

PAMELA S. TRAFFORD

Curriculum Vitae 8/1/2023

EDUCATION

- MBA, University of Montana, Missoula, MT, 1982
- BA Anthropology, University of Montana, Missoula, MT, 1977
- ABD, PhD program, University of Massachusetts, Amherst, 1992 to 1996

HONORS, AWARDS, FELLOWSHIPS AND GRANTS

- Nominated for the 2023 and 2022 American Accounting Association/J. Michael and Mary Anne Cook/Deloitte Foundation Prize for significant achievements in teaching and contributions to the accounting education community.
- Nominated for College outstanding teacher award, 2022-2023 and in multiple prior years.
- Teaching with digital technology award, Graduate programs. 2021-2022
- Dean's Panel participant: Inspiring Innovation in Teaching and Learning. 2021
- Isenberg Teaching Fellow, 2020-2021 (Inaugural group)
- Lybrand Silver Medal for "Let me explain," 2020. Article published in 3/2020 in Strategic Finance.
- University Innovation Fellow, 2016 (Inaugural group)
- Student-centered Learning and Teaching Fellowship, 2015-2016
- Member, Mellon Mutual Mentoring Team Grant Program, 2015-2016
- College Outstanding Teacher Award, Isenberg, 2014-2015
- Awarded two Open Education Initiative Grants from the University of Massachusetts, 2011
- Nominated for an outstanding online teaching award for the New England region of the University Continuing Education Association, 2007
- Award for lasting contribution to UMass Online, 2006
- Recipient of multiple Certificates of Excellence for Teaching in the Continuing and Professional Education Program, 2001- 2004
- Coopers & Lybrand Doctoral Grant, 1992-1994
- American Accounting Association Doctoral Consortium Fellow, 1994
- University of Massachusetts Doctoral Scholarship (1994)

TEACHING EXPERIENCE

Faculty- University of Massachusetts, Amherst MA (1997 to present)

- Promoted to Senior Lecturer, 2007, Senior Lecturer II, 2010
- Graduate courses taught in MBA and MSA programs (online and/or traditional delivery):
 - Current or recent teaching all of the courses below with an *
 - Financial and Managerial Accounting* (2 separate courses in earlier years, for MBAs)
 - Foundations of Accounting and Preparatory course* (for MBAs)
 - Financial Accounting and Reporting* (for MSAs)
 - Foundations of Financial reporting (for MSAs)
- Undergraduate courses taught (online, hybrid, and/or traditional delivery):
Current or recent teaching all of the courses below with an *.
 - Advanced Accounting*
 - Principles of Financial Accounting* and related honors colloquia
 - Principles of Managerial Accounting* and related honors colloquia
 - Intermediate Financial Accounting I and II*
 - Seminar for SIPP* (Semester in the Profession, team teach)
 - Accounting for the Hospitality Industry
 - Cost Accounting
 - Contemporary Issues for the Accounting Profession
 - Financial Statement Analysis- Honors Colloquium
 - Evolution and Revolution in Accounting- Honors Colloquium

TEACHING EXPERIENCE (CONTINUED)

Faculty- University of Massachusetts (continued)

- Began teaching online in 2001 and used multiple platforms.
 - Developed, designed, and taught various financial and managerial accounting courses to undergraduates, MBA students and MSA students.
 - Faculty liaison for online teaching (2006-2011). See section for prior academic service.
- Other teaching activities
 - Faculty advisor
 - MBA practicum advisor
 - Departmental honors director (see academic service)
 - Sponsor field experiences with directed academic components
 - Serve as chair or co-chair for independent honors capstone theses, with related advising
 - Contributor to school-wide accreditation/assessment efforts.
 - Use and pilot new teaching technologies and approaches

Teaching Associate- University of Massachusetts, Amherst, Massachusetts (1992 to 1997)

- Taught financial accounting, managerial accounting and individual taxation

Consultant/Instructor- University of Massachusetts, Amherst, Massachusetts (1997)

