

**81st Year  
Akron Chapter**



The Association of  
Accountants and  
Financial Professionals  
in Business

**Institute of Management Accountants  
2018-2019**

**Annual Program Book and  
Membership Roster**

**[akron.imanet.org](http://akron.imanet.org)**

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

## Institute of Management Accountants 2018-2019 Akron Chapter

|   |    |
|---|----|
| Chapter Schedule .....  | 4  |
| Technical Sessions Schedule .....                                 | 4  |
| Directors' Meetings.....  | 4  |
| President's Message .....   | 5  |
| Chapter History Akron Chapter 81 Years of Excellence.....         | 6  |
| Past Presidents.....  | 7  |
| IMA Mission, Membership & Services .....                          | 8  |
| Membership .....  | 10 |
| Chapter Competition .....   | 10 |
| The Chapter Competition/Recognition Program.....                  | 10 |
| IMA Global Awards .....   | 11 |
| Stuart Cameron McLeod Society.....                                | 12 |
| Member Service to Global .....                                    | 12 |
| Emeritus Life Members & Associates .....                          | 12 |
| Akron Chapter Awards .....  | 13 |
| Robert O. Feola Award – Member of the Year .....                  | 13 |
| Michale P. Grainieri Award – Associate Director of the Year ..... | 14 |
| Twenty-Fiver Club & Fifty Club.....                               | 15 |
| Perfect Attendance Roster .....                                   | 15 |
| Newsletter .....  | 16 |
| Employment Service .....  | 16 |
| Insurance .....   | 16 |
| CMA Certification.....  | 17 |
| CMA Testing Centers.....  | 18 |
| CSCA Credential .....   | 18 |
| CMA Mentoring Program.....  | 19 |
| The CMA Designation.....  | 19 |
| The CMA Mentoring Program .....                                   | 19 |
| Continuing Education.....   | 20 |
| IMA Professional Education Center .....                           | 20 |
| Meonske Conference 2019 .....                                     | 20 |
| Ohio Council Leadership Workshop .....                            | 20 |

|   |           |
|---|-----------|
| <b>IMA's Annual Conference &amp; Exposition .....</b> | <b>22</b> |
| Ohio Regional Council Activities.....                 | 23        |
| National Awards Won in Indianapolis .....             | 24        |
| Chapter Officers & Directors .....                    | 26        |
| Global & Ohio Council Officers Officers .....         | 29        |
| Program Agenda & Speakers .....                       | 30        |
| Canton Chapter Technical Meetings .....               | 47        |
| Cleveland East Chapter Technical Meetings .....       | 48        |
| Links Page .....                                      | 49        |
| Sponsors .....  | 50        |

## Chapter Schedule

### Technical Sessions Schedule

Usually the third Wednesday each month, September through May. See schedule below for specific dates. (Exceptions – no tech session meeting in December)

Location: Hilton Garden Inn, 1307 E Market St, Akron, OH 44305

Time: Pretech at 6:10 PM and Tech at 7:10 PM

| Meeting Date                  | Theme   |
|-------------------------------|---|
| Wednesday, September 19, 2018 | Bosses Night                                  |
| Wednesday, October 17, 2018   | Awards Night                                  |
| Wednesday, November 14, 2018  | Young Professionals Night                     |
| Wednesday, January 16, 2019   | Social Networking Night (no pre-tech session) |
| Tuesday, February 19, 2019    | Students Night                                |
| Wednesday, March 20, 2019     | CMA/CSCA/CFM Night                            |
| Wednesday, April 17, 2019     | Past Presidents Night                         |
| Wednesday, May 15, 2019       | Guest Night                                   |

Reservations are due Friday prior to the meeting: [akron@imachapter.org](mailto:akron@imachapter.org); (330) 904-7986 for voicemail reservation. Online reservations and payment can be submitted at [akron.imachapter.org/events](http://akron.imachapter.org/events).

### Directors' Meetings

All members are invited to attend a Board meeting. Please contact Chapter President Joe Richards for reservations by emailing [akron@imachapter.org](mailto:akron@imachapter.org) one week prior to the meeting. Usually the last Wednesday of each month at 6:15 PM (see list)

Meetings for 2018 – 2019 IMA Year

|                               |   |
|-------------------------------|---|
| Wednesday, May 30, 2018       | Mr G's Pizzeria, 2955 W. Market Street, Akron, OH               |
| Saturday, June 9, 2018        | New Era Restaurant, 10 Massillon Road, Akron, OH                |
| Wednesday, July 25, 2018      | Mr G's Pizzeria, 2955 W. Market Street, Akron, OH               |
| Wednesday, August 22, 2018    | Mr G's Pizzeria, 2955 W. Market Street, Akron, OH               |
| Wednesday, September 26, 2018 | Mr G's Pizzeria, 2955 W. Market Street, Akron, OH               |
| Wednesday, October 24, 2018   | Mr G's Pizzeria, 2955 W. Market Street, Akron, OH               |
| Wednesday, November 28, 2018  | Mr G's Pizzeria, 2955 W. Market Street, Akron, OH               |
| Wednesday, December 5, 2018   | Mr G's Pizzeria, 2955 W. Market Street, Akron, OH               |
| Wednesday, January 30, 2019   | Wolf Creek Winery, 2637 S Cleveland Massillon Rd, Barberton, OH |
| Wednesday, February 27, 2019  | Wolf Creek Winery, 2637 S Cleveland Massillon Rd, Barberton, OH |
| Wednesday, March 27, 2019     | Wolf Creek Winery, 2637 S Cleveland Massillon Rd, Barberton, OH |
| Wednesday, April 24, 2019     | Wolf Creek Winery, 2637 S Cleveland Massillon Rd, Barberton, OH |
| Wednesday, May 22, 2019       | Wolf Creek Winery, 2637 S Cleveland Massillon Rd, Barberton, OH |

Meetings are at 6:15 pm (September through May), except January (only Executive Board members are required to attend)

## President's Message

I hope you are as excited as I am that we are starting our new chapter year. I hope that the slate of speakers that have been rounded up meets your expectations as a chapter member. I have taken on this role at the same time as I have taken on a new job and so I have many reasons to be excited.

I want to congratulate Ken Bechtol for once again winning the Associate Director of the Year award and Linda Garrison for winning the Member of the Year award. They both have spent many hours preparing for and attending IMA meetings, Board meetings and other gatherings and deserve our admiration. I also want to congratulate last year's Board members for once again coming in Second in the World in Stevenson Division competition points. I definitely have my work cut out for me!



I really do want to know what you think about the happenings with the chapter and look forward to your feedback. Due to the new IMA Global policies, please send your remarks to [ima@akronchapter.org](mailto:ima@akronchapter.org) and make sure to include that I (Joe Richards) am the intended recipient. Thank you for all that you do to help the Akron Chapter be its best!

Joe Richards  
President 2018-2019

## Chapter History Akron Chapter 81 Years of Excellence

Akron Chapter was established on February 24, 1939 with 63 charter members. In its 39-year history, the chapter won three trophies, eleven banners and the Presidents' Award in 1977. In addition, many Akron Chapter members served with distinction on global committees and as global directors and vice-presidents. Akron Chapter was one of the moving forces behind the establishment of the Ohio Council, and one of our members served as the first chairman of Ohio Council.

Two chapters were spun off from Akron Chapter – Canton in 1961 and Cuyahoga Valley in 1970. In 1977, it was decided to partition the chapter into Akron Summit and Akron Cascade, each with a membership of approximately 250.

In the twelve years after partitioning, Akron Summit Chapter received eight banners, six global awards for public relations, and, for the second time, the most prestigious award of all, the Presidents' Award in 1987. After partitioning, Akron Cascade Chapter received a trophy for a second place finish, a banner and five global awards for public relations, membership achievement, and socio-economic achievement, and four Ohio Council Awards.

July 1, 1989 saw the merger of Akron Summit and Akron Cascade and the re-establishment of the Akron Chapter. Since coming back together, the Chapter has received seventeen global banners, most recently 2nd Place Remington Rand trophy awarded for 2017-18, and nine global awards for public relations and membership achievement and Community Service.

In 2000, the Cuyahoga Valley Chapter was merged into the Akron Chapter. In the Fall 2005, several members of the former Youngstown chapter transferred into Akron chapter. Akron Chapter is widely recognized as one of the leading chapters in the world, celebrating its 81st year.

