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Academic Background

Degrees

- Ph.D. Florida Atlantic University, Boca Raton, Florida, Accounting, 2001
- M.S. Army Command and General Staff College, Fort Leavenworth, Kansas, Strategic Military Operations, 2004
- M.B.A. Boston University, Boston, Massachusetts, Business, 1990
- M.S. University of Southern California, Los Angeles, California, Computer Science, 1990
- B.A. University of South Florida, Tampa, Florida, Finance, 1982

Professional Interests

Research Interests

Earnings Management

Teaching Interests

Financial/Cost Accounting

INTELLECTUAL CONTRIBUTIONS

Refereed Articles

- Mortimer, J. W. (in press, 2012). Evaluating the Mitigating Effect of Brand Value on the Financial Performance of Retail Firms in an Economic Recession. *International Research Journal of Applied Finance*.
- Mortimer, J. W., Little, P., & Marcis, J. (in press, 2012). Learning Style Preferences of Accounting Majors and Performance on Gleim Review Assessments. *Journal of Advancements in Business Education*, 1, 6.
- Mortimer, J. W., Little, P. L., Keene, M. A., & Henderson, L. R. (in press, 2011). Evaluating the Effect of Recession on Retail Firms' Strategy using DuPont Method: 2006-2009. *AABRI Journal of Finance and Accountancy*.
- Little, P., Mortimer, J., & Keene, M. (2010). The Du Pont Model: Evaluating the Effect of an Economic Recession on the Successful Implementation of Alternate Strategies in the Retail Industry. *Academy of Strategic Management Journal*, 8, 9.
- Mortimer, J. W. & Marcis, J. G. (2006). Bond Valuation: A Simpler and More Insightful Approach. *Journal of Theoretical Accounting Research*.
- Mortimer, J. W. (2004). Executive Incentives and the Horizon Problem: CEO Departure Revisited. *Palmetto Review*, 7, 9.

Refereed Proceedings

Full Paper

- Adebayo, A., Mortimer, J., Little, P., & Marcis, J. (in press, 2013). The Impact of Student Learning Styles. American Accounting Association National Meeting, American Accounting Association, 14.
- Mortimer, J. W., Little, P., & Marcis, J. (2012). THE IMPACT OF STUDENT LEARNING STYLES ON

SCHOLASTIC PERFORMANCE. Academy of Business Education.

Henderson, L. R., Mortimer, J. W., & Aguilar, O. (2012). GASB Exposure Draft on Public Sector Pension Plans: Measuring the Liability. American Accounting Association National Meeting.

Henderson, L. R., Mortimer, J. W., & Aguilar, O. (2011). PUBLIC SECTOR PENSION PLANS AND DISCOUNT RATES. Southeast Informs, Myrtle Beach: Southeast Informs.

Krippel, G. L., Marcis, J., & Mortimer, J. (in press, 2007). Motivating Your Students to take the CPA Exam. Southeastern Chapter INFORMS.

Mortimer, J. W. (2005). Capital Expenditures and the Horizon Problem. American Academy of Accounting and Finance.

Mortimer, J. W. (2005). Executive Incentives: CEO Departure Revisited. American Academy of Accounting and Finance.

Mortimer, J. W. (2004). Bond Valuation: A Simpler More Meaningful Method. Southeastern Chapter INFORMS, 8.

Mortimer, J. W. (2004). Bond Valuation: A Simpler More Meaningful Method. American Academy of Accounting and Finance, 7.

Henderson, L. R., Mortimer, J. W., McCollough, C. J., Schneider, P. A.D., & Serrano, D. (2004). Gray Areas of Accounting. Southeast Decision Sciences Institute.

Mortimer, J. W. (2003). Capital Expenditures and the Horizon Problem: CEO Departure Revisited. Southeastern Chapter INFORMS, 12.

Mortimer, J. W. (2003). Modeling the Buy versus Make Decision. Southeastern Chapter INFORMS, 12.

Mortimer, J. W. (2002). Executive Incentives and the Horizon Problem: CEO Departure Revisited. Southeastern Chapter INFORMS, 12.

