

Kerri Bohonowicz, CPA

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Herzig (maiden name)

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EDUCATION:	University of Massachusetts Amherst Isenberg School of Management <i>Masters of Science in Accounting</i>	Aug. 2007
	University of Massachusetts Amherst Isenberg School of Management <i>Bachelors of Business Administration</i> Major: Accounting and Information Systems	May 2006

PROFESSIONAL EXPERIENCE:

University of Massachusetts Amherst, Isenberg School of Management **Fall 2014-Present**
Senior Lecturer, Full-Time, Graduate and Undergraduate-Accounting Department (Fall 17-Present)

Adjunct Lecturer, Graduate and Undergraduate-Accounting Department (Fall 14-Summer 17)

- Teach intermediate accounting, intro to accounting, auditing, graduate advanced auditing and graduate not-for-profit accounting, including live, hybrid and online classes.
 - In intermediate accounting: review financial reporting concepts, with a particular focus on accounting treatment of various assets and liabilities, including recognition, measurement and disclosure. Students gain an understanding of adjusting entries, including depreciation and amortization; financial statement presentation; classification of assets, liabilities and expenses; revenue recognition, including construction contracts; inventory valuation methods; significant estimations using allowance accounts, including uncollectible accounts; accounting principles, such as the matching principle and capitalization; cash flow statements; other comprehensive income statements; impairment of assets, including intangibles; investments; and debt and equity transactions.
 - In audit and advanced audit: review concepts such materiality, sampling, audit procedures, auditing planning, risk assessment, audit evidence, internal controls, corporate governance, and professional responsibilities. In advanced audit, these concepts are reviewed in a case-based environment where students learn how to apply accounting, auditing and professional standards to make auditing decisions.
- Created a not-for-profit financial accounting class in the graduate program. This course prepares students for the CPA examination as it relates to government and not-for-profit entities.
- Since Spring 2020, teach the large lecture of intro to accounting to all business & other majors, a class size average of 650+ students per semester. This course is held live in two large auditoriums and has also recently been held online. I converted modalities from live to fully online half-way through my first semester teaching this course. In addition to leading the instruction of this course, I manage 15 teaching assistants and 30 lab sections.
- Serve on the graduate Accounting Department's Curriculum Committee
- In Fall 2018, co-chaired a student's honor thesis.
- In Fall 2019 & 2020, lead six of Isenberg's top students in an audit innovation case challenge with Deloitte. This included holding meetings with the students for six weeks and advising them through a nationally recognized presentation. In 2019, the team came in fifth place for the Northeast division. In 2020, the team won regionals and placed as National Finalists.
- In Fall 2019, lead department in an initiative for instructors to earn CPE credits by attending department research workshops. This included working with the state accounting board to gain an understanding of CPE course requirements and working with our department-level workshop team to coordinate CPE tracking.

University of Massachusetts Amherst, Isenberg School of Management

MSA Director

Jan 2018-August 2018

- Directed the administration of the Isenberg Accounting Department's MSA and Transitions graduate programs.
- Marketed the program to accounting undergraduate students, which resulted in numerous applications and admissions for the spring 2019 semester.
- Met with MSA staff regularly to brainstorm and implement ideas for program expansion.
- Enhanced marketing activities by: offering innovative ideas, meeting with Isenberg Marketing Leadership and participating on the revenue generation committee.
- Wrote a proposal for expansion to the Mount Ida campus.
- Redesigned course offerings and classroom sizes.
- Oversaw the development of the first student orientation.
- Managed course development and enhancement, including the addition of soft skill courses.
- Improved the transitions program by expanding course credits and reorganizing the course offering schedule to ensure manageability for students.
- Led an all faculty work group to brainstorm further improvements to the program.
- Improved the professionalism of the program by adopting certain MBA program policies, including student and faculty expectation agreements.
- Improved the tracking of the transitions program.
- Oversaw the 6/30/19 MSA budget process.
- Reported MSA statistics to the Advisory Council in Fall 17 and Spring 18.
- Managed the creation of new marketing materials, including a new brochure that included my personal statements about the program.
- Reviewed certain student applications and transcripts for eligibility into the program or to waive courses.
- Participated in MSA social events.
- Contributed to the redevelopment of the MSA website.
- Redesigned the MSA Information session slides and held marketing sessions with prospective students.
- MSA spring 2018 applications and acceptances were up 38% and 59%, respectively, from spring 2017. Transitions applications also increased significantly at 84% from summer 2017 to summer 2018.

