

THE PENNANT

A Publication of the **San Diego North County Chapter**



WWW.SDNCIMA.IMANET.ORG

August 2008

Date: Thursday August 28, 2008

Location: Claim Jumper

5958 Avenida Encinas
Carlsbad, CA 92008

Times: 5:45 p.m. Reception
6:30 p.m. Dinner
7:30 p.m. Presentation

Cost: \$30 Members & Guests
\$15 Students

Menu

Menu to be provided at time of registration

Directions

West of I-5 at Palomar Airport Rd

RSVP to Bill Calder at 760-740-0552
or billcalder@theima.org

Cancellations:

Bill Calder at 760-740-0552 or
billcalder@theima.org

Accounting for Animals and the Finance of Fauna "The inner workings of the San Diego Zoo"

- History of the San Diego Zoo and the Zoological Society
- Business Model and Funding
- Unique and interesting aspects
- Responsibilities of Zoo's and the changing roles in society

Guest Speaker: **David Page, CPA, MBA**

David Page is the Associate Director of Finance and Controller for the nonprofit Zoological Society of San Diego. He has been with the Zoo for 5 years. David graduated from SDSU in 1993 where he was actively involved in Beta Alpha Psi. Prior to joining the Zoo, David worked 4 years at Ernst & Young as an auditor and spent 5 years in the Corporate Controller role for various companies. David is a CPA and recently received his MBA from California State University - San Marcos. He lives in Carlsbad with his wife and daughter.

**SAN DIEGO NORTH COUNTY
SERVICE YEAR 2007-2008
OFFICERS AND DIRECTORS**

President	Jessica Alfaro	760-212-3872	jalfaro@gltcpas.com
President Elect			
Secretary	Cindy Boer	760-716-4585	cindyboer@sbcglobal.net
Treasurer	Bill Calder	760-740-0552	william.calder@sbcglobal.com
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Employment	The Board		
Special Activities			
Regional Council Del			
Member Attendance	Sandy Merein	858-485-0222	smerein@kforce.com
Accounting Day			
Social Events	Matt Dolman	760-746-3315 x207	mpdolman@cox.net
Comm Team Leader			
Newsletter	Jim Carr	858-427-4503	jcarr@lendersupport.com
Roster	Terry Gelber	760-635-3952	tgelber@yahoo.com
Community Service	Matt Dolman	760-420-3544	mpdolman@cox.net
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CMA/CFM	Jim Carr	858-427-4503	jcarr@lendersupport.com
Meetings			
Student Activities	Matt Dolman	760-420-3544	mpdolman@cox.net
Membership Tm Ldr	Sandy Merein	858-485-0222	smerein@kforce.com
Member Acquisitions			
Member Retention			
Corp & Acad Devel			

Articles for the Newsletter should be received by the 15th of the Month
Submit Articles to: **Jim Carr** mailto:jcarr@lendersupport.com

BOARD POSITIONS OPEN

We have a number of Board positions still open. Serving on the Board is good experience for anyone who desires to gain experience in managing an organization. As a Board member, you will participate in the decision making process which provides the direction the Chapter will take in the future. Here is your opportunity to have an impact and see your ideas put into practice. Being a Board member can also enhance your resume when seeking that next step up the corporate ladder.

If you are interested, please contact Jessica Alfaro at jalfaro@gltcpas.com.

As a member of the Chapter, you are cordially invited to attend the Board Meetings as non-voting members. The Chapter holds a board meeting every month, usually the second Thursday of the month. Meetings begin at 6 PM and lasts for approximately two hours. If you are interested in seeing how the Board operates, contact Sandy Merein at the email address above. We would be delighted to have you attend and we'll even provide dinner as well!

New IMA Listserv Helps Young Professionals Connect

As part of its continued commitment to the growing number of Young Professional members, IMA® is pleased to offer a new listserv especially for this audience. IMA's Young Professionals listserv is a free, subscription-based e-mail exchange that helps facilitate communication between members.

IMA members in the first ten years of their careers can meet like-minded members through this virtual community. Young Professional listserv members can share career development advice, networking tips, and best practices. It is a convenient way for young professionals to network and connect with other members.

For instructions about joining IMA's new Young Professionals listserv, visit https://www.imanet.org/pdf/listserv_inst.pdf.

The Young Professionals listserv is just one of many IMA special interest communities. For a complete list of listserves currently available, please visit https://www.imanet.org/communitites_email.asp.