Mortimer, J. W. (2002). Using Integrated Statements Models as Advance Organizers in Introductory Financial Accounting. Southeastern Chapter INFORMS, 12.

Presentation of Refereed Papers

National

Mortimer, J. W., Little, P., & Marcis, J. (2012, March). THE IMPACT OF STUDENT LEARNING STYLES ON SCHOLASTIC PERFORMANCE. International Academy of Business and Economics, Key West, Florida.

Little, P., Mortimer, J., & Keene, M. (2009). The Du Pont Model: Evaluating the Effect of an Economic Recession on the Successful Implementation of Alternative Strategies in the Retail Industry. Allied Academies Summer 2009 Internet Conference, Unknown, Unknown.

Working Papers

Mortimer, J. W. & Henderson, L. R. (2012). "PUBLIC SECTOR PENSION PLANS AND DISCOUNT RATES UNDER GASB STANDARDS: THE VALUATION DEBATE" targeted for Accounting Horizons.

Presentation of Non-Refereed Papers

National

Mortimer, J. W. & Henderson, L. R. (2012, December). Public Sector Pension Plans & Discount Rates Under GASB Standards: The Valuation Debate. Wall College of Business Accounting Advisory Board, Conway, South Carolina.

Mortimer, J. W., Little, P., & Marcis, J. (2012, September). Student Learning Styles, Media Preferences & Examination Performance. Academy of Business Education, Charleston, South Carolina.

State

Mortimer, J. W., Henderson, L. R., & Augilar, O. (2012, April). Defined Benefit Pension Liabilities of State and Local Government. Wall Interdisciplinary Talks (WITS), Conway, South Carolina.

Professional Associations

Memberships

American Accounting Association, 2012

Beta Alpha Psi, 2004-2012

ROTARACT, 2004-2008

Rotary, 2002-2008

Teaching

Courses Taught

Courses from the Teaching Schedule: Controllership, Cost Accounting, Financial/Managerial Accounting II, Governmental Accounting, Governmental Accounting (MBA), Governmental Accounting.

SkillsPersonal

Video Conferencing Course WebCT Smart Classroom Master Teaching Workshop

Other Teaching Activities

Course (New) - Creation/Delivery: Conventional

2011 - Course (New) - Creation/Delivery: Conventional. ACCT 632: (New Course) Advanced Managerial Accounting (This course was selected to assess two MAcc program student learning objectives: Accounting Knowledge and Technical Skills). 1) Course author responsible for the development/modification of course content, syllabus development, and course standards. 2. Fall 2011: Began creating the course to integrate and develop synergies with CBAD 333, Cost Accounting, and CBAD 434, Controllership.

2011 - Course (New) - Creation/Delivery: Conventional. CBAD 434: (New Course) Controllership 1) Course author: Responsible for coordinating with other faculty teaching this course to develop standardized learning objectives a. Designed and created all course materials. 1. Syllabus 2. Presentations 3. Readings 4. Homework 5. Tests b. Mapped the Gleim CMA I preparation materials to the text materials. c. Developed online testing (Gleim assessments). d. Created Excel software solution sets for the students. e. Used the peer-teaching model in this class.

Course (New) - Creation/Delivery: Online

2011 - Course (New) - Creation/Delivery: Online. CBAD 202 DL (Course Existing Redesign): Financial/Managerial Accounting II 1) Course author: Responsible for coordinating with other faculty teaching this course to develop standardized learning objectives. 2) Created the distance learn format for this course: 1. Syllabus 2. Online a. Presentations b. Homework c. Pre-tests d. Tests 3) Provided students detailed animated audio problem solutions created with Camtasia Studio 7 software.. 4) Special emphasis was placed on coordinating the course content with the homework and tests.

Student Collabor: Co-Author of Article/Chapter

2012 - Student Collabor: Co-Author of Article/Chapter.

