

Kathy Zilch, CPA, PhD
 Department of Operations and Information Management (OIM)
 Isenberg School of Management
 121 Presidents Drive
 University of Massachusetts at Amherst
 Amherst, MA 01003
 Email: kzilch@isenberg.umass.edu

EDUCATION AND PROFESSIONAL CERTIFICATION

Certified Public Accountant (CPA), Massachusetts, 2009-present

Ph.D. International Business, Southern New Hampshire University – On Campus, Manchester, NH, 2014

M.S. Financial Planning, Graduate Certificate Accounting, Bentley University, Waltham, MA, 2008

B.S. Accountancy, Minor: Finance, Providence College, Providence, RI, 2004

ACADEMIC EXPERIENCE

Lecturer – Operations and Information Management (OIM) Department, Isenberg School of Management, UMass Amherst (2019-present)

- Courses taught:
 - OIM 297S: Power Spreadsheets
 - OIM 350: Business Intelligence and Analytics
 - SCH-MGT 601: Data Management for Business Leaders
 - SCH-MGMT 602: Business Intelligence & Analytics

Associate Professor – Fisher College, Boston, MA (2008-2013, and 2017-2019)

- Began on campus in 2008; re-hired as full-time, online, Associate Professor in 2017
- Courses taught:
 - AC121: Financial Accounting
 - AC122: Managerial Accounting
 - AC201: Intermediate Accounting I
 - AC202: Intermediate Accounting II
 - AC301: Accounting Information Systems
 - EC102: Microeconomics
 - FI201: Principles of Business Finance
 - MG450: Senior Project
 - MBA5200: Financial Reporting and Statement Analysis
 - MBA5250: Strategic Cost and Profitability Analysis
 - MBA5300: Global Economics and Managerial Decision Making

Assistant Professor - Springfield College, Springfield, MA (2011-2017)

- Began as adjunct in 2011, hired full-time in 2014
- Courses taught:
 - BUSM150: Introduction to Business
 - ECON205: Microeconomics
 - BUSM210: Principles of Accounting I
 - BUSM211: Principles of Accounting II
 - BUSM250: Business Communications

- BUSM310: Business Information Systems
- BUSM320: Financial Statement Analysis
- BUSM361: Intermediate Accounting I
- BUSM362: Intermediate Accounting II
- BUSM420: Global Business Management
- BUSM492: Strategic Management
- BUSM611: Accounting for Managers
- BUSM651: Leading Organizations and People
- BUSM684: Corporate Residency Fieldwork

Academic Director – Bay Path University, Longmeadow, MA (2013-2014)

- Launched the college's first fully online accounting program
- Taught online courses as needed
- Created accounting major outcomes and course competencies; mapped to assignments within syllabi
- Hired and oversaw online accounting faculty

Adjunct Faculty – Southern New Hampshire University, Manchester, NH (2010-2014)

- Adjunct faculty member as needed; consultant for online MBA content development
- Courses taught:
 - MBA503: Financial Reporting and Analysis
 - ACC620: Intermediate Accounting II

INDUSTRY EXPERIENCE

Revenue Controller/Senior Financial Analyst - Americas Region, UBS Investment Banking Division (IBD), New York, NY, 2007-2008

Key interface for global IBD business managers and senior management on behalf of the financial control department; Oversight responsibility for the IBD operation of an acquisition in Brazil (Banco Pactual)

- Maintained ownership of over \$1 billion in annual revenue
- Conducted meetings with IBD business managers and financial control directors
- Assisted with forecasting revenue for senior management's use in strategic planning
- Participated in global system conversion testing; provided control and enhancement recommendations
- Reviewed international and domestic entries prior to data submission for management and financial reporting
- Produced monthly and quarterly variance analysis reports for regulators
- Performed daily ad-hoc analyses for IBD management

Equity Product Controller, Lehman Brothers, New York, NY, 2006-2007

- Produced daily global income reports and analyses for event driven traders and equity senior management
- Prepared daily variance analyses, daily reconciliations, and monthly GL entries
- Reported weekly analyses to internal finance executives in international conference calls
- Overhauled daily control procedures and continuously improved accounting processes
- Initiated and implemented the trading desk's conversion to an updated electronic estimates system
- Streamlined processes, permitting time for additional value-add analyses

Staff Auditor, Wolf and Company P.C., Boston, MA, 2004-2006

- Provided public accounting services to regional financial institutions

SERVICE

Isenberg School of Management:

