



# Credit and Financial Development Division NEWSLETTER

The Official Publication of the NACM Credit and Financial Development Division

September/October 2011

## Letter from...

**Sheila Roames, CCE**  
Vice Chairman, Education and  
Programs and Chairman-Elect



Hello to my CFDD Family!

Can you believe that we have reached the beginning of the last quarter of 2011? Where oh where has the time gone? It feels as though we were all just together in Minneapolis yesterday!

I am extremely honored to serve CFDD as Vice Chairman, Education Programs and Chairman-Elect. It's a great privilege, honor and responsibility to serve our CFDD organization. I believe that CFDD enhances each of us not only as professionals, but it also brings remarkable value to us as individuals.

I truly enjoyed seeing all of you in Cincinnati at the 2011 National Conference. I so look forward to this time with my "CFDD Family." To quote one of our past national chairman, "It is like attending a family reunion every year, with the bonus of credit education AND professional development included."

This conference is definitely what CFDD stands for. This was a special time for education, professional development and, of course, fantastic networking. CFDD members always have me in awe of their dedication and loyalty to our organization, to credit education and to professional development. I know that each of us "belong" because we each have the individual and collective desire for credit education, professional development, success, excellence and achievement. This, my friends, ties 100% into Chairman Bartlett's theme for this year—**CFDD: Planting the Seeds of Success. This year, the seeds that were planted were incredible, and I applaud each and every CFDD member who helped us raise \$13,000 for our National Scholarship fund through our Chapter donations, our Silent Auction and our famous Dessert Auction.** We sincerely appreciate your generosity and support of CFDD.

Chairman Bartlett, Vice Chairman Kendrick and I also had the wonderful opportunity of attending the 2011 NACM-CFDD Pacific Northwest Credit Conference in Seattle, Washington in late September. Thank you to the CFDD Seattle Chapter, the Rainy Days & Credit Ways Team and NACM BCS for a wonderful conference. The educational sessions were excellent, the food was great, and we were in a wonderful conference facility. It was exciting to see so many familiar faces. Thank you to everyone for making us feel at home and for the perfect weather!

The education and professional development of today's credit and finance professional have always been the primary focuses of CFDD. I encourage all of the CFDD membership to take full advantage of the educational and professional development opportunities that are available to each of us whether at the local or national level.

I strongly encourage you to make a note to attend next year's CFDD National Conference. We are excited to announce a tentative location for 2012: Seattle. Once budgets are approved, we can proceed with selecting the exact dates and other pertinent information.

Until then, please do not hesitate to give me a call or send me an email, as your national officers are here for YOU. Please email me at [Sheila.Roames@ergon.com](mailto:Sheila.Roames@ergon.com).

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# CFDD National Conference Sows Seeds of Credit Success

Growth-minded credit professionals gathered in Cincinnati in early October for the 2011 CFDD National Conference. The event was an overwhelming success that offered a great deal of networking opportunities and fund-raising events, along with a diverse program of educational sessions led by industry experts.

“We’ve chosen to attend this conference because professional development is a priority to all of us; we want to continue to build and expand our professional network, all with the goal of bringing, and adding, value to our companies,” said CFDD National Chairman Wendy Bartlett, CCE in her opening remarks on October 6. “In today’s tight economic environment, it’s more important than ever that CFDD, both at the local and national levels, provides each of you with valuable tools to help you create profit through credit.”

The conference’s educational sessions delivered on Bartlett’s pledge, providing attendees with best practices for a wide selection of credit necessities, even those that some credit professionals might regularly overlook. Professional counselor and frequent NACM presenter Susan Fee, M.Ed. opened the conference with a two-part session on creating positive first impressions, in order to properly set the stage for the future of a business relationship, and dealing with difficult customers, as all credit professionals must do almost by definition.

Other sessions included Wanda Borges, Esq.’s “Belts and Suspenders of the Credit Department: Before, During and After a Chapter 11 Proceeding,” which was dense with bankruptcy tips for commercial creditors; Tom Shimko, CCE’s “The Three-Dimensional Credit Manager,” which focused on maximizing one’s overall job performance; and Connie Thomas, CCE, MBA’s “Developing Your Own Scoring Model.”

In addition to these valuable sessions, an open forum titled “Leaders Sharing Expertise” formed the centerpiece of the conference’s second day, giving attendees a chance to benefit from an elite panel of experts and their estimable depth of knowledge. Moderated by NACM Past

National Chairman Phyllis Truitt, CCE, and featuring panelists Barbara Klosterman, CCE, Ed Bell, PhD, CBA, CICP and Donna Watson, CCE, the forum addressed a vast collection of attendee-driven topics and questions, touching on everything from credit cards and bankruptcy preferences to leadership skills and credit ethics.

In the spirit of CFDD’s commitment to education and professional growth through networking and relationship building, this year’s conference also had no shortage of exciting chances for credit professionals to meet with others and share their expertise. On the first night, attendees took part in a networking social that was organized around this year’s silent auction. Credit professionals mingled after the opening day’s program, meeting up with old friends and making new ones, all while bidding on items and raising more than \$3,500 for the CFDD National Scholarship Fund, which helps credit professionals get the education they need.

On the following night, a Motown-themed dinner party served as the conference’s last hurrah, and attendees took further advantage of the networking opportunities while letting their hair down after a day of intensive education. The dinner party also hosted a dessert auction: people at each dining table pitched in money, and the highest bidding table got first choice from a table filled with rich dessert options, while the second highest bidder got second choice, and so on. Attendees and their tablemates pitched in to get the dessert of their choosing, and ultimately contributed an additional \$2,500 to the CFDD National Scholarship Fund in the process.

Overall the event was a hit, and CFDD thanks its attendees, presenters and sponsors for helping the association continue to sow the seeds of credit success.



# The Inside Scoop: CFDD Chapter Presidents and Vice Presidents Meet with the CFDD National Board

Chairman Wendy Bartlett, CCE welcomed all to the annual meeting of the CFDD Chapter Presidents and Vice Presidents during the 2011 CFDD National Conference in Cincinnati. Wendy asked Lynn Kendrick, CBA, Vice Chairman, Member Services and Publicity, to kick off the meeting by discussing the 2011-2012 CFDD National membership campaign:

Lynn told the group that this membership campaign would begin at the Cincinnati conference. She also shared the history and origin of the campaign's "86 in 86" slogan.