## Past Presidents

|                              |           |                          |           |
|------------------------------|-----------|--------------------------|-----------|
| Harold T. McKee              | 1938-1939 | Earl W. Marson (s)       | 1981-1982 |
| Frank A. Terpe               | 1939-1940 | Robert S. Shapiro (c)    | 1981-1982 |
| F. Melvin Kassinger          | 1940-1941 | Wayne E. Tschappat (s)   | 1982-1983 |
| Les Weeden                   | 1941-1942 | Kenneth P. Bechtol (c)   | 1982-1983 |
| Walter S. Raymer, Jr.        | 1942-1943 | Arjan T. Sadhwani (s)    | 1983-1984 |
| Virgil L. Raasch             | 1943-1944 | Kenneth E. McNeil (c)    | 1983-1984 |
| Art J. Keiler                | 1944-1945 | David W. Brown (s)       | 1984-1985 |
| Fritz O. Kanehl              | 1945-1946 | Thomas J. Harrington (c) | 1984-1985 |
| Joe W. Christman             | 1946-1947 | Glen L. McCaulley (s)    | 1985-1986 |
| Jim E. Caldwell              | 1947-1948 | Charlene A. Schmidt (c)  | 1985-1986 |
| Charles M. Reinherr          | 1948-1949 | Thomas J. Higgins (s)    | 1986-1987 |
| Milo E. Zaveson              | 1949-1950 | Richard J. Martorano (c) | 1986-1987 |
| Art H. Werneke               | 1950-1951 | Leslie A. Burton (s)     | 1987-1988 |
| Joe E. Spuller               | 1951-1952 | John P. Gannon (c)       | 1987-1988 |
| "Molly" L. Mollenkopf        | 1952-1953 | Dan C. Lemon (c)         | 1988-1989 |
| Edward A. Kramer             | 1953-1954 | Michael D. Rossi (s)     | 1988-1989 |
| Roy W. Bevington             | 1954-1955 | Brent C. Smith           | 1989-1990 |
| Dennis Gordon                | 1955-1956 | Dante R. Tropea, Jr      | 1989-1990 |
| Cliff S. Farmer              | 1956-1957 | Rozell R. Duncan         | 1990-1991 |
| Robert O. Feola              | 1957-1958 | Mostafa Sarhan           | 1991-1992 |
| George B. Owens              | 1958-1959 | Jerry Frengou            | 1992-1992 |
| John K. Smucker              | 1959-1960 | Gary Frank               | 1992-1993 |
| Glen E. Woodson              | 1960-1961 | Stephanie LiCause        | 1993-1994 |
| Gus H. Burkhardt             | 1961-1962 | Neal Toth                | 1994-1995 |
| James E. Miller              | 1962-1963 | Tricia Hiss              | 1995-1996 |
| W. Harold Martin             | 1963-1964 | Elizabeth Hughes         | 1996-1997 |
| Jim H. Pohl                  | 1964-1965 | Thomas Calderon          | 1997-1998 |
| Thomas W. Blazey             | 1965-1966 | David W. Brown           | 1998-1999 |
| Michale P. Granieri          | 1966-1967 | Donna Early              | 1999-2000 |
| Richard H. Squier            | 1967-1968 | Susan Pope               | 2000-2001 |
| James H. Ake                 | 1968-1969 | Jennifer Fallows         | 2001-2002 |
| Phil S. Manthey              | 1969-1970 | Michael Pelech           | 2002-2003 |
| Paul M. Hall, Jr             | 1970-1971 | Tamra Emmett             | 2003-2004 |
| Charles E. Stonebraker       | 1971-1972 | Ron Riebe                | 2004-2005 |
| William R. Garber            | 1972-1973 | Diane Saulino            | 2005-2006 |
| Robert B. Charlton           | 1973-1974 | Dean Hull II             | 2006-2007 |
| Albert G. Kraemer            | 1974-1975 | Doreen Kuster            | 2007-2008 |
| Orville R. Keister           | 1975-1976 | Becky Price              | 2008-2009 |
| James H. Norman              | 1976-1977 | Doug Rinearson           | 2009-2010 |
| James D. Smith (s)           | 1977-1978 | Steve Law                | 2010-2011 |
| Martin S. Smith, Jr. (c)     | 1977-1978 | Brian Daniels            | 2011-2012 |
| Sheldon W. Barlette, Jr. (s) | 1978-1979 | Jeff Falter              | 2012-2013 |
| Karen M. Frey (c)            | 1978-1979 | Jeff Falter              | 2013-2014 |
| Nicholas R. Sucic (s)        | 1979-1980 | Shirley Calvin           | 2014-2015 |
| Paul E. Izzo (c)             | 1979-1980 | Kelly Heil               | 2015-2016 |
| Gene H. Kiefer (s)           | 1980-1981 | Linda Garrison           | 2016-2017 |
| Robert M. Adamov (c)         | 1980-1981 | Linda Garrison           | 2017-2018 |

(s) = Summit Chapter (c)= Cascade Chapter

## IMA Mission, Membership & Services

### Vision Statement

“The world’s leading association for management accounting and finance professionals”

### Statement of Mission

To provide a dynamic forum for management accounting and finance professionals to develop and advance their careers through certification, research and practice development, education, knowledge sharing, networking, and the advocacy of the highest ethical and best business practices in management accounting and finance.

### Services

Among the services available from which a member can benefit from are:

- Leadership Training. Volunteer service at the chapter or global level gives you valuable leadership experience. Volunteer leaders begin their service at the chapter board level, and may be elected to regional council service, global committee service, and global board service.
- Employment Networking. The Institute of Management Accountants (IMA®) serves as a clearing-house for members interested in either placing an “open position available” or “position wanted” notice in a local chapter or council newsletter, or in the career center on the IMA Website.
- Professional Education Center. Four on-line subscription programs - IMA Knowledge Exchange, IMA Advantage, IMA CPE Edge, and IMA Knowledge Exchange/Advantage (combination package) - offer hundreds of interactive self-study CPE titles.
- Members have access to a portfolio of products and services to meet their educational needs in both technical and personal development skills. Educational services have been developed with member convenience in mind and are offered in all mediums and are available at any time, in any place and at a range of prices. Training is delivered in multiple ways, including: online, self-study, in-house/ on-site, conferences and seminars. In addition, a large selection of professional publications is available for purchase.
- Participation in any IMA training is approved for CPE credit for those members who are certified.
- McLeod Library. Members have access to one of the largest and most comprehensive online collections in the management accounting and financial management fields, including the ProQuest Accounting Database.
- Ethics Counseling Service. A counselor will assist members in applying the IMA Standards of Ethical Conduct for Management Accountants and Financial Professionals to specific problems. Members using this hotline service are guaranteed confidentiality.
- Certified Management Accountant (CMA®) Program. The CMA program requires the candidate to pass a rigorous two-part examination and meet specific educational and professional standards. The program was established to recognize professional competence in the field of management accounting.
- Certified in Strategy and Competitive Analysis (CSCA®) Program. The CSCA credential is a specialty credential designed specifically for CMAs, which complements and expands upon the strategic planning and analysis skills developed through the CMA certification. It requires the



candidate to pass a 3-hour exam that includes 60 multiple-choice questions and 1 case study. Content areas covered are Strategic Analysis, Creating Competitive Advantage, and Strategy implementation and Performance Evaluation. Testing windows are offered in March and September.

- Certified Financial Manager (CFM®) Program. The last date that the CFM exam was offered by the ICMA was December 31, 2007. The CFM exam provided an in-depth measure of competence in areas such as financial statement analysis, working capital policy, capital structure, valuation issues, and risk management.
- Read Strategic Finance magazine for the latest practices and trends in finance and accounting and Management Accounting Quarterly for the latest research. Also read Strategic TechNotes semi-monthly technology e-newsletter and IMA Online News. These publications are included as benefits of your IMA membership. Visit the Strategic Finance website, [www.strategicfinancemag.com](http://www.strategicfinancemag.com) for reviews on software available in the industry.
- Member Interest Groups (MIGs). The Controllers Council, Cost Management Group, and the Small-Business Council each provide a tailored monthly electronic newsletter, a separate e-mail exchange for networking and sharing information, and access to the MIGs online directory, which allows members to locate colleagues by industry, location, and special projects. Members participate in surveys on a wide range of relevant, topical issues, with results reported in the newsletters and other media.
- Industry Sectors/E-Mail Exchanges. Accessible to members via the Internet at no cost, Industry Sectors offer a variety of ways to reach out to other members in your industry. Once you join an Industry Section, you can sign up for its e-mail exchange, which enables you to ask questions of hundreds of other members by simply sending an e-mail to the group address. Discussions cover topics from software development to accounting policies to career issues and more. There are Industry Sectors for the following industries: Academic, Banking, Communications, Construction, Financial Services, Government, Health Care, Manufacturing, Natural Resources, Not-for-Profit, Services, Technology, Transportation, Utilities and Wholesale/Retail.
- Open E-Mail Exchanges. In addition to the e-mail exchanges related to specific industries, you can join IMA E-Mail Exchanges dealing with other special interests. These include: Academic, Banking, Business Performance Management, Certification Candidates, Communications, Construction, Ethics Center, Family Business, Financial Management, Financial Services, Government, Healthcare, Internal Control Risk Management, International, Manufacturing, Natural Resources, New Costing, Nonprofit, Services, Techenablers, Tech, Trades, Transport, Utilities, Watercooler, and Young Professionals.
- Membership Discount Programs. IMA offers savings to members on a wide variety of services and products including car rentals, insurance, office resources, and financial services.
- IMA Online Marketplace. Do your shopping online at a discount. All IMA members receive discounts on the products and services for home or workplace that are offered through the IMA Online Marketplace at [www.imanet.org](http://www.imanet.org).

To learn more about IMA benefits and services, and for information on contacting the IMA and its departments directly, please visit the IMA at [www.imanet.org](http://www.imanet.org).

## Membership

Members in IMA range from management accountants to financial and information management professionals just beginning their careers to presidents and CFOs of major corporations. Membership also includes CPAs, CMAs, CFMs, CSCAs, educators, students, and many involved with federal, state, and local governments.

