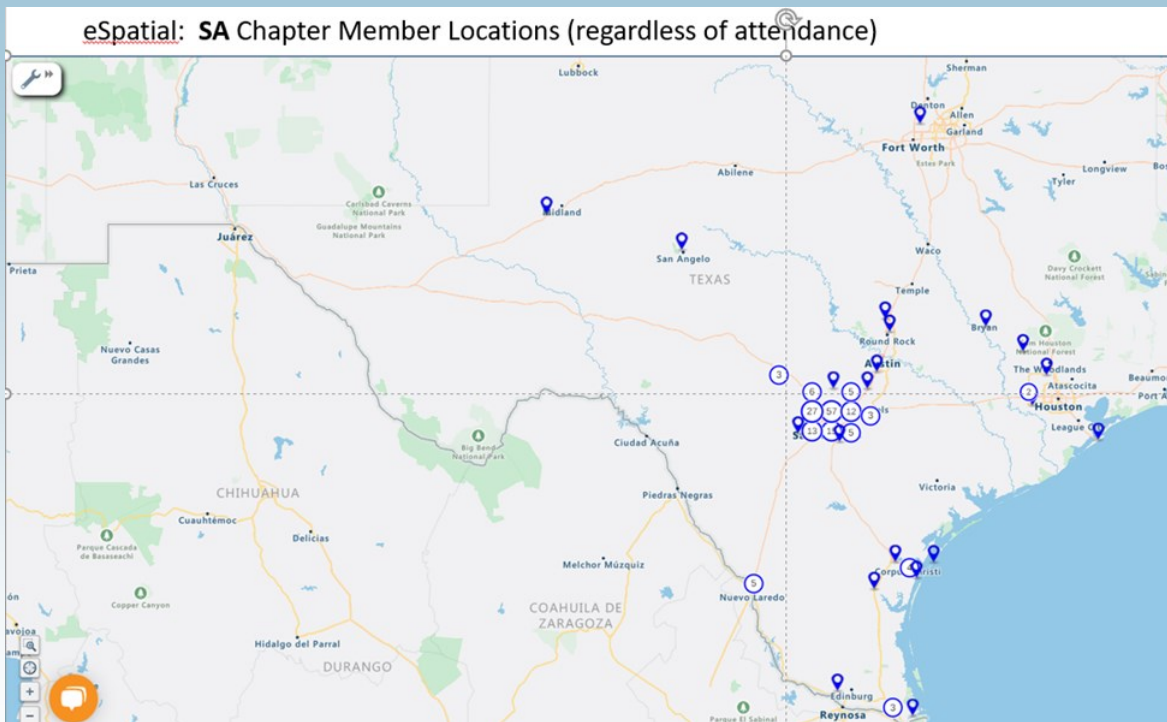
Thanks to our VP of Communication, **Eric Newswanger**, we rolled out a new tool to communicate with non chapter members that gives us great metrics on emails opened and links clicked!

Thanks to our 1st year Dir of Organization Management, **Tyler Najarian**, we have a better handle on chapter competition expectations from Global and we are launching a chapter operational dashboard to help guide board members on their responsibilities.

