

Catawba Valley Chapter

June 2018

Message from the President

Hello IMA Members!

IMA has instituted some new privacy rules that apply to every Chapter. We will be sending our Newsletters and other information out via our website now. Please take a good look at our Website after you read this Newsletter – we want to know what you think, what would you like to see us add? This is our new look, and going forward, we are responsible for our content, so if there is something that you would like to see, please send a note to any Board Member Newsletter.

With the change in privacy rules, please be aware that if you tell the IMA you no longer want information, this will keep you from getting information on our Chapter as well. If you know someone who has ‘opted out’ in the past, check to see if they are still interested in and ask them to go to the IMA site, and opt in . This also changes how the Chapter is contacting members. All of our contact will go through the Website now, and again, if you opt out you will not receive any information from us on upcoming events.

We still have two Board positions we need to fill. The Membership Team leader position checks the monthly reports on the Chapter Portal to see who has become a new member, or which member has an anniversary or to see if there are any members up for renewal in the month. Once that is determined, the Membership Leader or the Team, contacts the member to welcome, congratulate or remind them of the renewal date. This position can help work with a few business to bring guests to our meetings. The time needed is about 1 hour each month and can be done from your home. Please let me know if you have an interest in working with our members.

The Treasurer’s position may sound difficult but if you can add and subtract, you can do this! Once trained, it should only take about 1 hour each month to keep things running smoothly. The time will be slightly more during the months of our Conferences, but not by a much. This person keeps track of the Chapter checking account, pays any bills, makes deposits and reports the balance each month to the Board. Most of the work is completed in an Excel spreadsheet, with the remainder in the actual checkbook. An annual report must be filed each year IMA Global and the IRS, however these reports are simplified using the information in the Excel spreadsheet. This is an important position for our group and we will give support and training. This is something that looks good on your portfolio, are you willing to help us? Please let me know.

CONTINUED ON NEXT PAGE...

UPCOMING EVENT:

!!! STAY TUNED !!!

IN THIS ISSUE

- | | |
|-----|---|
| 1 | President’s Message |
| 2 | Calendar of Events/
Meeting Registration |
| 3-4 | 2017-2018 Officers
Team Member Offerings
IMA information
Certification Offerings |
| 6-8 | Achievements and Goals
Miscellaneous |

CONTINUED PRESIDENT'S MESSAGE....

Our competition year has been completed, and I have posted the results for our Chapter in this Newsletter. While we did not earn a banner this year, we did place 12th in the Warner Division in the 5 year Chapter Performance. Take a moment to review this information – many have worked hard for the position we earned. Thank you for your part in our performance.

One of our members, Kim Zahler has an article published in the June edition of Strategic Finance magazine. Take a moment to read it, and let her know if you have questions, or are interested in more information.

Regards,
Ellen

*“Your Attitude, not your Aptitude, will determine your Altitude”
Zig Ziglar*

JOB OPENINGS

If your company is looking to fill a position and you'd like to advertise it in the IMA newsletter, please forward the ad to Beth Prewitt at dbprewitt@hsmsolutions.com by the last day of the month preceding the month in which you want the ad to be printed.

Calendar of Events

DATES FOR 2018-2019 MEETINGS: To be announced

Mission Statement

To provide personal and professional development opportunities in management accounting, financial management and information management through education and association with business professionals and certification in management accounting and financial management to members in the Catawba Valley area.

**RSVP to SHERONDA FOX at 828-328-2201, ext. 3223 or sffox@hsmsolutions.com
by Tuesday before each meeting.**

**2018 – 2019
Catawba Valley IMA
Officers**

President: Ellen Knauf
President-Elect:
Treasurer:
Secretary: Charlie Nartker
Prof. Education: Ron Nicholson
Administration: Charlie Nartker
Communication: Kim Gales
Membership:

**2018 – 2019
Catawba Valley IMA
Directors**

- **Publicity:** Kim Drum-Gales
- **Webmaster:** Lindsey Huffman
- **Asst. Webmaster:** Rhonda Young
- **CMA Program:** Ron Nicholson
- **Employment:** Beth Prewitt
- **Reservations:** Sheronda Fox
- **Newsletters:** Kelly Frank
- **Education/Webinar:** Rhonda Young
- **Student Activities:** Lacy Sanchez
Chelsea Ledford
- **Scholarship:** Donna Frushour
Kim Zahller
- **Membership:**
- **Carolina Council Delegate:** Ron Nicholson
Ellen Knauf

*IMA has updated their website. Please make sure your information for your profile is correct. To access you data go to www.imanet.org. Under the [IMA Membership](#) section click on **“LOG IN”**. Your log in is your IMA membership number and your password is your last name, then click on **“GO”**. In the upper right hand corner of the screen you should see **“Welcome, (your name) | “My Profile” | “Logout”**, click on **“My Profile”**. Now you can view and edit your information.*



The Association of
Accountants and
Financial Professionals
in Business

www.imanet.org
<https://Linkup.imanet.org/carolinasregionalcouncil/home>
<http://catawbavalley.imanet.org>

Look/Go here:

- *Employment opportunities
- * RSVP for the monthly meetings
- * Give us feedback

**IMA Catawba Valley Chapter
P.O. Box 2132
Hickory, NC 28603**

http://www.linkedin.com/groups/Catawba-Valley-IMA-Chapter-4576209/about?trk=anet_ug_grppro
<http://www.facebook.com/pages/Catawba-Valley-IMA-Chapter/133913923378743>

Are you taking advantage of your IMA benefits?

IMA members are eligible for special offers from leading brand partners, providing discounts on:

- Insurance
- Office supplies
- Travel
- Executive recruitment
- Other business services

Learn more about these by visiting--www.imanet.org or calling 1-800-638-4427

CMA® Certification

Our Chapter has a rich history of almost two decades of providing support to members in earning the CMA. Many are enjoying the benefits of being a CMA because of this intensive support. Large discounts are currently available on Gleim review materials. [Click here](#) to find contact information for CMA Review. Take advantage of our experience and tell us your needs!

Achieve success in 2018 with the help of a Professor-Led CMA Live Review

Presented by the Catawba Valley IMA Chapter and **GLEIM®**

ENJOY

- Premium Gleim CMA Review System
- Unlimited access to professors
- Extensive coverage of practice multiple-choice and essay questions
- Access Until You Pass®

On-demand personal coaching available.
Spots are limited and do not include face-to-face class time.

Enroll Now!
Class size is limited.

Professor Ron Nicholson, CMA, MBA
ronnicholson@compascable.net
828.438.1019

Both parts \$1,495
Per part \$795

GLEIM DISCOUNT

All members of the Catawba Valley Chapter IMA may now purchase all CMA materials and online CPE at a discount of 20-30%. This includes pre-discounted sets. Standard shipping and handling will apply.

Institute of Management Accountants
 Chair's Award
 Chapters by Percentage Sequence - 2018