Current Governmental Accounting Standards require state and local governments to disclose the funded status of their defined benefit pension in the notes to financial statements using the investment rate of return on plan assets. Critics consider financial statements to be incomplete with respect to defined benefit pension plans despite existing footnote disclosures regarding the funding status of the plans. Critics also find that the rate used to value the pension liability is unrealistic and understates the actuarial accrued liability. In 2011 the Actuarial Standards Board and the GASB issued exposure drafts that proposed fundamental changes to governmental defined benefit pension reporting. On June 25, 2012 – The Governmental Accounting Standards Board (GASB) voted to approve two new standards that will substantially improve the accounting and financial reporting of public employee pensions by state governments. Among the more important changes in the new GASB pronouncements is the requirement that state and local governments who provide defined benefit pensions recognize their long-term liability (net pension liability) on the balance sheet of their government-wide financial statements. Net pension liability is the difference between the present value of projected plan benefit payments and the value of plan assets in trust for the payment of future benefits to employees and their beneficiaries. Prior to the new GASB pronouncements, the discount rate used to value net pension liability positions was based on pension plans' long-term investment rate of return. The new GASB pronouncements require discounting of the net liability position at an index rate for 20-year, AA-or-higher rated municipal bonds. Based on a sample of comprised of 45 state FYE 2009 defined pension benefit plans, this paper examines the hypothetical change in the net pension liability valuations as a result of the

implementation of the GASB pronouncements.
[Olga Aguilar]

Other Teaching Activities

2013 - Other Teaching Activities. 2/19/2013 Melinda Hathway, Cost Accountant at Boston Scientific, discussed cost concepts with my students.

Her e-mail note follows:

Thank you for giving me the opportunity to speak with them. I very much enjoyed it. If there is anything I can do to help you and the students please reach out to me. It is a great school and deserves recognition. We do have an internship program and a rotational program for students just out of college. As I mentioned at lunch, they currently only recruit from three schools. But perhaps the Wall Center for Excellence could contact them and convince them to expand their recruitment. I am not sure who is in charge of the Wall Center these days, but here is the website to the careers page for students. Please feel free to forward it along if you think they might be interested. It is a very nice alternative for students less interested in going into public accounting.

2013 - Other Teaching Activities. 2/15/2013: Met with Melinda Hathaway, former student and now Senior Analyst for Global Operations at Boston Scientific. The purpose of lunch was to build a stakeholder relationship with her by inviting her to my Tuesday morning Cost Accounting Class.

2013 - Other Teaching Activities.

You have successfully registered for the following Webinar: **Measuring Student Success with MyAccountingLab**
Thursday, February 7, 2013 3:00 PM - 4:00 PM EST

2013 - Other Teaching Activities. 2/26/2013 Attended Active Shooter Training. An active shooter is an armed person who uses deadly force and has unrestricted access to victims. ... we have asked our Department of Public Safety to provide faculty and staff with training on what actions to take in an active shooter situation. The training will include a video and scenarios, along with key indicators for recognizing potential workplace violence and the protocol for reporting concerns.

This training will be mandatory for all faculty and staff and must be completed by March 29 of this year. The sessions are one hour in length. Training dates for February are below. I'll send the dates and times for March in another communication. . We're taking your safety and the safety of our students very seriously, so those who do not participate in this required training by March 29 will be subject to administrative review. Please make every effort to attend.

2013 - Other Teaching Activities. Provided a CPA Certification Proposal presentation to the Accounting Faculty.

2012 - Other Teaching Activities.

The McGraw-Hill Managerial Accounting product team is hosting a **Focus Group on Monday, August 6th, from 10:00am – 12:00pm** at the upcoming 2012 **AAA Annual Meeting** in Washington, D.C., and we cordially invite you to attend! Author Stacey Whitecotton and McGraw-Hill's editorial and marketing personnel will lead discussions about challenges and best practices in teaching the introductory managerial accounting course, and will seek your input regarding how we can provide content and services that engage your students further. You will learn about the forthcoming 2nd edition of Whitecotton, Libby and Phillips' Managerial Accounting and provide oral feedback after reading two sample chapters. Finally, we will preview our exciting new Connect Accounting features, including LearnSmart, Intelligent Response Technology, and Guided Examples.

