

IMA San Antonio Chapter Newsletter



Chartered 1947—Our 74th year!!
April 1, 2021 Volume 2, Issue 2

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(Term Ends 06/30/21)

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Newsletter Editor

Hope Harrell

++Immediate Past President

**Passed 1st part CMA Exam

Contact All Officers at

SanAntonioIMA@gmail.com

April Meeting Schedule

NOTE: We will **not** have our regularly scheduled 3rd Thursday event this month since that is April 15th.

In Partnership with Kansas City Chapter

Thursday, April 22nd

6pm, 1 hr CPE

Using Games to Train & Engage Accounting Teams

SA Board Member – Brian Butler

Thursday, April 29th

11:30am, 1 hr CPE

Excel 301 – Intermediate Tips & Tricks

President's Message



Welcome to our 2nd chapter newsletter of 2021. This will be my last column as President since my 2nd one year term ends June 30th and our next newsletter will be July 1st.

Thank you so very much for a fun and rewarding two years. Our chapter is stronger and more active than ever. I have thoroughly enjoyed getting to know so many of you and working with such a great group of chapter volunteers. We are making a difference throughout south Texas and are poised to do even more post COVID.

See [page 4](#) for details about our Texas Council CPE event in October. It will be an opportunity to show the rest of the state and IMA Global what makes this such a dynamic group. I am very excited that our chapter continues to grow. Since 12/31/17, the number of our Professional Members has grown by **30%** and we have an incredible **159%** more Student Members.

Meeting attendance has increased even more dramatically – 2020 vs 2019: **+61%** (despite COVID and at a time that many other chapters have become less active) and 2020 vs 2018: **+254%**.

I'd like to welcome our newest chapter members - listed on [Page 8](#). If you are not yet a member, you should be! This is a terrific professional family. Please reach out with any questions to SanAntonioIMA@gmail.com.

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.

Annual sponsor:

[Empower Wealth Advisors](#)

Inside This Issue

2021 Calendar	2-3
Texas Council Conference	4
Count Me In!	4
Campus Outreach Update	5
Social Media News	5
Membership Update	5-9
Treasurer's Report	10
Tech News	10
Did You Know?	10
Chance to Win!	10

2021 Q1 Recap

Month/Date	Location	Topic	Speaker	Sponsor
January 14th	San Antonio Virtual	SA Chapter Board Meeting (All chapter members are welcome)	N/A	N/A
Jan 21st (2 hrs. CPE) CMA Appreciation Night	San Antonio Virtual	Forensic Accounting @ SAPD	Gilbert Barrera, J.D., M.P.A. (Professor, Texas A&M SA)	Bowtie Business Intelligence
		The Impact of Recent Legislation and Litigation on ERISA Retirement Plans	Ryan Canales (Certified Plan Fiduciary Advisor, Empower Wealth Advisors)	
		Student Member Internship Fair		
Feb 18th (2 hrs. CPE)	San Antonio Virtual	Interview and Resume Tips	Kelly Kjlajic Powers (Managing Partner, Powers Professional Partners)	Houston Business Automation LLC
		Components of a Good Anti-fraud Policy	(Professor, Texas State University)	
		Student Member Internship Fair		
Mar 18th (2 hrs. CPE)	San Antonio Virtual	Bowtie Business Intelligence Client Success Story	Olivia Bosovik (Director of Sales & Marketing, Bowtie Business Intelligence) + Peter Swanson (Founder + CEO)	Powers Professional Partners
		Applying lessons from the book, <u>Atomic Habits</u> , by James Clear	Kevin Eliassen (Data Mgt Analyst, Security Service Federal Credit Union)	

Q2 Upcoming Events

April 8th	San Antonio Virtual	SA Chapter Board Meeting (All chapter members are welcome)	N/A	N/A
April 15th (tax day)	Virtual	No Meeting	N/A	N/A
April 22nd (1 hr. CPE)	San Antonio Virtual	Using games to train and engage accounting teams	Presented in Partnership with KC Mo chapter Zac Jarrad	N/A
April 23rd	Virtual	IMA's Women Leadership Summit	Multiple	N/A
April 24th 8:30 am	Virtual	Texas Council Meeting (All chapter members are welcome)	N/A	N/A
April 29th 1 hr. CPE	San Antonio Virtual	Excel 301 Intermediate Tips & Tricks, Business Intelligence/Data Analytics	Brian Butler (Process Architect)	N/A
May 20th (2 hrs. CPE)	San Antonio Virtual	Anti-Money Laundering Success Stories	Terri Wright (owner, Terri J Wright Consulting)	TBD
		IMA's PACE (Profit Analytics Center of Excellence) to compare strategy and the COSO framework for ERM (Enterprise Risk Management)	Fernando Hernandez (Sr. Director, MyABCM US)	
Jun 13—16th (24 hrs. CPE)	Virtual	ACE 2021 (See pg. 6 , 1 presenter from our chapter)	Multiple	Multiple
Jun 17th (2 hrs. CPE)	San Antonio TBD/Virtual	2 Hour Ethics Case Study	TBD: 2 SA Board Members	TBD