- Faculty Participant, Destination Day, 2020

Fisher College:

- Representative, IACBE Business Department Accreditation, 2018-2019
- Member, Faculty Professional Development Book Club, *Teaching Interculturally* by Amy Lee, 2018-2019
- Evaluator, Online MBA Adjunct Faculty Course Evaluations, 2018-2019
- Academic Advisor, 2009-2011
- Member, Curriculum Committee 2009-2010
- Coach, Cheerleading, 2009-2010
- Participant, Open Houses 2009, 2010
- Participant, Accepted Students Days 2009, 2010

Springfield College:

- Member, President's Strategic Task Force: *New Programs*, 2016-2017
- Chair, Search Committee for Management Faculty, 2016-2017
- Advisor, Business Club, 2016-2017
- Member, Career Center Advisory Board, 2015-2017
- Academic Advisor, Oct. 2014-2017
- Member, Business Management Department Search Committee, 2015-2016
- Discussant, Freshman Book at Orientation, 2016
- Presenter, *Partnering with the Career Center*, Faculty Institute Breakout Sessions, 2016
- Coordinator, Business Management Department Adopt-A-Family, 2015
- Department Representative, Grinspoon Entrepreneurship Awards Ceremony and Banquet, 2016
- Advisor, IACBE Student Case Competition, 2014, 2015, 2016
 - Northeast Regional Conference:
 - 1st Place 2014-15
 - 1st Place 2016-17
 - National Conference:
 - 3rd Place 2014-15 (Baltimore, MD)
- Mentor, New Faculty, 2015
- Advisor, New and Transfer Student Orientation And Registration (SOAR), 2015, 2016
- Participant, Academic Advising Brown Bag Lunch Training, 2014
- Presenter, New Student Orientation (faculty session), 2014, 2015, 2016
- Presenter, Undergraduate Student Open Houses, 2014, 2015, 2016
- Advisor, Graduate Student Open Houses, 2015, 2016
- Participant, Humanics in Action Day, 2014, 2016

Bay Path University:

- Academic Advisor, 2013-2014
- Member, Search Committee for MSA Program Director, 2014
- Member, Contracts Process Committee, 2013-2014

PUBLICATION and CONFERENCE PRESENTATIONS

R. Fiore, Lee, L., Zilch, K., "Luck or Strategy? Some Insights into Successful New Ventures." IEEE - Engineering Management Review, June, 2019, p 1-3, Online ISSN: 1937-4178

R. Fiore, Lee, L., Zilch, K., "The Calculation of Probable Venture Success and its impact On Strategic Management." Presented, Northeast Decision Sciences Institute, April 4-6, 2019, Annual Conference, Philadelphia, PA

Zilch, Dr. Kathleen. "Integrating Global Context into Business Courses," International Assembly for Collegiate Business Education, New England Region 1 (Franklin, MA – October 18, 2018). Hosted by Dean College.

Zilch, Dr. Kathleen. "Guest Speakers via Skype," International Assembly for Collegiate Business Education, New England Region 1 (Franklin, MA – October 13, 2016). Hosted by Dean College.

Fiore, Dr. Robert. Zilch, Dr. Kathleen. "Fallacies Produced by Post Hoc Analysis in Management, Eleven Examples of Ex-Ante Insight," Northeast Business and Economics Association (Jamaica, NY - November 6, 2015).

Zilch, Dr. Kathleen. "Incentives for Sustainability: Analysis of Tax Policy in the U.S. and E.U.," Academy of International Business, Northeast Chapter (Boston, MA – October 23, 2015). Hosted by University of Massachusetts at Boston, Sponsored by Temple University CIBER and University of Connecticut CIBER.

Zilch, Dr. Kathleen. "Case Study Grading Rubric," International Assembly for Collegiate Business Education, New England Region 1 (Dudley, MA – October 15, 2015). Hosted by Nichols College.

Zilch, Dr. Kathleen. Samii, Dr. Massood. "Sustainability in the European Union: Analysis of Governance Issues and CO2 Emissions," Academy of International Business, Northeast Chapter (Providence, RI – November 14, 2014). Hosted by Bryant University, Sponsored by University of Connecticut CIBER.

(Byrne) Zilch, Kathleen. Samii, Leila. Nugent, Dr. Nicholas. "Marketing Strategy for Financial Firms in Turmoil," Academy of International Business, Northeast Chapter (Hamden, CT - October 1, 2010). Hosted by Quinnipiac University, Sponsored by Temple University CIBER.