Lynn noted that at NACM's 13th annual convention held in Washington, DC in June 1925, "under the energetic leadership of Miss Florence E. Banks of the Los Angeles Soap Company, a breakfast of women credit managers in attendance was held." Attending that 1925 breakfast were about 40 female credit managers who had a general discussion about methods to improve the technique of credit granting in the many different lines of business represented. It was believed that this type of meeting would become a permanent feature of NACM's annual convention. And the rest, as they say, is history! The gathering of credit women became the Credit and Financial Development Division, which is still going strong today.

Lynn explained that as CFDD celebrates its 86th anniversary, the CFDD National Board of Directors thought that it would be remarkable to salute the organization's history by growing by 86 new members! She encouraged all in attendance to get busy meeting our "86 in 86" goal.

Lynn outlined how everyone benefits from participating in this campaign. CFDD members, for example, will benefit by successfully recruiting new members. Each CFDD member who recruits a new member will be entered into a drawing for each new member recruited; the more members one recruits, the better the chances are for that person to win a complimentary registration to next year's 2012 CFDD National Conference, which is tentatively scheduled for Seattle. This complimentary registration is non-transferable (use it or lose it). And to add to the fun, each CFDD member who successfully recruits five or more new CFDD members will receive a \$50 gift card.

Lynn reported that in addition to growing membership, there are also benefits for the chapters. Each time a chapter receives and reports a new member, the chapter's name will be placed into a grand prize drawing to be held at the conclusion of the campaign. The winning chapter will receive two free NACM teleconference registrations with the topics to be chosen by the chapter. The teleconferences will be in digital replay format, allowing the chapter to take advantage of them at any time. Digital replays of NACM's teleconferences are a great tool to use as a topic for a monthly meeting.

Lynn added that Direct Members are encouraged to join the campaign. Every time a Direct Member recruits a new member, they will be entered into the drawing for both categories outlined above.

Providing the chapter presidents and vice presidents with some tips, Lynn recommended that the chapters take the lead in contacting their local NACM Affiliate president to learn whether there are any membership campaigns underway at the affiliate that CFDD could help with. Perhaps a special introductory NACM membership rate will be offered, which could be helpful in CFDD's membership recruitment efforts as well. It's always important to figure out whether there are any NACM trial membership offers available, which allow new members to get involved before purchasing a membership at the regular annual rate.

Lynn also underscored how important it is to offer incentives at the chapter level. She encouraged chapters to reward members who recruit a new member with a gift card for each new recruit who joins. One idea for chapters to consider would be entering members into a grand prize drawing each time they recruit a new member; the more members they recruit, the better the chance they have of winning. At the end of the campaign Lynn encouraged the chapter to draw one name to win a CFDD membership for one year.

## Welcoming New Members

In a related vein, Lynn encouraged chapters to ensure that each new CFDD member receives a membership book that includes pertinent information such as a member roster, a listing of the chapter's officers and board of directors, and a summary of the benefits of CFDD membership. As Lynn noted, CFDD's scholarship fund is a huge benefit of membership too; thus, it is key that new members understand how the national CFDD scholarship program works. Don't forget to provide each new member with a membership pin.

Lynn stressed that it is critical to make new members feel welcome and valued. She encouraged the chapters to list new members in their newsletters and on their websites. Lynn recommended that chapters organize a "Welcome New Members Committee" that would be responsible for phoning new members and extending personal invitations to them to attend meetings. At each meeting Lynn encouraged chapters to introduce new members to make them feel welcomed and part of the group. New members must understand how important they are to each chapter. Lynn encouraged chapters to get new members involved as soon as possible—start by assigning them to a committee. In no time, new members will want to take on more leadership responsibilities by chairing committees. Lynn explained that CFDD grows leaders, stressing that new members are CFDD's future board leaders and officers.

## Tools to Get You Started

Lynn reminded all present that on the CFDD website, [CFDD.org](http://CFDD.org), recruitment tools have been created. To access these tools, click on

the “Members Only Area” and log in. From there, click on “Leadership Guide” and then “Officers Training Manual.” You will find:

- Membership Drive Suggestions
- Sample Letters
- Sample New Member Letter
- Sample Flyer/Brochure

Lynn concluded the discussion by wishing all, “Happy Recruiting!” Chairman Bartlett thanked Lynn and her entire committee for their efforts.

### **Plan Ahead: Support the 2012 Conference**

Wendy encouraged each CFDD Chapter to consider buying a 2012 conference sponsorship. If a chapter already funds the cost of sending their chairman to the National Conference, Wendy suggested that the chapter consider doing so as a conference sponsor. A sponsorship will bring publicity to Chapters, covers the cost of one registration and includes the additional support of the conference. If a conference sponsorship is not within reach, Wendy encouraged every chapter to consider funding the cost of the registration fee for presidents, noting that it is a great way to reward and honor their top leader. Eric Lerdahl shared the Kansas City Chapter’s strategy to help its members attend the National Conference: each member who attends at least four chapter meetings a year receives \$200 toward the cost of their conference registration. Wendy encouraged chapters to think of similar creative ways to support the CFDD National Conference.

The discussion next focused on the importance of training chapter officers. Wendy reminded everyone that there is a wealth of information posted in the “Members Only Area” of the CFDD website. She encouraged the chapters to review the information in the CFDD Leadership Guide, which provides materials specifically written for chapter presidents and is designed to help new presidents understand their role and responsibilities. All of the forms used by the chapters are also contained within the Leadership Guide. Wendy reminded all chapters to continue to report their leadership changes to Carol Fowle, CCE, CFDD’s membership coordinator. Carol can be reached by email at [cfdd@nacm.org](mailto:cfdd@nacm.org).