Q3 Upcoming Events

Month/Date	Location	Topic	Speaker	Sponsor
July TBD	San Antonio TBD	SA Chapter Board Meeting (All chapter members are welcome)	N/A	N/A
July TBD	Brownsville Harlingen	TBD	TBD	TBD
July TBD	Laredo	TBD	TBD	TBD
July 15th (2 hrs. CPE)	San Antonio TBD/Virtual or in person	Working Styles of Different Generations	Bruce Howard (Exec Dir, South Texas Alliance of Career Champions) & Brandon Howard (UTSA Lecturer)	TBD
		Business Automation Success Stories	Adam Scheidler & Aaron Scheidler (Houston Business Automation LLC)	
July 26th 8:00 am	Virtual	Texas Council Meeting (All chapter members are welcome)	N/A	TBD
August TBD	Corpus Christi	TBD	TBD	TBD
August 19th (2 hrs. CPE)	San Antonio TBD/Virtual or in person	Dave Ramsey's 7 Baby Steps to Getting Out of Debt and Building a Legacy	Allie Medvecky (Controller @ Cancer Insights LLC)	TBD
		The Value of a CMA in a Not for Profit	Torey Reese, CMA (Controller, Veterinary)	
September 19th (2 hrs. CPE)	San Antonio TBD/Virtual	TBD- HR/PR related	Samantha Cooper with ADP	TBD
		Using Business Intelligence @ Caterpillar	Bianca Wessel, CMA (Caterpillar)	

Q4 Upcoming Events

October TBD	San Antonio TBD/Virtual	SA Chapter Board Meeting (All chapter members are welcome))	N/A	N/A
October 1st—2nd (12 hrs. CPE)	San Antonio TBD/Virtual Hyatt Hill Country Resort	Texas Council CPE Workshop	Multiple	Fee
October 21st (2 hrs. CPE)	San Antonio	Modern Day Financial Fraud	Ronald Long (4 time author and former sheriff)	TBD
		Presentation #2 TBD	TBD	
November TBD	Brownsville	TBD	TBD	TBD
November TBD	Laredo	TBD	TBD	TBD
November 4th—6th	Anaheim, CA	IMA Student Leadership Conference	Multiple	TBD
November 18th (2 hrs. CPE)	San Antonio	TBD	TBD	TBD
December TBD	Corpus Christi	TBD	TBD	TBD
December 16th	San Antonio	TBD	TBD	TBD

Texas Council Annual IMA Conference Preliminary Speakers and Topics October 1st—2nd Hyatt Hill Country Resort (COVID willing)

Topics	Speakers
Opening Remarks: Recent Results & Direction of IMA & Mgt Acctg/Finance Profession	Jeff Thomson (CEO, IMA)
Career Advice, Certifications	Bud Kulesza (Man of Many Hats)
Client Success Story	Melissa Juenke (Implementation Lead, Finit Solutions)
CMA Exam Structure & Tips	Wiley or Becker TBD
Electronic Record Storage	Mimi Dionne CA, CDIA, CIP, CRM, IGP, MLJS, PMP (RIM Mgr of McKesson)
Ethics Case Senior	Bud Kulesza (Man of Many Hats)
Finance Transformation	Jerrad Hall (Partner, Finance Transformation, Vaco LLC, Forensic LLC)
Fraud	Dan Ramey (President, Houston Financial Forensics)
Future Trends in Acctg & Finance	Blake Oliver (Cohost of the Cloud Accounting Podcast)
IFRS Convergence..... Not!	Dr. Dennis Elam (Associate Professor, TAMUSA)
Leadership: Creating a Company Culture that Reflects Your Values	Kevin O'Driscoll (Owner, RIY Business Group)
Lessons Learned from the Book <u>Atomic Habits</u> by James Clear	Kevin Eliassen (Data Mgt Analyst, Security Service Federal Credit Union)
Navigating Organizational Change	Blake Blackmar (Fmr Big XII Starting Football Player)
Socionomics	Dr. Dennis Elam (Associate Professor, TAMUSA)
Tech Track: Cybersecurity	Sid Shaffer (VP and Chief Delivery Officer, INTEGRITI)
Tech Track: Data Analytics	Lawrence Coffee (Director, Data Analytics, Vaco LLC)
Tech Track: Excel 301	Brian Butler (System Analyst)
Tech Track: Round Table	Brian Butler/Tim Christ/Neal Juern
Tech Track: TBD	Neal Juern (Managing Director, Juern Technology)
Closing Season: Project Management & Risk Management in Climbing Mt. Everest	Alan Mallory (Speaker, Author, Performance Coach)