How to Write Winning Job Descriptions

The perfect hire starts with the perfect job description, which serves as the basis of your all-important job ad. After all, hiring mistakes often result from a job description that failed to capture the essence of the open position. Consider the following tips:

Cover the key components. Lead off your job description with the position title, followed by the department and to whom the person will report. Next is a two- to three-sentence overview of the general nature, function and purpose of the job. Then list the primary areas of responsibility (consider using bullet points to differentiate tasks), along with important periodic duties. Follow this by citing a list of the skills, attributes and educational background you desire.

Cut the clutter. While certain higher-level accounting and finance roles will likely require lengthier write-ups than others, don't go into excessive detail. The job description is meant to be a concise and clear snapshot — not an exhaustive laundry list of every minute aspect of the job.

Redefine roles when appropriate. When an employee first vacates a position, your instinct might be to dig up and dust off an outdated description. Your best bet, however, is to take the time to reexamine the role and identify what the position will require now and in the near future. Review your staff's mix of strengths and weaknesses and look for opportunities to fill skills and knowledge shortfalls as you revise the job description. Moreover, carefully review your team's current and anticipated workloads. You may find that instead of making a new hire to take on the duties described in the revised job description, it makes more sense to spread these responsibilities across the department and address gaps or heavy workload periods by bringing in temporary accounting professionals.

Don't box yourself in. Finally, don't be too rigid. Keep in mind that what you prefer in the "perfect" candidate might not be what is absolutely required to do the job effectively. Advanced academic credentials, for example, can function as helpful screening devices, but their absence shouldn't be a deal-breaker that prevents you from hiring an otherwise ideal applicant.

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Accountemps is the world's first and largest temporary staffing service specializing in the placement of accounting, finance and bookkeeping professionals. The company has more than 350 offices throughout North America, Europe and the Asia-Pacific region, and offers online job search services at www.accountemps.com.

QuickBooks[®] connects to budgeting/forecasting software with new product from Centage.

Natick, Mass. Small and mid-market businesses using QuickBooks financial software for accounting now have easy connectivity to Budget Maestro, a leading budgeting and forecasting solution. Centage, an Intuit Developer Network Member, has introduced Link Maestro. for QuickBooks, a data integration tool that provides fast and easy transfer of critical financial information from QuickBooks Pro, Premier, and Enterprise Products, 2005 to 2007 editions, into its Budget Maestro solution. The automatic exchange of financial information streamlines data analysis, improves accuracy by eliminating manual data transfer and speeds the monthly analysis of key metrics like budget to actual results. Budget Maestro supports the full business management cycle of budget development, comparing actual results to plan, re-forecasting, contingency and what-if scenario planning, as well as virtually unlimited financial and management report generation. www.centage.com

Learning That Matters

Rapid change, increased workloads, and training budget reductions ... we know our members need targeted, just-in-time learning that matters. IMA's Professional Development offerings focus on meaningful information, active and distributed learning methods delivered in multiple ways to suit your needs. Our offerings are about a whole lot more than content delivery ... they're about helping you ensure your investment in learning constantly improves your on-job performance.

Find out more about how to boost your career using IMA's customized [CMA Learning System](#) exam prep and continuing education program.

Explore our anytime, anywhere [CPE Self-study](#) courses available through IMA's Professional Education Center.

IMA Membership Benefits

Among IMA[®]'s array of member benefits, IMA U.S. members and their organizations can take advantage of special discounts on a variety of business products and services from leading brands. For more information, please visit the **Member Program & Benefits** section of IMA's website at http://www.imanet.org/membership_benefits_discounts.asp. (Discounts are available through this web page.)

STUDENT MEMBERSHIPS

Are you a student? Would you like to meet individuals who can help with your job search after graduation? Do you want to meet experienced professionals in the field of Accounting? Then join the IMA. The IMA is an organization which promotes the professionalism within the Accounting field. Here you can meet professionals who are actually practicing what you are learning. A student membership costs \$37 per year.

As an added bonus, if you join the IMA, the North County Chapter will host the first technical meeting you attend and if you join the Chapter Board, we'll host two technical meetings at no charge to you.

Contact Sandy Merein at smerein@kforce.com for membership information.

New Statement on Management Accounting Explores Ethical Conduct

In the business reality of the 21st Century, where knowledge management and intangible assets are key sources of competitive advantage, the individual behavior of employees – from top management to front-line workers—can make or break an organization's reputation. To further the study of the issue of ethical business conduct, IMA[®] is pleased to release its latest Statement on Management Accounting (SMA): *Values and Ethics: From Inception to Practice*.

The new SMA can be downloaded free of charge at IMA's website at www.imanet.org/smas.