

the Advantage

Spring 2019

CBIZ Women Helping Women Succeed in Business



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Client Spotlight: Terracon's Gayle Packer



Gayle Packer's career trajectory is anything but linear. She started in agriculture, and in January 2019 became the president and CEO of Terracon, an engineering

consulting firm in Kansas City with over 4,500 employees.

"I don't think I've ever been very good at planning what my career would look like," Packer says. "I've been able to articulate at a very early age what I wanted my career to be like but not what I wanted to be. I wanted to help people, make a difference in a positive way, be challenged and be where there were no questions about the ethics that were going on around me. As long as those things are being satisfied, I'm happy."

Gayle launched her career in Ohio, where she received her bachelor's and master's degrees from The Ohio State University. She worked in PR

and sales for an agricultural broadcast network before attending the University of Minnesota for law school. After law school, she moved to Kansas City where she worked for two larger law firms, and eventually took a legal contract position at Terracon.

After two years at Terracon, Gayle began working closely with then CEO David Gaboury to get involved in the company's strategic business activities. Gayle credits David's influence in having a significant impact on where she is today, but she says there were also countless learning opportunities along the way.

"Oftentimes people get stuck in this idea — especially women — that a person has to have a single, formal mentor. You can learn a lot from the people around you," she says. "It can be as simple as 'Hey, can I buy you a coffee?'"

Another piece of advice she would give to women would be to commit to their

decisions and where they are currently. Trusting herself, not spending too much time looking backward and being authentic have been foundational to her success, she says. That success includes being named to *Ingram Magazine's* "Forty under 40" in 2008 and the *Kansas City Business Journal's* "Women Who Mean Business" Class of 2010.

When she's not at work, Gayle spends her time with her dogs, being the best aunt she can be, and cheering for her favorite sports teams—The Ohio State Buckeyes and the Kansas City Royals. She has also served on the board for the Heartstrings Community Foundation, a not-for-profit that provides employment opportunities for adults with intellectual and developmental disabilities.

Gayle has her work cut out for her in her first year as CEO, but she's been part of launching Terracon's strategic plan for a while now. She looks forward to helping her employees and clients take advantage of it.

CWA Embraces a New Year with an Accomplished Executive Board Team

Exciting changes are happening within the CWA program leadership in 2019. After serving for more than 10 years as the National Leader, **Nancy Mellard**, Executive Vice President and General Counsel for the Benefits & Insurance (B&I) Services Division of CBIZ, has handed over the reins and transitioned her role to **Lori Novickis**, Director of Corporate Relations.

“Under Nancy’s leadership, CWA has become one of the most admired programs of its type within our industries and one that has become indelibly woven into our culture at CBIZ,” Novickis says. “Because of her passion and vision, we are well-positioned for our next chapter of growth.”

“It has been my privilege to have been an integral part of CWA these past years. I am committed to continue to work with Lori and the Executive Board on the mission and goals of this important program,” Mellard says.

In addition to the 13 CWA Board members who will continue to serve in 2019, the Board is pleased to welcome eight new members. Each member brings a fresh perspective and represents diversity of backgrounds, experiences and geographies. Warm welcome to our new members who will be instrumental in executing CWA’s priorities in 2019!

Welcome, new CWA Board members!



Sherry Burick
B&I Winston-Salem



Amy Grant
FS New York



Heather Hernandez
FS San Diego



Sarah Jackson
FS Denver



Catherine Latham
FS New England



Kim Randolph
FS Boca Raton



Janet Thompson
B&I Overland Park



Leonora Yurichak
Corporate Cleveland

Thank you for your years of service!

The CWA Board would like to give a special thank you to the members who transitioned out of their roles at the end of 2018. Through their dedication to our mission, CWA has become an important program.



Kathy Fratantoni
FS Philadelphia



Mary Kay Griffin
FS Salt Lake City



Roxann Kerr Lindsey
B&I Kansas City



Betty Noell
B&I Roanoke



Brenda Piazza
FS Golden State



Fasika Sahlu
FS New York

A Message from Lori Novickis



A Brand New Lens

A new year brings new opportunities—to reflect, evaluate and consider new ideas. It’s an opportunity to look at things through a brand new lens. When you put a new lens on your camera, you see things more clearly. It helps bring your vision into sharper focus.

