



Catawba Valley Chapter

March 2018

Message from the President

Hello Members!

Our Asheville Conference was a success, we had a good number of attendees in the room, I believe about 40, and we had several on the live Webinar. These events take a lot of work from several people and I want them all to know how much their time means to me. Sheronda, Lindsey, Rhonda, Charlie, Ron and some help from Martin Brossman, thank you so much for your dedication to making this a great event.

Our March meeting is scheduled for THURSDAY, the 15th, as a late afternoon event. Mr. Jerry Lape has a presentation for us on activity-based accounting. Jerry has several years working in Cost Accounting with AL Steel in Pittsburgh, PA. He moved to North Carolina in 2000 working for Allvac, a subsidiary of ATI. Jerry is currently working part time as a consultant with CAMSO. He tells me that he has never enjoyed working so much – could that be because his work is part-time? He is active in his Church ministry and is an avid NASCAR fan, and a fan of both the Pittsburgh Steelers and Ohio State University Buckeyes. His presentation sounds very interesting, and I hope you can find time to attend.

It is time again for you to make nominations for our Chapter Officers for next year. If you have any interest in a Board position, please contact any Board member, or send me an email. The key positions are President, Vice President, Administrative Team Leader, Secretary and Treasurer. If you currently hold one of these positions and want to continue in that role, please let me know. Look at the list included with every Newsletter to see our positions. Remember, we are working toward a Team environment for several areas. As of this letter, only one person has volunteered for a Team. A copy of the Teams Document is included in this Newsletter for your review. Please consider volunteering a few hours of your time to one of these Teams. Global requires we have this list turned in by the end of March, with the new fiscal year begins June 1st

‘Nothing is impossible - the word itself says “I’m possible”!’ —Audrey Hepburn.

Best Regards,
Ellen

UPCOMING EVENT:

THURSDAY- MARCH 15, 2018

Late Afternoon Meeting
Lake Hickory Country Club
Registration 3:30 / Speaker 4:00

Jerry Lape–Activity Based Costing

MEMBERS - \$12
STUDENTS - \$10
GUESTS - \$15

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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:

March 15th – Late afternoon meeting (4-5:30) at LHCC
Jerry Lape – Activity Based Accounting
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 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. 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 2017 with the help of a Professor-Led CMA Review

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

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Enjoy

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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 IMA Teams

For any organization to be successful teamwork is needed, this is even more important in a non-profit since its members have jobs or other obligations that often have a higher priority than the non-profit. To help our Chapter run efficiently, I would like to create the following Teams. Each Team will have a small focus, allowing them to use their time toward the goals of that group.

One person from each Team will be the spokesperson for that Team to keep the Board informed on that Team's area or focus. The information may be given to the Board in an email, but may be best presented at a Board Meeting.

Please review the Teams listed below, we are looking for volunteers to build these Teams. If you are interested in any of the Teams, please send me an email (emknauf@hmsolutions.com). Our Chapter will only be as good as the quality of the time you offer.

Membership Team

- 3-4 individuals are needed in this team with one person as the main contact for the Board.
- The purpose of this team is to reach out and welcome new members and to remind current members about a month before their current membership renewal date. A friendly call to welcome a new member or touching base with a current member will help keep the local Chapter of the IMA in mind.
- Create a plan to recognize significant anniversary dates of our members. With the addition of the IMA store, a different product could be associated with milestone events for our members. Create a plan for anniversaries, including the value of the gift levels. Present a summary to the Board (this can be in a document). Once the plan has Board approval, this Team will be responsible for executing the plan on a timely basis.
- If there are any new ideas for retaining and/or growing our membership, please provide this information to the Board.
- Provide information/pictures for uploading to our website and other social media sites.

Scholarship Team

- 3-5 individuals are needed for this team with one person as the main contact for the Board.
- Communicate our Scholarship program to the area College & Universities. This would include presenting the information to the Head of the Accounting/Finance departments and any Accounting Club.
- Send out the applications with enough time for the students to apply.
- Review the applications once the time frame has ended, and summarize. Determine the top candidate(s) for this year.
- Present the Board with your summarization and recommendations.
- Contact the winner(s) after the Board has voted, and help coordinate getting the winner(s) to the next meeting for the check presentation.

Education Team

- 2-3 individuals are needed for this team, with 1 person as the main contact for the Board.
- The focus of this team is mostly tied to the 2 Conferences we hold each year. This team will coordinate the speakers and gathering the information required for the bio's and the flyer.
- Create an eye-catching flyer for publication and emailing to our various contacts.
- Collect and verify all of the necessary NASBA paperwork has been completed and is filed in our Google Docs' folder for each event.
- Create documentation on the information required by NASBA that can be used as the team changes.
- Provide information for both the Newsletter and the Website along with our social media sites about what we are offering for education (CPE, CMA, etc).

		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 six publicity items: Includes Meeting announcements, Events and Conference	5/7	8/20	9/6	10/8	12/1	1/5			Completed	Kim
2	Publish six additional publicity items:	2/4									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	2/1	3/5							IMA newsletters
15	Provide support for a regional or council IMA activity	2/24								Completed	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	11/14 Ron	1/18 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
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 -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