- Taught review sessions for managerial accounting to MBA students

Tax Training Liaison- KPMG LLP, Billings MT (1988 to 1992)

- Trained staff and senior accountants in trust taxation and computer applications

Teaching Assistant- University of Montana, Missoula, MT (1980 to 1982)

- Taught Financial Accounting I, II, and III to undergraduate students

SCHOLARLY CONTRIBUTIONS

- Focus group webinar/ review survey for the new edition of Advanced Accounting, 5/e, by Hopkins. Cambridge Business Publishers, including MBC. (October and November 2022)
- In depth select chapter review, MHHE textbook. Financial Accounting for Managers by Thomas/ Drake/ Thornock/ Spiceland. (December 2021)
- Member of McGraw Hill Accounting's ConnectED Virtual Focus Group: An Accounting Digital Innovation Focus Group. (October, 2021)
- Reviewer for content development of new textbook aimed at MBAs: Financial Accounting for Managers, Wayne Thomas, Jake Thornock, Michael Drake and David Spiceland. (August, 2021)
- Published article: "Let me explain: Supplement quantitative performance measures with narrative reporting," authored with Jeremy Bentley, Conner Blake, and Margaret Shackell-Dowell. March 2020, Strategic Finance. (March 2020)
- Presentation, American Accounting Association. Effective teaching and learning strategies section of AAA, Poster presentation, August 2018, "Benefits of hybrid courses for student learning, instructor training, and resource allocation."
- Reviewer for content revisions to Financial Accounting, Hoyle and Skender, prospective 3rd edition. (2018)
- Reviewer for content revision to Financial and Managerial Accounting for MBAs, prospective 5th ed. Easton, Halsey, McAnally, Hartgraves and Morse. (2016)
- Authored OWL content for financial and managerial accounting courses (1997-present.) The database is revised annually. Content is used by other faculty.
- Published customized version of Financial Accounting, Hoyle. Significant customization made the book suitable for use by MBAs. (2012,2013)
- Authored student workbooks for large financial accounting course. (1997-2003)
- Developed initial framework of accounting knowledge for ALEKS, a company creating algorithmic learning software. (2001)

PROFESSIONAL CERTIFICATIONS

- Certified Public Accountant, Montana (1983- present)
- Chartered Global Management Accountant (2015- 2020) No longer renew just to save the cost.

PROFESSIONAL AFFILIATIONS

- Member of the American Accounting Association
- Member of the Massachusetts Society of Certified Public Accountants
- Member of American Institute of Certified Public Accountants
- Member of Chartered Global Management Accountants & of the Institute of Management Accountants through 2020

PROFESSIONAL EXPERIENCE

American Association of Physician Leadership (2017-present)

- Faculty in the executive education program
- Developed executive education course

Business Consultant (2014 to present)

- Provide general accounting and/or tax advice to various small businesses, including a manufacturer and a dance studio.

CPA, Senior Manager- KPMG LLP, (1982 to 1992)

- Certified public accountant, specialized in tax services
 - Provided tax compliance and tax consulting to a diverse client base that ranged from international public firms to sole proprietorships.
 - Major clients included high wealth individuals and businesses in the following industries: banking, oil and gas extraction, construction, transportation, manufacturing, trust Services, healthcare, real estate and various charitable organizations and foundations.
 - Invited speaker at various functions to update public and particular client groups on new tax proposals
 - Prior to Senior manager promotion in 1988: Manager (1986-1988). Staff (1982-1986.)

Consultant- Aleks Corporation, Santa Ana, CA (2001)

- Evaluated the adaptability of their problem-generating algorithm to an on-line knowledge assessment program for several areas of accounting. Provided feedback and a logical content sequence for the algorithm

PROFESSIONAL SERVICE

Coordinator/participant, MSCPA campus event: Is Accounting for Me?