Wendy informed chapter leadership that a package of raffle tickets, offering a chance to win a 2012 Credit Congress registration, has been sent to each chapter; raffle tickets are \$10 each. Sheila Roames, CCE, Vice Chairman, Education & Programs and Chairman-Elect, reminded everyone that the cost of a Credit Congress registration is around \$800 and that the raffle is a great opportunity to win a registration. Sheila encouraged chapter leaders in attendance to return to their chapters and encourage support for the raffle, whose proceeds will go to the scholarship fund. Ideas to stir interest in the raffle included offering chapter incentives. For example, for every ticket purchased, a chapter can buy the purchaser an additional ticket, doubling their chance to win. The raffle ends on February 10, 2012, and the drawing will be held soon afterward.

### **The Care and Maintenance of Leaders**

The discussion turned to the problem of growing chapter leadership. Wendy urged all those present to grow leadership. Wendy said that

she frequently hears how chapters struggle to recruit new board members, opting to recycle those who have already served. Discussion returned to the importance of growing membership, welcoming new ideas and encouraging new members to get involved. Coaching new members to assume leadership positions is a shared responsibility of all CFDD leaders; it is critical to serve as a new member’s coach, encouraging them to expand their skills by assuming more leadership responsibilities.

The Portland Chapter described how they have retooled their membership chairman’s responsibilities by dividing them into two areas: administrative and hospitality. This move encourages those comfortable with administration to have a clear role and permits those with networking skills to focus on their strength in welcoming new members, greeting members, etc. The Dallas/Fort Worth Chapter shared that its past leaders have gotten together to work to identify chapter members with leadership potential who may be holding back. This group is committed to drawing out hidden leadership potential in new members, with the goal of creating a succession plan for board leadership. As part of this program, former leaders will personally meet with new members in order to identify their interests and strengths.

Wendy offered all attendees a challenge because she believes that within each chapter there are members with great leadership skills attending meetings. Wendy challenged those in attendance to identify a member who has not been very active but within whom potential is observed. She challenged participants to invite those folks to dinner and to begin building a relationship that will lead to developing a future leader. Wendy’s challenge is to develop leaders through relationship building. Send her the name of the member invited out to dinner along with the topic of the conversation and the receipt, and she will reimburse the cost of the dinner. Wendy stressed that people need to be encouraged; people need to know that you value them enough to invite them in.

Sheila suggested that a perfect way to get members involved is to invite them to lead a discussion about what they do. Members enjoy hearing about how others manage the credit function, solve problems and support their companies. It is important to invite local credit executives to serve as guest speakers and to share success stories, techniques and ideas. Sharing credit expertise is paramount to success.

Pat Adams of the Los Angeles Chapter suggested developing a partnership between board members and new members, pointing to that group’s successful “Big Brother/Big Sister Program.” Those new to credit will find the partnership concept helpful, and it may turn into a membership recruitment tool. All agreed that they couldn’t think of a better way to implement a mentoring program: assign a mentor to every new member.

### **Professional Development and Membership Initiatives**

Marlene Groh, CCE, Immediate Past Chairman, brought the group up-to-date on the development of a CFDD professional development program. Recognizing that the credit education market is heavily saturated, the CFDD National Board has decided to distinctively refine its focus by developing a series of professional development modules. It is important for CFDD members to hone leadership and general busi-

ness skills. CFDD is determined to create something that cannot be purchased elsewhere as a means to encourage membership engagement and growth.

In the time remaining, Wendy asked the attendees to discuss what is currently working to grow membership.

Mary Moore, CBA volunteered that her chapter has a strong relationship with their NACM Affiliate. The affiliate's membership representative is offering all new NACM members in Omaha a complimentary one-year CFDD membership.

Jacci Barrows, CCE, CICP reminded everyone that as part of their jobs, potential members may be those requesting credit references. She suggested that all chapter members begin to contact those who request a credit reference to discuss the benefits of CFDD membership.

Sheila encouraged those who attend industry credit group meetings to also discuss the benefits of CFDD membership. It was also suggested that CFDD members attend affiliate sessions offered about the NACM Professional Designation Program.

Reese Dyer, CCE added that NACM Affiliates are the greatest recruiting tool available. Reese encouraged CFDD Chapters to leverage their affiliate's communication structure to communicate with members. If CFDD Chapters are met with opposition, Reese counseled that it is best to identify the barriers and learn how to overcome them. Work with your affiliate to develop relationships with new members.

Dawn Wallace Cook, CCE suggested that joint CFDD-NACM Affiliate meetings be held, offering topics that affiliates are interested in producing and would also be of interest to CFDD members. Ask CFDD members to lead meetings; these are interesting, informative and of wide interest to all members.

Melissa Harrison-Ballou, CCE, CICP suggested that chapters develop a relationship with bankruptcy court employees and attend a bankruptcy trial.

It was suggested that each chapter develop a member profile, detailing lines of business (distributors, wholesalers, etc). This helps the chapter plan what meeting topics to choose based on the types of businesses their members work for. The Kansas City Chapter is working to develop a quick profile sheet; Eric will share it via Lynn when the project is completed.

With so many ideas offered, it's easy to see that there's a bright future ahead for CFDD!

## Celebrating Membership Milestones

Congratulations to all milestone honorees whose steadfast participation and significant contributions have enriched CFDD on the local and national levels. Among them is the remarkable Eleanor Frei of the CFDD Portland Chapter, who is celebrating her 50th year as a CFDD member. Those who were able to attend either the CFDD National Conference or the Pacific Northwest Credit Conference were presented with certificates recognizing their years of membership.

### *Honored for 15 years of membership:*

Richard Adams, CCE, CAE	Phoenix
David Erickson, CCE	Portland
Gregory Garner	San Diego
Diana Halstead	Tacoma
Shelley Hart, CBF	Wichita
Terry Hollaway, CBA	Denver
Roberto Rodriguez	San Diego
Nancy Slaughter, CCE	Phoenix
Roger Stricklett	Phoenix
Micki Wilson	Wichita
Ellen Wodiuk, CBA	Phoenix

### *Honored for 25 years of membership:*

Nadine Brandsma, CBF	Portland
Alice Campbell, CBF, CICP	Portland
LeeAnn Garrington, CCE	Dallas/Fort Worth

### *Honored for 50 years of membership:*

Eleanor Frei	Portland
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## We extend a sincere Thank You to the following Sponsors of the CFDD National Conference:

CFDD Dallas/Fort Worth

CFDD Dayton

CFDD Kansas City

CFDD Los Angeles

CFDD Portland

United TranzActions

## Seasoned Credit Professional Reflects on 2011 National Conference

Our annual CFDD Conference held in Hebron, KY on October 6th, 7th and 8th, 2011 was very gratifying. It not only renewed old friendships but allowed for new ones as well.

