



Mesa East Valley's IN TOUCH

May 2014

Vol 22, Issue 10

www.mesaeastvalleyafwa.org

President's Corner by Diane Hewlett

Hi!

I hope everyone is having a great spring so far. Although we had some really hot weather, as I'm writing this, we have had a little bit of a reprieve and we are having some a few really nice days before we get to the horrible stuff.

Just last week, we had our April Fun Event. We all had a great time! Postino's in Gilbert is a great spot for appetizers and drinks and was conveniently located right next door to the theatre. The play "9 to 5: The Musical" was really fun. The actors did a great job with the constantly changing set, and as it is a square stage with seats all around, they had the challenge of trying to face all different sides. The show is a fun look at the working world for women in the 70's, and we have definitely made some great strides! The clothes and hair styles were sure fun to see and brought back some memories. We also enjoyed seeing several past members who came for the fun event, and hopefully, we will see them again at a meeting or other events soon!

One of the main events in May was the Southwest Regional Conference in Flagstaff on May 15 and 16. A total of 12 CPE hours was offered, and they had some great speakers and topics lined up. The social activities included a Thursday evening visit to Lowell Observatory and Friday evening was the National Board and Foundation Board installation dinner. If you are a member of our chapter, you were covered for two nights in a shared hotel room. What a perfect time of year to get away to Flagstaff!

Stacey Craig, our President-elect, and the nominating committee still have positions to fill for next year's board. If you are interesting and willing to help do what it takes to keep our chapter going month after month, please contact her and let her know how you can help out. She can also let you know what positions are still available.

Please plan to attend our May meeting on May 27. Our very own member, Kathleen Pease, will present QuickBooks help for us. Our last meeting of the year will be the installation on June 17 (please note it is the third Tuesday of the month).

Happy spring to all!

Diane Hewlett
President

Inside this issue:

President's Corner	1
Meeting Details	2
Announcements	3
Mission Statement Officers & Board	4
Descriptions of Officer Positions	5-8



Meeting Details
Tuesday May 27, 2014

TOPIC: Quickbooks Review

LOCATION: Landmark Restaurant
809 W Main St, Mesa

DINNER: Pot Roast or Salad Bar

TIME: 5:30 p.m. Networking

6:00 p.m. Dinner

7:00 p.m. Presentation

COST: \$26 member / \$32 guest / \$20 student

Do not go where the path may lead, go instead where there is no path and leave a trail.

Ralph Waldo Emerson

RSVP by May 23rd online at:

<http://mesaeastvalleyafwa.org/meetings.html>

You can also contact our membership director Laura Mangan at lauralynne@earthlink.net or call 480-276-5926.

ADMINISTRATIVE POLICIES: If you would like to cancel a reservation, please contact Laura at the above email. Per chapter rules, if you register and do not attend or do not cancel by the Monday prior to the meeting, you will be charged the cost of the dinner. For more information regarding administrative policies such as complaint and refund, please contact Programs Director, Patricia Schumacher Pks-cpa@cox.net

ANNOUNCEMENTS



- **Club Incentive:** Anyone who brings a guest to the monthly meeting will get 5 extra chances for the member relations drawing and will also be entered in a drawing to win a \$50 gift card at the end of the year.
- **General Fund Drive:** For every \$10 donated you get a chance for a \$50 gift card - pick an envelope for a specific donation amount or just send a donation to the treasurer.
- **Monthly 50/50 Drawing:** If you can't win the Lottery, try the 50/50 drawing for better odds (tickets \$2 each or 6 for \$10).
- **Officer Installation:** Come June 17th, thank our outgoing officers and support the incoming new officers.
- **Seminar:** Plan on attending Empowering Today's Accountant Saturday August 2nd.
- **Quarterly Food Drive:** Support the United Food Bank and bring nonperishable items to fill the box.
- **2014 AFWA Annual Conference:** Start planning now to visit New Orleans Sept 28th - Oct 1st for fellowship and intellectual stimulation with your peers.
- **2013-2014 Membership Campaign:** Two ways to win-New member recruitment (July 1, 2013 to May 31, 2014) and Current Member Retention (June 30, 2013 to July 31, 2014)



BENEFITS OF MEMBERSHIP

- **Prestigious status of professional affiliation**
- **National contacts for networking and professional information**
- **Forum for CPE**
- **Scholarships**
- **Leadership opportunities in supportive arena**
- **Subscription to *Accountability* e-Newsletter**
- **National and regional conferences at a discounted rate**
- **Access to Career Center**
- **Access to LinkedIn group**
- **National online membership directory**
- **Discounted membership to the Institute for Management Accountants (IMA)**
- **Discounted products and services through affiliation agreements (CPA review courses, , CCH tax & accounting books, and Long Term Care Insurance)**

