



# Catawba Valley Chapter

January 2018

## Message from the President

Hello Members!

Are you all rested and refreshed after the Holidays? It is nice to take a few days to relax, visit with family and friends. Our Chapter is off to a busy start to the new year, with a new website, a joint meeting with the local APICS Chapter and the Winter Conference and Carolinas Council Winter Meeting in the next 2 months.

**We are saddened to hear that our long time friend and supporter, Joe Ryan, passed away on January 2<sup>nd</sup>. Not only was he involved in our Chapter as Secretary, he was a Vice President for IMA at the National level. A copy of the full obituary for Joe is included in the newsletter. Please take a moment to remember Joe and his family. He will truly be missed by many.**

In December, the family we helped had many issues to overcome. It was a single parent home of 3 small children and the parent had just gotten out of an abusive situation. Leaving with just a few items of clothing and some toys it was like starting over. They had a home, but little furniture. A few other groups were able to find beds and a couch. We shopped for the entire family, finding a dining room table and chairs, towels, bowls, plates, silverware and cups, plus plenty of clothing for the children. We found several items for each child using the list the parent provided for Christmas presents. Shortly after I first spoke to this person, there was an unexpected death of the parent's Mother. Dealing with leaving the abusive situation and the death of a loved one made things very difficult for this little family. The gifts and supplies we provided were very welcomed. The ability of our Chapter to help a local family is wonderful. If you have not been the person to shop and deliver to the family we sponsor at Christmas, please consider this. It may seem like it takes up some time, but giving truly lightens your heart. Our appreciation goes to Ann from Family Guidance Center for finding us a family that truly needed our help and support.

Have you been to our new website yet? We have a new look and we are adding items to it. This site gives you the ability to register for our monthly meetings or to register for our Conferences. We will be adding to it; adding news and pictures. Please let us know what you think. Visit us at <https://Linkup.imanet.org/catawbavalleychapter/home> . If you have something to add, please send it to Lindsey Huffman ([lhuffman@carolinatrust.com](mailto:lhuffman@carolinatrust.com)).

The meeting in January will be a joint dinner meeting with the local APICS Chapter on January 18<sup>th</sup> at the Catawba Country Club. Mr. Yash Bhatia, President –Datos Consulting ,will present “Building a Data-Driven Enterprise”. Please read more about the speaker and the presentation in the newsletter. This is a lively event, a great way to network with people from a related field, and the food has always been great as well.

Hope to see you all there!  
Ellen

1

**UPCOMING EVENT:**

**THURSDAY- JANUARY 18, 2018**  
**Joint APICS Dinner Meeting**  
**Catawba Country Club**  
**5:30 = Social / 6:00 Dinner**

**Building a Data-Driven Enterprise**  
**Presented by Yash Bhatia –**  
**President of Datos Consulting**

**MEMBERS - \$20**  
**STUDENTS - \$10**  
**GUESTS - \$25**

IN THIS ISSUE	
1	President's Message
2	Obituary -Joe Ryan Calendar of Events/ Meeting Registration
3-5	2017-2018 Officers About the Speaker IMA information Certification Offerings
6-9	Achievements and Goals Student Chapter News APICS Press Releases



Marion, NC

*In Memory of*

# Joseph Frederick Ryan

**July 25, 1930 - January 2, 2018**

Joseph Frederick Ryan, 87 of Old Fort NC, passed away peacefully at home surrounded by his family, on Tuesday January 2, 2018.

Mr. Ryan was born in Northampton, MA on July 25, 1930, to the late Frances Vishaway Ryan and Thomas F. Ryan.

He was a member of First Baptist Church of Swannanoa in Swannanoa, NC and First Baptist Church of Orlando, FL. Mr. Ryan loved his church, his faith and was very active in his church. He taught Sunday school for over 40 years, served as a Deacon and sang in the choir. He was committed and consistent in his faith. In his final days, his love for the Lord was evident as he spoke of "walking toward Jesus".

Mr. Ryan was a Certified Public Accountant and he worked for Ardamar & Associates, Inc in the Orlando area, before he retired. He also had an office in Black Mtn, NC and built a home office so he could continue to provide financial planning for the community. During

his 50 years of accounting, he was affiliated with IMA (Institute of Management Accountants) group and served as Secretary in the Hickory, NC Chapter and was also one of 12, handpicked nationally, to be the IMA National Vice President, of which he was very honored to serve.

Mr. Ryan was a proud member of the United States Army. He served our country for three years during the Korean Conflict. For recreation, Mr. Ryan was an avid golfer. He enjoyed every aspect of the game. But most importantly, Mr. Ryan put God first, then his family and lastly his work. He loved his wife and children dearly and they will miss him terribly.

In addition to his parents, he is preceded in death by three sisters, and six brothers.

Surviving Mr. Ryan are his wife of 60 years, Marilyn; sons Geoff (Fay) Ryan of Old Fort and Jay Ryan of Marion; daughters, Brenda (fiancé Matthew Sampson) Drosjack of Columbia, MD and Heather (Nina Shaffer) Morris of Richmond, VA; and a brother, Eugene Ryan, of Easthampton, MA and grandchildren; Christina Ryan of Asheville, NC and Courtney Drosjack of Columbia, MD.

The family will receive friends on Saturday, January 6, 2018 from 10 am to 11 am at First Baptist Church of Swannanoa, 503 Park St., Swannanoa, NC 28778. A Memorial Service will follow the visitation at 11 am at the church, with Pastor Jeff Dowdy officiating.

In lieu of flowers, memorials can be made to: Care Partners Hospice and Palliative Care McDowell, 575 Airport Rd., Marion, NC 28752 and/or The Pulmonary Fibrosis Foundation website:

<https://pulmonaryfibrosis.donorpages.com/Tribute/JosephFRyan> and/or the First Baptist Church of Swannanoa Building Fund.