Our speakers were knowledgeable and the sessions enjoyable. I brought back some new ideas and thoughts to share with my manager. The overall energy of the group was inspiring.

As a “seasoned” credit professional, I appreciated the conversations of others dealing with the same struggles in their jobs as I do daily. The most crucial topics were collections in these difficult economic times. Others are seeing customers once classified as prompt with payment now slowing to the absolute maximum we will allow. I feel one of the best things offered at our conferences is the networking. It is invaluable in our profession.

Phyllis Truitt, CCE was the Moderator for our Open Forum on Friday Morning. This gave the attendees an open platform for a myriad of possibilities of topics to ask the panel. In the afternoon session Wanda Borges, Esq. discussed the many aspects of Bankruptcy. Phyllis summed up the value of the conference by stating “these two sessions were worth the price of admission.”

This is my fourth CFDD Credit Conference and I feel one of the best. Our hotel accommodations were great and their staff very efficient. Our lives are so busy with family and jobs and the many responsibilities each of us carry. I am so glad I took the time to attend the conference.

*Joyce Davis, CBA is the credit manager for Lanham Hardwood Flooring of Louisville, Kentucky.*

## First-Time Attendee Foresees a Great Future Thanks to National Conference

I am the credit manager at Brake Supply Company in Evansville, Indiana. I've been a member of the Evansville CFDD Chapter going on three years and currently serve as vice president and head of the education committee. I recently had the pleasure of attending my first CFDD National Conference in Cincinnati, on October 6-8, when our chapter president was unable to attend. The site of our meeting, the Cincinnati Airport Marriott, was great. The people were very friendly and seemed very happy to have everyone with CFDD there for our event.

I was really excited to see what the conference was all about since I had heard a lot of stories from people in the chapter who have attended in the past. I really felt that the sessions I attended were very informative and the speakers were very dedicated to adding value to the conference. The networking was invaluable; everyone was very friendly and seemed genuinely interested in me as a person. I also enjoyed the evening events. The Silent Auction and the Desert Auction were great fundraisers for the CFDD National Scholarship Fund, and the members gave generously. I also thought the Friday night Motown event was a lot of fun. Many people dressed up in Motown-style outfits and everyone seemed to have a really good time.

On several occasions I was asked about my future plans in CFDD. I appreciate that our area director, Jane Loehr, CCE, introduced me to many people at the conference and also offered to help me earn an NACM designation.

Having attended the 2011 CFDD National Conference, I feel that I will have a great future in CFDD. I have made some invaluable contacts who can assist me in my development. I will also be sharing my experience with fellow chapter members in the hopes that we can have several members present at the next conference.

*Jonathon Hickman is the credit manager for Brake Supply Company, Inc. of Evansville, Indiana.*

## Conference Does Not Disappoint First-Time Attendee

I attended my first CFDD National Conference in Cincinnati last week, and it did not disappoint. I was very proud to represent not only my local CFDD chapter (shout-out to Louisville!) but also my employer Southern Graphic Systems, Inc.

The speakers were great and the open forum was very interesting. It was helpful just to hear how others in the credit world deal with issues. I took away a couple of ideas that I have spoken with my Credit Manager about already.

The networking luncheon was at first intimidating, but I met individuals from across the country. We spoke about ideas on fun things to do to keep the morale up in these trying times—again, lots of good ideas. I also learned there is such a thing as chocolate overload!

The Motown dinner and dessert auction was fun, and the food was delicious. The ladies I sat with were very entertaining! Our table had the least amount of people and, thus, the least amount of money for the dessert auction—but two ladies were able to “hustle” some extra cash! The purpose of the dessert auction was to raise money for scholarships. A lot of companies are cutting back on expenses and these scholarships come in handy!

CFDD and NACM did a great job of putting the meeting together. I appreciate the time and effort put into the planning and execution. I look forward to attending my next conference.

*Lori Curry-Roller is a credit specialist at Southern Graphic Systems International, Inc. in Louisville, Kentucky.*



# CFDD Portland Honors Jackie Meyers and Kathleen Victoria

Please join CFDD Portland in honoring Jackie Meyers and Kathleen Victoria, who have been named as the recipients of the chapter's Distinguished Member Award and Outstanding New Member Award, respectively.

## Jackie Meyers

Jackie was born in Vancouver, Washington but raised in the Tillamook area. She graduated from Tillamook High School in 1969. Tillamook is known as the land of cheese, trees and ocean breezes. Jackie loved the cheese and the trees (her dad was a logger), but the cold ocean breezes were not her "favorite thing." While Jackie was working for Tillamook Hospital, she also had another job on the side as a bookkeeper for a doctor. That's where she was introduced to the world of accounts receivable.

Jackie later moved to the Portland area and worked for Good Samaritan Hospital as a cashier and a Medicare billing specialist. In 1972 Jackie moved back to Vancouver and started working for Puckett Aviation and Airport Inn as their bookkeeper. She married one of the owners and raised four children. She also learned how to fly airplanes and operate a restaurant. Jackie and her family eventually sold the airport, moved to Pekin Ferry Moorage in Ridgefield and learned how to run a boat moorage.

In 1980 her husband passed away and she began shooting pool to deal with the stress. This is where she met Bonnie Hansen. At that time Bonnie was the credit manager for Cadet Manufacturing of Vancouver; she and Jackie made a deal that Jackie would come to work for her and help her get caught up. However, if Bonnie didn't think Jackie was meeting expectations then she would leave within the first two weeks. Jackie was hired by the company in April 1985. Jackie jokes that she got her job over a pool game. Bonnie moved up to HR and Jackie was named the credit manager for Cadet.