- Led activities and coordinated panel discussion with MSCPA personnel as part of their annual event promoting the accounting profession. (Spring 2023, 2019, 2018)

Volunteer- VITA (Voluntary Income Tax Assistance) Program (2016-2020)

- Review returns for student volunteers in international tax program, Isenberg School.

Massachusetts Society of CPAs-Academic & Career Development Committee (2012-present)

- Committee member. Meet regularly with practitioners to discuss new developments and provide guidance to academia and the profession.

Taxpayer Advocacy Panel (2011-2015)

- Service on Taxpayer Assistance Service Centers Committee and Taxpayer Issues Screening Committee (2014-2015)
- Substantive service working with IRS officials to collect information about taxpayer issues and make proposals to Internal Revenue Service to improve service.
- Outreach efforts in Massachusetts to communicate the TAP mission and bring taxpayer issues to the IRS.

Board of Directors, MotherWoman, Inc. (2012- 2013)

- MotherWoman is a regional non-profit. Served as Treasurer, member of Finance and Executive committees

PROFESSIONAL DEVELOPMENT

- Maintain license as a Certified Public Accountant. Requires 120 continuing professional education hours every 3 years.
 - 2020-2022 Total CPE hours: 158.9; 2019-2021: 159.3; 2018-2020: 153.5
- Attend conferences and symposiums with other practitioners to stay in touch with issues and developments in the profession. These are generally sponsored by the AICPA, MSCPA, or governmental taxing authorities.
- Attend webinars on current accounting, taxation and other business issues to stay current on technical and topical issues.
 - Regular attendee of many webinars on CPA evolution and the impact on teaching and the profession. Webinars are sponsored by the AICPA, the AAA and the MSCPA.
 - Other webinars are sponsored by FASB, Deloitte, KPMG, PWC, and others covering various topics including accounting, tax, ethics, analytics and emerging issues.
- Select professional conferences:
 - MassCPAs 2023 Virtual Educators Conference: Adapt, Inspire, Connect
 - Deloitte 2020 Year-end Technical Update: A virtual CPE week
 - Regular attendee of AAA WeAre webinar series and AICPA/CIMA Faculty Hours
 - Income Tax School. 2-day conference, updating federal and state taxation issues with CPAs and practitioners as well as representatives from IRS, MDOR, etc. (most recent, 2019)
 - American Accounting Association (AAA) Annual Convention (3-day conference). 2018,2017,2016
 - PwC Annual Faculty Consortium (2-day conference) 2017
 - AAA Workshop on accounting for sustainability. 2016
 - KPMG National Faculty Symposium (2 days). Current issues. 2016
 - AAA Big Data Conference (2 days). Big data applications in accounting. 2016

CURRENT ACADEMIC SERVICE

Honors Director, Accounting (2011- present)

- Communicate requirements to students and advise on the honors curriculum of the CHC.
- Advise faculty on honors matters.
- Approve all independent honors contracts
- Design/review accounting honors course content

University/Isenberg committee memberships

- *Isenberg Teaching Award and Recognition Selection Committee (TARSC)*. (Spring 2019-present). Choose recipients of the College Outstanding Teaching awards for Isenberg faculty.
- *Innovation Fellows Group* (2016-present). Discuss new instructional innovations, create a roadmap for sustainable innovations at UMass Amherst and promote the use of technology innovations in teaching and research.
- *Member, MSA Curriculum committee* (2017- present). Meet for curriculum redesign. Have contributed several course proposals in Transitions program, most recently in 2023.
- *Member, MBA Graduate Faculty Committee*. (2011-present) Integrate curriculum, consider assessment results and goals, and strategize programmatic goals. Determine the accounting curriculum for online and part-time programs. Review course histories for transfer credit determinations, advise students interested in accounting-related fields.

