



# Catawba Valley Chapter

April 2020

## Message from the President

Hello Members

The efforts to curtail group gatherings does keep us from holding meetings or any social activities. We want you to understand that the IMA is working from home, but still functioning and looking for ways to bring training and CPE events to you.

Our Global IMA leaders have given the Chapters some slack in the timing to complete a few administrative tasks. One of these tasks is the election of Board Members for the new year, starting on July 1<sup>st</sup>. In previous years, this has been a difficult task to accomplish in our Chapter. To give you some idea of the amount of time and involvement required, in this newsletter there is a list of the jobs, how much time each takes on a monthly basis, and a short job description. We are looking for members who want to help make our Chapter better, improve on some things we need, and offer new ideas.

The current members of your Board have been there for several years – this is not to say we all need to be replaced, because it's good to have some knowledge of the history and what has worked and what could be improved. New people in the group give us a new perspective on what decisions are made, what CPE to offer, different ways to connect each month.

With the effects of COVID-19, we may not be able to hold another meeting for this year, and voting may be done by electronic means. We are hopeful that we can have one more meeting this year, however, it will be determined on when it is safe to meet in a group setting.

Take this time you may have away from work and look at the opportunities available to improve your skills, read the articles in the Strategic Finance magazine, take an online class. This situation has given us an opportunity to take a good look at our work-life from a different angle, make this work for you.

Please stay safe, continue to practice social distancing, get outside of you home to enjoy some spring weather. Stay in touch with your colleagues and friends. Let's make the most of this time.

Ellen

### SHOUT OUTS TO:

**GARRETT BROWN – APP STATE  
\$1,000 CAROLINA'S COUNCIL  
SCHOLARSHIP RECIPIENT**  
**BRENDON JOHNSON – APP  
\$500 CAROLINA'S COUNCIL  
SCHOLARSHIP RECIPIENT**

**BOTH RECIPIENTS ARE MEMBERS  
OF THE STUDENT CHAPTER AT APP  
AND BOTH ATTENDED THE  
STUDENT LEADERSHIP  
CONFERENCE IN CHARLOTTE IN  
NOVEMBER.**

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## 2020 Board Elections

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### IMA CATAWBA VALLEY CHAPTER - ANNUAL ELECTIONS

Position	Running for office
President	
Administration VP	Charles Nartker
Communication VP	
Prof Education VP	Ron Nicholson
Membership VP	
Treasurer	Jil York
Secretary	Charles Nartker
Webmaster	
Director Registrations	
Director Webinar	Rhonda Young
Director Student Activities	Kim Zahller
Director Student Activities	Chelsea Ledford
Director Student Activities & Scholarship Committee	
Director Newsletter	

As you can see above, we have several places where we need volunteers. While I am not actively running for office again, I will gladly help the person who is elected.

If you are interested in ANY of these positions please email me at [emknauf@charter.net](mailto:emknauf@charter.net)

IMA has asked us to complete our voting by the end of April.

#### 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 Kim Gales at [kimgales1@gmail.com](mailto:kimgales1@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



The Association of  
Accountants and  
Financial Professionals  
in Business

*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.*

[www.imanet.org](http://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.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 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.

## CATAWBA VALLEY CHAPTER BOARD POSITIONS

**Director of Newsletters** – responsible for the timely preparing and sharing of the Chapter Newsletter. Could include contacting Board members for information, assembling, proofing and issuing the newsletter. Submits completed product to the Webmaster and Communications Directors for publishing. 1 person needed. Approximately 1-2 hours each month (usually around the beginning of the month)

**Director of Student Activities** – works directly with our Student Chapters (CVCC & APP STATE), coordinates events with Chapter & Students, enrolls students, provides guidance toward CMA reviews and is actively involved in the continuous growth of the Student Chapters. 2 people needed Approximately 5-30 hours per month – prefer a professor.

**Scholarship Committee** – reviews scholarship policy and works within the monetary amount set by the Board for each year's scholarship. Sends information out to local area Colleges and Universities, reviews applications and makes final suggestions of the top 3 candidates to the Board. 3-5 people, one as the Team Leader. Approximately 2 hours per month, with most of this being August – December, unless the scholarship time frame is changed.