Jackie has been a member of CFDD since 2005. She has served on the board for a many years, most recently as our chapter treasurer for the past four years. This is the first year since 2005 that she has not been on some committee or on the board. Jackie has always been a friend and a supporter of the Portland Chapter of CFDD. Over the years her donations, and those on behalf of Cadet, have supported the chapter's fundraising efforts for scholarships. She is always willing to help anyone and to serve the chapter with the best intentions at all times. Jackie is the first with a smile and a laugh, even at herself.

Jackie has seven grandchildren (and will share pictures) and a grand-dog (Cooper) that now lives with her. She is looking forward to retirement within the next five years and is hoping the housing market improves so her rental properties will help with that plan.

The CFDD Portland Chapter proudly recognizes Jackie's tremendous contributions during the past six years. She was nominated from within our chapter's membership and consistently epitomizes the best attributes that define a distinguished member. Congratulations to Jackie Meyers of Cadet Manufacturing for receiving the CFDD Portland Chapter's 2011 Distinguished Member Award!

## Kathleen Victoria

Kathleen Victoria is the corporate credit manager and SOX compliance coordinator for Kyocera Industrial Ceramics Corporation (KICC) in Vancouver. Prior to joining KICC, Kathleen worked for Clovis & Roche, Accounts Receivable Management, and Robert Half. Kathleen earned her bachelor's degree in accounting from the University of Washington's Milgard School of Business in 2006 and will be returning to school to obtain her master's in accounting from Washington State University.

Kathleen was a member of NACM Oregon from 1996-1998 and chair of the electrical wholesale industry trade group in 1998. In 2010 she renewed her membership with NACM and joined the CFDD Portland Chapter. Her experience and knowledge in the credit profession lent itself to a seamless transition with CFDD Portland Chapter members. She quickly became a familiar face to our membership by attending our monthly education meetings and asking how she could become more involved. As a result, Kathleen signed up to serve on four committees this year, including service as this year's publicity chair. This is definitely the way to jump-start one's involvement in CFDD!

The Outstanding New Member Award was created in 1990 to acknowledge and recognize an integral member of the CFDD Portland Chapter who shows tremendous potential within their first two years of membership. Given the award's emphasis on a newer member, its criteria primarily focuses on attendance at monthly meetings, participation and involvement in committees, and adding an exceptional benefit to our entire membership. Kathleen Victoria has clearly defined herself as an active and participative member of our CFDD family.

Congratulations to Kathleen Victoria of Kyocera Industrial Ceramics Corporation for receiving the CFDD Portland Chapter's 2011 Outstanding New Member Award!

*The preceding article is drawn from the award presentations for Jackie Meyers and Kathleen Victoria. The CFDD National Newsletter thanks CFDD Portland for providing this material.*



# Chapter News

## Kansas City

### Member News

CFDD Kansas City has member news to share!

Long-time member **Christine Marchewka CCE, CEW** has retired from her position as accounts receivable manager for McDowell, Rice, Smith, & Buchanan, a law firm based in Kansas City, Missouri and Overland Park, Kansas.

In April the chapter held its Past Presidents, Member Appreciation and Awards Meeting. Congratulations are extended to the following CFDD Kansas City members who were recognized at the event:

2011 Distinguished New Member **Marsha Niccoli**, Brown-Strauss Steel  
2011 Credit Professional of the Year **Cindy Wheeler**, CFM Distributors, Inc.  
2011 Presidential Citation **Shawn Renee Ismert, CBA**, Sioux Chief Manufacturing Co., Inc.

### Chapter Resources

The Kansas City Chapter is also pleased to introduce its newly redesigned website ([www.cfddkc.org](http://www.cfddkc.org)). The chapter thanks **Nancy Watson-Pistole, CCE** for helping to update its website.

In related news, the chapter has also added the NACM–CFDD Kansas City Chapter Group on LinkedIn. Go to the site’s “Groups Directory,” do a search on “NACM–CFDD Kansas City,” and join us! We look forward to hearing from you.

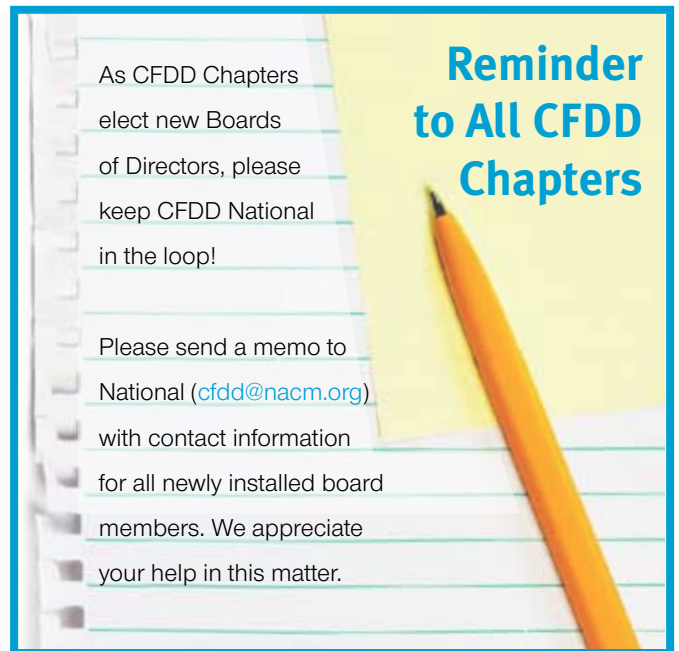
## Wichita

Current chapter president **Roger Nice, CCE, CICP** was named the 2011 Credit Executive of the Year at the eighth annual Credit Professionals’ Conference on September 15. Nice is the credit manager for Hustler Turf Equipment’s eastern U.S. and European customers.

## CFDD Chapters Give Generously, Once Again

Twenty CFDD Chapters have generously donated more than \$5,500 to the CFDD Scholarship Fund—a tangible act that supports the organization’s well-received efforts to invest in its members and the credit profession at large. The chapters were recognized at the Annual Business Meeting, which was held during the 2011 CFDD National Conference in Cincinnati. We thank these chapters for their generous contributions to the CFDD Scholarship Fund.