Office	Name	Phone	Email
President	Diane Hewlett	480-705-7244	dianephx928@gmail.com
Treasurer	Kathryn Dunn	480-844-7708	kathrynmduhn@earthlink.net
Assistant Treasurer	Joyanna Hammond	480-491-3819	ham0858@aol.com
Secretary	Deborah Wheeler	602-758-6278	deborah@graceconsultingus.com
Past President	Shelby Williams	602-430-8834	Shelby_williams@yahoo.com
Membership Director	Laura Mangan	480-276-5926	lauralynne@earthlink.net
Programs Director	Patricia Schumacher	480-584-4344	Pks-cpa@cox.net
Asst Programs Director	Ila Sowins-Dunmire	480-216-5383	iasowinsdunmire@cox.net
Member Relations	Anna Von Straussenburg	480-225-1993	anna@jescpapc.com
By-Laws	Anna Von Straussenburg	480-225-1993	anna@jescpapc.com
Newsletter	Karen Peterson	480-248-7303	kpeterson76@cox.net
Career Services	Deanna Schantel		dschantel@cox.net
Webmaster	Laura Mangan	480-276-5926	lauralynne@earthlink.net
Assistant Webmaster	Diane Hewlett	480-705-7244	dianephx928@gmail.com
Public Relations	Laura Mangan	480-276-5926	lauralynne@earthlink.net
Educational Foundation	Pat Donohue	480-218-0334	pkdonohue@cox.net
Scholarship	Shelby Williams	602-430-8834	Shelby_williams@yahoo.com
Community Service	Shelby Williams	602-430-8834	Shelby_williams@yahoo.com

President

- If possible, attend national meetings and regional conferences. It is especially important to attend the national meetings the year preceding and during your term of office.
- Act as ex-officio to all committees except Nominating Committee.
- Contact Regional Director
 - Your regional director is a resource throughout the year and can assist with any questions you may have about the organization, timing, problems within your chapter, etc.
- Preside over all Board and Membership Meetings (Monthly)
 - Prepare Agenda
 - Gather Committee Reports
 - Email reports, minutes, treasurer's report and agenda prior to meeting
 - Recognize all new members at membership meetings
 - Run the meeting
- Prepare President's Message for monthly newsletter. (Monthly)
- Complete Quarterly Reporting (Oct, Jan, April, July)
 - These forms are sent via email from Nationals and usually give a deadline of when they need to be completed
- Preside over Board Orientation & Annual Planning Meeting (July)
 - Theme
 - Budget
 - Program Calendar
 - Other events
- Work with Treasurer to update signers for bank account (July)
- Complete Delegate Credentials Form for National Conference (August)

- Consider holding a mid-year board meeting to discuss if goals are being met and budget is adequate for remainder of year (Dec/Jan)
- Complete Chapter Dues Form if necessary (February)
- Select "Member of the Year" and coordinate plaque for the individual as well as adding the name to the yearly (June)
- Coordinate June installation speaker to announce new board (June)
- Order from Nationals the President's Pin for incoming President (June)
- Coordinate gifts for incoming board members to receive for installation (June)
- Coordinate Perfect Attendance awards (June)

President-elect

- Attend Board Orientation & Annual Planning Meeting
- Attend all Board and Membership Meetings
- Fill in when President is not available or for special assignments
- Other responsibilities as assigned by the president.
- Works with the president to gain knowledge concerning the operations of the chapter.
- Nominating committee member
- Send in "Slate of New Officers" to National after the election
 - President and Treasurer Form (Due in April)
 - Officer and Committee Form (Due in May)
- Select a gift for outgoing President (June)
- Coordinate Landmark contract with The Landmark (June)
 - Monthly meeting dates
 - Monthly meeting menus
- Select date for Board Orientation & Annual Planning Meeting (June)

- Coordinate hosting of joint chapter meeting (September)
 - Phoenix and MEV take turns hosting the joint meeting every year

Immediate Past President

- Attend Board Orientation & Annual Planning Meeting
- Attend all Board and Membership Meetings
- Nominating committee member
- Keep the president on track
- Suggest areas for improvement
- Assist committees as needed
- Keep bylaws & standing rules current and ensure they are current with National bylaw changes

Treasurer

• The Treasurer is responsible for maintaining the financial records of the chapter. The duties involved with this include the following:

- Attend Board Orientation & Annual Planning Meeting
- Attend all Board and Membership Meetings
- Assist the President and chapter board with the preparation of the annual budget.
- Record transactions as they occur and on a timely basis, such as deposits, payments, etc. The chapter is on a cash basis and is currently using QuickBooks Pro to maintain the financial records.
- On a monthly basis, provide the board with the financial reports: The Statement of Financial Position, The Monthly Statement of Activities – Budget versus Actual, and the Year to Date Statement of Activities – Budget versus Actual.
- Reconcile the bank accounts each month as of the last day of the month.
- Transfer payments from the Pay Pal account and record activity on a monthly basis.
- At chapter meetings, collect payments and verify that all members in attendance have paid either by payment at the meeting or through Pay Pal. (If there is an Assistant Treasurer, this can also be handled by her). Confirm the meal count and pay the Landmark Restaurant. Be sure to give them the Landmark Points card so we receive our points.
- After the chapter meeting, stamp and copy all checks for deposit, prepare and make the deposit on a timely basis, e-mail a copy of the attendance sheet to the Secretary and update the attendance master spreadsheet.
- Pay chapter bills as approved by the chapter board.
- Arrange the annual audit/review of financial statements with a non-board member and submit a copy of the annual financials to AFWA national by October 15.
- File any tax returns, if required, with the State of Arizona. Verify that AZ Form 99 does not need to be filed. (The Federal form 990 is filed by AFWA National and is not filed by the Chapter).
- Promote and monitor the Fry's gift card program. Occasionally, remind members of how the program works and collect funds to buy new gift cards. These can be purchased for any amount, from \$5.00 up and then reloaded by the member. Contact Fry's to obtain cards and to get reports as to how we are doing.