Since the program’s inception in 2007, I’ve had the distinct honor of serving as a CWA Executive Board member. I truly value that experience, but it’s not what I’m relying on now. It’s often said, “what got us here won’t get us there,” and this mindset is driving my outlook as we move into 2019. We’re still focused on the goals we’ve outlined over the years, but it’s time for us to attach a new lens.

CWA’s primary objective of advocating for the recruitment, retention and advancement of women remains unchanged, but I’m looking ahead toward the new ways we can achieve that mission. Our new lens consists of new leadership, 8 new board members, a refreshed approach and ultimately a clearer vision of the future of CBIZ and CWA.

In our last newsletter, we shared our many accomplishments over the past decade. Much of the credit for our successes to date goes to **Nancy Mellard**. On behalf of myself and the CWA Executive Board, I’d like to thank Nancy for her years of leadership and thank our recently outgoing Board members for their continued dedication and support of our mission.

I’m honored to have been selected as the new National Leader of CWA, and I look forward to working with all of our CBIZ professionals as we focus on our future.

Lori Novickis

Lori Novickis, National Leader, CWA

Rediscovering What Makes Your Career

Exciting

When **LaToya McKinney**, Audit Associate in the CBIZ Chicago office, sent an email on behalf of the National Association of Black Accountants (NABA) about a volunteer opportunity for the annual event, the Center for Advancement of Minority Accountants, I immediately wanted to get involved. Having spent over six years mentoring women and youth, I was excited to get a chance to use my professional background to mentor student accountants. Little did I know that participating in the event would remind me why I enjoy accounting so much.

The Center for Advancement of Minority Accountants event took place on Oct. 6, 2018, at the University of Illinois at Chicago Student Center. It included a panel discussion about career paths in the accounting and finance industries, followed by mock interviews, resume reviews and critiques and a mock job fair.



Vani Murthy (above, left) with LaToya McKinney and Felicia Cox (below, right)

It was LaToya's first time hosting a major event for the Chicago chapter of NABA and the first public speaking engagement for **Felicia Cox**, Senior Audit Associate. I enjoyed seeing CBIZ women take on leadership roles in the community and make an impact. It made me proud to represent CBIZ alongside such incredible women!



I was also encouraged by the heavy presence of women involved in the event's panel discussion. Traditionally, the accounting profession is seen as a male-dominated field. Here were these incredibly successful women sharing their experience with young accountants and serving as role models, especially for young women in the audience.

One of the panelists shared that when she introduces herself as an accountant, people often say, "Oh! You must be good at math!" and she said, "I don't know why people think that. I don't even like math!" It made all the accountants in the room smile and nod in agreement.

That comment reflects one of the most common misconceptions: you have to be a math expert to be an accountant. Being an accountant is about applying technical knowledge and skills in the areas of accounting, tax, audit or finance. It is about combining these skills and business acumen to help businesses grow.

Although most of us start our careers in public accounting, aspiring accountants can choose either a private or public company career path. One panelist had started her own practice after working as an auditor for several years and shared how she enjoyed being an entrepreneur. An in-house corporate Certified Public Accountant (CPA) on the panel shared how he uses his professional skills and knowledge to prepare financial statements, help with budgeting, analyze financial trends and assist management in decision making.

Like to travel? Want to work in a country of your choice and experience different cultures? A panelist who worked as an auditor for a large accounting firm and later switched to a global company talked about how international commerce increases the demand for accounting professionals around the world.

Licensed CPAs also have the ability to specialize in niche areas based on their skills and interests. Felicia said working with clients in different industries gives her a broad range of experience. As a CPA with a specialization in tax, I shared how the ever-changing world of tax makes our work anything but monotonous. I also met a young CPA after the panel discussion who is working for an investment firm as a personal financial planner helping individuals with their savings, investments and managing risk. She mentioned that she opened a brokerage account for her nephew and was helping him with his investments so he could save money to go to college.

Long hours? Yes, just like any other profession when there are deadlines to be met. However, companies are offering flexible work arrangement benefits, enabling women and men to achieve a greater degree of work-life integration.

After a follow-up discussion with the students, it was evident that they felt confident about starting their career in accounting.