## Chapter Competition

### The Chapter Competition/Recognition Program

To guide more clearly the concept of chapter operation, an annual competition among chapters was inaugurated in 1924, at the suggestion of Charles R. Stevenson, who commissioned a trophy to be awarded to the winner. The following year, a system of payments to chapters was incorporated in the competition. Various other trophies and awards have been introduced through the ensuing years to provide additional recognition for high performance and excellence of operations.

The competition is directed principally toward stimulating chapters to promote IMA's objectives and provide a broad spectrum of activities and services to members. Planning of each year's chapter activities by officers and directors in the late spring and early summer is thus encouraged. The Chapter Competition, therefore:

- Establishes standards of good performance through constant appraisal of chapter programs and activities.
- Measures actual performance against these standards by awarding credit for activities reported by each chapter. Monthly standings are published which effectively rate every chapter's success in meeting these standards.
- Provides incentives such as trophies, banner patches, and awards for excellence in planning, performance and reporting of chapter activities.

The competition is credited with having fostered a remarkable esprit de corps and kinship among the chapters and individual members. It has long been considered a sound and basic influence on the continued growth and advancement of the IMA.

## IMA Global Awards

Chapters with 125 or more members:

- Stevenson Trophy – Awarded to the chapter with the highest final standing.
- Remington Rand Trophy – Awarded to the chapter with the second highest standing.
- Stuart Cameron McLeod Society Trophy – Awarded to the chapter with the third highest standing.
- Carter Trophy – Awarded to the chapter making the most improvement in standings during the competition year as based on the 3 previous year average.
- Stevenson Banner – Awarded to each of the 4th through 15th place leading chapters.

All Chapters:

- Chair's Award – Awarded to the chapter that has shown the most consistent good performance for the last five years.
- Kasunic Award – Awarded to the runner-up to the Chair's Award.
- Lybrand Medal Awards – Awarded to the top three authors of manuscripts.
- S. Alden Pendleton Award – Awarded to the chapter with the greatest achievement in community service programs.
- Public Relations Award – Awarded to five chapters with the greatest achievement in public relations activities.
- Newsletter Award – Awarded to the top three chapter newsletters.
- Membership Achievement Award – Awarded to up to 3 chapters with the highest accomplishment in the areas of net membership growth and retention.
- Website Award – Awarded to top six chapter websites.
- ICMA Regents' Award – Awarded to chapters with the best record of achievement in increasing of CMA chapter members, examination parts passed, and CMA presentations to local industries and/or quality CMA Certification Review Programs conducted.

You can review the awards the Akron Chapter has received over the years at our website:

<http://akron.imanet.org/home>.

### Stuart Cameron McLeod Society

Formed in 1934 as the “Spot” Club (X Marks the Spot), the club was renamed in 1957 as the Stuart Cameron McLeod Society in honor of one of the early leaders of IMA. Membership in the Stuart Cameron McLeod Society (SCMS) consists of current and past global officers and/or regional directors. The purpose of the SCMS is to promote and perpetuate friendships developed through service in IMA. It also provides an opportunity for its members, through their interest and experience, to offer leadership and guidance in the development, growth and expansion of IMA.

SCMS is also known as the “Society for Continuing Membership Service”. This describes your fellow chapter members who are active members of the Stuart Cameron McLeod Society.

The following SCMS members belong to our chapter:

- Sheldon W. Barlette, Jr.
- Kenneth P. Bechtol
- Edward J. Coia
- Paul M. Hall, Jr.
- Matthew E. Jurkovic
- Stephen Law
- Stephanie M. LiCause
- Robert J. Scharnott
- Nicholas R. Sucic
- James R. White

### Member Service to Global

Please visit the Akron Chapter Website for a listing of members who have served IMA on a Global Level.

<http://akron.imanet.org/home>

### Emeritus Life Members & Associates

Emeritus Life Members (ELM) and Emeritus Life Associates (ELA) are retired members, at least 55 years of age, who have completed 20 or more years of membership with the IMA, including five years as an elected officer or director at any combination of chapter, regional, or global level service. The objective is to recognize the debt which the Institute owes to members of long standing and service and to continue the ties of friendship developed during the members’ terms of active participation in the organization.

Applications must be received by the Global Board within 18 months of the effective date of termination or resignation from IMA. ELAs, “grandfathered” in 1993, receive a free IMA membership, are entitled to insurance and are members, but do not receive the IMA magazines and cannot hold chapter office. ELMs pay 25% of the IMA dues, \$52, and are entitled to all IMA benefits, including the magazines.

For more information or to determine your eligibility for this status, contact IMA Customer Service at [ima@imanet.org](mailto:ima@imanet.org).

## Akron Chapter Awards

### Robert O. Feola Award – Member of the Year

#### Linda Garrison

The Akron Chapter IMA Board of Directors is pleased to announce Linda Garrison as the winner of the 2017-18 Robert O. Feola Award as Member-of-the-Year. Linda is GBS Team Leader/GCTSC Cash Management at the Goodyear Tire & Rubber Company.

Even though the current chapter president is not usually eligible to win the MOY award because the President is involved in so many chapter activities, an exception was made this year due to the extraordinary job that Linda did in leading Akron chapter to winning the prestigious Remington Rand Trophy (2nd place Stevenson Division banner) for two years in a row, recruited two Goodyear executives as chapter speakers, completed five years of Perfect Attendance at tech session meetings, frequently attended the conference call quarterly ORC meetings, was a mentor/mentee in the CMA program, and filled many chapter positions while serving as president (Chair of the Nominating Committee, Director of CMA & CFM Programs, Director of the Library, Director of Special Activities, Director of Chapter Awards, and served as the Webmaster). She attended (and led) 9 of the 10 monthly Board meetings and attended (and presided over) 7 of the 8 tech session meetings. She also assembled and submitted our entries in the 2017-18 Social Media competition, newsletter competition forms, public relations competition, and the Board slate form.

Linda has been a member of the Akron chapter IMA since May 2009. The Board extends its congratulations to Linda, and thanks her for her continuing service and contribution.

For prior award recipients, please visit the chapter website: <http://akron.imanet.org/home>.

The Robert O. Feola Award competition is primarily designed to develop interest and encourage participation by our members. Every member, except the current President, is eligible. The Board will nominate Member-of-the-Year ("MOY") candidates who have made a significant contribution to the goals of the Akron chapter by promoting continuing education, certification, membership, participation, communication with the chapter and Akron community, and involvement of the student chapters. The Executive Board will review the accomplishments of the candidates and select the MOY. All members are encouraged to work to add his or her name to the impressive MOY roster.

## Michale P. Grainieri Award – Associate Director of the Year

Ken Bechtol

The IMA Akron Chapter Board is pleased to announce that Ken Bechtol has been named the winner of the 2017-18 Michale P. Granieri Award as Associate Director of the Year. Ken is a retired General Auditor for The Davey Tree Expert Company, and a former contract internal auditor consultant for Robert Half.

Ken was cited for getting the Program Book finished and to the printer on time while he was on death row at AGMC and Edwin Shaw Rehab Center (following a 7-30-17 bicycle accident), delivering Program Books to the Hilton Garden Inn for distribution to chapter members at the September meeting, to speakers, to program book advertisers, and to members without an email address. He also prepared the first draft of the Agenda for Board meetings, submits articles for the monthly newsletter, issues Welcome letters to new chapter members, and introduced two tech session speakers. He completed 46 years of Perfect Attendance at tech session meetings. He also served on the Meonske Conference planning committee, and “keeps us in line”. He has deservedly won this award numerous times, as well as the Member-of-the-Year award.

Ken has been a member of the IMA Akron chapter since 1973, and has had perfect attendance since joining. He is a Past President of the Akron Cascade chapter and a member of the prestigious IMA Global Stuart Cameron McLeod Society, is a US Veteran (Captain in the USAF), a member of the AICPA, the Ohio Society of CPAs, the California Society of CPAs, the American Accounting Association, and is a CPA and CMA. The Board extends its congratulations to Ken, and thanks him for his continuing service and contribution.

This award has been made possible through the interest earned on the monetary contribution of the late Michale “Mike” P. Granieri, who served as President of the Akron chapter in 1966-67. Mike’s contributions have not been limited to the local chapter. He served as the first Ohio Council Chairman, and served on various committees at the National level from 1971-77, including International Vice President in 1974-75.

Serving as an associate director is excellent training to prepare an individual for the greater task of director or officer. It is also a great way to practice leadership skills while watching the Board members in action. As time demands become greater and greater, it is increasingly important to have associate directors in order to limit the burden on any one individual.

Nominations for this award can be made by any current member of the Board. The selection criteria will be the same as the MOY award applied to all those associate directors who have been nominated.