**Director of Registrations** – works with the Education Team and Webmaster to confirm all events are correctly presented and each registration is complete for events. This will include reaching out to registrants if the information is missing, compiling the lists of registrants by type attending (live or webinar), working with the Treasurer to ensure payments are received and applied to the correct party. Can involve attending the live events to work the registration table. 1 person. Approximately 2 hours per month, more in the months prior to live events.

**Director of Webinars** – responsible for the setup, presentation and record keeping involved with presenting a webinar. This person must have computer skills and be familiar with the NASBA rules of recordkeeping, will need to contact registrants possibly on the day of the event to help with setup for the registrant. 1 person (a 2<sup>nd</sup> would be helpful). Approximately 2-4 hours per month, more in the months of the event.

**Webmaster** – responsible for updating the Chapter website and working with Global on any changes. This person sets up event registrations, working with the Education Team, Director of Registrations and the Director of Webinars. 1 person. Approximately 2-4 hours per month.

**Secretary** – responsible for recordkeeping for the Chapter. This includes minutes of Board Meetings, maintaining contact information of Board members and contacts used during the normal course of holding meetings and events, Submitting Core Value and Ethics Compliance forms to the Community Relations team at Global, meeting planning and any other administrative functions assigned. 1 person. Approximately 3-6 hours per month

**Treasurer** - responsible for the control of chapter funds, balancing bank accounts, preparing annual budget, deposits and payment of bills approved by the Board. This person will be responsible for the annual filings (Federal and IMA Global) and will work with the Webmaster, Director of Registrations and the Secretary in collecting funds for events. 1 person. Approximately 3-6 hours per month.

**Director of Education (Professor of Education)** – is responsible for setting up and organizing CPE for events, including monthly meeting, Conferences, Webinars. This will include working to secure qualified speakers, and working out the contracts for such. The person will help organize the location of events, and will submit the location contracts to the President for approval. This person also needs to understand the rules set by NASBA for the various types of CPE events, and be a big part in the review and filing of documents by event and will be the contact to NASBA for the Chapter. 1 person. Approximately 3-5 hours per month.

**President** – this person is the leader of our Chapter and is responsible for holding regular meetings, overseeing all positions are completing their assignments, and can assign other tasks and create sub committees. This person will preside over meetings and be in attendance for Board functions, meetings and Conferences. Is a ex-officio member of all committees, authorizes expenditures of chapter funds, assumes responsibility for the fiscal budget, and listens to all officers ideas on how to improve each function. This person works with the Carolina's Council as a representative, (there can be others), and conducts the election of the chapter officer/directors and sends that information to the Community Relations Committee at Global. 1 person. Approximately 5-8 hours per month.

Catawba Valley Goals for 2019-2020										
		1	2	3	4	5	6	7	8	Completed
	Calendar year is May 1-April 30									
1	Publish <del>six</del> publicity items: Includes Meeting announcements, Events and Conference	HDR 9/12/19	Lenoir 9/15/19	HDR 10/5/19	Lenoir 10/3/19	HDR 11/03/19	Lenoir 11/03/19			Complete
2	Publish <del>six</del> additional publicity items:	HDR 11/25/19	Lenoir 11/25/19	HDR 1/5/2020	Lenoir 1/5/20	Morganton Asheville Conf. 1-30	Asheville Conf 1-30	HDR Asheville Conf 1-30		
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- REQUIRIES multiple members	2/3								
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	10/21						
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	10/2	11/4	11/27	12/2	1/5/20	Complete
14	Publish 4 additional informational communications to board or chapter members	2/4								
15	Provide support for a regional or council IMA activity									
16	<b>Two</b> 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	Ellen 1/21/20								
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									Complete

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	Ellen & Ron 1/19							Complete	Ron & Ellen
26	Member to publish article in <i>Strategic Finance, Mgmt Accounting Qtrly</i>										
<b>Items below are Extra Credit. These show our dedication to the CMA program and push us to winning a Banner each year</b>											
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 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

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