

# PAMELA S. TRAFFORD

Curriculum Vitae July 2024

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## 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 University Distinguishes Teaching Award, 2023-2024 and in multiple prior years.
- Nominated for College outstanding teacher award in multiple prior years, most recently 2024.
- 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.
- 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 I and/or 2\* (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 \*.
  - Intermediate Financial Accounting I and II\*
  - Advanced Accounting\*
  - Principles of Financial Accounting\* and related honors colloquia
  - Principles of Managerial Accounting\* and related honors colloquia
  - Seminar for SIP (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.
  - Isenberg Faculty Liaison for online teaching (2006-2011). See section for prior academic service.
- Other teaching activities
  - Faculty advisor
  - Student organization advisor (Alliance for Women in Accounting (2014- present), National Association for Black Accountants (2013-2018).
  - 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.

### **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. Included select online assignment features. (October 2022)
- Two-chapter review of content for MHHE textbook. *Financial Accounting for Managers* by Thomas/ Drake/ Thornock/ Spiceland. (March 2022)
- 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. *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 5<sup>th</sup> 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

## **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**

### **Board of Directors, Biodynamic Farmland Conservation Trust, Inc. (BFCT) (2014-present)**

- BFCT is a nonprofit that oversees the activities of Brookfield Farm, a CSA with over 1 million in assets that supports over 600 households, annually.
- Treasurer-elect. Currently serving with prior Treasurer through his retirement in 2024. Keep financial records, coordinate with auditors, review and coordinate budgets, and advise on financial issues.

### **Coordinator/participant, MSCPA campus event: Is Accounting for Me? (Spring 2023, 2019, 2018)**

- Led activities and coordinated panel discussion with MSCPA personnel as part of their annual event promoting the accounting profession.

### **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 (2014-2015)**

- Service on Taxpayer Assistance Service Centers Committee and Taxpayer Issues Screening Committee
- Substantive service working with IRS officials to collect information about taxpayer issues and make proposals to Internal Revenue Service to improve service.

### **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.
  - Includes a minimum of 120 hours of qualifying professional education credits in every rolling 3-year period.
- 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

- *Chairman, Isenberg Teaching Award Committee (TAC).* (Spring 2019-present). Choose recipients of the College Outstanding Teaching awards for Isenberg faculty. Chair committee beginning in 2014.
- *Member, College Review Committee (2013-present).* Review cases for promotion to Senior Lecturer and Senior Lecturer II across the School and make recommendations to the Dean.
- *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

- As a former teaching fellow, asked to consult on various projects. (2021-2024). Recent examples include:
  - Work with Dean Hess on identifying issues for badging credentials, reward system
  - Work with S. Boyer to identify Canvas issues for a subgroup working at the University level.
- 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

(Academic Service continues on next page.)

## **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)