Albuquerque	\$250
Birmingham	\$350
Cincinnati	\$100
Dallas/Fort Worth	\$500
Denver	\$300
Evansville	\$100
Jasper	\$100
Kansas City	\$500
Louisville	\$250
Minneapolis/St. Paul	\$250
Omaha/Lincoln	\$500
Orlando	\$200
Phoenix	\$250
Portland	\$400
Raleigh/Durham	\$500
Salem/Albany	\$100
San Diego	\$270
Seattle	\$300
Tacoma	\$200
Toledo	\$300
Wichita	\$100



# Silent Auction is a Rousing Success

Now in its third year, the always-popular Silent Auction at the 2011 CFDD National Conference raised more than \$3,500 for the CFDD Scholarship Fund. Nearly 80 items were presented for bids, including four electronic book devices, a multitude of gift cards and a lovely selection of handcrafted jewelry. Thank you to everyone for their generous donations and equally generous bids!

## **Kindle**

*Donated By:* CFDD Past National Chairmen  
*Winning Bidder:* Lynn Kendrick, CBA

## **Kindle**

*Donated By:* CFDD Past National Chairmen  
*Winning Bidder:* Millie DeMariano

## **Nook Color: The Reader's Tablet**

*Donated By:* CFDD Phoenix Chapter  
*Winning Bidder:* Kelly Shock, CCE

## **Nook: The Reader's Tablet**

*Donated By:* CFDD Past National Chairmen  
*Winning Bidder:* Cindy Hayes

## **\$50 Barnes & Noble Gift Card**

*Donated By:* CFDD Omaha/Lincoln Chapter  
*Winning Bidder:* Barbara Leathers

## **\$50 Best Buy Gift Card**

*Donated By:* Dave Beckel, CCE  
*Winning Bidder:* Dawn Wallace Cook, CCE

## **\$50 Lowe's Gift Card**

*Donated By:* Fifth Third Bank  
*Winning Bidder:* Phyllis Truitt, CCE

## **\$50 Shell Gas Gift Card and Cedar BBQ Planks**

*Donated By:* Jane Ashley, CBA and Frank Hiltz, CBA  
*Winning Bidder:* Dawn Wallace Cook, CCE

## **\$50 Shell Gas Gift Card**

*Donated By:* Jane Ashley, CBA  
*Winning Bidder:* Barb Klosterman, CCE

## **\$50 Target Gift Card**

*Donated By:* Sheila Roames, CCE/Ergon  
*Winning Bidder:* Phyllis Truitt, CCE

## **\$50 Target Gift Card**

*Donated By:* Duane Schwartz, CCE  
*Winning Bidder:* Carol Fowle, CCE

## **\$50 Target Gift Card**

*Donated By:* Duane Schwartz, CCE  
*Winning Bidder:* Barb Condit, CCE

## **\$50 Target Gift Card**

*Donated By:* Kay Watson, CBA  
*Winning Bidder:* Barbara Herrera, CBA

## **\$50 Visa Gift Card**

*Donated By:* Barb Condit, CCE  
*Winning Bidder:* Pam Foreman, CCE

## **\$50 Visa Gift Card**

*Donated By:* Barb Condit, CCE  
*Winning Bidder:* Pam Foreman, CCE

## **\$50 Visa Gift Card**

*Donated By:* Sheila Roames, CCE/Ergon  
*Winning Bidder:* Phyllis Truitt, CCE

## **\$50 Visa Gift Card**

*Donated By:* Sheila Roames, CCE/Ergon  
*Winning Bidder:* Pam Foreman, CCE

## **\$50 Visa Gift Card**

*Donated By:* Bonnie Sudman, CBA  
*Winning Bidder:* Barb Klosterman, CCE

## **\$50 Walgreen's Gift Card**

*Donated By:* Debbie Morse  
*Winning Bidder:* Phyllis Truitt, CCE

## **\$30 Home Depot Gift Card**

*Donated By:* Reese Dyer, CCE and Bob Karau  
*Winning Bidder:* Steve Snow

## **\$30 Home Depot Gift Card**

*Donated By:* Pat Roberts and Betty Melby, CCE  
*Winning Bidder:* Dave Beckel, CCE

## **\$25 Archiver's Gift Card**

*Donated By:* Denise Boock, CICIP and Darlene Reinke, CCE  
*Winning Bidder:* Pamela Meyer, CBF

## **\$25 Archiver's Gift Card**

*Donated By:* Alison Seman, CCE and Annette Nii, CBA  
*Winning Bidder:* Mary Moore, CBA

## **\$25 Barnes & Noble Gift Card**

*Donated By:* Betty Konerza, CBA  
*Winning Bidder:* Dawn Wallace Cook, CCE

## **\$25 iTunes Gift Card**

*Donated By:* Toni Nuernberg, CAE  
*Winning Bidder:* Linda Williams

## **\$25 iTunes Gift Card**

*Donated By:* Toni Nuernberg, CAE  
*Winning Bidder:* Nancy Watson-Pistole, CCE, CICIP

## **\$25 Lowe's Gift Card**

*Donated By:* Fifth Third Bank  
*Winning Bidder:* Susie Secuskie, CBA

## **\$25 Lowe's Gift Card**

*Donated By:* Fifth Third Bank  
*Winning Bidder:* June Lay

**\$25 Target Gift Card**

Donated By: Toni Nuernberg, CAE  
Winning Bidder: Carol Fowle, CCE

**\$25 Target Gift Card**

Donated By: Toni Nuernberg, CAE  
Winning Bidder: Dave Beckel, CCE

**\$25 Visa Gift Card and Cedar BBQ Planks**

Donated By: Bonnie Sudman, CBA and Frank Hiltz, CBA  
Winning Bidder: Barb Klosterman, CCE

**\$25 Visa Gift Card, Cooler, Visor and Two Cozies**

Donated By: Bonnie Sudman, CBA and Anneliese Rodabauch  
Winning Bidder: Linda Williams

