



Catawba Valley Chapter

October 2017

Message from the President

Hello Members!

The weather has changed and Fall is in the air. Our Student meeting in September was very interesting and well received. Fraud is a wide topic covering ethical, business, personal and educational areas. All of these were discussed with several personal experiences to draw from. A big THANK YOU to our panel members, Donna Frushour, Nathan Thompson and Ron Nicholson.

At our September meeting, we announced the new scholarship program and have spread the information to several colleges in the area. If you know of a College student, sophomore or higher who is pursuing a career in Accounting or Finance, please direct them to this information, included in this newsletter. We are hoping for a good number of applicants, and the final date to submit all of the information is November 15th.

This month our Breakfast meeting will be on Friday, October 27th. Rich Rodberg will give us insight on how to help Project Managers connect activities with accounting codes. Rich is a member of a neighboring PMI Chapter and has several years of experience to draw from. The communication channels between the project manager and the accountant need to be open to capture the expenses, but they also need to be talking the same language. Rich will have some pointers of ways to help.

Please visit our new website - IMA Global has provided a platform for every Chapter, giving us information on National events and giving us an updated look. You can find us at <http://linkup.imanet.org/catawbavalley/home>. Add us to your favorites bar and visit to find our latest offerings, Conference information.

Best Regards,
Ellen

UPCOMING EVENT:

FRIDAY- OCTOBER 27, 2017
!! BREAKFAST MEETING !!

Lake Hickory Country Club
8:00-8:15= Registration
8:15= Speaker

Rich Rodberg will present
Project Management

Accounting
Members - \$10
Students - \$10
Guests - \$12

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

Calendar of Events

DATES FOR 2017-2018 MEETINGS:

- October 27th – Breakfast Meeting at LHCC
Richard (Rich) A. Rodberg, PMP
Project Management Accounting-Using Project Mgmt to Expense Projects
- November 9th – ANNUAL CONFERENCE-Hickory Metro Convention Ctr.
- December 8th – Lunch meeting at LHCC
- January 18th – Dinner meeting
- February 16th – Breakfast meeting at LHCC
- February 23rd-24th – WINTER CONFERENCE-Hilton Asheville Biltmore Park
- March 16th – Late afternoon meeting (4-5:30) at LHCC
- April 13th – Lunch meeting at LHCC
- May 18th – 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
by Tuesday before each Thursday 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:** Chelsea Ledford
- **Scholarship:** Mike Gahagan
- **Membership:** Rhonda Young
Dee Strickland
Brenda Craig
- **Carolina Council Delegate:** Ron Nicholson
Ellen Knauf



The Association of
Accountants and
Financial Professionals
in Business

www.imanet.org
www.imacarolinascouncil.org
<http://linkup.imanet.org/catawbavalley/home>

Look/Go here:

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

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>

*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.*

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

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

ABOUT THE SPEAKER

Richard (Rich) A. Rodberg, PMP

While presently retired, Rich has worked in the telecommunications, publishing, operations, and manufacturing fields as a project manager for more than 25 years.

Enjoying volunteering, Rich has been part of the PMI Metrolina Chapter's leadership since 2004 and has held the following positions:

2004, 2005, 2006 – AVP/ VP Communications

2007 – VP Student Development

2008, 2009 – VP Professional Development

2010-2017 – Student Outreach Chairperson

2013-2017- PMIEF Chapter Liaison

Rich has also made presentations for the chapter's monthly chapter meetings, Saturday PDU sessions, and to Appalachian States' Project Management Classes. And he was a regular session leader for the chapter's certification prep course.

Rich also mentored for the UNC Charlotte SIFE/Enactus Chapter for five years.


This Month's Meeting Presentation will show a quick and easy method to help project managers help the accounting department connecting activities and account codes.



Pictured L-R while attending the August joint meeting with APICS are Ron Nicholson, Marilyn and Joe Ryan, Beth Pernell, Dee Strickland, Beth Prewitt and Rhonda Young. Not pictured is our photographer, Charlie Nartker.

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**

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Enjoy

- Premium Gleim CMA Review System
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Per part **\$795** Both parts **\$1,495**

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

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.

Catawba Valley Goals for 2017-2018										Completed	Notes	
Calendar year is May 1-April 30	1	2	3	4	5	6	7	8				
1	Publish six publicity items: Includes Meeting announcements, Events and Conference	5/7	8/20	9/6								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	9/21										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											Christmas Family
9	Develop a written annual plan that aligns with Global's strategic plan											Board
10	Prepare an annual budget											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	9/7	10/2					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											Winter Conference
16	Two 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										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										Ron & Ellen

26	Member to publish article in <i>Strategic Finance, Mgmt Accounting Qtrly</i>										Publish by 3/31
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										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 -NDT 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



OCTOBER PROFESSIONAL DEVELOPMENT MEETING

Date: *Thursday, October 5th, 2017*

Program: *Transitioning a Healthcare System's Materials Management, Inventory and Purchasing Practices and its Staff from a Just-in-Case Mentality to a Just-in-Time Reality*

Speaker: *Michael Rawls, System Director of Purchasing and Materials Management at Appalachian Regional Healthcare System*

Location: *Catawba Country Club
1154 Country Club Road, Newton NC 28658*

Time: *5:30 pm to 7:30pm*

Cost: *\$20 for the general public, \$15 for APICS members & faculty, \$5 for student members and \$10 for student guests.*

RSVP: *Contact Bill Phillips, VP Arrangements at 828.584.8197 or email explore2@bellsouth.net*