Samii, Leila. (Byrne) Zilch, Kathleen. Nugent, Dr. Nicholas. "Dynamic Factors for Marketing with Social Media," Academy of International Business, Northeast Chapter (Hamden, CT - October 2, 2010). Hosted by Quinnipiac University, Sponsored by Temple University CIBER.

PROFESSIONAL DEVELOPMENT

CPA Continuing Professional Education (CPE):

Advanced Excel Reporting

PES Online Course ID: 7195B, Completed June 18, 2020

CPA Continuing Professional Education (CPE):

Excel Basics 2019

PES Online Course ID: 7645, Completed June 10, 2020

CPA Continuing Professional Education (CPE):

Ethics and Professional Conduct for Massachusetts CPAs
PES Online Course ID: 4925M, Completed May 26, 2020

Using Echo360 in Your Blackboard Course, Presented by University Without Walls at UMass Amherst
Webinar, October 2, 2019

CPA Continuing Professional Education (CPE):

An Accountant's Guide to Trusts
PES Online Course ID: 5565K1, Completed June 15, 2018

CPA Continuing Professional Education (CPE):

Individual Retirement Arrangements (IRAs)
PES Online Course ID: 5175P, Completed June 12, 2018

CPA Continuing Professional Education (CPE):

The Ultimate Financial Plan
PES Online Course ID: 6825A, Completed June 11, 2018

CPA Continuing Professional Education (CPE):

Ethics and Professional Conduct for Massachusetts CPAs (CPE)
PES Online Course ID: 4925K, Completed June 6, 2018

Safe Zone Training, Hosted by: Springfield College. Presented by: Dr. Laurel Davis-Delano and Dr. Elizabeth Morgan. Completed September 22, 2016

CPA Continuing Professional Education (CPE):

IFRS and US GAAP
PES Online Course ID: 6725A, Completed June 9, 2016

CPA Continuing Professional Education (CPE):

Creative Accounting and Accounting Scandals in the USA
PES Online Course ID: 6920, Completed May 30, 2016

CPA Continuing Professional Education (CPE):

Analysis of Financial Statements
PES Online Course ID: 7130, Completed May 24, 2016

CPA Continuing Professional Education (CPE):

Ethics and Professional Conduct for Massachusetts CPA's
PES Online Course ID: 4925, Completed May 12, 2016

IACBE Outcomes Assessment Training, Nichols College. October 16, 2015.

iPad Training, Springfield College, October 6, 2015.

Workshop: Assessing Critical Learning Outcomes to Improve Student Learning, Hosted by: Springfield College. Presented by: Dr. Mary Ann Coughlin and Dr. Missy-Marie Montgomery. June 23, 2015.

SCHOLARSHIP and PROFESSIONAL ACTIVITIES

Dissertation Committee Member, *Climate Change and Sustainability Strategy: MNCs Performance Assessment*, PhD Student: Mashari AlGhunaim, Other Committee Members: Dr. Massood Samii, Dr. Bulent Aybar, Dr. Tej Dhakar. 2016-2018. Final Defense: November 2018.

External Program Reviewer, Riccardi School of Business at Bridgewater State University (BSU).

Sole consultant contracted to evaluate the following three programs at BSU: BS Finance, BS Accounting, and MS Accounting. Evaluation included: Site visit, interviews with faculty and administrators, and examination of self-study report covering 5-year period. Final report and recommendations submitted to Finance and Accounting Department Chair and Dean's office. June 2018

Dissertation: *Sustainability Incentives in the European Union: Analysis of Institutional Factors, Governance Issues, and Tax Policy*, Committee: Dr. Massood Samii, Dr. Nicholas Nugent, Dr. Aysun Ficici, Prof. Karin Caruso, CPA, Spring 2014

External Program Reviewer, Riccardi School of Business at Bridgewater State University (BSU).

Sole consultant contracted to evaluate the following two programs at BSU: BS Accounting and MS Accounting. Evaluation included: Site visit, interviews with faculty and administrators, and examination of self-study report covering 5 year period. Final report and recommendations submitted to Finance and Accounting Department Chair and Dean's office. June 2013

TECHNOLOGY SKILLS

- Instructional: Blackboard, Moodle, Canvas, CengageNOW, WileyPlus, Aplia, SAM
- Google: Docs, Forms, and Slides
- Microsoft: Word, PowerPoint, Access, Advanced Excel, VBA Programming in Excel
- Industry: SAP, Business Objects, Sage 50, SQL, and Tableau