

Kathy Zilch, CPA, PhD
 Isenberg School of Management
 University of Massachusetts at Amherst
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TEACHING EXPERIENCE

University of Massachusetts
Operations and Information Management (OIM) Department
Lecturer

Amherst, MA
2019-present

- Courses taught:
 - o OIM 307: Power Spreadsheets for Business Analysts (formerly OIM 297S)
 - o OIM 350: Business Intelligence and Analytics
 - o SCH-MGMT 601: Data Management for Business Leaders
 - o 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:
 - o AC121: Financial Accounting
 - o AC122: Managerial Accounting
 - o AC201: Intermediate Accounting I
 - o AC202: Intermediate Accounting II
 - o AC301: Accounting Information Systems
 - o EC102: Microeconomics
 - o FI201: Principles of Business Finance
 - o MG450: Senior Project
 - o MBA5200: Financial Reporting and Statement Analysis
 - o MBA5250: Strategic Cost and Profitability Analysis
 - o 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:
 - o BUSM150: Introduction to Business
 - o ECON205: Microeconomics
 - o BUSM210: Principles of Accounting I
 - o BUSM211: Principles of Accounting II
 - o BUSM250: Business Communications
 - o BUSM310: Business Information Systems
 - o BUSM320: Financial Statement Analysis
 - o BUSM361: Intermediate Accounting I

- BUSM362: Intermediate Accounting II
- BUSM420: Global Business Management
- BUSM492: Strategic Management (Senior Capstone)
- BUSM611: Accounting for Managers (MBA)
- BUSM651: Leading Organizations and People (MBA)
- BUSM684: Corporate Residency Fieldwork (MBA)

Bay Path University
Academic Director
2014

Longmeadow, MA
2013-

- 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

AWARDS AND HONORS

Teaching Fellows – Isenberg School of Management

2023 – 2025

- Selected as one of four faculty members, out of all academic departments in the Isenberg School of Management
- Collaborate with the Isenberg Director of Instructional Technologies, sharing best practices and innovative technologies with all Isenberg faculty, to enrich teaching across departments

Recipient, Teaching with Digital Technology Award – Isenberg School of Management

2022

- Nominated by students and selected by a faculty committee, to receive award for effectively integrating technology into undergraduate teaching

ACADEMIC SERVICE

Isenberg School of Management, University of Massachusetts:

- Member, Isenberg Graduate Programs Curriculum Committee, 2022-present
- Member, OIM Department Curriculum Committee, 2021-present
- Founding Faculty Advisor, OIM Department Peer Mentoring Program, 2022-present
- Member, Lecturer Search Committees, 2022, 2024
- Chair, Honors Thesis for an OIM Honors Student
- Mentor, OIM Department New Faculty, 2022-2023
- 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:
 - 1st Place 2014-15
 - 1st Place 2016-17
 - National Conference:
 - 3rd 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
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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.

PROFESSIONAL DEVELOPMENT/ACTIVITIES

2009 – current, CPA Continuing Professional Education (CPE): Average 40 hours per year of professional development to maintain current CPA license. Topics areas include Ethics and AI in Business.

2024, Course Design Institute (CDI) hosted by the IDEAS team at University of Massachusetts – Amherst.

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)
Revenue Controller/Senior Financial Analyst, Americas Region**

**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 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
Equity Product Controller

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

Wolf and Company P.C.
Staff Auditor

Boston, MA
2004-2006

- Provided public accounting services to regional financial institutions

EDUCATION AND PROFESSIONAL CERTIFICATION

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

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

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

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

Certified Public Accountant (CPA), Massachusetts, 2009-present

TECHNOLOGY SKILLS

- Instructional: Blackboard, Moodle, Canvas, CengageNOW, WileyPlus, 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