

**Kathy Zilch, CPA, PhD**  
 Isenberg School of Management  
 University of Massachusetts at Amherst  
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<b>TEACHING EXPERIENCE</b>
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**University of Massachusetts**  
**Operations and Information Management (OIM) Department**  
**Lecturer**

***Amherst, MA***  
**2019-present**

- Awards/Recognition:
  - Teaching Fellow, Isenberg School of Management (2023-2024)
    - Recognizes faculty for their creative and effective use of educational technologies in course design and delivery
    - Fellows are responsible for sharing best practices with the full faculty, to enrich Isenberg School of Management's instruction across departments
  - Teaching with Digital Technology Award (Undergraduate), Isenberg School of Management (2022)
    - Awarded for innovative use of technology in the classroom
    - Students' nomination with selection by faculty committee
- Courses taught:
  - OIM 307: Power Spreadsheets for Business Analysts (formerly OIM 297S)
  - OIM 350: Business Intelligence and Analytics
  - SCH-MGMT 601: Data Management for Business Leaders
  - SCH-MGMT 602: Business Intelligence & Analytics

**Fisher College**  
**Online Associate Professor**  
**Assistant Professor**  
**Adjunct**

***Boston, MA***  
**2017-2019**  
**2010-2011**  
**2008-2009, 2011-2013**

- 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

**Springfield College**  
**Assistant Professor**  
**Adjunct**

*Springfield, MA*  
**2014-2017**  
**2011 - 2013**

- 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

**Bay Path University**  
**Academic Director**

*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

**Southern New Hampshire University**  
**Adjunct Faculty**

*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

<b>ACADEMIC SERVICE</b>
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Isenberg School of Management, University of Massachusetts:

- Founding Faculty Advisor, OIM Department Peer Mentoring Program, 2022-present
- Mentor, OIM Department New Faculty, 2022-present
- Member, Graduate Programs Curriculum Committee, 2022-present
- Member, Department Curriculum Committee, 2021-present
- Faculty Participant, OIM/ISOM Alumni Event at UMass Club in Boston, MA, April 26, 2023
- Faculty Participant, OIM Department events (Destination Day, New Majors Event, etc.) 2020-present

## 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

**PAPERS / CONFERENCE PRESENTATIONS**

Zilch, Dr. Kathleen. "Ethical Considerations in Big Data Analytics for Covid-19 Mitigation," *The Ethics of Business, Trade, and Global Governance* (Wentworth by the Sea, NH – December 2-3, 2022). Co-sponsored by St. Anselm College, University of Vienna, and University of St. Andrews.

- 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.
- 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
- (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.

<b>PROFESSIONAL ACTIVITIES</b>
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2009 – current, CPA Continuing Professional Education (CPE): Average 40 hours per year of professional development to maintain current CPA license

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

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.

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

## INDUSTRY EXPERIENCE

**UBS Investment Bank, Investment Banking Division (IBD)** **New York, NY**  
**Revenue Controller/Senior Financial Analyst, Americas Region** **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 for reporting and analysis of over \$1 billion in annual revenue
- 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

**Lehman Brothers** **New York, NY**  
**Equity Product Controller** **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

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

- Provided public accounting services to regional financial institutions

<b>EDUCATION AND PROFESSIONAL CERTIFICATION</b>
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**Certified Public Accountant (CPA)**, Massachusetts, 2009-present

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

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

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

<b>TECHNOLOGY SKILLS</b>
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- Instructional: Blackboard, Moodle, Canvas, CengageNOW, WileyPlus, and Cengage SAM
- Advanced MS Excel: 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 Analysis, ERDPlus, Tableau, and various financial and managerial accounting applications