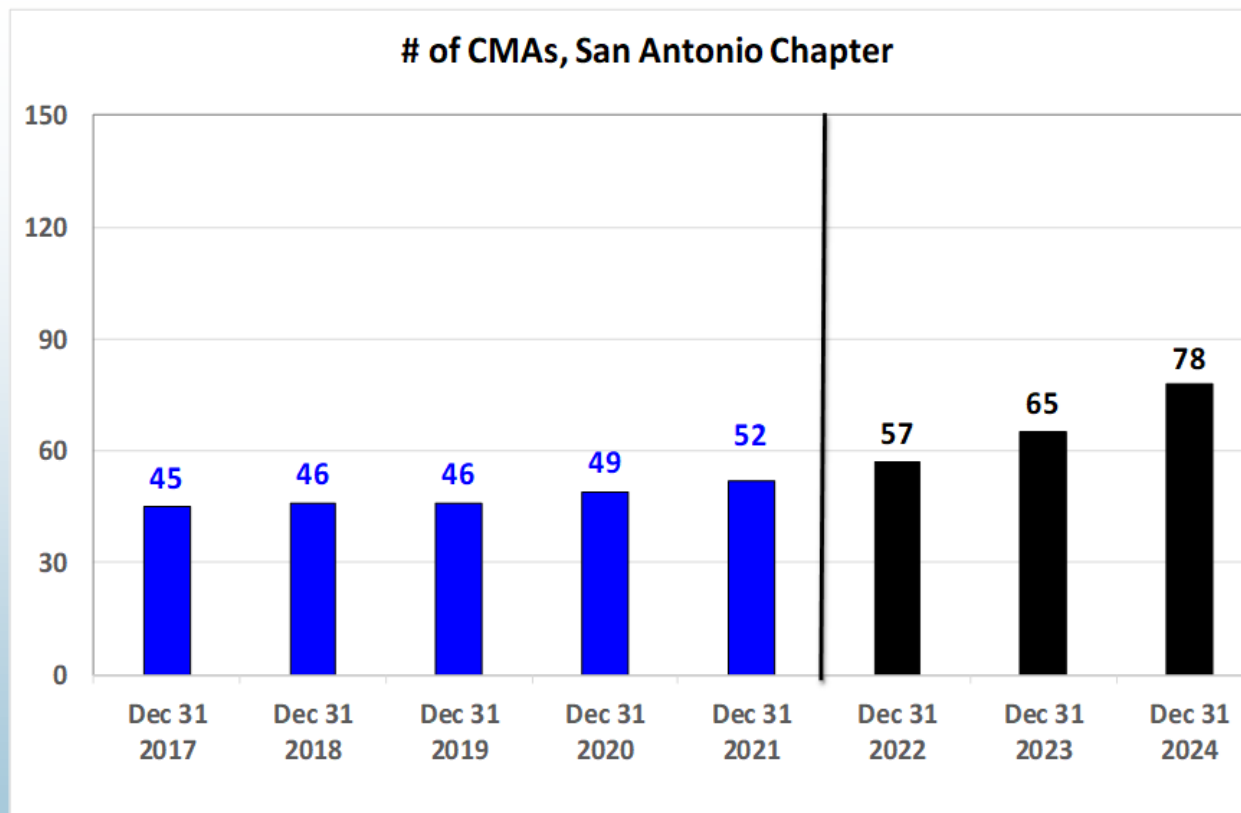
We implemented eSpatial- a geo mapping software to better understand our membership and meeting attendance – which is ‘driving’ us to do more road trips to Corpus Christi, Laredo and the Valley. We even introduced this concept to leadership at Global – opening their eyes to technology they need but aren’t yet using.



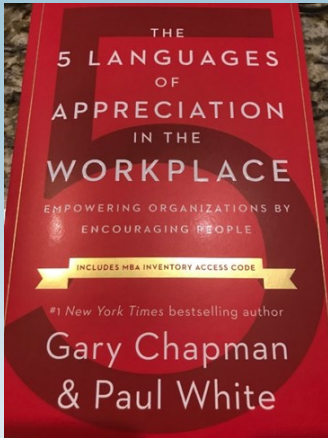
## Membership Update, Continued



We added a net of **3** new CMA's, bringing us to **52** – a **15.6%** increase from a few years ago. Even more exciting is our pipeline of future CMA's: **55** of our members say they are interested in earning their CMA and **21** of those have either passed 1 or both of their exams or have an exam date in mind. Some of those are professionals who have already met the experience requirement but plenty of those are recent graduates who are working toward that requirement as we speak. If you have considered updating your professional credentials and want to plug into the chapter, email us at [SanAntonioIMA@gmail.com](mailto:SanAntonioIMA@gmail.com).