Chapter	2013-2014			2014-2015			2015-2016			2016-2017			2017-2018			Total Percent
	Points	Div	Percent	Points	Div	Percent	Points	Div	Percent	Points	Div	Percent	Points	Div	Percent	
0216 South Central Indiana	5482	S	77.3141	8044	S	100.0000	6535	S	74.5110	5146	S	80.4870	5913	S	79.8380	412.1500
0901 Dubai - UAE	5715	S	80.6126	6344	S	78.8655	6649	S	75.8063	5331	S	83.3695	5650	S	76.2875	394.9415
0284 Minneapolis	6119	S	86.3026	6978	S	86.7449	4708	S	53.6790	5543	S	86.6960	5139	S	69.3870	382.8096
0058 Akron	5287	S	74.5635	4543	S	56.4746	6046	S	68.9343	5918	S	92.5494	6193	S	83.6174	376.1393
0060 Portland	5640	S	79.5546	5991	S	74.4755	5588	S	63.7135	5473	S	85.5941	5012	S	67.6751	371.0129
0919 Abu Dhabi	4932	S	69.5599	4717	S	58.6328	7299	S	83.2236	5147	S	80.5035	5433	S	73.3523	365.2721
0917 Amman Jordan	7090	W	100.0000	4023	S	50.0062	8771	S	100.0000	4242	S	66.3354	2960	S	39.9660	356.3076
0239 AZ Valley of the Sun	5229	S	73.7539	5720	S	71.1055	4955	S	56.4938	4973	S	77.7785	5403	S	72.9452	352.0769
0119 Ann Arbor	4575	S	64.5289	4740	S	58.9163	5071	S	57.8159	5583	S	87.3116	6119	S	82.6185	351.1911
0076 Evansville	6250	S	88.1524	4726	S	58.7482	5376	S	61.2914	4738	S	74.1040	5091	S	68.7343	351.0303
0011 Detroit	5550	S	78.2738	5494	S	68.2927	4955	S	56.4906	5081	S	79.4685	5072	S	68.4848	351.0103
0389 WinnebagoLand	4446	S	62.7016	3614	S	44.9198	5038	S	57.4465	6289	W	98.3568	5545	W	74.8699	338.2946
0404 Dallas Fort Worth Area	5950	S	83.9279	6248	S	77.6652	4425	S	50.4535	4078	S	63.7731	4557	S	61.5320	337.3516
0155 Canton	4084	W	57.6023	4380	S	54.4518	5605	S	63.9114	5707	W	89.2606	5045	W	68.1204	333.3465
0414 Southwest Florida	4668	W	65.8325	4083	W	50.7495	6874	W	78.3790	6081	W	95.1033	2710	W	36.5876	326.6519
0029 Dayton	4405	S	62.1364	4529	S	56.2933	5067	S	57.7728	5223	S	81.6840	4809	S	64.9246	322.8111
0016 Hartford	3116	S	43.9517	3971	S	49.3651	5534	S	63.0997	5006	S	78.2856	6292	S	84.9506	319.6527
0295 Delmarva	2549	W	35.9518	2844	W	35.3548	5651	W	64.4312	6118	W	95.6885	6402	W	86.4354	317.8617
0406 North Carolina Triangle Area	4728	S	66.6860	4225	S	52.5254	4752	S	54.1834	4947	S	77.3752	4736	S	63.9517	314.7216
0086 Waterloo-Cedar Falls	2684	W	37.8614	3137	W	39.0004	5682	W	64.7796	6288	W	98.3406	4841	W	65.3674	305.3493
0032 Louisville	4119	S	58.0925	4176	S	51.9098	5017	S	57.2022	4917	S	76.8964	4485	S	60.5531	304.6540
0197 Joplin Tri-State	1621	W	22.8562	3475	W	43.1947	6151	W	70.1369	5592	W	87.4630	5801	W	78.3285	301.9793
0226 Reno Area	3501	W	49.3818	3867	W	48.0715	5512	W	62.8469	5421	W	84.7871	3918	W	52.9065	297.9938
0007 Cleveland	3938	S	55.5424	4194	S	52.1333	4519	S	51.5232	4516	S	70.6283	5013	S	67.6903	297.5176
0066 Central Illinois	4838	S	68.2398	4053	S	50.3822	3956	S	45.1099	3496	S	54.6685	5570	S	75.2109	293.6113
0335 Cincinnati North	3940	S	55.5728	3327	S	41.3582	5095	S	58.0887	4721	S	73.8355	4766	S	64.3563	293.2116
0051 Michiana	3234	W	45.6151	3655	W	45.4308	4279	W	48.7884	5636	W	88.1374	4659	W	62.9049	290.8765
0103 San Diego	4773	S	67.3232	2787	S	34.6433	4954	S	56.4854	4708	S	73.6308	4258	S	57.4876	289.5703
0913 Qatar	1776	S	25.0498	3127	S	38.8662	3721	S	42.4315	6394	S	100.0000	6004	S	81.0644	287.4119
0043 Houston	4730	S	66.7094	4782	S	59.4442	3796	S	43.2768	3692	S	57.7448	4363	S	58.9069	286.0820
0235 Cleveland East	3228	W	45.5304	4741	W	58.9360	4536	W	51.7236	4560	W	71.3128	4298	W	58.0319	285.5347
0062 Nashville	4232	S	59.6958	4064	S	50.5174	5142	S	58.6241	3960	S	61.9347	3850	S	51.9883	282.7604
0068 Reading	3546	W	50.0192	3258	W	40.4994	4573	W	52.1420	5058	W	79.1006	4353	W	58.7730	280.5342
0323 Bloomington Indiana	2392	W	33.7447	2786	W	34.6301	4987	W	56.8592	5706	W	89.2329	4714	W	63.6491	278.1160
0123 Raritan Valley	4535	S	63.9605	4738	S	58.8948	4034	S	45.9957	4634	S	72.4750	2672	S	36.0745	277.4005
0263 Catawba Valley	3473	W	48.9832	3471	W	43.1477	4099	W	46.7395	5353	W	83.7249	4009	W	54.1329	276.7281
0102 Fox River Valley	3846	S	54.2421	3850	S	47.8577	4266	S	48.6393	4780	S	74.7491	3675	S	49.6159	275.1040
0146 Morris-Essex	4314	S	60.8512	3943	S	49.0177	4765	S	54.3279	3132	S	48.9755	4536	S	61.2384	274.4107
...

