

**Kathleen Zilch, CPA, PhD**  
 Isenberg School of Management  
 University of Massachusetts at Amherst  
 kzilch@isenberg.umass.edu

## **ACADEMIC EXPERIENCE**

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

- Awards:
  - o 2022 Recipient, Teaching with Digital Technology - Undergraduate
  - o 2021 Nominee, Teaching with Digital Technology – Graduate
  - o 2021 Nominee, Teaching with Digital Technology – Undergraduate
- Courses taught:
  - o OIM 297S: Power Spreadsheets
  - o OIM 350: Business Intelligence and Analytics
  - o SCH-MGT 601: Data Management for Business Leaders
  - o 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:
  - o Undergraduate:
    - Classroom:
      - EC102: Microeconomics
      - FI201: Principles of Business Finance
    - Online:
      - AC201: Intermediate Accounting I
      - AC202: Intermediate Accounting II
      - AC301: Accounting Information Systems
      - MG450: Senior Project
    - Both Classroom and Online sections:
      - AC121: Financial Accounting
      - AC122: Managerial Accounting
  - o Graduate:
    - Online:
      - 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:
  - o Undergraduate:
    - Classroom:
      - 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
- Graduate:
  - Classroom:
    - BUSM611: Accounting for Managers
  - Hybrid (Classroom and Online for same section):
    - BUSM651: Leading Organizations and People
  - Independent Study:
    - BUSM684: Corporate Residency Fieldwork

#### **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:
  - Graduate:
    - Classroom:
      - MBA503: Financial Reporting and Analysis
    - Classroom and Online sections (not hybrid):
      - ACC620: Intermediate Accounting II

### **ACADEMIC SERVICE**

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#### Isenberg School of Management:

- Member, Department Curriculum Committee, 2021-present
- 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:
    - 1<sup>st</sup> Place 2014-15
    - 1<sup>st</sup> Place 2016-17
  - National Conference:
    - 3<sup>rd</sup> 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

### **SCHOLARSHIP and PROFESSIONAL ACTIVITIES**

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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

## **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**

2009 – current, CPA Continuing Professional Education (CPE): Average 40 hours per year of professional development to maintain current CPA license

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

## **INDUSTRY EXPERIENCE**

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### **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

## **EDUCATION AND PROFESSIONAL CERTIFICATION**

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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

## **TECHNOLOGY SKILLS**

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- Instructional: Blackboard, Moodle, Canvas, CengageNOW, WileyPlus, and Cengage SAM
- Advanced MS Excel, including: VLookups, Pivot Tables, Pivot Charts, Power Query, Power Pivot, Data Analysis Expression (DAX) functions, What-If Analysis, Solver, Macros, other automation techniques
- Coding: VBA, SQL
- Industry: SAP, Business Objects, ERDPlus, and Tableau