Community Health Center of Franklin County (Not-for-profit, 70 employees)

March 2011-June 2017

www.chcfc.org

Chief Financial Officer

- Oversaw annual budget of \$6.5 million in compliance with the health center's business and strategic plans as set forth by the Board of Directors. Budget includes a \$2 million federal grant.
- Administered treasury, budget, audit, tax, accounting, purchasing, real estate, debt and insurance activities.
- Directly responsible for all reporting to government agencies, including the IRS, Medicare, Medicaid and the Health Resources and Service Administration.
- Responsible for preparing financial and budget variance reports for the Board of Directors and Senior Management.
- Collaborated with the Human Resource Director to ensure employee compliance with health center policies, accurate payroll processing and compliance with employer regulations, such as new ACA requirements.
- Implemented and directed a project to add a new revenue stream by offering discounted prescriptions to health center patients by contracting with local pharmacies.
- Member of the Senior Management team and participated in decision making related to the operations and recovery of the Health Center, including marketing and fundraising.
- Oversaw all federal and non-federal grant related activities, monitor grant budgets, and submit financial reports.
- Managed the departments of billing and accounting.
- Restructured the accounting and billing departments to properly segregate duties and create efficiencies.
- Corrected severe audit deficiencies by implementing and monitoring internal control procedures and policies. No audit findings have been reported since fiscal year 2012.

- Reviewed receivables to ensure timely collections. Collaborated with billing manager to resolve collection issues, including training staff in all departments.
- Monitored expenditures and cash receipts in an environment of limited cash flow.
- Measured and monitored productivity of Providers, discuss with Chief Medical Officer and CEO.
- Maintained general ledger cost allocations to ensure adequate department financials and grant reporting.
- Calculated and analyzed financial ratios and compared to local, state and national performance benchmarks.
- Responsible for the health center's fiscal and federal grant policies, including monitoring the compliance of billing and accounting staff.
- Mastered the complexity of the health care reimbursement system in Massachusetts, including the Health Safety Net fund and Accountable Care Organizations.

Community Health Center of Franklin County (Non-profit, 65 employees)

January 2012-March 2013

www.chcfc.org

Interim Chief Executive Officer & Chief Financial Officer

- Oversaw the operations of a federally qualified health center for 3 sites, 9,000 patients, 37,000 visits per year and 65 employees, including 7 senior management direct reports.
- Managed dual executive positions of CEO and CFO during a period of financial distress, resulting in financial gains and a positive budget variance compared to a trend of 4 consecutive years of losses.
- Composed a plan of correction to the DPH to obtain the health center's license after suffering severe findings and untimely responses. This plan was approved and license was obtained in February 2012.
- Facilitated a federal site visit in March 2012. Presented financial recovery recommendations that exemplified the credentials of the senior management team to restructure the operations of the health center, resulting in sustainability and profitability. The health center was found to be in compliance with 14 of the 19 program requirements. Developed a plan with the senior management team to address findings within the 90 day requirement. Currently, the health center is in compliance with all 19 requirements.
- Developed a financial recovery plan for the fiscal years ending June 30, 2013 and 2014. The financial recovery plan included: scheduling template changes allowing for increased visits and revenue and decreased expenses, resulting in operating gains and increased cash flow. The plan was realistic, obtainable, and incorporated the goals of the health center without compromising the mission.
- Restructured debt to increase leverage and cash flow.
- Discovered opportunities to collaborate and renegotiate contracts to decrease costs. Contracts include: employment, employee benefits, behavioral health, cleaning, medical supplies, software, etc.
- Partnered with the Mass League to ensure the needs of health centers are addressed with state and federal officials. Participated in meetings to increase collaborations between health centers. Discussed proposed legislation affecting funding and reimbursement of health centers.
- Implemented new patient protocols and tracking to improve access to care and to increase patient visits.
- Re-organized staffing of dental department to maximize productivity and revenue and decrease costs. Dental has been in a gain position for the last two years.
- Collaborated with the Development Director to receive two grants that had never been received by the health center, including a HIV grant and an American Cancer Society/NFL grant for \$45,000 to support breast cancer awareness.
- Facilitated community awareness. Offered innovative marketing ideas to the Development Director to increase patients and fundraising.
- Offered valuable solutions to the Human Resource Director and other senior management staff to resolve employee conflicts in an effective and professional manner incorporating the goals of the health center.
- Supported the implementation of electronic health records, Dentrix (dental) and Intergrity (medical).
- Developed accurate reporting systems with the CIO.