So, who says accounting is boring? Welcome to our exciting world!



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Partnership Brings Protein-Packed Breakfast to District Kids

Of the nearly 2,500 students in the Center School District in Kansas City, Missouri, over 87.5% qualify for free or reduced meals through the National School Lunch and Breakfast Programs. Last school year, however, only about 30% of students were eating breakfast at school.

In the fall of 2016, **Michelle Kruse**, a CBIZ Wellness Coordinator who works part-time onsite for Center School District, approved the grant application for Partners for Breakfast in the Classroom (PBIC). Michelle saw the opportunity to improve students' learning and health. The grant helps qualifying, high-need schools provide a free breakfast to all students to help improve participation in the federally funded school breakfast program. Participating PBIC schools commit to serving breakfast "after the bell" so that all students can eat together in their classrooms, versus going through the traditional cafeteria service.

Applying for the grant required site visits and assessing equipment and staffing needs, financial feasibility and staff and student interest. Michelle spent some of her time to get the grant application done, and it paid off in a big way. The district received the maximum funding allowed, nearly \$250,000 or about \$100 per child. This grant provided kitchen and custodial equipment, point-of-sale technology systems, and funding for program marketing, staffing and training. Securing the grant was a victory in itself, but Michelle wasn't finished.

"As a Registered Dietitian, I understand the important role nutrition plays in academic performance and behavior," Michelle says. "Every morning, I tell my own kids to 'pick a protein,' knowing that protein will help them feel full and improve blood sugar levels, concentration and energy. While I was really excited about the grant, I was leery of the menu that would be selected."

A typical school breakfast menu includes cereal, cereal bars, whole-grain Pop Tarts, whole-grain cinnamon rolls, juice, fruit and white, chocolate or strawberry milk. School districts are reimbursed by the United States Department of Agriculture (USDA) for all free and reduced meals served, up to approximately \$2.30 per student. However, to be reimbursable, meals must include required components of whole grain, milk, fruit or fruit juice. There is currently no protein requirement and often not enough room in food service budgets to provide a protein source.

During the PBIC application process, Michelle attended a conference where Dr. Heather Leidy, nutrition researcher and professor at Purdue University, spoke. Dr. Leidy



Cafeteria staff prepare breakfast for Center School District students as part of PBIC program.

presented her research on protein consumption and its positive effects on behavior, mood, cognition, appetite and obesity prevention in adolescents.

Michelle immediately thought about the Center School District's breakfast menu and introduced herself to Dr. Leidy. They discussed her concerns and brainstormed a solution—funding from the Egg Nutrition Center to study the effects of a protein-rich breakfast versus a typical school breakfast. The Egg Nutrition Center provided Center Middle School with approximately \$400,000 in food ingredients, supplies and kitchen equipment this school year alone.

Phase one of the study began August 2018 at Center Middle School. Center Elementary School's average daily attendance increased from 75% to 89%. Principal Karen Prickett credits this program for the increase. District-wide, behavior referrals and nurse visits have decreased.



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Building Your Personal Brand

A brand is what distinguishes something from its rivals. Typically, when we think about it, a company or product pops into our head. Amazon has a brand. Starbucks pumpkin spice lattes have a brand. Turns out, you do too.

You possess life experiences, natural abilities and learned skill sets that make you who you are. Your personal brand brings these together in a unique way to differentiate you from everybody else. Building a strong personal brand opens doors to new business and personal opportunities. Think about Apple. Steve Jobs had a personal brand that extended far beyond tech expert—he was diverse, creative and innovative. Quite literally, Steve encouraged others to “think differently.” As a direct result of this powerful personal brand, he was able to take a failing computer company and transform it into the technology powerhouse we know today.

To start building your own personal brand, you first need to understand your value. Here’s a hint: it’s more robust than your LinkedIn headline. What do you excel at in your profession? What do you like to do outside of the office? What unique events have you experienced and how did they shape you? Who are your role models? Pinpoint what you bring to the table and what motivates you to excel.

Once you understand your value, articulate it. You know why you’re special. It’s time for you to communicate that in a way that’s easy for other people to understand. Identify your accomplishments. Why were these endeavors successful? Were you recognized for any of them? Answering these questions can help you draft a succinct value proposition.