While we finished the completion this year in 28th place in the Warner Division (W) we held on to a good average over the past 5 years. We finished the 2017-2018 competition year in 12th place in the 5 year Chapter percentage performance.

		Catawba Valley Goals for 2018-2019									
Calendar year is May 1-April 30		1	2	3	4	5	6	7	8	Completed	Notes
1	Publish six publicity items: Includes Meeting announcements, Events and Conference										Kim
2	Publish six additional publicity items:										Kim
3	Provide an IMA/CMA promotional mailing to potential members										
4	Sponsor a student night/event- a dedicated chapter meeting										Sept & March
5	Sponsor an IMA booth at a local job fair										
6	Provide formal mentoring opportunities for board members										Ongoing for chapter members
7	Make a guest presentation in classroom: discuss IMA certification opportunities										Charlie & Lucy
8	Participate in a charitable event- REQUIRES multiple members										Christmas Family
9	Develop a written annual plan that aligns with Global's strategic plan										Board
10	Prepare an annual budget										Treasurer
11	Hold regular scheduled board meetings										4 minimum
12	Hold a Chapter Management Session to train incoming officers										President
13	Publish 8 informational communications to board or chapter members	5/1									Newsletters-4 minimum
14	Publish 4 additional informational communications to board or chapter members										IMA newsletters
15	Provide support for a regional or council IMA activity										
16	Two board members attend Council's Spring Leadership Training Session or Chapter Leadership Effectiveness workshop										ANY Board Member
17	Attend two volunteer leaders teleconference calls										Any Board Member
18	Submit best practices ideas to the Chapter & Council Best Practices Forum										
19	Maintain more than 5 active board members for the year										Board
20	Publish an annual chapter program book of events or chapter roster										Lindsey/Rhonda
21	Facebook and LinkedIn										Links are on website
22	Sponsor Student Chapter										
23	Organize and Participate in a Plant Tour by a member of finance										
24	Have a chapter member serve on a Global Committee or Global Board of Directors										

25	Attend at least two council meetings (by telephone conference call)										Ron & Ellen
26	Member to publish article in <i>Strategic Finance, Mgmt, Accounting & Trly</i>										
<p align="center">Items below are Extra Credit. These show our dedication to the CMA program and push us to winning a Banner each year</p>											
E1	Promote CMA certification in publication										2 success stories 25 points
E2	Director for CMA program position assigned, hold 2 activities for program										25 points-Ron
E3	Promote CMA through 2 special communications to a targeted group										50 points -NOT newsletter
E4	Promote CMA through a presentation to a university or targeted group										1 delivery w/10 + to University =50pts
E5	Establish structured mentoring relationship w/survey returned to Global for CMA Exam										1 relationship is 75 pts, 2 or more are 150 pts CMA review Ron
E6	Sponsor/actively co-sponsor CMA Review Course 3 clases w/review										3 classes is 100 pts, 6 classes is 200 pts
E7	Promote CMA to Corporate, Government or NonProfit of 5 or more										25 points