## Twenty-Fiver Club & Fifty Club

### Twenty-Fiver Club

In 1980, the Institute's Executive Committee established the "IMA Twenty-Fiver Club." The intent was to provide recognition, by means of a special certificate, to those loyal members with 25 or more years membership who have not retired and are not, therefore, eligible for ELA or ELM. The following members achieved 25-Year milestone anniversaries during this chapter year:

- Gary Floyd
- Ronald Hoover
- Robert Reitz
- Daniel Riemenschneider
- Becki Watson
- Sharon Wright
- Doreen Kuster

### Fifty Club

The following members achieved 50-Year milestone anniversaries during this chapter year:

- Billy Dreyer

## Perfect Attendance Roster

### 100% Continuous Attendance Club

Forty-seven years: Bill Dreyer

Forty-six years: Ken Bechtol

Forty-one years: James A. Campbell

Forty years: Wayne Hawkins

Twenty-nine years: Linda Simko

Twenty-six years: Roy Howarter

Ten years: Shirley Calvin

Eight years: Doreen Kuster

Six Years: Sherri McGuinness, Andrea Schnee

Five years: Linda Garrison

Three years: Kelly Heil

Two year: Christine Niswender

One year: Don Mullen

## Newsletter

Every member is encouraged to contribute items to our monthly newsletter, the Summit Report, such as promotions, accomplishments, employment news, births, marriages, and other items of interest to the membership, as well as technical information. The editor reserves the right to edit all materials submitted and used for publication.

If you have problems receiving the newsletter, please check that IMA has your correct e-mail address at <https://www.imanet.org/>

Contact our Director – Newsletter, Kelly Heil at [akron@imachapter.org](mailto:akron@imachapter.org).

## Employment Service

Employment service is an important part of the Akron Chapter's activities. The service is furnished for the benefit of members and the business community.

No fees are involved. This confidential service matches members seeking employment opportunities with potential employers based upon the qualifications of the positions available. Networking opportunities also make Chapter membership a valuable tool in personal and professional growth and development.

The global IMA website also has a searchable employment database listing positions available nationwide as well as a salary survey. Visit the Career Center at <https://www.imanet.org/>

If you are seeking a new position or are looking for qualified accountants, please contact our Director of Employment, Robert Shapiro at [akron@imachapter.org](mailto:akron@imachapter.org).

## Insurance

Insurance: Help secure your family's financial future...at premiums you can afford today. With the IMA Group Insurance Program, you can count on competitively-priced, high-quality insurance to protect you and your family. And because coverage is not tied to your job, this insurance can follow you throughout your career. It all adds up to a valuable benefit of IMA membership.

Programs available: Executive Recruitment, Shipping, Office Supplies, Personal Insurance, Automobile Insurance, Technical Training, Retail Discounts, Rental Cars, Credit Card Reward Programs, Identity Theft Protection, Employee Recognition.

Plan descriptions and applications are available at the IMA website <http://www.imanet.org> or contact the Akron Chapter's Director of Insurance, Roy Howarter at [akron@imachapter.org](mailto:akron@imachapter.org).



## CMA Certification

The Institute of Management Accountants (IMA®) established the Institute of Certified Management Accountants (ICMA®) in 1972 to implement and administer the Certified Management Accountant (CMA) Program. The ICMA evaluates the credentials of candidates, administers the examination, grants certificates, and ensures that CMAs continue to meet the professional requirements necessary to retain their certificates in good standing. The ICMA is governed by the ICMA Board of Regents. The board members are appointed by the President of the IMA for three- year terms, with one-third of the members appointed each year. The ICMA staff plans and implements the ICMA activities within the framework of policies and procedures established by the ICMA Board of Regents.

Exams are administered through the worldwide network of Prometric Testing Centers and are available in accordance with local customs. There are many locations through the U.S. and internationally. To locate a Testing Center and schedule exam appointments, visit [www. prometric.com/ICMA](http://www.prometric.com/ICMA).

Note that candidates must first enroll in the CMA program and receive approval of enrollment before registering for exam parts. Candidates must register to take at least one exam part within the first 12 months of entering the program and must complete both exam parts within three years.

“The CMA program focuses on the critical skills of financial planning, analysis, control, decision support, and professional ethics – skills that are in demand by organizations around the world.”

The CMA program consists of a two-part exam format.

- Part 1, Financial Reporting, Planning, Performance and Control Part 2, Financial Decision Making.
- Part 2, Financial Decision Making

Each exam part is four hours in length and consists of 100 multiple-choice questions and two 30-minute essay questions. Exam parts can be taken in any order during three testing window periods:

- January and February
- May and June
- September and October

Candidates will receive the results on their performance in approximately 6 weeks from the end of the month in which the exam was taken. New applicants to the ICMA should seek admission 60-90 days before they wish to take the exam. Continuing candidates should register for parts 4-6 weeks prior to taking the exam.

Globally, CMAs earn 47% more in median salary and 67% more in median total compensation than their non-CMA peers (IMA 2018 U.S. Salary Survey)

For the latest information about the CMA, visit the Certification section of IMA’s website at [www.imanet.org/cma\\_certification.aspx](http://www.imanet.org/cma_certification.aspx).

Members with questions related to program application may contact IMA Customer Service at 1-800-638-4427 or via email at [ima@imanet.org](mailto:ima@imanet.org)

## CMA Testing Centers

### Local Thomson Prometric Testing Centers

[www.prometric.com/ICMA](http://www.prometric.com/ICMA)

| <b>Location</b>    | <b>Site</b> | <b>Phone</b> | <b>Address</b>  |
|--------------------|-------------|--------------|---|
| Akron              | 1402        | 234-466-0494 | 1000 S. Cleveland Massillon Rd<br>Suite 104<br>Akron, OH 44333                |
| Mentor             | 1427        | 440-255-0055 | 8880 Mentor Avenue<br>Co-Located with Sylvan Learning Ctr<br>Mentor, OH 44060 |
| Middleburg Heights | 1411        | 440-260-0883 | 7261 Engle Road<br>Suite 203<br>Middleburg Heights, OH 44130                  |
| Youngstown/Niles   | 1420        | 330-652-1886 | 950 Youngstown Warren Rd<br>Square One Center Suite D<br>Niles, OH 44446      |
| Mansfield          | 1416        | 419-775-1219 | 625 Lexington Avenue, Suite 6<br>Mansfield, OH 44907                          |

## CSCA Credential

The CSCA® (Certified in Strategy and Competitive Analysis) is a specialty credential designed specifically for CMAs, which complements and expands upon the strategic planning and analysis skills developed through the CMA® (Certified Management Accountants) certification.

This credential will help you master the concepts and techniques that are required to earn a seat at the leadership table and become a key player in driving the strategic planning process at your organization.

## CMA Mentoring Program

The Akron chapter IMA is proud to offer its members a mentoring program to assist CMA candidates with strategies to pass the CMA exam. The Akron IMA CMA Mentoring Program will encourage networking and provide career development opportunities designed to help CMA candidates (mentees) and other members (mentors) in our chapter to form valuable mentoring relationships. The success of this program will rely on volunteers to serve as mentors. Mentoring can take place online, by phone, or in person at Akron chapter events or other locations.

## The CMA Designation

The CMA (Certified Management Accountant) is the advanced professional certification specifically designated to measure the accounting and financial management skills that drive business performance. Achieving the CMA credential demonstrates your mastery of financial planning, analysis, control, and decision support, as well as professional ethics.

The CMA credential is...

- Focused – On the critical skills you use in business
- Respected – Leading employers seek to hire and promote CMAs
- Valued – CMAs on average, earn higher compensation than noncertified professionals
- Convenient – CMA exams are offered electronically in hundreds of locations worldwide

## The CMA Mentoring Program

- The accreditation process leading to the CMA designation can be a rigorous experience requiring great energy and effort. The CMA candidate will have questions regarding exam content, study materials, test taking strategies, and much more. Without somebody to guide and mentor them, the candidate may become discouraged and abandon the certification program. However, through the Akron IMA CMA Mentoring Program, candidates will be able to seek and obtain the support and guidance of fellow chapter members who have earned their CMA designation.
- Mentees and mentors will be matched based on the needs of the mentee and the availability of the mentors. The ideal mentor for this CMA focused program would be an individual who has obtained the CMA certification and / or who has recently passed one or both parts of the newer two part CMA exam structure. All individuals who are currently enrolled in the CMA program and studying for the CMA exam are encouraged to enroll as a mentee. In addition, individuals who are undecided about obtaining the CMA certification and would like additional information or guidance are encouraged to enroll.

If you would like more information, please contact: Jeff Falter [akron@imachapter.org](mailto:akron@imachapter.org)

## Continuing Education

### IMA Professional Education Center

IMA's Professional Education Center offers a vast portfolio of 500+ NASBA-approved CPE Continuing Education courses. Topics range from accounting standards to business strategy and critical industry issues. See <https://www.imanet.org/>

### Meonske Conference 2019

Ohio Council and Kent State University Present

45<sup>th</sup> Annual Meonske Professional Development Conference

Thursday and Friday, April 25 & 26, 2019

Please mark your calendar for this educational event.

Further information will be available as details are finalized on our web site at [www.ohioima.org](http://www.ohioima.org)

### Ohio Council Leadership Workshop

Leadership Training Workshop (Training for incoming Board members)

Saturday, May 4 at 8:30 a.m.

Location: Courtyard by Marriott Columbus West

Address: 2350 Westbelt Drive, Columbus, OH 43228

Training sessions will last until approx. 2:30 p.m.



