

SPECIAL POINTS OF
INTEREST:

- Testimonials
about the
February
Speaker
- March Luncheon
with PCACPA!
- February
Anniversaries!

INSIDE THIS
ISSUE:

Presidents Message	2
About Dr. Dale Feinauer	2
PCACPA Luncheon	3
February Anniversaries	3
IMA Conference & Expo	4
Community Service	4
2009 Schedule of Meetings	5
February Meeting Directions	5
2008-2009 Board of Directors	5

February 17, 2008 Dinner Meeting



Strategic Planning

Dr. Dale Feinauer

The topic for the presentation will be Implementing Strategic Planning into Your Organization. Strategic planning is vital to any organization, big or small. Determine how to structure your strategic planning activities to assure that your plans are both truly strategic and that they become a reality. Learn the importance of organizational culture and its impact to the long-term success of your organization. Learn the importance of identifying your organization's core competencies and how to leverage these in the planning process.

"He has such a way of captivating the audience and clearly stating his point."

- Stefanie Betley - former
UW-Oshkosh Student

About Dr. Dale Feinauer

Dale Feinauer received his Bachelors of Science (Spring 1979), Masters of Labor and Human Resources (Spring 1982), and Ph.D. in Labor and Human Resources (Spring 1983), from The Ohio State University. He has been a Professor at The University of Wisconsin-Oshkosh since 1983 teaching graduate and undergraduate courses in both human resources and management.

(Continued on Page 2)

Meeting Agenda

Meeting Location: Spiedini's Italian Restaurant, Plover

Board Meeting: 5:00-5:30 pm

Social Time: 5:30—6:00 pm

Dinner: 6:00—6:30 pm

President Remarks: 6:30—6:40 pm

Presentation: 6:40—7:30 pm

Dinner will be served buffet style. Italian Buffet: Sicilian chicken breast, Italian meatballs, Italian sausage, Pizza, Pasta, Vegetable, Salad, Bread, Coffee, and Ice Cream Sundaes for dessert.

Investment: \$22 IMA member & Guests, \$15 Professionals between opportunities, \$11 Students

Please make your dinner reservations by noon on Friday, February 13th.

Online registration at: www.heartofwi.imanet.org/dinner_reservations.htm



President's Message

Greetings!

We are now in the second half of the 2008-2009 chapter year. Although I was unable to attend the January meeting I hope that you had a chance to take advantage of some great CPE.

Next year's board elections are coming up so if you are interested in becoming part of the planning process please take advantage of this opportunity. The success of our chapter serving its members is attributable to our great board members and we welcome anybody who is interested.

We also have tentatively lined up a luncheon with the Portage County Area CPA's in March. This is a new venture for our chapter and we hope that you will find great value in this opportunity.

As always, feel free to let me know how we are doing. I look forward to seeing you.

Best regards,

Kimberly J. Buehler, CMA, CFM, CPA

President, 2008-2009

"I saw Professor Feinauer speak at a local IASA conference in 2007. He is one of those speakers you remember years later. He is also a very knowledgeable person with both academic and business experience."

- Cinda Mijal,
Sentry Insurance

"He can take any topic and make it interesting."

- Lindsey Somers,
Sentry Insurance

About Dr. Dale Feinauer (continued)

He is engaged in consulting for over 150 organization in the areas of: employee empowerment, team building, reengineering, compensation, training, planning, organization culture, managing organizational change, board/CEO relations, board roles in the management of not-for-profit organizations, recruitment, performance appraisal and human resource planning.

Dale participates in his community by providing volunteer services to over 100 organization including serving on the Board of Directors of Evergreen Manor Retirement Community and formerly served as President of the Omro Schools Board of Education, the University of Wisconsin Oshkosh Faculty Senate and the Winnebago County Association for Retarded Citizens.

A note from our Student Leadership Award Recipient...

Many thanks to the Heart of Wisconsin IMA for my scholarship. It is helping me meet my schooling goals. I am glad to be a part of this great organization.

-Mary G. Pierce

Portage County Area Certified Public Accountants (PCACPA) & Heart of Wisconsin IMA Co-Sponsored CPE Event

Join us for a One Hour Luncheon CPE Opportunity in Stevens Point. Have a delicious lunch, earn CPE, and network with another professional accounting organization from Portage County. The PCACPA's primary focus is networking for local CPAs and future CPAs. They offer a monthly luncheon (third Wednesday of every month) in Stevens Point.

Luncheon/CPE Event

Earn 1 hour of CPE

Date: Wednesday, March 11th

Time: Lunch 12:00 (noon) to 12:20

Presentation 12:20 - 1:10

Investment: \$6 for PCACPA, IMA members, and guests

Topic: TBD

Location: TBD, Stevens Point

More information will be available at the February dinner meeting and in the March newsletter. For questions please contact Lisa Shopinski (715.346.8293 or Lisa.Shopinski@Sentry.com) or Lindsey Somers (715.346.7826 or Lindsey.Somers@Sentry.com).

February Anniversaries

10 years

Patti Wadzinski

Debra Yach

5 years

Geoffrey Mburu

Congratulations to Norman Kane and Kristi Miller for obtaining their CMA certifications in January!