## Membership Update, Continued



We started a pilot business book discussion group with a handful of board and chapter members. It's reading Gary Chapman's [The 5 Languages of Appreciation in the Workplace](#). More to come on this concept next year, but the early returns indicate we'll be expanding this to a wider number of our members in 2022. It meets virtually via Zoom (on camera!) once every two weeks for just 40 minutes discussing 2 chapters in a roundtable format.

All this is to say 2021 was great, but you ain't seen nothing yet! If you were active this year, you got A LOT out of your membership. However, if you weren't all that active, make 2022 the year that changes. We promise that you will get more out of it than you put into it.

## New CMAs in 2021

Nathan Lortz, CMA



Vic Dullas, CMA



Dr. Anne-Marie Lelkes, CMA



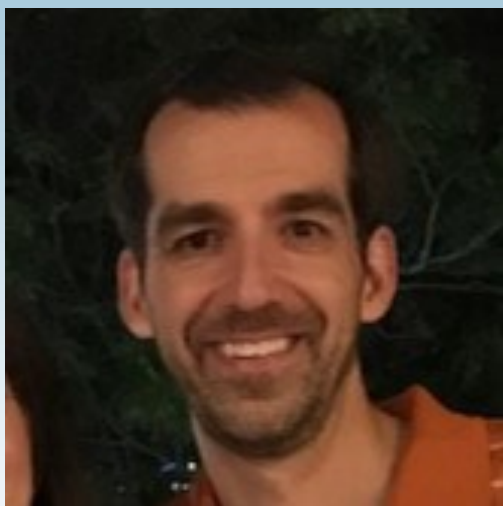
Oliwia Fowler, CMA



## Membership Update, Continued

### New CSCA in 2021

Bradford Sliva, CMA, CSCA



### Internship Fair for Student Members

This January and February, the chapter will host a virtual intern fair exclusively for SA chapter student members as a way to help them gain invaluable work experiences. Students will have the opportunity to narrate a 45 - 60 second self-introduction to the chapter at either of the monthly in person or web meetings. Companies will then follow up directly with the students to further interview them. Internships may be for either the spring or summer: part-time or full-time. Student members need to complete the one page slide template about themselves and return it to [SanAntonioIMA@gmail.com](mailto:SanAntonioIMA@gmail.com) no later than Friday, January 7th and Friday, February 4th, respectively. This info will then be promoted to hundreds of San Antonio area companies that either have chapter members or are friends of the chapter.

### Top Frequent Attendees of 2021

#### 15+ Meetings/Events

Addison LePere Findley (1)  
Farhana Khan  
Jan Williams  
Mike Lovelace, CMA  
Torey Reese, CMA

#### 10+ Meetings/Events

Amanda Craig (2)  
Brian Butler  
Burhaan Khan  
Ira Cople  
Jenifer Larson  
Lacee Stratemann ##  
Russell Gaines, CMA  
Thomas Mills ##  
Tyler Najarian ##  
Vic Dullas, CMA

#### 7+ Meetings/Events

Bruce Howard  
David O'Leary  
Dr. Anne-Marie Lelkes, CMA  
Eric Newswanger ##  
Hope Harrell ## (1)  
Jill Schafer  
Susan Paddock  
Valeria Telles ##  
Yaser Omer, CMA

#### ## Students

(1) Completed 1 CMA exam  
(2) Completed 2 CMA exam

### Milestone membership Anniversaries in 2021

#### 30 years (1991)

David Porter, CMA, CFM  
Michael Balka, CMA  
Ryan Engel, CMA  
Virginia Morales

#### 10 years (2011)

Chukwuma Ozowalu, CMA  
Husam BK Alqassass  
Linda Campbell

#### 5 years (2016)

Beatrice Quintanilla-Abercrombie  
Mary Carter, CMA  
Benjamin Mefford, CMA  
Bradford Sliva, CMA, CSCA  
Russell Gaines, CMA