The Association of  
Accountants and  
Financial Professionals  
in Business

OHIO REGIONAL COUNCIL

# Annual Meonske Professional Development Conference

*Celebrating 45 Years*

*Recognized as One of the Top  
Five Accounting Conferences  
in the Country*

**16 Hours of CPE**

**April 25-26, 2019**  
Kent State University

[ohio.imanet.org](http://ohio.imanet.org)

## IMA's Annual Conference & Exposition

**June 15-19, 2019**

### **Sheraton San Diego Hotel & Marina, San Diego CA**

A stay at Sheraton San Diego Hotel and Marina places you in the heart of San Diego, minutes from Harbor Island and close to San Diego Convention Center. This 4-star hotel is close to Balboa Park and San Diego Zoo. There are 1,053 air-conditioned rooms featuring minibars and LCD televisions. Rooms have private balconies or patios. Digital programming and video-game consoles are provided for your entertainment. Relax at the full-service spa, where you can enjoy massages, body treatments, and facials. Amenities include 3 outdoor swimming pools, 3 spa tubs, and outdoor tennis courts. Other amenities include a 24-hour business center, express checkout, complimentary newspapers in the lobby, a conference center and meeting rooms, and a roundtrip airport shuttle that is complimentary during limited hours. The hotel also features 6 restaurants and 2 coffee shops/cafes.

The ACE2019 100-year anniversary Conference Program features four days with over 65 exciting and informative sessions. You can earn 25+ NASBA-approved CPE credits while gaining practical knowledge and skills you can use immediately to improve your job performance and become the go-to-player on your team.

**WHO SHOULD ATTEND:** The 2019 Conference ("100 Years and Counting") is designed for individuals who make their living in the finance and accounting industries – from new professionals just beginning their careers to seasoned executives.

Whether you are a senior-level executive or just starting your career, IMA's conference offers excellent education and networking opportunities: CFO, Controller, Director/Manager of Finance, Accountant, Analyst, Auditor, Executive Officer, Treasurer, Academic, Vice President, Supervisor.

With over 800 attendees each year, IMA's Annual Conference & Exposition is the definitive event for managerial finance and accounting professionals. Advance your knowledge through four days of educational sessions, experienced presenters, workshops, and valuable networking. Not only earn 25+ NASBA-approved CPE credits, but also fulfill your ICMA ethics requirement. The Conference offers eight specialty tracks.

For additional information, please go to [www.imaconference.org](http://www.imaconference.org) or contact Conference & Events Manager LeighAnn Tobia ([ltobia@imanet.org](mailto:ltobia@imanet.org), 800-638-4427, x 1519).



# Ohio Regional Council 2018-2019

“Get together. Be inspired.”

**Please Save the Dates!**



## Ohio Council Board Meeting & LTW 2018

**Spring Board Meeting** – Friday, May 18 starting at 4:00 p.m.

Location: Picasso's Art Studio

Address: 1974 N Mallway Drive, Upper Arlington, OH 43221

4:00 to 5:45 p.m. – Ohio Regional Council Board Meeting

6:00 p.m. – Dinner and Painting Activity

Hotel for Friday night: Courtyard by Marriott Columbus West

Address: 2350 Westbelt Drive, Columbus, OH 43228

Phone: (614) 771-8999

**Leadership Training Workshop** – Saturday, May 4 at 8:30 a.m.

Location: Courtyard by Marriott Columbus West

Address: 2350 Westbelt Drive, Columbus, OH 43228

Training sessions will last until approx. 2:30 p.m.

## Board Meeting Dates

Teleconference on Thursday, July 26, 2018 at 4:30 p.m.

Teleconference on Thursday, October 25, 2018 at 4:30 p.m.

Teleconference on Thursday, January 24, 2019 at 4:30 p.m.

In-Person Meeting on Friday, May 3, 2019 at 4:00 p.m.

Leadership Training Workshop on Saturday, May 4, 2019

# **ACE2019 | SAN DIEGO**

IMA's Annual Conference & Expo

**June 15-19, 2019**

Sheraton San Diego Hotel & Marina

## **Ohio Regional Council 2018-2019**

**"Get together. Be inspired."**

**Please Save the Dates!**





## National Awards Won in Indianapolis



Akron chapter IMA member, Sue Mullen (center) picked up our 2<sup>nd</sup> place in the WORLD Stevenson Division Banner and Remington Rand Trophy won at the Indianapolis National Conference 2017-18 IMA year. Sue is joined by Ginger White (left) and Alex Eng (right).



Chapter President, Linda Garrison, holding the trophy.

The chapter also won two Bronze Medals, for Public Relations and Newsletter competitions for the 2017-18 year.



## Chapter Officers & Directors

President

Joseph A. Richards

Vice President – Finance & Administration

Jeffrey A. Falter

Vice President – Education & Speakers

Christine Niswender

Vice President – Communications & Community Relations

Kelly Heil

Vice President – Membership

Treasurer

Shirley A. Calvin

Secretary

Christine Niswender

Chair, Audit Committee

Open

Chair Nominating Committee

Linda S. Garrison

Director, Employment

Robert S. Shapiro

Associate Director, Employment

Open

Director, Insurance; Director, Speaker Archives

Roy A. Howarter

Director, CMA, CFM, & CSCA Programs

Linda S. Garrison

Director Speakers

Christine Niswender

Associate Director, Speakers

Open

Director, Technical & Board Meeting Facilitation & Attendance  
Jeffrey A. Falter

Director, Librarian  
Linda S. Garrison

Director, PD Session  
Noel Juguilon

Director, Program Booklet  
Roy A. Howarter

Associate Director, Program Booklet

Director, Advertising  
Open

Director, Corporate & Academic Development  
Open

Director, Public Relations  
Joseph A. Richards

Associate Director, Public Relations  
Open

Director, Special Activities  
Open

Director, Member Attendance  
Jeffrey A. Falter

Associate Director, Member Attendance  
Billy H. Dreyer

Director, Member Relations  
Jeffrey A. Falter

Director, Retired Professionals  
S. Wayne Hawkins

Director, Student Relations  
Wendy M. Tietz

Coordinator – KSU  
Wendy M. Tietz

Coordinator – University of Akron

Il-Woon Kim

Coordinator – Youngstown State University  
Raymond J. Shaffer

Co-Cordinator – Youngstown State University  
David B. Law

Director, Chapter Awards  
Linda S. Garrison

Director, Newsletter  
Kelly Heil

Webmaster  
Linda S. Garrison

Co-Webmaster  
Kelly Heil

## Global & Ohio Council Officers Officers

### Chair

Ginger R. White, CMA,CCSCA  
Institute of Management Accountants

### Chair-Elect

Crhistian Cuzick, CMA  
Institute of Management Accountants

### Chair-Emeritus

Alex C. Eng, CMA, CFM, CPA  
Institute of Management Accountants

### President & CEO

Jeffrey C. Thomson, CMA  
Institute of Management Accountants

### Community Relations Manager

Wore Giotta  
Institute of Management Accountants

### IMA Global Director (Ohio Region)

Tanya Shell

### Ohio Council Officers

#### Chairman

Candace W. Levine

#### Secretary

Peter G. Dorff, CMA, CFM, CPA

## Program Agenda & Speakers

**All meetings are usually on the third Wednesday of the month at the Hilton Garden Inn with date exceptions noted.**

**For dinner reservations, go to the link on the chapter portal ([akron.imanet.org/events](http://akron.imanet.org/events)).**

**Dinner cost is \$25 for members; \$30 for non-members; \$10 for student members.**

**You may attend for CPE without participating in the meal.**

Hilton Garden Inn  
September 19, 2018  
**BOSS NIGHT**  
6:10 PM  
Pre-Technical Session

**LINDA GARRISON**

GBS Team Leader GCTSC Cash Management, The Goodyear Tire & Rubber Company

**WENDY TIETZ, PH.D., CMA, CSCA, CPA**

Professor, Kent State University, Department of Accounting

***“IMA Policies and Chapter Portal Operations”***

Linda Garrison has worked at The Goodyear Tire & Rubber Company at their Akron Headquarters location since 1989. She has held various accounting, finance, information technology, and marketing positions in her 29 years with the company. Linda has worked in Procurement, Engineered Products Accounts Receivable, Data Security, IT Finance, North America Consolidation Accounting, Commercial Tire FP&A, and Global Business Services General Accounting. Her current title is GBS Team Leader GCTSC Cash Management. This position leads the accounting functions for the Goodyear Commercial Tire & Service Centers cash management.

Linda has been a member of the IMA Akron Chapter since 2013, and has held several Board positions, including Secretary, Chair-Nominating Committee, Director CMA/CSCA Programs, Director Librarian, Director Public Relations, Director Special Activities, Director Chapter Awards, Webmaster, and President...many of these roles held simultaneously. As President of Akron chapter IMA, Linda led the chapter to second place in the WORLD in the Stevenson Division twice.

Linda earned her Bachelor of Science, Marketing and Masters in Business Administration, E-Business from the University of Akron. She is currently working on obtaining her CMA certificate.