Take your career to a higher level. Become a leader in your organization.

Today's accounting and finance professionals can achieve and become tomorrow's business leaders! Join the Institute of Management Accountants (IMA) at our 90th Annual Conference & Exposition and take your career to new heights.

This galvanizing annual event features three days of exciting and informative sessions delivered by some of the most renowned thought leaders in accounting and finance, including:

- **Marianne Jennings**, Professor of Legal and Ethical Studies, Arizona State University
- **Kurt Kuehn**, Chief Financial Officer, UPS
- **Richard Lamm**, Three-term Governor, State of Colorado; and Co-director, Institute of Public Policy Studies, University of Denver
- **David Walker**, President and CEO, Peter G. Peterson Foundation; and former U.S. Comptroller General

With a conference program of nearly 40 sessions to choose from, you'll learn about the profession's most timely issues, including costing methodologies, ERM (Enterprise Risk Management), performance management, CMA certification, plus helpful on-the-job tips and tools. You can earn more than 20 NASBA approved CPE credits while gaining practical knowledge and skills you can use right away.

Find more information online at www.imanet.org

IMA Community Service

Holiday Basket Project A Success!

Our chapter sponsored a family of three, a mother & 2 boys (4yrs & 2yrs), from Marathon County this holiday season. Thanks to our members, we were able to collect \$240 to help make this family's holiday season a little brighter.

Here are some of the items we were able to provide this family:

- Camouflage pajamas for each child; 2 games & a blanket for the 2 year old
- Gingerbread house kit and duck pond game
- \$75 grocery gift card
- Tape & wrapping paper supplies

The following items were donated:

- Lotion/Soap, candle & holder, Santa figurine, Christmas socks, snowman towel set—for mother
- Super hero cars, stencils, Mrs. Spider movie with plush toy, teddy bears for both children

Special thanks to Joel Schult and Lisa Shopinski for organizing the fund raiser and getting the gifts to the family!



**2008-2009
Heart of Wisconsin
Schedule
of Meetings**

February 17, 2009

Strategic Planning
Spiedini's, Plover

March 24, 2009

UWSP SGA/Centers Budgeting
SentryWorld, Stevens Point

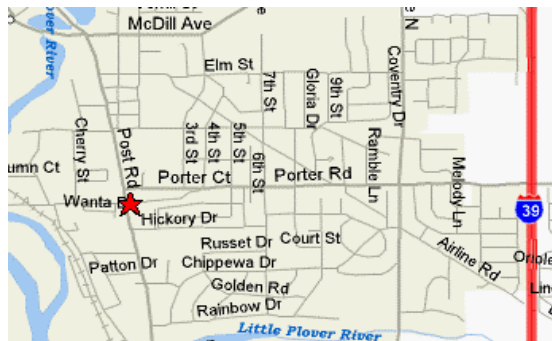
April 21, 2009

Wisconsin Woodchucks
Gulliver's Landing, Wausau

May 19, 2009

Your Personal Financial To-Do-List
Tony Roma's, Mosinee

Directions—Spiedini's Italian Restaurant



**Spiedini's Italian Restaurant
1010 Post Road, Plover**

From Wausau:

Head South on I-39 to Cty. Hwy HH—Exit 156. From the exit ramp, turn left onto HH/McDill Ave. Go approx. 2 miles and turn left on Bus. Hwy. 51/Post Road.

Spiedini's is on the left-hand side, approx. .7 miles from the intersection of McDill Ave. and Post Road.

2008-2009 Board of Directors

ADMINISTRATOR & FINANCE

PRESIDENT-**Kimberly Buehler**

ADMIN TEAM LEADER-**Jennifer Poggemann**

SECRETARY-**Arienne Livermore**

TREASURER-**John Vann**

DIR. OF MEETINGS-**Trisha Steines**

COMMUNICATIONS & COMMUNITY RELATIONS

TEAM LEADER-**Lindsey Somers**

CO-DIR. NEWSLETTER-**Jamie Roelke, Open**

CO-DIR. ROSTER / BOOKLET

-**Carrie Dreger, Jennifer Cejka**

WEBMASTER-**Eric Ledvina**

PUBLIC RELATIONS-**Bob Smith***

COMMUNITY SERVICE-**Joel Schult**

DIR. OF STUDENT ACTIVITIES-**Mary Pierce***

MEMBERSHIP DEVELOPMENT

TEAM LEADER-**Kristi Miller**

DIR. OF MEMBER ACQUISITION-**Brian Dewitt**

DIR. OF RETENTION & PARTICIPATION-**Open**

DIR. OF CORP. AND ACADEMIC DEV. -**Open**

CO- DIR. OF MEMBER ATTENDANCE -

-**Cody Giese, Evan Schreiner**

DIR. OF EMPLOYMENT - **Open**

Contact info for our board members can be found in the roster booklet, or by going to <http://heartofwi.imanet.org>

*UWSP student

Please contact Becky Reimer at becky.reimer@sentry.com or 715.346.7782 if you are interested in fill one of the open positions.

STRAIGHT FROM THE HEART