Count Me In!

Did you know that we have our very own IMA Podcast, **Count Me In**? This podcast includes everything affecting the accounting and finance world! The podcast brings the latest perspectives and insights on accounting and finance to you from the experts. Listen to it today to sharpen your skills and gain inside knowledge! Here are a couple of common places you can find the podcast: Spotify, Apple Podcasts, Podbean, and of course, the IMA website.

Campus Outreach Update

So far in the Spring 2021 semester, we have been busy visiting several universities and promoting IMA! In this past quarter, San Antonio chapter is also assisting the Houston Chapter with setting up its own Academic Faculty Dinner to occur in April. If you know of any faculty at any surrounding universities that may be interested in having us present to them, please do share our contact information with them. *Academic Members, if you would like us to come to or present virtually to your class, let us know. Or, if you are a member and have 1 hour, be a part of one of these presentations. Contact us at SanAntonioIMA@gmail.com.*

Q1 (Completed):

Texas A&M University – San Antonio
Texas State University
Trinity University

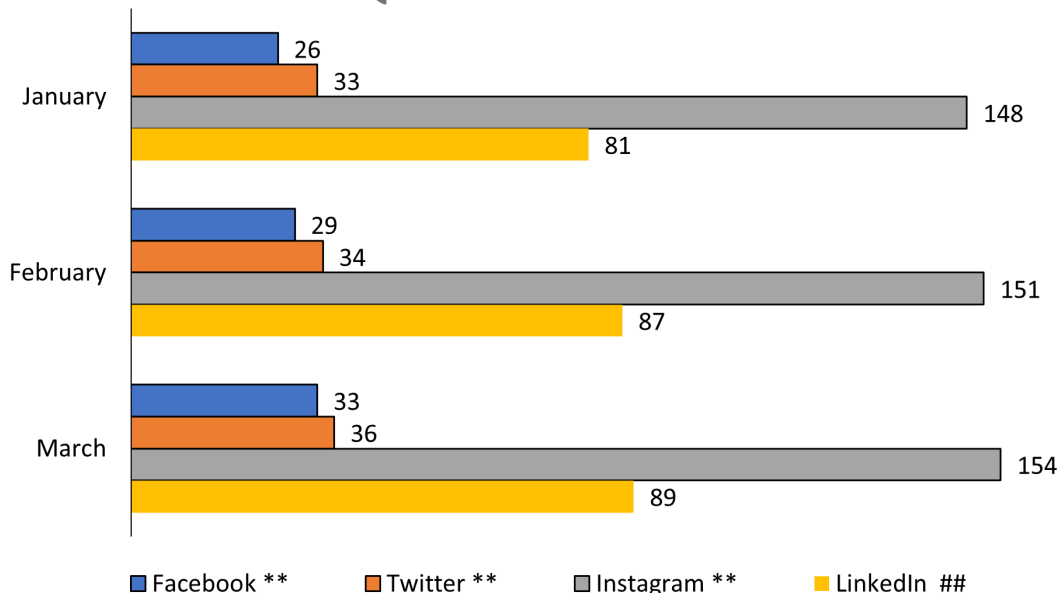
Q2 (Scheduled):

Austin Community College
Baylor University
Texas A&M University—Corpus Christi
Texas A&M University—Kingsville

Social Media News

The IMA San Antonio Chapter is officially 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, Like, and Share to stay updated and be reminded about ways to get involved with the chapter! Our original LinkedIn group called [San Antonio Chapter of the IMA](#) is what LinkedIn called closed because inclusion has to be approved. The closed group is currently active and has over **550** members. We created an open page for the San Antonio Chapter to reach a wider audience outside of the original closed group. Please follow our new [public LinkedIn page](#), [Instagram](#), [Facebook](#), and [Twitter](#)!