---

Wendy Tietz, Ph.D., CMA, CSCA, CPA, is a Professor in the Department of Accounting in the College of Business Administration at Kent State University, where she has taught financial accounting and managerial accounting since 2000. She teaches in a variety of formats, including large face to face, hybrid synchronous web-based, and asynchronous web-based. She authors a blog, “Accounting in the Headlines”, which has real-world news stories and resources for use in the introductory accounting classroom. Dr. Tietz was awarded the Jim Bulloch/IMA Award for Innovations in Management Accounting Education for her blog in 2016 and the Bea Sanders/AICPA Teaching Innovation Award in 2014 and in 2017. She is the co-author of Managerial Accounting, Braun & Tietz, 5<sup>th</sup> edition, 2017, Pearson Education, and is also a co-author of Financial Accounting, Thomas, Tietz & Harrison, 12<sup>th</sup> edition, 2018, Pearson Education.

Hilton Garden Inn  
September 19, 2018  
**BOSS NIGHT**  
7:10 PM  
Technical Session

**NORBERT (NOBBY) LEWANDOWSKI**  
Principal, Lewandowski & Company

***“Leadership, Integrity & Success”***

Knobby is nationally recognized for his presentations, seminars, workshops and business coaching. His delivery of relevant topics keeps audiences tuned in and thirsty for more information. By wrapping wisdom in a package of wit, music, and humor, he captures the crowd.

From his career as a professional baseball player to founding one of the largest accounting firms in Northeast Ohio (CEO for 23 years) to his successful entrepreneurial ventures, Nobby’s life experiences, both successful and challenging, result in humbling and inspiring presentations. Ironically, his biggest personal challenge to overcome has defied conventional thinking in becoming a career public speaker!



Simply stated, Nobby Lewandowski stutters. On April 6, 1965, a turning point occurred in his life. It was on that day the managing partner of the major accounting firm who employed Nobby informed him that he would be better suited for a position that required minimal verbal skills as this person thought his flawed speech represented an “inability to communicate”. Nobby eventually left the firm and he clearly “communicated” to his boss that his “inability to speak fluently” should never be confused with an “inability to communicate”.

Determined to never let his speech challenge be an impediment to his success, Nobby has become a huge success in the arena of public speaking despite being a stutterer. He helps his audience understand facing adversity, and obstacles can result in building strong character and be the foundation for success. By facing his own challenges, Nobby has successfully leveraged what most would think to be a “liability” into a unique and impactful “asset”. Nobby truly proves the theory that “It’s What You Say, Not How You Say It”.

Nobby received a BA from Kent State University and an MBA from Case Western University. He has been an Ohio CPA since 1964, a member of the AICPA and the OSCPA’s. He writes articles in accounting magazines and has written two books.



Hilton Garden Inn  
October 17, 2018  
AWARDS NIGHT  
6:10 PM  
Pre-Technical Session

**TERRY GINLEY, CPA**

Director of Operations and Technology Services, Velosio, LLC

***“Business Intelligence: Know the Value of Your Data”***

As the Director of Operations and Technology Services, Terry Ginley is responsible for Velosio’s emerging initiatives, which include Master VAR, Microsoft Dynamics AX practice, as well as Merger and Acquisition activities. Velosio, formed through the combination of SBS Group and Socius, is one of Microsoft’s largest Dynamics partners in North America with over 300 employees serving more than 4,000 clients.

A certified public accountant, Terry has over 20 years of leadership, accounting and information technology experience, with successful global expertise in the ERP, Financial Reporting and Business Intelligence software markets in both enterprise and mid-market companies.

Previous to Volosio, Terry served as the Business Intelligence (BI) Global Practice Manager for Microsoft Corporation. He championed and launched the BI Global Practice in 2008, the first of 12 Global Practices in Microsoft Consulting Services (MCS). Prior to obtaining this position, Terry held other roles, including Senior Director of Microsoft Customer Services and Support, and Vice President of Professional Services for FRx Software Corporation.

Terry graduated from Bowling Green State University with a Bachelor’s of Science degree in Accountancy. He is a member of the Ohio Society of CPAs (OSCPAs), a former Committee Chairman of the OSCPAs, and a past presenter and author to the OSCPAs and IMA on the topics of Financial Reporting, Business Intelligence and Technology.

Hilton Garden Inn  
October 17, 2018  
**AWARDS NIGHT**  
7:10 PM  
Technical Session

## **MATT BASH**

Resource Manager for Management Resources, Robert Half Management  
Resources

### ***“MR Social Media and Your Career”***



Matt Bash is the Resource Manager for Management Resources at Robert Half. Management Resources specializes in providing interim strategic and system solutions at the Senior Level Accounting and Finance positions. Mr. Bash began his career in banking as a Bank Teller for First Merit Bank at Medina Square, and spent 17+ years in the banking industry as an Accountant for 9 years, Auditor for 3 years, and 5 years as a Consultant working with the FDIC and Deloitte & Touché helping with the closing of financial institutions across the country.

He is a native of Brunswick OH

Hilton Garden Inn  
November 14, 2018  
YOUNG PROFESSIONALS' NIGHT  
6:10 PM  
Pre-Technical Session

**DR. DREW SELLERS, CMA**

***"Data Analytics in Accounting"***

Dr. R. Drew Sellers is the Director for the Center for Information Systems and an Associate Professor in the Accounting department at Kent State University. He teaches data analytics and accounting information systems to undergraduate and graduate students. His research focuses on audit quality and social structure in the accounting profession; in particular the dynamics of social networks within firms. He has presented his work at numerous regional and national conferences and published articles in journals such as Accounting Horizons, Behavioral Research in Accounting, Managerial Auditing Journal, Journal of Managerial Issues and Issues in Accounting Education.

Dr. Sellers is a Certified Management Accountant, CMA, and received his doctorate from Case Western Reserve University, Cleveland, Ohio in 2008. Prior to becoming a professor, he worked in public accounting and consulting for twenty years and twelve years in industry. He was a Partner at Arthur Andersen/Accenture, President for a regional technology firm and Chief Information Officer at an international health care company.

Hilton Garden Inn  
November 14, 2018  
**YOUNG PROFESSIONALS' NIGHT**  
7:10 PM  
Technical Session

**RUSS TIETZ, MBA, CPA**  
Assistant Professor of Accounting  
University of Mount Union

***“Impact of Tax Reform on 2017 Individual Taxes”***

Russell “Russ” Tietz, MBA, CPA is an Assistant Professor of Accounting at The University of Mount Union. Prior to joining Mount Union in 2013, Russ taught undergraduate and graduate level classes at Walsh University, Kent State University, and the University of Akron.

Russ had over 30 years of professional experience in public accounting and industry prior to making the transition to fulltime educator in 2013. His career included work in external auditing, internal auditing, financial reporting, accounting research and business planning. Russ also has owned his own tax practice for sixteen years. He draws on this experience to bring practical examples into the classroom to aid the learning process for his students. Russ teaches Financial Accounting, Advanced Accounting, and Federal Taxation at Mount Union.

Russ has a BS in Accounting and an MBA in Finance, both from the University of Akron. He is also a CPA in Ohio.

**Hilton Garden Inn**  
**January 16, 2019**  
**SOCIAL NETWORKING NIGHT**  
7:10 PM  
NO PRETECH SESSION MEETING  
5:30 PM networking, 6:30 dinner  
Technical Session

**JONI BOWEN**  
PR and Media specialist  
Kent State College of Business Administration

***“Social Media for Businesses”***

Joni works as PR and Media specialist in the Marketing Communications Office at the Kent State College of Business Administration. In this role, she is responsible for marketing College initiatives and undergraduate programs. She administers all college social media channels to support efforts to recruit and retain students. Prior to working in higher education marketing, Joni worked as a journalist for a daily newspaper in Stark County. In addition to her reporting duties, she worked to bring the newspaper into the digital age, launching a social media presence, incorporating multimedia storytelling into reporting practice and building on website offerings for readers. She enjoys staying current in all things related to technology and social media and likes helping organizations share their stories in the most engaging way possible. In the spring, Joni will be teaching Social Media Marketing in the College of Business Administration.



Hilton Garden Inn  
February 19, 2019  
STUDENTS' NIGHT  
6:10 PM  
Pre-Technical Session

**SAM FARKAS, CPA, MBA**

Lead Financial Analyst, International Treasury  
The Goodyear Tire & Rubber Company

***“How to Use Hedging to Minimize FX Volatility”***



Mr. Farkas has been responsible for managing foreign exchange (FX) risk at The Goodyear Tire & Rubber Co. since February 2016. His experience extends to monitoring, analyzing, and hedging cash flow & balance sheet exposures of the company. He provides support for hedge/no-hedge decisions, for other special transactions and assists in evaluating new strategies to minimize P&L volatility due to FX movements.

Prior to Treasury, he has held various roles in Internal Controls, Procurement Finance and Internal Audit Departments of Goodyear. He holds an MBA and an MA degree in Econometrics from Ohio University, Athens, OH.

Hilton Garden Inn  
February 19, 2019  
STUDENTS' NIGHT  
7:10 PM  
Technical Session

**DENISE M. LEE, CPA, MBA**  
Serial Entrepreneur, Faculty, Kent State University

***“My Story: The Journey from CPA to Serial Entrepreneur to Author”***

Denise Lee is an entrepreneur who has co-founded five start-up companies whose outcomes have included the outright sale of a company to a large corporation, the sale of her interest in a company to a private buyer, business shuttering after success in order to pursue a different opportunity, and business shuttering after failure to get a product to market. Two of the businesses were in the medical industry, two were in the construction industry, and one was in the education industry. Denise is also a CPA with 6 years of public accounting experience.



