



# Catawba Valley Chapter

May 2018

## Message from the President

Hello IMA Members!

Are you thinking about summer? The weather may finally be turning warmer, and before we blink kids will be out of school. Before we get to all of that, we have some interesting things happening in our Chapter to share.

In March, we received an email from a former IMA Member who now works for the Red Cross. She asked if we would post an opening for a volunteer financial reviewer. Not only did our Chapter supply that member, we had a second person who was interested too. Please see the Volunteer Opportunity with the Red Cross farther in the Newsletter.

Finding volunteers is a struggle, and our Chapter has had its share of difficulty in finding people to fill our Board. This year, we have had several members willing to help in small ways. Some will be part of the Scholarship Team, some on the Student Activities Team. In this Newsletter, is a list of our new Board Members for the 2018-2019 IMA year. There are a few places we could use another hand, another member of the Scholarship Team would be nice, and a couple of hands to help in the Membership Team will make the tasks lighter. We are in need of a Treasurer – if any of these positions or something else catches your interest, please let one of the Board members know.

The May meeting is a joint meeting with APICS, to make up for our January meeting that we cancelled due to bad weather. Mr. Yash Bhatia, President of Datos Consulting will present “Building a Data-Driven Enterprise”. Mr. Bhatia was engaging and he kept the audience involved when he presented this for us at the Asheville Winter Conference. This is an interesting way to look at a situation and it could change how decisions are made. This is a DINNER meeting, and the last one of our season, we hope you will be able to attend.

Recently, Charlie and Lacy gave a presentation on the IMA and earning a CMA for Chelsea Ledford’s Accounting Class at CVCC. Global provides a PowerPoint presentation, leaving areas the Chapter can add information including contact information. The presentation went well. We are looking forward to making more presentations in the early fall to help jump start the scholarship program. If you have any contact information for local colleges, please share this with Charlie and Lacy.

Regards,  
Ellen

### UPCOMING EVENT:

**THURSDAY- MAY 10, 2018**

**Joint Dinner Meeting with APICS**

**Catawba Country Club**

**5:30=social**

**6:15=dinner**

**6:45=speaker**

**Yash Bhatia to present Building a Data-Driven Enterprise**

**MEMBERS - \$15**

**STUDENTS - \$5**

**GUESTS - \$20**

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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](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:

May 10<sup>th</sup> – Joint meeting with APICS  
Catawba Country Club  
Yash Bhatia to present Building a Data-Driven Enterprise

### 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.*

**2018 – 2019  
Catawba Valley IMA  
Officers**

**President:** Ellen Knauf  
**President-Elect:**  
**Treasurer:**  
**Secretary:** Charlie Nartker  
**Prof. Education:** Ron Nicholson  
**Administration:** Charlie Nartker  
**Communication:** Kim Gales  
**Membership:** Danette Landrum

**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:** Sheronda Fox
- **Newsletters:** Kelly Frank
- **Education/Webinar:** Rhonda Young
- **Student Activities:** Lacy Sanchez  
Chelsea Ledford
- **Scholarship:** Donna Frushour  
Kim Zahller
- **Membership:**
- **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.*

[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.

## ***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."

## **Volunteer opportunity with the Red Cross – answered twice by Catawba Valley IMA Members.**

The Red Cross contacted us in early March looking for a financial volunteer. The contact came from a former IMA member, who works for the Red Cross. She gave us the all of the pertinent requirements, and asked that we spread the word to our members. An email blast was pushed to all of our members.

Charlie, one of our Board members stepped up and filled in the need right away. Then, another member also responded to the Red Cross opportunity. Please see the email below from Liz McCall about how she will be helping out too.

We love to hear that we are helping in our Communities. I am glad our IMA Chapter was able to help fill not just 1 opening, but 2 for the Red Cross!

Thank you!

Email used with permission:

**Subject:** RE: IMA community volunteer opportunity

Hi,

I thought I would let you know – I completed Red Cross training last night to be a “Fiscal Reviewer.” I contacted the Red Cross about the position below, but it had been filled. They had a need to fill the Fiscal Reviewer position, so I applied and begin today reviewing new cases for the Asheville area.

I had been contemplating how to give back to the community and I feel like this was God’s way of answering/calling. The role is small but needed.

Thank you for being a catalyst to my personal growth - had you not sent the e-mail below, I would have never thought about volunteering for the Red Cross.

Kind Regards,

Liz

**Elizabeth McCall CPA**

Controller – Hickory

HMS North America



**BSN medical Inc.**

**an Essity Company**

[liz.mccall@bsnmedical.com](mailto:liz.mccall@bsnmedical.com)

[www.bsnmedical.com](http://www.bsnmedical.com)

		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 <del>six</del> publicity items: Includes Meeting announcements, Events and Conference	5/7	8/20	9/6	10/8	12/1	1/5			Completed	Kim
2	Publish <del>six</del> additional publicity items:	2/4	3/6								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	4/25								Completed	Charlie & Lacy
8	Participate in a charitable event- REQUIRIES 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	4/5					Completed	IMA newsletters
15	Provide support for a regional or council IMA activity	2/24								Completed	Winter Conference
16	<b>Two</b> board members attend Council's Spring Leadership Training Session or Chapter Leadership Effectiveness workshop	Oct	Dec							Completed	Ron
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	3/31								Completed	Board
20	Publish an annual chapter program book of events or chapter roster										Lindsey/Rhonda
21	Facebook and LinkedIn									Completed	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										

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>	8/17/2017									Completed	Kim Zahller
<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	4/25/2018									Completed	20 attendees - Charlie & Lacy
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