**\$25 Visa Gift Card**

Donated By: Sheila Roames, CCE/Ergon  
Winning Bidder: Ellen Wodiuk, CBA

**\$25 Visa Gift Card**

Donated By: Sheila Roames, CCE/Ergon  
Winning Bidder: Charlene Gothard

**\$25 Visa Gift Card**

Donated By: Sheila Roames, CCE/Ergon  
Winning Bidder: Carol Fowle, CCE

**\$25 Williams-Sonoma/Williams-Sonoma Home/Pottery Barn/  
PB Kids/PB Teens Gift Card**

Donated By: Marcia Kaczmarek, CCE, Barb Condit, CCE  
and Jo Rettke, CCE  
Winning Bidder: Dawn Wallace Cook, CCE

**\$25 Williams-Sonoma/Williams-Sonoma Home/Pottery Barn/  
PB Kids/PB Teens Gift Card**

Donated By: Cindy Vekas, CCE and Melva Becker, CCE  
Winning Bidder: Pamela Meyer, CBF

**\$25 Williams-Sonoma/Williams-Sonoma Home/Pottery Barn/  
PB Kids/PB Teens Gift Card**

Donated By: Pamela Meyer, CBF and Tina Hirdler, CBF  
Winning Bidder: Wendy Bartlett, CCE

**\$25 Williams-Sonoma/Williams-Sonoma Home/Pottery Barn/  
PB Kids/PB Teens Gift Card**

Donated By: James Sarkkinen, CBA and Roy Stout  
Winning Bidder: June Lay

**Mini Miche Bag with Five Shells**

Donated By: Mary Moore, CBA  
Winning Bidder: Jeff O'Banion, CCE, CICP

**Belle Hop Jewelry Roll, Keychain Tote and Travel Door Alarm**

Donated By: Robin Schauseil, CAE  
Winning Bidder: Kim Hardy, CBA, CICP

**White Ceramic Necklace**

Donated By: Susan Paul, HelmsBriscoe  
Winning Bidder: Charlene Gothard

**Luggage Scale and Convertible Keychain**

Donated By: Robin Schauseil, CAE  
Winning Bidder: Marlene Groh, CCE, CICP

**Handmade Nature-Motif Wall Hanging**

Donated By: Kathi Garten  
Winning Bidder: Robin Schauseil, CAE

**Gardening & Relaxation Gift Basket**

Donated By: Anonymous  
Winning Bidder: Jerrilynne Jankowski

**Talbots' Silver Hammered Circle Necklace & Earrings**

Donated By: Robin Schauseil, CAE  
Winning Bidder: Micki Wilson

**Talbots' Bead Necklace & Earrings**

Donated By: Robin Schauseil, CAE  
Winning Bidder: Dawn Wallace Cook, CCE

**Talbots' Silver Square-Design Necklace & Hoop Earrings**

Donated By: Robin Schauseil, CAE  
Winning Bidder: Carol Fowle, CCE

**Wilson's Belted Leather Tote**

Donated By: Carey Ryan, CBA  
Winning Bidder: Barb Condit, CCE

**Bon Appetit Gift Basket**

Donated By: Carol Johnson, CICP  
Winning Bidder: Jane Loehr, CCE

**Bon Appetit Gift Basket**

Donated By: Carol Johnson, CICP  
Winning Bidder: Jane Loehr, CCE

**Scarf and Necklace Set (a 72" eyelash yarn, black scarf with a black  
and gold yarn necklace and a multicolor yarn necklace)**

Donated By: Mike Meyer, CCE and Cindi Meyer  
Winning Bidder: Jane Ashley, CBA

**Scarf and Necklace Set (a 72" eyelash yarn brown scarf with a  
matching yarn necklace and a multicolor yard necklace)**

Donated By: Lynn Kendrick, CBA and Susie Secuskie, CBA  
Winning Bidder: Dawn Wallace Cook, CCE

**Two Fun Fur Scarves**

Donated By: Nancy Watson-Pistole, CCE, CICP  
Winning Bidder: Wendy Bartlett, CCE