Quarter 1 - Social Media Presence



** started in May 2020
started in Nov 2020

Membership Update

The last few months have been very busy for the chapter and the rest of 2021 is going to be even busier! We've had some truly fantastic speakers so far with more on the way.

Please notice the April meeting schedule on [Page 1](#). It will be an unusual month for us.

IMA Global continues to encourage patience on returning to in person meetings. For that reason, our chapter meetings will stay virtual for now. While we are promoting the **Oct 1 & 2 Texas Council CPE event** as *tentatively* happening at Hyatt Hill Country Resort & Spa, it is contingent upon Global relaxing their 100% virtual stance. We will absolutely let you know if or when that occurs.

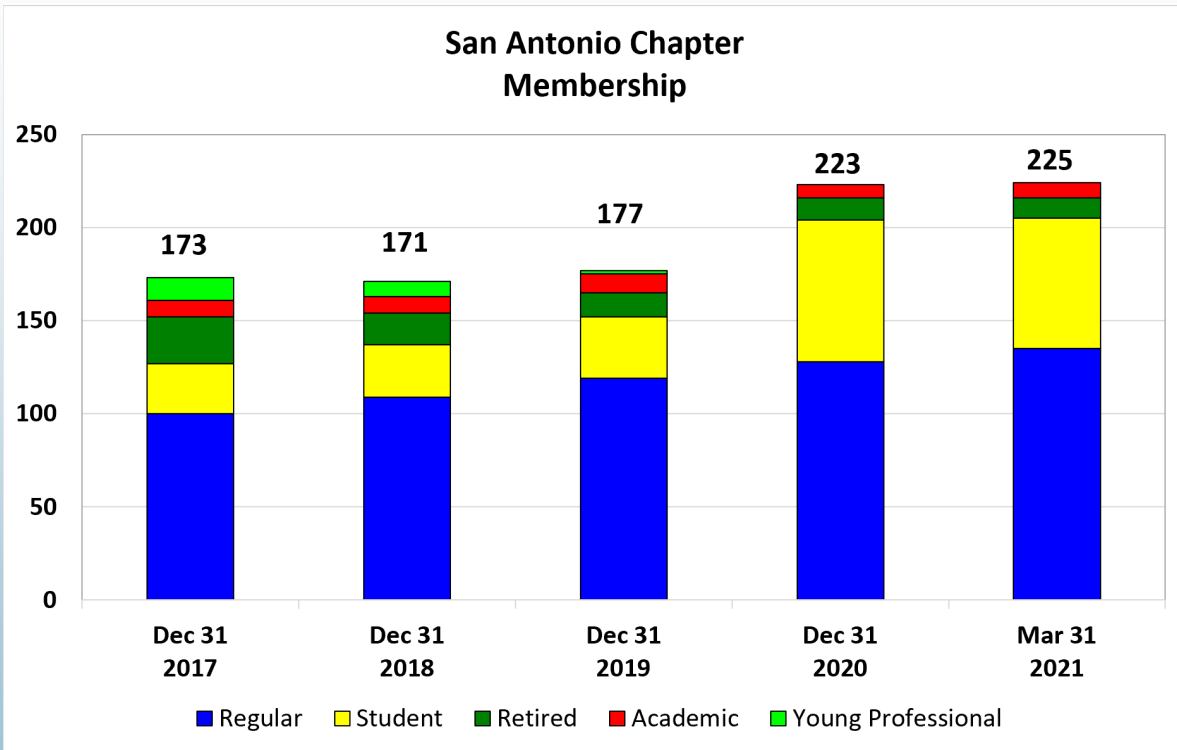
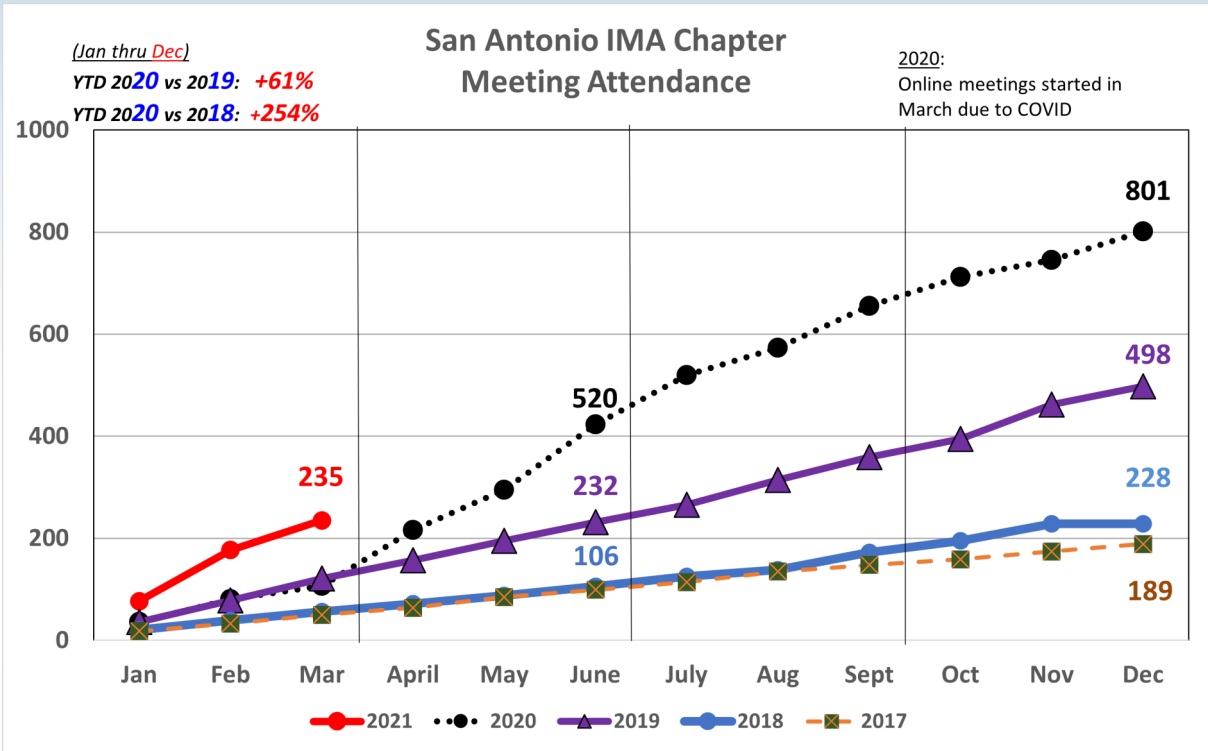
We are rolling out **CMA Spotlights** - both in this newsletter (on [Page 7](#)) and through our various social media platforms - as a way to highlight the achievements of our members and promote awareness of the CMA designation. There are quite a few members in the pipeline just behind those you have seen so far. For all of you who are studying, keep up the great work! For anyone who has wondered if they should pursue CMA, the answer is Yes! Contact the chapter for more information to plug into our network of encouragers.