## 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@hmsolutions.com](mailto:dbprewitt@hmsolutions.com) by the last day of the month preceding the month in which you want the ad to be printed.

## Calendar of Events

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### DATES FOR 2017-2018 MEETINGS:

January 18<sup>th</sup> – Joint meeting with APICS at Catawba Country Club  
Yash Bhatia--President of Datos Consulting presents  
'Building a Data-Driven Enterprise'

February 16<sup>th</sup> – Breakfast meeting at LHCC

February 23<sup>rd</sup>-24<sup>th</sup> – WINTER CONFERENCE-Hilton Asheville Biltmore Park

March 15<sup>th</sup> – Late afternoon meeting (4-5:30) at LHCC

April 13<sup>th</sup> – Lunch meeting at LHCC

May 18<sup>th</sup> – Lunch meeting at LHCC

### 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@hmsolutions.com](mailto:sffox@hmsolutions.com)**  
*by Tuesday before each meeting.*

**2017 – 2018  
Catawba Valley IMA  
Officers**

**President:** Ellen Knauf  
**President-Elect:**  
**Treasurer:** Beth Pernell  
**Secretary:** Charlie Nartker  
**Administration:** Charlie Nartker  
Team Leader  
**Communication:** Kim Gales  
Team Leader  
**Membership:** Danette Landrum  
Team Leader

**2017 – 2018  
Catawba Valley IMA  
Directors**

- **Publicity:** Kim Drum-Gales
- **Webmaster:** Lindsey Huffman
- **Asst. Webmaster:** Rhonda Young
- **CMA Program:** Ron Nicholson
- **Employment:** Beth Prewitt
- **Meetings (RSVPs):** Sheronda Fox
- **Newsletters:** Kelly Frank
- **Education:** Ron Nicholson
- **Student Activities:** Lacy Sanchez  
Chelsea Ledford
- **Scholarship:** Mike Gahagan
- **Membership:** Rhonda Young  
Dee Strickland  
Brenda Craig
- **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](http://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](http://www.imanet.org)  
<https://Linkup.imanet.org/carolinasregionalcouncil/home>  
<https://Linkup.imanet.org/catawbavalleychapter/home>

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.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](http://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 2017 with the help of a Professor-Led CMA Review

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

### ON-DEMAND PERSONAL COACHING

#### Enjoy

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

Per part **\$795**

Both parts **\$1,495**

Send contact information with payment to: IMA Catawba Valley Chapter  
PO Box 2132 | Hickory, NC 28603

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**Enroll Now! Class size is limited.**

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

### 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 SPEAKER***

Yash Bhatia, President of Datos Consulting

Presentation: 'Building a Data-Driven Enterprise'

"Data-driven" as core business strategy helps companies gain a competitive edge by leveraging the transformative power of data and analytics. Using data, companies can understand their consumers' behaviors better, providing great value for stakeholders and customers. This presentation will discuss how to be a data conscious organization, how to leverage data to drive decision-making in your organization, and present a case study about building a data-driven enterprise.

**Speaker Bio:** Yash Bhatia is President of Datos Consulting, a data science and analytics consulting firm that provides process improvements and integrated analytical solutions for end-to-end optimization and decision-making. He is currently on the board of the APICS Industrial Crescent Chapter in Greenville, SC and, Co-Chair of the Warehouse Education and Research Council (WERC) of South Carolina. Yash has been a speaker at APICS PDM in Greenville, SC; IMA (Institute of Management Accountants) at BMW Zentrum; Clemson University; and was on a panel at the Supply Chain and Quality Conference in Charleston on August 2017 speaking on "Data-Driven Automotive Supply Chain Management."

		Catawba Valley Goals for 2017-2018									
Calendar year is May 1-April 30		1	2	3	4	5	6	7	8	Completed	Notes
1	Publish <b>six</b> publicity items: Includes Meeting announcements, Events and Conference	5/7	8/20	9/6	10/8	12/1					Kim
2	Publish <b>six</b> additional publicity items:										Kim
3	Provide an IMA/CMA promotional mailing to potential members										
4	Sponsor a student night/event- a dedicated chapter meeting	9/21								Completed	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										Ron/Chelsea others
8	Participate in a charitable event- REQUIRES multiple members	12/21								Completed	Christmas Family Mary, Danny, Ellen
9	Develop a written annual plan that aligns with Global's strategic plan										Board
10	Prepare an annual budget	12/15								Completed	Ellen/Beth
11	Hold regular scheduled board meetings	6/29	8/16								4 minimum
12	Hold a Chapter Management Session to train incoming officers										Ron
13	Publish 8 informational communications to board or chapter members	5/17	6/17	7/1	8/1	9/1	10/2	11/3	12/1	Completed	Newsletters-4 minimum
14	Publish 4 additional informational communications to board or chapter members	1/5									IMA newsletters
15	Provide support for a regional or council IMA activity										Winter Conference
16	<b>Two</b> board members attend Council's Spring Leadership Training Session or Chapter Leadership Effectiveness workshop										Ellen & Ron, Others?
17	Attend two volunteer leaders teleconference calls	5/8 Ellen	11/14 Ron							Completed	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										Ron & Ellen

25	Attend at least two council meetings (by telephone conference call)	Ellen 7/29	Ellen 10/20								Completed	Ron & Ellen
26	Member to publish article in <i>Strategic Finance, Mgmt Accounting Qtrly</i>											Publish by 3/31
<p align="center"><b>Items below are Extra Credit. These show our dedication to the CMA program and push us to winning a Banner each year</b></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											10 attendees 50 pts, 20 attendees 100 pts
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 classes 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