**Animal Print/Black Glass Beaded Necklace/Earrings**

Donated By: Nancy Watson-Pistole, CCE, CICP  
Winning Bidder: Lynn Kendrick, CBA

**3 Carat Aquamarine in 14KT Gold Bezel Set Pendant with 14KT Gold  
Boxlink Chain**

Donated By: Arlene Pipkin, CCE  
Winning Bidder: Carol Fowle, CCE

**Embroidered Sweatshirt (Loon design)**

Donated By: Barb Condit, CCE  
Winning Bidder: Jenifer Dunseth

**Embroidered Sweatshirt (Wolf design)**

Donated By: Barb Condit, CCE  
Winning Bidder: Jenifer Dunseth

**Handmade Turquoise and Garnet Necklace, Bracelet and Earring Set**

*Donated By:* Cindy Hayes

*Winning Bidder:* Jacci Barrows, CCE, CICP

**Elizabeth Taylor Necklace, Pendant and Earring Set;  
White Diamonds Perfume**

*Donated By:* Barbara Herrera, CBA

*Winning Bidder:* Ed Bell, Ph.D., CBA, CICP

**New Mexico Chili Gift Basket**

*Donated By:* CFDD Albuquerque Chapter

*Winning Bidder:* Jerrilynne Jankowski

**Key Lime Dessert Kit**

*Donated By:* Jenifer Dunseth

*Winning Bidder:* Barbara Leathers

**Metal/Ceramic Nut Bowls**

*Donated By:* Jenifer Dunseth

*Winning Bidder:* Mike Brittain, CAE

**Generations Cookbook, Baby Blankets and Lip Gloss**

*Donated By:* Susan Steagall

*Winning Bidder:* Charlene Gothard

**Yankee Candle Basket**

*Donated By:* Susan Steagall

*Winning Bidder:* Ellen Wodiuk, CBA

**Jewelry Box and Blue Beaded Necklace**

*Donated By:* Connie Jarvis

*Winning Bidder:* Barbara Herrera, CBA

**Black and Silver Pendant and Bracelet**

*Donated By:* Connie Jarvis

*Winning Bidder:* Mike Brittain, CAE

**Gold and Silver Necklace, Bracelet and Earrings**

*Donated By:* Connie Jarvis

*Winning Bidder:* Marlene Groh, CCE, CICP

**Starbuck's Tote Gift Bag including Orange Blossoms Green Tea  
and Thermal Tumbler**

*Donated By:* Lynn Kendrick, CBA

*Winning Bidder:* Kim Claxton, CBA

**Golf Package (Two boxes of Titleist golf balls, water bottle,  
baseball cap and gym bag)**

*Donated By:* Kim Hardy, CBA, CICP

*Winning Bidder:* Nancy Scheneman, CBA

**Umbrella, Leather Padfolio, Black Fleece Scarf and Gloves**

*Donated By:* CFDD Louisville Chapter

*Winning Bidder:* Dawn Wallace Cook, CCE

**Cooler Package (3-gallon Sqwincher Brand Cooler,  
packages of Sqwincher concentrate and safety items)**

*Donated By:* Kim Hardy, CBA, CICP/Orr Safety

*Winning Bidder:* Dawn Wallace Cook, CCE

**Roller Computer Bag with CFDD Logo Items**

*Donated By:* Dawn Wallace Cook, CCE

*Winning Bidder:* Wendy Bartlett, CCE

**Premier Jewelry Woman's Crystal Cuff Watch**

*Donated By:* CFDD Wichita Chapter

*Winning Bidder:* Vivian Van Keuren

**NACM's Manual of Credit and Commercial Laws**

*Donated By:* CFDD Denver Chapter

*Winning Bidder:* Tonya Barr

**Natural Stone Jewelry Necklace and Earrings**

*Donated By:* Floy Warren-Feltmann

*Winning Bidder:* Nadine Whitehead, CCE

**CFDD USB Bracelet**

*Donated By:* CFDD Denver Chapter

*Winning Bidder:* Sheila Roames, CCE

**CFDD USB Bracelet**

*Donated By:* CFDD Denver Chapter

*Winning Bidder:* Barb Condit, CCE

**CFDD'S NATIONAL  
EDUCATIONAL PROGRAMS**

CFDD Chapters may now order CFDD's National Programs free of charge! Program topics include:

- Credit Policies and Procedures
- Ethics—It's a Matter of Choice
- Financial Statement Analysis and Credit Scoring
- Mediation—An Alternative to Dispute Resolution
- Selling Marginal Accounts—Are the Rewards Worth the Risk?

These programs can be conveniently downloaded from the CFDD Members Only Area of the CFDD National website. Please check out these timely resources!



# CFDD National Fundraiser



## 2012 NACM Credit Congress Registration

Gaylord Texan Resort & Convention Center

Grapevine, Texas

June 10–13, 2012

\$10/each

Tickets have been distributed to all chapters to sell locally  
to members of CFDD and NACM.

Please contact your Chapter President to purchase a ticket today!

Tickets on sale until February 10, 2012

Drawing to be held at NACM-National Headquarters

Winner will be notified immediately following the drawing and  
will be announced in the March issue of the CFDD-National Newsletter

All proceeds will support the CFDD National Scholarship Fund

Open to all members of CFDD and NACM

Opportunity for chapters to award a local scholarship!

# AWARDS & ACHIEVEMENTS

CHAPTER	MEMBER	COMPANY	AWARD/ACHIEVEMENTS
Dallas/Fort Worth	Dax Coopman	Chemical Lime Co., Lhoist NA	CBA Designation
Dallas/Fort Worth	Pamela Jones	Morrison Supply Co., Inc.	CBF Designation
Dallas/Fort Worth	Maggie Rossell	Chemical Lime Co., Lhoist NA	CBA Designation
Direct Member	Carolyn Lipinski	W.W. Grainger, Inc.	CCE Designation
Minneapolis/St. Paul	Melva Becker	Joseph T. Ryerson & Son, Inc.	CCE Designation
Minneapolis/St. Paul	Christina Hirdler	Ryerson, Inc.	CBF Designation
Minneapolis/St. Paul	Teresa Woods	E. A. Sween Company/Dixie Express	CBA Designation
Phoenix	Donald Kruggel	W.W. Grainger, Inc.	CCE Designation
Phoenix	Michael Nawrocki	W.W. Grainger, Inc.	CCE Designation
Phoenix	Ellen Silvas	Cytec Engineered Materials, Inc.	CBF Designation
Portland	Kathleen Victoria	Kyocera Industrial Ceramics	Scholarship for the Pacific Northwest Credit Conference
Portland	Jackie Maze	Cadet Manufacturing Co.	Scholarship for the Pacific Northwest Credit Conference
Portland	Jeffrey O'Banion, CCE, CICP	Northwest Natural Gas Co.	Scholarship for the Pacific Northwest Credit Conference
Portland	Dawn Fuller	Columbia River Knife & Tool	Scholarship for the Pacific Northwest Credit Conference
Portland	Rita Peters	Quimby Corporation	Scholarship for the Pacific Northwest Credit Conference
Portland	Lori Buckelew	Eagle Foundry Co.	Scholarship for the NACM Western Region Conference

## CFDD MISSION STATEMENT

The mission of the NACM Credit and Financial Development Division is to develop tomorrow's business leaders through core offerings.

## CFDD VISION STATEMENT

To be a leading provider of professional development opportunities through learning, coaching, networking and individual enrichment.

# CFDD Logo Items



Searching for that perfect gift that combines practicality, value and pride? Look no further than CFDD's extensive selection of logo items! From pens and mouse pads to portfolios and personal lunch bags, CFDD logo items can satisfy even the most discerning recipient. They also make great gifts for speakers and special guests. Don't delay! Browse the [CFDD logo item web pages](#), part of the online NACM Bookstore, and purchase merchandise that reflects your investment in the CFDD professional credit community!

## CFDD logo items currently available:



Portfolio (\$18)

Junior Padfolio (\$15)

Personal Lunch Bag (\$15)

Acrylic Desk Tray (\$10)

Cork Mouse Pad (\$10)

Stainless Steel Tumbler (\$10)

Brass Ball Point Pen (\$7)

Calculator (\$6)

Ball Point Pen (\$5)

Business Card Case (\$5)

Robotic Book Light (\$5)

Can Holder (\$2.50)

Luggage Grip (\$2.50)



## New items!

Business Card Album (\$15)

Super Mini Umbrella (\$15)

