



Catawba Valley Chapter

August 2017

Message from the President

Welcome to August!

Our 1st meeting for this year will be combined with APICS on Thursday, August 24th. We chose this because the topic is one that is always of interest. The topic is getting intelligence out of spreadsheets in Excel. Once we have more information on the speaker and a bio we will share that. This is a *dinner meeting* at the Catawba Country Club, the meal they provide is always excellent and the topic sounds like it could be very useful as well. The social time starts at 5:30 with dinner starting at 6:15, the program starts about 6:45pm.

There are a few changes to our dates for this year, please check the upcoming meeting dates and times in the section later in the newsletter. When we tried to get our dates with Lake Hickory Country Club we found a few conflicts, nothing serious but a few dates have changed. Our Thinkers Team has several excellent ideas for topics and are lining up speakers now.

Recently, I attended the Carolina's Council Planning meeting. They are very excited to hear our plans for the Winter Conference and their Winter meeting in Asheville. Ron has done a great job of getting a brewery tour and tasting set up and I think this will be a great event. Thanks Ron! The Council reviewed the plans by IMA Global to remove the Young Professional membership, and will grandfather those in that category in until they turn 33. The concern is we are hurting those who graduate from college by asking them to pay the full membership price when they have just started a new career. The Council will check to see if Global is allowing those who graduate to stay as students for the 1st year post graduation. There was some discussion about the Chapters paying some or part of the difference to keep these young members. I agree, if we don't support the new members, the Association will not grow.

If you are listed as a Board Member for IMA this year, don't forget to complete both the Ethics and Core Values forms and submit them to IMA Global. Please copy Charlie Nartker if you haven't already done so. He currently is missing these forms from 3 Board Members.

Regards,
Ellen

UPCOMING EVENT:
THURSDAY- AUGUST 24, 2017
****APICS Joint Meeting****

CATAWBA Country Club
 5:30-6:00= Registration
 6:15-6:45= Meal
 6:45 = Speaker

Excel: Getting Intelligence out of Spreadsheets
Members - \$20
Students - \$10
Guests - \$25

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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@hsm solutions.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:

- August 24th – Joint Meeting with APICS at Catawba Country Club
Topic = Excel: Getting Intelligence out of Spreadsheets
- September 21st – Late afternoon meeting (4-5:30) at LHCC
- October 27th – Breakfast Meeting at LHCC
- 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 [BETH PERNELL](mailto:kepernell@hsm solutions.com) at 828-328-2201, ext. 5105 or kepernell@hsm solutions.com
by *Tuesday* before each *Thursday* meeting.

To self register click here: [Register for meeting \(CTRL + click here\)](#)

**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.imacarolinacouncil.org
www.catawbavalley.imanet.org

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

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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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.

IMA Announces Record Growth in CMA
NEWS PROVIDED BY
Institute of Management Accountants
10:30 ET

MONTVALE, N.J., July 31, 2017 /PRNewswire/ -- **IMA**[®] (Institute of Management Accountants) is proud to announce record-breaking growth for its **CMA**[®] (Certified Management Accountant) program during the fiscal year ending June 30, 2017. The total number of CMA candidates grew by 40 percent to a record high of 41,000. This expansion of the program has contributed to a 21 percent compound annual growth rate of the CMA candidate pipeline over the last five years. Additionally, IMA's total membership increased by 11 percent, bringing it to the 90,000 mark, and putting the organization on track to reach 100,000 members by its 100th anniversary in 2019.

"This growth represents the tremendous commitment that our volunteers, partners and staff make to support the profession, as well as the commitment our members make to advance their careers," said Jeff Thomson, CMA, CAE, IMA president and CEO. "We're extremely proud of the success we've achieved and we look forward to reaching more milestones as we approach our 100th anniversary."

According to Thomson, IMA's continued focus on growing with confidence and integrity, and a strong balance sheet grounded in financial discipline, enabled it to invest in the multi-million-dollar "You've Got to Earn It" ad campaign. The integrated campaign resulted in 26,000 new leads for the CMA program. IMA also celebrated the 10th year of the Chinese language version of the CMA exam, as well as double-digit growth (29 percent) of new CMA candidates in the U.S.

To honor those who have supported the CMA's success, ICMA[®] (Institute of Certified Management Accountants), the certification division of IMA, announced the recipients of its top honors during its 2017 Annual Conference & Expo in Denver last month. Ping An Insurance of China and Johnson & Johnson were both awarded for their dedication to the CMA program.

ABOUT THE SPEAKER

John Kowalczyk is an instructor in Computer Information Systems at Appalachian State University, and has taught a variety of courses ranging in level from introductory to advanced project courses. He developed the first course in JAVA programming, and has been active in integrating emerging trends in CIS into his courses. He has been an instructor for 10 years, and prior to his current position, taught at Caldwell Community College and Technical Institute, and at Catawba Valley Community College, where he developed a workforce development program in CIS for inmates at the Alexander Correctional Facility in Taylorsville, NC.

John has over 20 years of professional work experience in CIS, including working at IBM in the early 80's on the System 32, which then evolved to the System 36, and then to the System 38. Subsequent to IBM, John worked as a programmer analyst consultant, using various contemporary programming languages such as RPG ILE, JAVA, SQL, as well as WEB Development applications. Prior professional experience also includes positions at Caldwell Banker, Deloitte and other companies in the IT arena.

John holds a M.S. in Higher Education in CIS from Appalachian State University, a BBA in Finance from Texas State University, and an Associates degree as a Programmer/Analyst from the College of Southern Nevada. John is active as a volunteer ski patroller at Appalachian Ski Mountain and as a baseball coach for Watauga County Parks and Rec.

ABOUT THE TOPIC

Business intelligence (BI) is the collection of tools and processes that are used to gather data and turn it into meaningful information that people can use to make better decisions. John's presentation will cover a select number of fundamental Business Intelligence (BI) tools now available in Microsoft Excel. Microsoft provides a variety of BI tools that can address key analytical workloads, making it easier to gather data and use the data to make better business decisions, create powerful reports, scorecards, and dashboards. In his presentation, John will preview and speak about some of fundamental topics in Microsoft's Power BI package for Excel. The Power BI package consists of four powerful tools—Power Pivot, Power View, Power Query and Power Maps.

		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									Kim
2	Publish six additional publicity items: Provide an IMA/CMA promotional mailing to potential members										Kim
4	Sponsor a student night/event- a dedicated chapter meeting										Oct & 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									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							Newsletters-4 minimum
14	Publish 4 add'l info 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 Lead'ship Training or Chapter Lead'ship Effect'ness 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 BOD										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
24	Have a chapter member serve on a Global Committee or Global Board of Directors										Ron & Ellen
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