Other current academic service

- Massachusetts Society of CPAs- Academic & Career Development Committee (2012 to current)
- Advisor/mentor in various undergraduate and graduate case competitions
- Judge in MBA case competitions

PRIOR ACADEMIC SERVICE

Select committee memberships

- *Chancellors Flexible Learning Taskforce*. Member of subcommittee: Instruction, Pedagogy and Technology. (Spring, 2021. Report issued July, 2021)
- *Chancellor's Textbook Working Group* (2016-2017.) Explore issues related to improved compliance with the HEOA mandate and overall campus goals of efficiency and transparency.
- *Commonwealth Honors College Council of the Faculty Senate*. (2013-2016). Member of Program working committee.

- *Curriculum Innovation Subcommittee of the Joint Task Force on Strategic Oversight.* (2012-2103) Reports to the Campus Leadership Council and Faculty Senate Rules Committee to make recommendations related to curricular innovation.
- *Moodle Advisory Committee* (2010-2012). Meet monthly to discuss improvements to Moodle.
- *Teaching Commons Advisory Committee.* (2010-2013). Provide consultation on program development and priorities with an emphasis on the development of the Teaching Commons as a collaborative campus-wide portal for faculty success.
- *Future LMS (Learning Management System) Committee (June 2010-December 2010).* Charged with reviewing the best technologies for teaching online.
- *Learning Platform Review Committee* (January 2010- August 2011). Members were charged with reviewing the best technologies for teaching online. We surveyed constituents, collecting data from vendors, tested all of the platform possibilities.
- *E-Learning Application Cabinet* (March 2006 to August 2011). Participants from all UMass campuses meet quarterly to help set strategic direction for the UMass Online technology platform.
- *Ad Hoc Committee on Online Learning* (2004 to 2008). Advise the campus administration with respect to the optimal technological infrastructure appropriate to effective online and technologically assisted instruction, including the University Library.
- Search committee, School, Director of Graduate and Professional Programs, Spring 2019
- Search committee, Accounting Department, 2018-2019: 2 Lecturer positions
- Search committee, MBA program faculty pool (a very large search), 2018
- Member, Search committee for Accounting Department, Associate Chair (2011- 2012)
- Member, Search committee for Accounting Department, Tax Lecturer (2011- 2012)
- Member, Search committee for Center for Teaching, Instructional Technology Specialist. (2008)

Faculty Liaison for Online Learning

The goal was to improve the quality of the online learning experience for students and faculty. (2006-2011)

- Advocated for faculty in policy and procedural matters at various levels of the UMass system.
- Helped faculty set up and conduct their online teaching activities.
- Identified and coordinated opportunities to improve the quality of online teaching with new resources (software, equipment, personnel, and other). Assisted in functions for UMOL such as attending a day-long presentation to help choose potential help desk vendors for UMOL.
- Coordinated training and provided internal training and support.
- Created and maintained a website/blog for Isenberg online instructors to use as a resource.
- Piloted several new learning management systems, tablets, and other new products.
- Met with representatives of Five College, Inc. and the campuses to find ways to support creative uses of online technology.

Selected Faculty Workshops (As Presenter)

- Teaching Fellows Workshops 2020-2021. Developed and presented content to Isenberg faculty.
- Brown bag lunch with faculty in Communication Disorders about startup of online courses. (2010)
- Hold 7 workshops for faculty on using Blackboard Vista. (2007-2009)
- Center for Teaching- Spring 2009 Online and Hybrid Education Series. One of 3 invited speakers presenting to faculty from across the campus. Topic: Designing a hybrid course. (2009)

Other

- Speaker/panel participant. UMass Library. Open Education Initiative grant recipients discuss the results of our work related to the OEI grants (2011)
- Faculty sponsor. UMass chapter of NABA (National Association of Black Accountants.) 2013-2019
- Presenter at Careers in Accounting and Management Professions program (C.A.M.P), 2015-2016
- Participated in many recorded presentations to promote Isenberg.
- Participant in videotaped session with UMOL to promote the quality of online education. (2010)
- Presenter, (with Shirley Shmerling) to a Chinese Consortium of academic and political leaders. UMOL is working on a long-term arrangement and chose us as representatives to discuss our philosophy and approaches to online learning. (2008)