Chicopee Savings Bank-Chicopee, MA (Public Company, 132 employees)
www.chicopeesavings.com
Assistant Vice President and Officer of Financial Reporting

July 2008-March 2011

- Responsible for preparing and providing relevant and timely financial information to shareholders, the Board of Directors, the SEC, the Federal Reserve Bank, and internal management.
- Managed four accounting systems that assist with the efficiencies of the financial reporting department.
- Drafted and filed the Bank's SEC reports such as 10Q's and 10K's, utilizing Microsoft Word and Excel.
- Ensured compliance with GAAP and federal and state regulations.
- Served as the liaison to auditors, attorneys, and all departments of the Bank to ensure accuracy of financial reporting and timeliness of SEC filing requirements.
- Demonstrated strong written and oral communication skills for the preparation and presentation of financial reports to the Audit and Asset Liability Committees.
- Responsible for drafting and filing quarterly earnings releases.
- Prepared and filed 'Bank Holding Company' Federal Reserve Bank quarterly reports and ensured accordance with federal regulations.
- Assisted executive management in planning and preparing the annual budget.
- Maintained effective working relationships within all departments.
- Coordinated and analyzed financial information from all departments.
- Maintained strong attention to detail skills.
- Analyzed financial reports of competitors to maintain knowledge of industry.
- Researched and updated Chief Financial Officer on recent accounting pronouncements.
- Responsible for the financial reporting of the Bank's Equity Incentive Plan and Interest Rate Risk Management (Asset/Liability Management) using software programs, such as Express Options and Basis.
- Presented and prepared liquidity and interest rate risk reports, including trend analyses, forecasts and financial ratios to the ALCO committee.
- Primarily responsible for the accounting of the Bank's Charitable Foundation, including preparing financial statements utilizing QuickBooks software and calculating the annual donation requirement.
- Managed time sensitive deadlines through planning, prioritizing, and strict time management.
- Participated in accounting update seminars sponsored by the Financial Managers Society.
- Maintained membership in the IT Committee to discuss technology projects and risk management procedures and practices.
- Accomplished reporting consistencies amongst all departments and regulatory reports.
- Established a 10K committee to involve all aspects of the business in financial reporting decisions.

Wolf and Company-Springfield, MA (Public Accounting Firm)
Auditor

Aug. 2007-July 2008

- Participated in the planning of audit engagements through understanding and testing of client's internal controls using the COSO framework.
- Performed loan evaluations during the decline in the real estate market to assess the creditworthiness of the borrower as well as the value of the collateral securing the loan.
- Tested all areas of the audit (cash, fixed assets, investments, borrowings, intangibles, equity, accruals etc.), specializing in loans and the allowance for loan losses, a highly criticized audit area.
- Communicated with management and documented accounting policies, procedures, and internal controls (including SOX 404).
- Prepared non-public bank's financial reports.
- Audited public bank's SEC reports: 10K's and 10Q's.
- Utilized Microsoft Word and Excel to perform and summarize test work.
- Recommended accounting procedures to improve clients financial reporting.