Our **Campus Outreach** (see [Page 6](#)) continues to do a great job sharing the word about IMA and the CMA in general and our chapter specifically. If you have never participated in one of these, I encourage you to do so. We have a standard deck we present and split up speaking responsibilities by comfort zone. In fact, if you are terrified of presenting, you can just come along and be present. No need to even speak at all till you see how easy the process is and how appreciative the students are for professionals to tell them about any path other than Big 4.

In the coming week or two, you may get an email from us asking for your **home and work zip code** (if we don't already have them). This is part of a ground breaking pilot program described on [Page 9](#) as a cooperative effort among several chapters but led by San Antonio.

The one thing that's missing from all this is your colleagues. Invite them to come with you to an upcoming event and see the value for themselves. We'd love to have them join a winning team!

Your chapter is the most active chapter in Texas and certainly among the most active in the US. Way to go, San Antonio!



Congratulations - New CMAs!



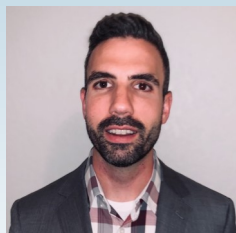
Amy Foshee Holmes

Quote: The CMA certification is internationally recognized and creates opportunities to connect with professionals globally. Being a CMA enhances my ability to collaborate with others and learn more about the global nature of business.

Credentials: PhD, CPA, CMA

Position: Associate Professor of Accounting at Trinity University

IMA Member Since: 2014



Garrett Gold

Quote: The CMA is a globally recognized certification covering a broad-based skillset. With a focus on strategic planning and analysis, this designation signifies expertise in the decision-making tools needed to be a true business partner. As the accounting profession evolves from merely reporting financial information to analyzing and interpreting that information to impact business operations, these skills will increase in importance. As a new member of the San Antonio Chapter of the IMA, I look forward to networking and continuing education opportunities.

