



Catawba Valley Chapter

September 2019

Message from the President

Hello Everyone,

Our first luncheon meeting is in MORGANTON on September 20th, I am looking forward to enjoying a new venue, in a new town, and I hope to see many of our members who live or work nearby to attend. The Board thought that maybe we would be serving our larger area by holding meetings in a few different locations each quarter, and we are starting with this meeting.

Through our connection with APICS, we connected with Mike Ogle. His presentation “**Emerging Technologies Enhance Capabilities for Better Tracking of Supply Chain Information and Material Flows**” will give us an idea of how to use the information from the use supply chain in financial analysis. Supply Chain technologies are being pushed industry wide so this will be a good opportunity to learn the basics. Please read more about this presentation and Mike’s qualifications in this Newsletter.

It’s Official – at least from Global’s viewpoint -our Chapter is glad to welcome the Accounting Club of Appalachian State University as a Student Chapter of the IMA! Kim Zahller has been the driver in getting University support, motivating students and working with Global to get all of the paperwork finalized. In September, we will hold a welcome dinner and get to meet the New Officers in Boone. We are very excited to have another Student Chapter!

The Student Leadership Conference will be held on November 14-16 this year in Charlotte. The Charlotte Chapter is working with IMA Global to provide volunteer opportunities for the local Chapters. We have a list of the days, times and events where volunteers are needed. To keep this organized, we are asked to fill out a form for the times we would like to volunteer. If you have time on any of the dates, Thursday through Saturday there are day and some early evening slots are open. Please contact me and I will get you the information. The volunteers can stay for the presentations and, of course, this is a very good networking opportunity

Personally, I am looking forward to meeting more of our Chapter members. Please plan to attend either a meeting in Morganton (September) or in Lenoir (October) or December (Hickory). The list of dates and locations, including the time of each event is included in this Newsletter.

Ellen

UPCOMING EVENT:

FRIDAY, SEPT 20TH
LUNCH MEETING
MORGANTON COMMUNITY HSE
120 N KING ST, MORGANTON
MEETING 12 – 1
SOCIAL 11:30 - 12
SPEAKER = MIKE OGLE
EMERGING TECHNOLOGIES

MEMBERS - \$17
STUDENT MEMBERS - \$10
ALL NON MEMBERS - \$20

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Calendar of Events

IMA Monthly Meetings 2019-2020

<u>Date</u>	<u>Town</u>	<u>Info</u>
August 25	Hickory	Crawdads event, Sunday on the Picnic Deck.
September 20	Morganton	Morganton Community House 120 North King St Lunch - social at 11:30 with meeting from 12-1 pm
October 11	Lenoir	Broyhill Civic Center 1913 Hickory Blvd (321) Lunch - social at 11:30 with meeting from 12-1 pm
November 22	Hickory	Conference, Hickory Metro Convention Center All day event, including lunch
December 6	Hickory	Lake Hickory Country Club 430 17 th Ave NW Lunch - social at 11:30 with meeting from 12-1 pm
January 9 or 16	Hickory	Dinner w/APICS Catawba Country Club DINNER 5:30 to 8 pm including registration/social
February 21	Morganton	Morganton Community House 120 North King St. Lunch - social at 11:30 with meeting from 12-1 pm
February 28	Asheville	Conference, Hilton Biltmore, w/Carolina's Council. All day event, including lunch
March 20	Lenoir	Broyhill Civic Center 1913 Hickory Blvd (321) Lunch - social at 11:30 with meeting from 12-1 pm
April 17	Hickory	Lake Hickory Country Club, 430 17 th Ave NW Lunch - social at 11:30 with meeting from 12-1 pm

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 Rhonda Young at youngrhonda72@gmail.com
by NOON on Tuesday before each meeting.**

**2019 – 2020
Catawba Valley IMA
Officers**

President: Ellen Knauf
President-Elect:
Treasurer: Jil York
Secretary: Charles 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:** Rhonda Young
- **Newsletters:**
- **Education/Webinar:** Rhonda Young
- **Student Activities:** Lacy Sanchez
Chelsea Ledford
Kim Zahller
- **Scholarship:** Lacy Sanchez
- **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>

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

- **Insurance**
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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®**

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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.