### Longest Registered Chapter Members

William Schuh - 1965  
W. Mcbrearty - 1966  
Hector Cavazos - 1970



## **Be an Important Part of Something New!**

How? By telling us your zip code! =)

This is a pilot initiative designed to demonstrate the value to IMA Global for how chapters can be more responsive to their members. Your chapter is partnering with 5 or 6 other chapters (to defray costs) to buy a single license for [eSpatial.com](https://espatial.com). This Software as a Service enables us to map member and visitor provided zip codes with meeting attendance frequency to give Board members a better understanding of where our attendees are and identify more convenient meeting locations. NOTE: In order to protect each member's data privacy, IMA does NOT disclose zip codes much less street addresses - to the chapter. If you have not previously opted in by providing just your zip code to the chapter, please email it to [SanAntonioIMA@gmail.com](mailto:SanAntonioIMA@gmail.com). No personally identifiable information will ever be uploaded to this software.

## **Get More Out of Your Membership**

Get Involved! How much time do you have? (contact [SanAntonioIMA@gmail.com](mailto:SanAntonioIMA@gmail.com))

1 hour, 1 time:	Join a team making a campus presentation (happens throughout the year)
2 hours, 1 time:	Judge the student case competition submissions hosted by Global (happens in March)
2 hours/month:	Attend the chapter meetings (3rd Thursday of every month)
5 hours/quarter:	Help with these awesome newsletters! (doing these quarterly in 2022)
1 hour/week:	Volunteer to join the Board in a role you are passionate about

## **“Think Like a Startup” by Bruce Howard, Director of Workforce Development**

One of my favorite stories about a company startup is the history of Southwest Airlines. Do you know that the idea was conceived by Herb Kelleher on a cocktail napkin? Yes, my understanding of the story is he drew a triangle on a cocktail napkin connecting Dallas, Houston, and San Antonio. His vision was to build an airline that would allow easy, convenient travel between the three biggest cities in Texas.



Well, look at where Southwest Airlines is today! Have you sat down and pictured a vision of your career? You can use a cocktail napkin like Mr. Kelleher or whatever you wish to record your thoughts. The idea is to imagine it--- then get started on building it!

Most business leaders in the world of startup companies will tell you about the biggest step in building a company is to just start. Now is the time for you to design and draw up the plans for your career. Spend some time over the holidays researching, exploring, talking to others--- whatever you need to do, to help you build your vision.

A dream is nothing but a dream until you start! So, it's quite simple: Imagine where you want to be, what you want to do.  
Design your career path!  
And then take off! Start! Do it! Do it now!