Credentials: CPA, CMA

Position: Manager, SEC Reporting at Rackspace Technology

IMA Member Since: 2020



Torey Reese

Quote: My biggest recommendation other than to ensure you have adequate study materials and time, is to have commitment. Not just your commitment, but commitment from those around you to be your cheerleader, help with daily life (especially if you have kids), be a study buddy, or leave you alone. Whatever support is most conducive to you achieving your goal.

Credentials: MBA, CMA, Notary Public

Position: Finance Manager & Controller for Veterinary Emergency & Critical Care Society

IMA Member Since: 2019



Meagan Scholz

Quote: The CMA certification was an achievement that I was proud to attach to my name. Not only is it globally recognized, but the certification adds value to my expertise. The CMA certification has made me more knowledgeable in my field and has allowed me to make changes within our company for the betterment of our future. The process of getting my CMA certification was challenging, but the reward of achieving that goal was well worth the time that I needed to put into it. My advice to anyone going through the process of getting their CMA certification would be to keep working through it as you will achieve a thorough understanding of the accounting concepts and principles that will help push you to your career goals.

Credentials: CMA

Position: Controller at RD Thomas Advertising

IMA Member Since: 2018

CMA Progress

IMA has a formal CMA program entrance process. Our chapter is interested in supporting your success in this endeavor and speeding you through the two exams as quickly and painlessly as possible. As part of that effort, we maintain an email list of chapter members who are currently preparing for the exams and help them to share knowledge and successful strategies and to encourage each other. That list has approximately 15 members on it. If you would like to be added, please contact SanAntonioIMA@gmail.com.

Student Members Internship Fair

We had several chapter members who participated in our first ever virtual Internship Fair in January and February web meetings. While it's too soon to know how many landed jobs as a result, we are excited to have given these terrific young members the opportunity to introduce themselves to more than 200 chapter members and more than 500 friends of the chapter!

Participants:

Aaron Bedolla
Burhaan Khan

George Reinmiller
Kyle McLaughlin

Renato Uria
Sanghamitra Das

Saul Martinez
Simon Aguirre

Stephen Daniel

Welcome to the IMA SA Chapter (since 07/01/20)!

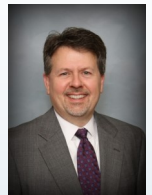
Aaron Bedolla ##	George Reinmiller ##	Meghan Gonzales ##	Valeria Tellers
Adrian Adams ##	Gilbert Garcia ##	Nathan Lortz ##	William Stransky
Asmira Muharemagic	Heidi Del Angel ##	Sandra Ortega	
Bianca Millan ##	Hope Harrell ##	Nathan Lortz ##	
Bruce Howard	Jerrod Stallings ##	Saul Martinez ##	Student member ##
Cameron Camacho ##	Jessica Perez ##	Sharee Simon ##	
Christiana Antwi Obimpeh ##	Lacey Stratemann ##	Simon Aguirre ##	
Christopher Potter ##	Lauren Medina ##	Stephen Daniel ##	
Dshandra McAfee	Lauren Tinkler	Taoye Lu ##	
Eric Newswanger ##	Madeline Work ##	Thomas Mills ##	
Fernando Hernandez Pico	Mana Jacobo ##	Tyler Najarian ##	

Incoming Board Members (One year term, effective July 1st, 2021)

President	Farhana Khan	** Passed CMA Part 1
Secretary	Julie Lynch	## Student member
Treasurer	Torey Reese, CMA	++ Past President
VP Administration	Jan Williams	Returning board member in new position
VP Communications	Eric Newswanger##	New board member
VP Engagement	Mike Lovelace, CMA	Returning board member in same position
VP Professional Education	Lacey Stratemann##	
VP Student Outreach	Addison LePere##**	
Co-Dir, Analytics & Special Projects	Brian Butler	
Co-Dir, Analytics & Special Projects	Burhaan Khan##	
Dir, Workforce Development	Bruce Howard	
Digital Ambassador	Amanda Craig##**	
Historian	Simon Aguirre##	
At Large Directors	Ira Copple	
	Jennifer Larson++	
	Russell Gaines, CMA	
	Yolanda Solano++	
Newsletter Editor	Hope Harrell##	

Member in the News

For the 2nd year in a row, our chapter's very own Mike Lovelace, CMA, has been selected to present at the IMA Annual CPE Conference in June (see [page 3](#)). Mike will be co-presenting with a colleague, Lawrence Coffee, on the topic of **Business Intelligence and Data Analytics for Small to Medium-sized Businesses**. Make sure to attend virtually on **Wed. June 16th, 12:15—1:15 pm CDT**. Way to go, Mike!