About the Topic and the Speaker

Title:

Emerging Technologies Enhance Capabilities for Better Tracking of Supply Chain Information and Material Flows

Abstract:

Emerging tech is interesting and amazing, plus there is hope that tech can provide transformational capabilities for individuals and companies. However, it is very important to focus on supply chain fundamentals when evaluating emerging tech. This presentation provides an overview of the pressures that are leading to greater use of emerging tech in supply chain, the capabilities provided by a variety of emerging technologies, plus an assessment of their near-term readiness. The presenter will also provide ways that emerging tech provides greater capabilities for visibility of information and material flows, enhancing the ability to better track and allocate the use of resources.

Bio:

Mike Ogle is currently a freelance writer and course developer for a variety of supply chain publications, associations, and companies. In November of 2018, Mike left his position at APICS headquarters where he served as the Senior Director of Research and Academic Engagement. Prior to his time at APICS, he was an Assistant Professor in the Systems Engineering department at UNC Charlotte, teaching and researching in the areas of supply chain, logistics, and material handling. Prior to UNC Charlotte, Mike was Vice President of Educational & Technical Services for 15+ years at the MHI trade association. Through May 2016, he served two years on the Board of Directors of the Warehousing Education and Research Council (WERC) and was also on the board of the Logistics and Supply Chain (LSC) Division of the Institute of Industrial & Systems Engineers (IISE). He has been both speaker and session chair at CSCMP, WERC, and IIE conferences. He earned a Ph.D. in Industrial Engineering from Arizona State University and an MSIE from the University of Arkansas.

		Catawba Valley Goals for 2019-2020								
Calendar year is May 1-April 30		1	2	3	4	5	6	7	8	Completed
1	Publish six publicity items: Includes Meeting announcements, Events and Conference									
2	Publish six additional publicity items:									
3	Provide an IMA/CMA promotional mailing to potential members									
4	Sponsor a student night/event- a dedicated chapter meeting									
5	Sponsor an IMA booth at a local job fair									
6	Provide formal mentoring opportunities for board members									
7	Make a guest presentation in classroom: discuss IMA certification opportunities									
8	Participate in a charitable event- REQUIRES multiple members									
9	Develop a written annual plan that aligns with Global's strategic plan									
10	Prepare an annual budget									
11	Hold regular scheduled board meetings	6/26	7/9							
12	Hold a Chapter Management Session to train incoming officers	6/26								
13	Publish 8 informational communications to board or chapter members	7/3	8/5	9/9						
14	Publish 4 additional informational communications to board or chapter members									
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 (CLEW)	Ellen 7/17	Ellen 8/13	Rhonda 8/13						Complete
17	Attend two volunteer leaders teleconference calls									
18	Submit best practices ideas to the Chapter & Council Best Practices Forum									
19	Maintain more than 4 active board members for the year									
20	Publish an annual chapter program book of events or chapter roster									
21	Facebook and LinkedIn									
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)	Ellen 7/20									
26	Member to publish article in <i>Strategic Finance, Mgmt Accounting Qtrly</i>										
Items below are Extra Credit. These show our dedication to the CMA program and push us to winning a Banner each year											
E1	Promote CMA certification in publication										
E2	Director for CMA program position assigned, hold 2 activities for program										
E3	Promote CMA through 2 special communications to a targeted group										
E4	Promote CMA through a presentation to a university or targeted group										
E5	Establish structured mentoring relationship w/survey returned to Global for CMA Exam										
E6	Sponsor/actively co-sponsor CMA Review Course 3 classes w/review										
E7	Promote CMA to Corporate, Government or NonProfit of 5 or more										

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@hsm solutions.com by the last day of the month preceding the month in which you want the ad to be printed.