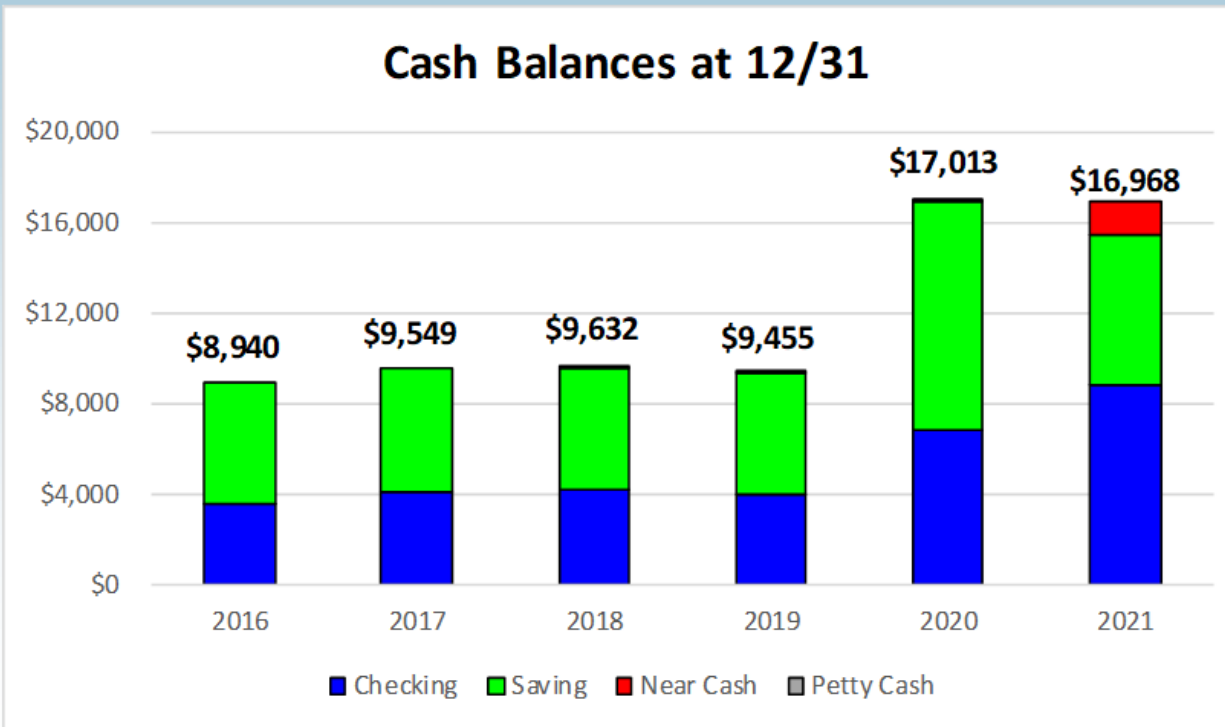
If you need help, I'd like to hear from you at [bhoward1925@gmail.com](mailto:bhoward1925@gmail.com)  
Happy Holidays!

## **Latin American Engagement by Fernando Hernandez, VP Latin American Engagement**

2021 proved to be a great year, full of opportunities that challenged our adaptive capacities. Being more flexible, reducing fixed costs and unnecessary expenses were key lines for thriving in the past year, and the next to come. Though science brought us the hope for a faster and less painful return to the "business as usual" that we knew, expecting to recover in our families and business. I can bet that most of the economic scenarios, fall short on the hecticness of reality, stressing more our capabilities as Management Accountants. Helping top management understand the implications of such a changing environment is part of our mission. Having access to the right tools and techniques is a prerequisite. Have a great 2022, and don't stop asking the right questions.

## Treasurer's Report by Torey Reese, CMA, Treasurer

The Chapter is in a very strong financial position. Near Cash includes \$500 Receivable from Texas Council for Annual Conference Costs as well as \$1,000 Receivable from 2022 Annual Meeting Sponsor. Both amounts are expected in first half of January 2022.



### 2021 Sponsors

Months	Company
Jan	<a href="#">Bowtie Business Intelligence</a>
Feb	<a href="#">Houston Business Automation LLC</a>
Mar	<a href="#">Powers Professional Partners, LLC</a>
May	<a href="#">Becker CMA Review</a>
Jun	<a href="#">Powers Professional Partners, LLC</a>
Jul	<a href="#">MyABCM US</a>
Nov	<a href="#">MarketingAide.IO</a>
Dec	<a href="#">ISolvedHCM.com</a>

### Chapter Mission

The San Antonio Chapter (#0090) of the Institute of Management Accountants was chartered in 1947 and is part of the IMA Texas Council (Dallas/Ft. Worth, Houston, El Paso, Laredo and Austin). We exist to serve local accounting and finance professionals with continuing education programs and networking opportunities. If you are a college student, young professional, college faculty, or seasoned professional, we have services and meeting content that will help you in your career. If you are a retired professional, we can help you stay in touch with peers and remain informed on current topics.

### Did You Know?

You can support the chapter financially without even buying a meal?! IMA compensates a chapter for each of its members who attends and earns CPE from IMA webinars even if you don't need the CPE to maintain a license. It's not a lot, but over the course of a year and across all chapter members, it really adds up!