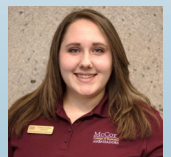
Don Russell Chapter Volunteer of the Year Award

Last month, the board selected Mike Lovelace, CMA, as the recipient for this year's award. Mike has been the VP of Engagement since April 2017 and puts in a lot of hours helping the chapter in ways that are visible to members and even more behind the scenes. He has been part of the driving force to increase meeting attendance from **11** in 2017 to **128** at a meeting last year (**62%** total annual increase over 2019 and **253%** increase over 2018) including outreach to area universities as well as Corpus Christi, Brownsville and Laredo. Congratulations, Mike!



Chapter Scholarship Recipients!

The chapter's very strong financial position – helped largely by our awesome meeting sponsors - enabled us to recognize the hard work of 2 of our very own deserving student members! **Addison LePere** (top) and **Amanda Craig** – Master of Accountancy students at Texas State University and current board members. Both have passed the 1st CMA exam and took the 2nd exam at the end of last month. Both are also *critical* parts of our planning team for the Texas Council CPE Event (now to be held in October 2021 at the Hyatt Hill Country Resort). They have spent countless hours developing website and marketing content to make this first ever in San Antonio event a resounding success.



“Let’s Go On Vacation”, Bruce Howard, Director, Workforce Development

Greetings to everyone! Hope your spring has sprung with safety and optimism! My name is Bruce Howard and I have the honor of serving on your Board of Directors in the new position of Director, Workforce Development. I have over 20 years in both recruiting and career advising with college students, experienced professionals that are changing career paths and others just seeking new career opportunities. After beginning my career with a Fortune 500 energy company I was personally challenged with switching career paths after a 21-year tenure, so I am extremely passionate about helping others find and develop their true career direction.



Many times, during my years as a career coach I found that most people lack the completion of the first step in designing an effective career strategy. The first step is one of the most important actions someone can take towards building a fulfilling development plan, but it’s often overlooked or passed by only to realize the significance of it later. This first step is to define the destination of your career. Yes, where are you going is so important! It’s like getting ready to take a vacation and not knowing where you are going. If you don’t know where you are headed how can you effectively pack the things you will want, or need, on your trip? Going to the beach is great, but what if you got there and all you had were ski clothes with you? Wait, what? You’ve got the wrong stuff for the destination of your vacation!

Your career should be managed in the same way. Where are you going? What are you going to do? Who are you going to do it for? You must take time to research, study and explore to decide on a career destination that fits your goals. There will be pros and cons to evaluate like salary, location, job duties, etc. but this is time well spent on evaluating and prioritizing these characteristics. Will there be detours? Sure! But every trip, even planned, does not go perfect. However, as the old saying goes, “Failure to plan, is planning to fail”.

By identifying your career destination, you will know how to “pack” for the trip. You will review your own skill set to see if you have everything you’ll need for the trip. You may find that you are missing some things. That will be ok because now you have time to pick up those skills, experience, background, knowledge, etc. before you leave for your trip. Now, do you need to take everything with you on your trip? Would you take all the shoes you have to the beach? No! You just pack the things that you will want when you get there. Of course, these are the skills and strengths the employer wants you to have for the job. You will highlight these on your resume to indicate you are the best fit for the job! And thank goodness you packed right for the trip! You can reach me at bhoward1925@gmail.com if you need help packing!

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. 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)

- | | |
|------------------|--|
| 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 (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 2021!) |
| 1 hour/week: | Volunteer to join the Board in a role you are passionate about |