Assistant Treasurer

- Fill in for the Treasurer when needed.
- Responsibilities are at the discretion of the Treasurer.
 - Could assist by:
 - Collecting payments at the meetings
 - Verifying that all attendees have paid either at the meeting or through Paypal.
 - Total the funds received at meetings for the Treasurer to help maintain separation of duties.

Secretary

- Attend Board Orientation & Annual Planning Meeting
- Coordinate speaker audio/visual needs with restaurant or other source
- Maintain CPE forms for membership

Assistant Programs Director

- Prepare the CPE documentation in accordance with NASBA and AFWA requirements
- Distribute the CPE forms during meetings/seminars
- Submit the forms to national after the meetings

Public Relations Director

- The goal of the PR director is to ensure event information is posted giving time for people to attend events. Support the national communication efforts by distributing press releases, special papers, conferences and events.
 - Publish membership meeting, networking, social and educational events for members and the public. Use free resources including social media, news outlets, and business journals.
 - Manage social media accounts – Facebook, LinkedIn, Twitter, Meetup, Blog. Follow industry social media, national organization and other chapters, create events, share content, and generate discussions
 - Press Releases: Prepare and distribute press releases for chapter events and member announcements.
 - Serve as the chapter contact for news/media outlets.

Website Director

- Maintain chapter website with current information.
- Post meeting registration following previous month's meeting.
- Update board members and contact information each year.
- Update news flashes highlighting the current meeting, community service and other events.
- Monitor analytics for referral sources.
- Test meeting and event registration and paypal links for accuracy.
- Set up Jotform registration for meetings and events.
- Ensure links to files and national website are working properly.
- Maintain distribution lists
 - Add new members
 - Delete people who are no longer members

Member Relations

- Distribute name tags at meetings
- Keep name tags current with new members
- Bring monthly meeting member relation gifts
 - Prepare drawing for end of meeting
- Bring December member gifts

Newsletter Director

- Responsible for editing, publishing and distributing a monthly newsletter
- Gather information from Board, National, Regional

Seminar Committee Chair

- The AFWA Mesa East Valley Chapter has presented a day-long seminar each summer cosponsored by the IMA AZ Valley of the Sun Chapter. This event offers attendees 8 hours of CPE from two tracks of sessions. A date/location is selected. This has usually alternated Friday/Saturday as feedback has been split between people unable to get out of the office vs giving up personal time. A contract is signed with the event facility for meeting rooms and food.
 - Prepare Sponsorship, Save the Date flyer, Brochure and speaker request materials.
 - Confirm speakers/topics with CPE requirements

- Mail cards to past attendees and contacts
- Contact potential sponsors
- Create budgets
- Track registrations/payments
- Prepare registration list, name tags
- CPE Documentation – sign in sheets, certificates (2 copies), evaluation forms, handout materials
- Speaker biographies and introductions
- Email attendees reminders and follow up
- Speaker thank you gifts, confirmation emails and thank you letters
- Volunteers for registration desk, introductions, cpe forms
- Scholarship fundraising options – raffles/auctions and 50/50 drawings

Job Bank

- Primary source for job notices
- Keep members informed on openings and career/industry trends

Educational Foundation

- Stay informed of AFWA Educational Foundation events, forms, websites, and promotions
- Encourage educational foundation donations/contributions and raffle items for conferences
- Lead financial literacy efforts at the local level
- Maintain financial literacy program forms and information
- primary contact for students, teachers and financial aid offices, sponsors, manage periodic raffles/donations

Scholarship and Student Activities

- Maintain chapter scholarship forms and selection criteria
- Send applications to universities and colleges to obtain scholarship candidates
- Review and select scholarship applicants and make recommendation to the Board
- Promote interest in AFWA to various college and university organizations and clubs by offering AFWA services
- Coordinate a “student” recruitment event with Programs and Membership
- Be the primary contact for students, teachers and financial aid offices, and sponsors
- Manage periodic raffles/donations to refund scholarship fund

Community Service

- Lead and support others with the community service projects that our AFWA Chapter has committed to doing.
- Keep members informed of community service projects
- Be the primary contact for organizations and volunteers

Nominating Committee

- Immediate Past-President is the Chairperson
- Meet in January to review positions and possible candidates
- Present, in writing via Newsletter or email, a “Slate of Officers” at the February general membership meeting for consideration and a “call for nominations” from the floor
- Election to be held no later than March general membership meeting