Denise is currently a faculty member at Kent State University in the Department of Marketing and Entrepreneurship where she is involved in teaching and coaching entrepreneurship students. In 2011, Denise received the Kent State University College of Business Teaching Excellence Award. In 2014, she was nominated for the same award. In 2015, she received a Faculty Recognition Award from the Kent State University Teaching Council.

Denise has developed and taught a variety of traditional and online entrepreneurship courses at Kent State University, including Introduction to Entrepreneurship, Entrepreneurial Experience I & II, Entrepreneurial Tools, Entrepreneurial Marketing, New Venture Creation and Entrepreneurial Finance. She is also Coordinator for Kent State University's Undergraduate Entrepreneurship Curriculum.

**Specialties:** As an entrepreneur, Denise has specialized in overall business strategy, business planning, process and procedure development, and overall company management. Denise has extensive experience in all phases of the administrative development and proper exit of new business ventures. As a CPA, Denise specialized in audit, business valuation and corporate taxation.

Denise is currently working with Chicago Business Press to publish a textbook about entrepreneurial finance. The expected publication date of the textbook is 2019.

Hilton Garden Inn  
March 20, 2019  
CMA/CFM/CSCA Night  
6:10 PM  
Pre-Technical Session

**DON MULLEN, CPA, MBA**  
Stark State College Akron

***“The Impact of a Community College on Workforce Development”***



Don Mullen is currently Executive Director of Stark State College Akron. He has been employed at Stark State College for almost 10 years and he accepted his current position about three years ago. Prior to this position, Don was Department Chair of Accounting and Finance. He is a Goodyear retiree, having worked there 31 years – his last position was Director of Finance of Global Products – Including Worldwide Racing, Off-the-Road Tires Aviation, Goodyear Chemicals, R&D and the Rubber Plantations. He was basically the CFO of a Strategic Business Unit which generated more than \$1.5 billion / annually.

Don holds an undergraduate degree from the University of Akron and an MBA in finance from the University of Texas at Tyler. He is a CPA and hold memberships in the Ohio Society of Certified Public Accountants and the American Institute of Certified Public Accountants. He also holds the designation of Certified Global Management Accountant. Don holds an active teaching license in the State of Ohio to teach Social Studies and Data Systems in grades 7-12.

**Community Activities**

- Member of the Akron Urban League
- Akron/Summit Head Start Self-Assessment Committee
- Member of Elevate Akron Committee
- Appointed by The Mayor of the City of Akron and County Executive to serve on the 2020 Census Committee
- Member of the County Executive’s Diversity Committee
- Member of the United Way / City of Akron Financial Empowerment Service Committee
- And several others

Don and his wife of almost 49 years, Karen, who is a retired health care executive, live in Bath and have three grown children and five grandchildren.

Finally, believe it or not he was a competitive handball and racquetball player – winning the University of Akron intramural Racquetball championship when he was in his mid-50s.



Hilton Garden Inn  
March 20, 2019  
CMA/CFM/CSCA Night  
7:10 PM  
Technical Session

**JAYNE COLE**

Director, Global IT Risk and Security, Goodyear Tire & Rubber Company

**DIRK ZABEL**

Manager, Global IT Operations, Goodyear Tire & Rubber Company

**PAM GERBER**

Cyber Ops Section Lead, Goodyear Tire & Rubber Company

***“Cybersecurity”***



Jayne Cole graduated from Cleveland State with a BA in Communication. She worked for 17 years at a private label credit card bank in Operations and then as a leader in IT. Jayne earned her Project Management certification in 2003 from the Project Management Institute.

Jayne joined Goodyear in 2008 and helped create the North American Tire IT Project Management Office. Since 2008, she has held a variety of positions in both North America & Corporate IT as well as Operations in both Corporate and

EMEA including:

- Manager of corporate ERP team – mainframe, Ariba, SAP
- Enterprise Competency Manager – taught project management all over the world
- Director EMEA Project Management Office
- Director, IT Risk & Security including accountability for Data Privacy

Pam Gerber has spent a total of 13 years in the security realm. Most of her time has been in IT Risk & Security, while about four years of that she spent in physical security conducting investigations, with half that time focused on Insider Threat.

Pam joined Goodyear in 2002. She is currently the Cyber Operations Section Lead reporting to Jayne.



Pam holds a Masters of Art in Organizational Leadership, a Bachelors of Art in Organizational Management from Malone College, and an Associates of Art from the University of Akron. Pam holds the Insider Threat Program Manager (ITPM) certification.

Pam has worked for Cleveland Museum of Art, JP Morgan Chase, IBM and now Goodyear.



Dirk Zabel is originally from Germany, graduating from Fachhochschule Fulda with a Diplom Informatiker FH (BS in Applied Mathematics, Computer Sciences, and Telecommunications).

Dirk started at Goodyear in 1995 as Netzwerk und System Administrator at Deutsche Goodyear Holdings GmbH in Germany. He came to Goodyear Akron in 2000, and has held several positions, including, Network Services Architect, IT Team Lead, Manager Retail IT COE (Center of Excellence), Manager of IT Enterprise Operational Services, and currently Manager of Global IT Operations. His operations department serves Goodyear's global needs 24x7.

Dirk is fluent in both English and German and holds the ITIL Foundation in IT Service Management Certification.

Hilton Garden Inn  
April 17, 2019  
**PAST PRESIDENTS NIGHT**  
6:10 PM  
Pre-Technical Session

**B. SUE MULLEN, CMA, CSCA, CPA**

Professional Instructor of Accounting  
College of Business, Ashland University

***“Update on the CMA/CSCA Exams”***

Sue joined Ashland University in 2006 as an adjunct instructor and in 2016 joined the faculty as a professional instructor. She currently advises AU’s IMA Student Accounting Club and advises the Student Ambassador for the OSCP. Sue is a Certified Public Accountant (CPA), Certified Management Accountant (CMA) and Certified in Strategy and Competitive Analysis (CSCA). She is a member of the Ohio Society of Certified Public Accountants (OSCPA), the American Institute of Certified Public Accountants (AICPA), and an active member in the Institute of Management Accountants (IMA).

Sue’s previous employers include Meaden & Moore, Moen and BDO. She has an MBA from Ashland University and a B.A. from Baldwin-Wallace University.



Hilton Garden Inn  
April 17, 2019  
PAST PRESIDENTS NIGHT  
7:10 PM  
Technical Session

## CATHY POSNER

Founder/Owner of Transition Consulting and Coaching

### ***“Understanding and Promoting the Brand of You!”***



Cathy Posner is the founder/owner of Transition Consulting and Coaching. What started as a nonprofit consulting business in 1997 expanded in 2007 after Cathy completed a life coaching program and realized she wanted to share the benefits of coaching with others. Through Transition Consulting and Coaching, Cathy provides career support, including exploring possible career paths, strengthening your resume and online (LinkedIn) presence, developing a search strategy for your next position, and preparing for interviews. She also offers small business development services—including program or goal development and writing for marketing materials—and nonprofit consulting services, especially in the areas of board development and strategic planning. Cathy also works as a Senior Coach

with Career Curve, providing outplacement and transition support to candidates and as a Specialized Training Consultant with the Medina County Career Center, Adult Education department.

Prior to founding Transition Consulting and Coaching, Cathy held positions in human resources, program development and leadership at a number of nonprofit organizations in the Cleveland area, including the Cleveland Museum of Art, the Nature Center at Shaker Lakes, the former Young Audiences of Greater Cleveland (now the Center for Arts-Inspired Learning), Global Issues Resource Center at Tri-C (Eastern Campus) and Medina County Performing Arts Foundation.

Cathy continues to be involved in multiple community organizations. She is a current board member and past President of the Medina County Women’s Endowment Fund, a board member of Feeding Medina County, a member of the Medina Farmers Market Advisory Committee, a member of Main Street Medina, a member of Medina City Schools PTO, a member of the Medina Diversity Project, PR Chair for Kids First Medina, a member of Women’s Network of Northeast Ohio, 100+ Women Who Care and the Medina Chamber of Commerce, where she serves on the EmpowHER committee. In 2014, Cathy was honored as a Women of Professional Excellence through Women’s Network of Northeast Ohio and was honored as a 2018 Women of Our Community award recipient and Athena Award nominee.

Cathy holds a graduate degree from Case Western Reserve University and an undergraduate degree from the College of Wooster. Originally from the east side of Cleveland, Cathy, her husband Mason, and daughter Lucinda live in Medina. Cathy believes that everyone has gifts to share with the world and she is passionate about helping others identify and grow them!

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

Hilton Garden Inn  
May 15, 2019  
GUEST NIGHT  
6:10 PM  
Pre-Technical Session

**AARON DAHNKE, CAE**  
Education Manager, Natural Stone Institute

***“Training – A Full Staff Project”***

Aaron Dahnke is currently the Education Manager for the Natural Stone Institute and is responsible for leading the association’s education and training programs which include: Stone-related training at major industry tradeshow, The Natural Stone Institute/Stone World regional education program, delivery of CEU credits to the design community, and resources from the association bookstore. Aaron is also currently involved in The Natural Stone Institute's Chapter program.