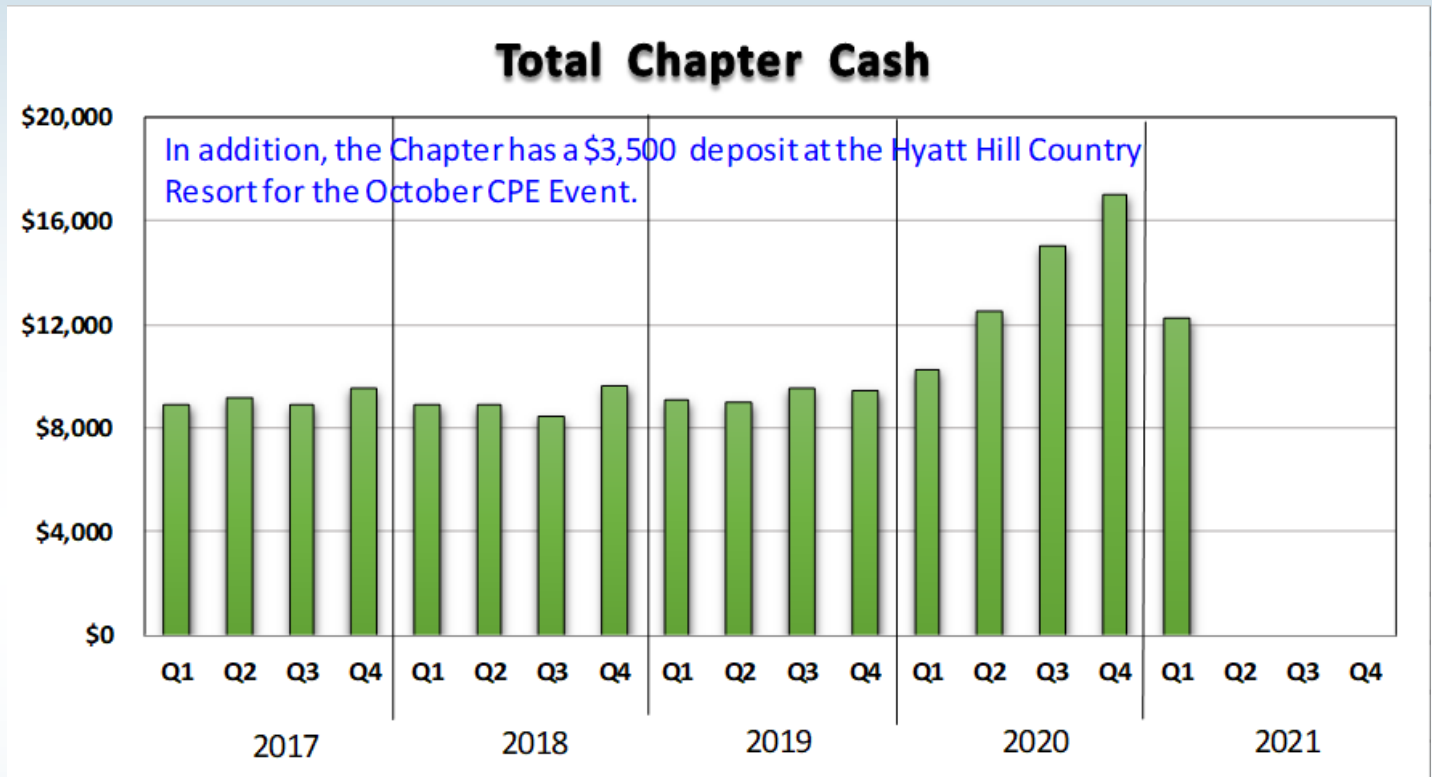
Treasurer's Report

The chapter is off to a great start for 2021 with chapter cash balance of **\$12,285** excluding receipts for IMA TX Annual Conference in 2021. We awarded two **\$500** scholarships to our student board members (see [page 8](#)), Addison LePere and Amanda Craig, for their outstanding contribution to the chapter (see [page 8](#)). We also purchased a 1 year, 1 seat subscription for zip code mapping software, E-Spatial, for **\$1,165** to better serve our members based on their geographic location. Texas Council, Dallas, and Houston chapters have agreed to partially reimburse the cost of software (**\$150** each). We continue to receive sponsorship for our monthly meetings. We would like to appreciate the following sponsors and thank you to each of them. Also, shout out to Ryan Canales from [Empower Wealth Advisors](#) for his annual sponsorship (Dec 2020-Nov 2021).

Jan 2021
[Bowtie Business Intelligence](#)

Feb 2021
[Houston Business Automation](#)

Mar 2021
[Powers Professional Partners](#)



Tech News

No Report

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!

Chance to Win!

To find out how many of you are actually reading our newsletter, enter to win a free dinner for you and a colleague at the next in person SA Chapter meeting of your choice! Two winners will be chosen at random from all non-board members who enter by emailing the Chapter at SanAntonioIMA@gmail.com. All members and non-members are welcome to enter!