PricewaterhouseCoopers-Boston, MA (Public Accounting Firm)
Auditor (Full-time Aug. 2006-Aug. 2007; Internship May 2005-Aug. 2005)

May 2005-Aug. 2007

- Participated in audits of financial institutions, colleges and government agencies.
- Performed testing of SEC reports, such as 10K's, 10Q's, 8K's and initial public offerings.
- Audited an endowment fund for a Boston area University.

- Controlled and maintained multiple confirmation logs, which required follow up with client contacts to ensure that all information was received before deadlines.
- Performed testing and analytics in areas such as: cash, cash flows, accruals, debt/equity, investments, intangibles/goodwill.
- Assisted with a client's debt offering by tying out a comfort letter covering six quarters of financial information.
- Contributed to a bank's restatement process in Puerto Rico; covered areas concerning FAS 91 and SOX 404.
- Demonstrated flexibility through working many over-time hours and travelling to client sites.
- Succeeded in a team player environment by offering assistance to team members and maintaining a positive attitude.
- Documented work in guidance with PwC Documentation Standards in Lotus Notes.
- Participated in multiple recruiting events at the University of Massachusetts Amherst.

University of Massachusetts

Sept. 2005-May 2006

Teaching Assistant- 20 hrs. Per week

- Instructed two discussion sections for an intermediate accounting course (approx. 30 students per class) without the professor's attendance.
- Assisted the Professor during exams by answering student questions.
- Graded student's homework and quizzes, compensating for 10% of overall grade.
- Held lab hours for students who requested additional assistance in accounting, also held lab hours for a Microsoft Access computer course.

COMPUTER SKILLS:

- Proficient with Microsoft Office Suite, especially Excel, Word and Outlook.
- Experienced with accounting and budgeting software such as IPS Sendero, Express Options, QuickBooks, Peachtree and Basis.
- Experienced with Canvas, Blackboard and Connect course instruction databases.

LEADERSHIP SKILLS:

- Graduated from Leadership Pioneer Valley in June 2014
- Served in Executive level positions, such as CEO and CFO

TEACHING CERTIFICATIONS:

- Graduated from AACSB Bridge Program in June 2015: a teaching certificate program for senior-executives that provides the teaching skills necessary to teach higher-education business classes in an AACSB accredited business school.

LICENSES:

- Licensed Certified Public Accountant in the state of Massachusetts, expires June 2028

FELLOWSHIPS:

- Isenberg Teaching Fellow June 2021-May 2023

NOMINATIONS:

- Distinguished Teaching Award
 - Nominee for 2021/2022 academic year
 - Finalist for 2019/2020 academic year
- Lilly Fellowship finalist for Isenberg school in 2021
- Isenberg Outstanding Teacher Award nominee in 2021, 2022, 2024 & 2026
- Isenberg Teaching Fellow awardee in 2021 & 2022

CURRENT SERVICE ACTIVITIES:

- Serve on the Accounting Department's Scholarship Committee, effective September 2023. Chair, effective September 2024.
- Serve on the Graduate Department's MSA Curriculum Committee, effective Spring 2021
- Serve on the Accounting Department's Workshop Committee to assist with CPE tracking for our CPA licensed faculty, effective Fall 2019

- Served as Faculty Advisor for the annual Deloitte Audit Case Competition: for Fall 2019, Fall 2020 and Spring 2021 semesters
- Student club: Delta Sigma Pi, faculty initiate, effective Spring 2020
- UMass Gives: Accounting Ambassador 2019, 2021, 2022, 2023
- Served on the Undergraduate Accounting Department's Curriculum Committee for AACSB accreditation, effective Fall 2017-Spring 2021

BOARD OF DIRECTOR ACTIVITIES:

- UMassFive College Federal Credit Union- member of the board of directors, effective March 2023