Your value proposition only works if people see it. Think about how you can expand it to fit different media

channels and audiences. This can take the form of a LinkedIn profile, bio on a website or an elevator pitch at a networking event. Successful personal branding happens when people know who you are, what you do and why you do it.

Once you’re confident in your brand, establish credibility in your areas of expertise. Create strategic content like blog posts, podcasts or status updates and share them in places your target audience will see it. Of course you should share these on your company and personal websites and through social media channels, but you should also reach out to fellow thought leaders to share the content with them directly. Third-party placement accelerates brand recognition and helps build trust in your brand.

Leading by example, encourage employees at all levels of your organization to develop personal brands. There are several benefits:

- 1. Employees with well-established personal brands have credibility.** They tend to be well-respected in their industries and communities, and this perception will extend back to the organization they work for. People buy from those they trust.
- 2. People want to work for organizations that support their development.** Employers that provide resources to help their employees grow professionally tend to experience happier, more productive workforces.
- 3. When your employees understand their personal brand, unique skill sets are brought to the surface.** These characteristics can expand the capabilities of their existing teams or encourage collaboration among multiple departments working toward common goals.

Incentivizing employees to develop personal brands doesn’t require a lot of time or expense. Training on social media best practices, defining annual goal-setting policies or incorporating an employee recognition program are all great places to start.

A personal brand is so much more than posting a couple of tweets and signing up for a networking event. When the posts are archived and the events are over, what will people remember about you?



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CWA Recognition

We are proud to recognize our professionals for their contributions to diversity, their lines of business, our communities and CBIZ.

Dana Burton | Florida Institute of CPAs, Women to Watch, Experienced Leader, Finalist

Andy Burczyk | Missouri Society of CPAs, Impact Award, Outstanding Diversity Advancement, Winner

Cheryl Calhoun | *Los Angeles Business Journal*, Most Influential Minority CPA, Winner | *Los Angeles Business Journal*, Most Influential Women in Accounting, Winner

Stacey Dickson | KC International Association of Business Communicators, Gold Quill Award of Merit

Meagan Dowell | *Kansas City Business Journal*, NextGen Leaders, Winner

Alicia Holloway | Florida Institute of CPAs Women to Watch, Emerging Leader, Finalist

Anne Ledwein | Minneapolis Finance & Commerce, Top Women in Finance, Honoree

Kelly O'Neil | LA Biz Women of Influence, Winner | *Los Angeles Business Journal*, Most Influential Women in Accounting, Winner

Cindy Orr | National Association of Plan Advisors, Top Woman Advisor, Captain

Kristen Peed | Northeast Ohio Council on Higher Education, Expys Best Supervisor/Mentor, Finalist

Amanda Porupski | Florida Institute of CPAs Women to Watch, Emerging Leader, Winner

Karen Roberts | National Association of Plan Advisors, Top Woman Advisor, Captain

Cindy Rosenberg | *New York Business Journal*, Women of Influence, Winner | *Crain's New York*, Notable Women in Accounting & Consulting, Honoree

Fasika Sahl | *Crain's New York*, Notable Women in Accounting & Consulting, Honoree

Caitlin Waters | *The Independent*, 2019 Class of Rising Stars

Robin Widdis | CBIZ, Inc. Steven L. Gerard Legacy Award, Winner

Engaged Leaders

CBIZ Golden State 5th Annual Leadership Luncheon

CBIZ female professionals network, build connections and learn about how CWA can support them. About 35 women attended from the Bakersfield, Oxnard, Encino and Los Angeles offices.



CBIZ Cumberland, MD Graduates NCI Class

The ladies of the CBIZ Cumberland office were fully engaged in their Networking Circles I curriculum. The group (L-R) consisted of: Rhonda Robinson, Emily Helmick, Katrina Thompson, Robyn Orndorf, Heather Knierlem, Bev Simms, Tami Litton, Judy Squires and Holly Kidwell. Special thanks to Rhonda, Holly and Mandi Nicol for helping throughout the training.



CBIZ Philadelphia Hosts "Tis the Season FUNdraiser"

The CWA chapter in Philly hosted a fundraising event that raised \$15,425 to benefit The Philadelphia Ronald McDonald House. Great job!



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