Before joining the Natural Stone Institute, Aaron managed the Center for Nonprofit Advancement’s (Washington DC) education program. While at the Center for Nonprofit Advancement, Aaron’s duties included building an educational curriculum for the nonprofit community, which included over 100 educational classes a year. In conjunction with the Washington DC Mayor’s Office, Aaron also managed the yearly D.C. Public Private Partnership Conference, which provided day-long nonprofit educational training for the region.

Aaron currently resides in Westlake and is a graduate of Ohio University, where he earned both Bachelor's and Master's degrees. He also received his Certified Association Executive (CAE) designation from the American Society of Association Executives in 2015.

Hilton Garden Inn  
May 15, 2019  
GUEST NIGHT  
7:10 PM  
Technical Session

**GREG M. DAUGHERTY**

Partner, Porter Wright Morris & Arthur LLP

***“ESOPs: A Tax-Advantaged Business Succession Planning Vehicle”***

Greg Daugherty focuses his practice on executive compensation and employee benefits matters for publicly traded and privately held companies and nonprofit organizations. He has extensive experience assisting business owners with their succession planning needs through the implementation of employee stock ownership plans (ESOPs).

Greg’s executive compensation and employee benefits experience consists of assisting employers with design implementation, and compliance issues related to qualified and nonqualified retirement plans, stock and non-stock based incentive programs, employment agreements, severance agreements, and change-in-control and parachute agreements. He provides advice relate to ERISA fiduciary and 409A compliance and strategic planning, including advising companies on compensation and benefits issues in connection with mergers, acquisitions, and spinoffs. Greg also assists employers with benefit plan correction programs offered by the Department of Labor and Internal Revenue Service.

Greg’s ESOP experience consists of assisting companies with the design and implementation of ESOPs and representing companies in stock purchase transactions involving the company, sellers, and the ESOP. Greg also assists both companies and lenders in connection with loans made to ESOP-owned companies. He provides ongoing counsel to ESOP-owned companies, assisting with ERISA fiduciary questions and with the implementation of incentive compensation arrangements that facilitate an employee ownership culture.

Greg received a JD (with honors) from The Ohio State University Michael E. Moritz College of Law and a Bachelor of Science (*summa cum laude*) from Miami University. He is a member of the Ohio Bar. His professional associations include The ESOP Association, Ohio Employee Ownership Center, American Bar Association, and the Columbus Bar Association (Pension Advisory Committee and Chair 2011-2013 of the Employee Benefits Committee). Greg has been designated an “Ohio Super Lawyer, Rising Stars Edition”.

Among Greg’s community associations are St. Christopher Parish (Young Professionals Group), Kiwanis Club of Columbus, Columbus Young Professionals Club, and Officer 2009-2013 with Miami University Alumni Association.

## Canton Chapter Technical Meetings

### **Canton Chapter 2018 – 2019 Technical Meeting Schedule**

All meetings except for September, October, and March are held at Kozmo's Grille (unless indicated otherwise), 37 1<sup>st</sup> Street SW, Massillon, OH 44647 with pre-tech sessions at 5:00 PM, dinner at 6:30 PM, and tech session speaker at 7:00 PM. For reservations, e-mail Jeff Walters at [jwalters@cbiz.com](mailto:jwalters@cbiz.com). Cost is \$30/person. The following speakers were available at press time.

| <b><u>DATE</u></b> | <b><u>TIME</u></b> | <b><u>ACTIVITY and SPEAKER</u></b>   |
|--------------------|--------------------|--|
| <b>9-18-18</b>     | <b>5:00</b>        | <b>"Student Night" at <u>Walsh University</u> –Jennifer Grossman, Clifton Larson Allen</b> |
|                    | <b>7:00</b>        | <b>"Student Night" at <u>Walsh University</u> - Chris Holmes, JM Smucker Company</b>       |
| <b>10-16-18</b>    | <b>5:00</b>        | <b>Beth Lechner at <u>Habitat for Humanity</u></b>   |
|                    | <b>7:00</b>        | <b>Community Service Activity at <u>Habitat for Humanity</u></b>                           |
| <b>11-13-18</b>    | <b>5:00</b>        | <b>"State Tax Update" - Clifton Larson Allen</b>   |
|                    | <b>7:00</b>        | <b>"Federal Tax Update" -Maloney &amp; Novotny</b>   |
| <b>12-18-18</b>    | <b>5:00</b>        | <b>"Canton Health Department" -Gus Dria</b>  |
|                    | <b>7:00</b>        | <b>"JM Smucker Company" – Chris Holmes</b>   |
| <b>1-15-19</b>     | <b>5:00</b>        | <b>"Business Valuations &amp; ESOPs" =Eric Flickinger, Apple Growth</b>                    |
|                    | <b>7:00</b>        | <b>"Cyber Security Issues" -Vestige</b>  |
| <b>2-19-19</b>     | <b>5:00</b>        | <b>"Howard Hanna" – Jessie Allison</b>   |
|                    | <b>7:00</b>        | <b>"Smith Foods" – TBD</b>   |
| <b>3-19-19</b>     | <b>5:00</b>        | <b>"Strategic Planning" at <u>Royal Docks Brewery</u></b>                                  |
|                    | <b>7:00</b>        | <b>"Networking" at <u>Royal Docks Brewery</u></b>  |
| <b>4-16-19</b>     | <b>5:00</b>        | <b>"Case Farms" – Michael Popowycz, CFO</b>  |
|                    | <b>7:00</b>        | <b>"Case Farms" – Tom Shelton, CEO</b>   |
| <b>5-21-19</b>     | <b>5:00</b>        | <b>"CFS Staffing" – Evelyn Hronec</b>  |
|                    | <b>7:00</b>        | <b>"Aultman/Aultcare" - TBD</b>  |

Canton chapter President Jeffery Walters, (888) 668-6501, x 230, [jwalters@cbiz.com](mailto:jwalters@cbiz.com)

## Cleveland East Chapter Technical Meetings

### **Cleveland East Chapter 2018-2019 Technical Meeting Schedule**

Tech session meetings start at 6:00 PM with networking and sign-in, dinner and speaker at 6:15 PM, and adjournment by 7:30 PM. For reservations, go to [www.cleveast.imanet.org](http://www.cleveast.imanet.org) . Cost is \$25 per person; \$10 for students. The following speakers were available at press time.

\*\*All meetings are at TBD

| <b><u>DATE</u></b> | <b><u>ACTIVITY &amp; SPEAKER</u></b>                                     |
|--------------------|--|
| <b>8-22-18</b>     | <b>Social Event – Rock &amp; Roll Hall of Fame (5:30 PM)</b>             |
| <b>9-18-18</b>     | <b>“Employment Opportunities for Accountants” – Case Western Reserve</b> |
| <b>10-20-18</b>    | <b>Student Connection – Whirleyball (3:00 PM – 5:00 PM)</b>              |
| <b>10-26-18</b>    | <b>Annual Controllers’ Workshop (8 hours CPE seminar) - BASF</b>         |
| <b>1-15-19</b>     | <b>“Economic Update”</b>   |
| <b>2-19-19</b>     | <b>“Tax Update”</b>  |
| <b>3-20-19</b>     | <b>“Large Data Analysis”</b>   |
| <b>4-16-19</b>     | <b>“Ethics” (2 hours CPE)</b>  |
| <b>5-15-19</b>     | <b>“Employment Update”</b>   |

Cleveland East chapter President Ernie Brass, (216) 598-1952, [bcd\\_net@yahoo.com](mailto:bcd_net@yahoo.com).



## Links Page

Dinner Reservations: [akron@imachapter.org](mailto:akron@imachapter.org)

Newsletter articles: Kelly Heil, [akron@imachapter.org](mailto:akron@imachapter.org)

Employment service: Robert Shapiro, [akron@imachapter.org](mailto:akron@imachapter.org)

Akron chapter website: [akron.imanet.org](http://akron.imanet.org)

IMA Global website: [www.imanet.org](http://www.imanet.org)

Login : enter user name  
(your IMA account number)  
Enter password (last name,  
unless you changed your password)

Ohio Council website: [www.ohioima.org](http://www.ohioima.org)

Online Program Book: [akron.imanet.org](http://akron.imanet.org), Go to *About Chapter* -> *Program Book* to download.

Access online recording of chapter meetings:

To register, contact Linda Simko, [akron@imachapter.org](mailto:akron@imachapter.org)



## WE BELIEVE IN BUSINESS NOT AS USUAL.

You need more than a seat-filler. You need people who fit your company, truly enjoy what they do, and can hit the ground running. It's time to let Robert Half help you build the productive and energized workforce that can make your company even better.

IT'S TIME WE ALL WORK HAPPY.®



Akron  
330.253.8367  
[roberthalf.com](http://roberthalf.com)

**rh** Robert Half®

© 2017 Robert Half International Inc. An EOE M/F/D/V.RH-0817



# #1 CMA EXAM PREP

**GLEIM**<sup>®</sup>  
CMA REVIEW

Strategic  
Partner



IMA Ohio Council  
Members

**SAVE UP TO  
25%**

Visit **GLEIM.COM/IMAOHIO**  
for your savings!

---

**IMACHapters@gleim.com**  
**800.874.5346**