2012 - Other Teaching Activities. 11/28/2012: Attended Moodle Basics Course. This session will introduce the user to the Moodle system, and will cover basic Moodle navigation, editing course settings, adding basic course content such as files and folders. More advanced topics--such as assignments, quizzes, and grading--will be offered in later sessions. Participants will be able to: •Locate basic tools and settings in Moodle •Set up a basic course outline using basic editing features •Add folders and files to course content areas

Date: Wednesday, November 28th, 2012

2011 - Other Teaching Activities. CBAD 202 (Course Existing): Financial/Managerial Accounting II 1) Course author: Responsible for coordinating with other faculty teaching this course to develop standardized learning objectives. 2) Introduced a more interactive approach to the class. Prior to each class, I used in-class questionnaires to assess students' understanding of each class topic. This technique improved my class by: a. Interaction with the students while discussing their understanding of the materials (student buy-in). b. Enabling me to modify the subsequent class presentation to better satisfy students' understanding of the

topic. c. Reinforcing important course topics.

2011 - Other Teaching Activities. CBAD 333: (Course Existing) Cost Accounting 1) Course author: Responsible for coordinating with other faculty teaching this course to develop standardized learning objectives. 2) Transitioned assessment tests from the Gleim CMA to the Gleim CPA test preparation format. This requires exhaustive examination of the text publisher's and Gleim's materials to cross-map topical coverage. I initiated this shift to accommodate the CPA track students (the majority of students.) The transition from Gleim CMA to Gleim CPA test preparation software saves each student approximately \$75. 3) Introduced online Gleim assessments. 4) Experimented with online testing in BlackBoard using Respondus 4.0 test preparation software. 5) Significantly expanded my ExCel solution set. My ExCel solution set is a set of problems that I solve in ExCel format for the students. The solutions provide alternative ways to solve problems and embedded comments further assist students as they solve their homework.

2011 - Other Teaching Activities. ACCT 533: (Course Existing - Revised) Governmental Accounting (This course was selected to assess three MAcc program student learning objectives: Accounting Knowledge, Oral & Written Communication and Technical Skills). 1) Significantly increased the rigor of this class by: a. Developing and implementing a more formal presentation requirement. Each student is required to present a state comprehensive financial annual report (CAFR). A rubric for assessing the presentation was provided to the students. b. Significantly expanding the number and difficulty level of assigned problems. c. Introducing recent governmental and not-for-profit industry payroll and benefit information into the classroom presentations 2) Significantly revised the research paper requirement for this class. a. To enhance paper uniformity I: 1. Required the use of Kate L. Turabian's, "A Manual for Writers of Research Papers, Theses, and Dissertations" style guide. 2. Provided the students a PowerPoint presentation overview of Kate Turabian's style guide. 3. Provided the class a PowerPoint presentation on the typical research paper content and class expectations

2011 - Other Teaching Activities. CBAD 433: (Course Existing) Governmental Accounting 1) Course author: Responsible for coordinating with other faculty teaching this course to develop standardized learning objectives. 2) Significantly increased the rigor of this class by: a. Developing and implementing a more presentation requirement. Each student is required to present a state comprehensive financial annual report. A rubric for assessing the presentation was provided to the students. b. Significantly expanding the number and difficulty level of assigned problems. c. Introducing recent governmental and not-for-profit industry payroll and benefit information into the classroom presentations

2010 - Other Teaching Activities. CBAD 433/533: Governmental Accounting

1. Course author responsible for the development/modification of course content, syllabus development, and course standards.

2. Smithville simulation software is used to support student understanding of governmental accounting processes.

2010 - Other Teaching Activities. CBAD 434: Controllershship

1. Course author responsible for the development/modification of course content, syllabus development, and course standards.

2. Fall 2010: Began reorganizing the course to integrate and develop synergies with CBAD 333, Cost Accounting.

2010 - Other Teaching Activities. CBAD 333: Cost Accounting

1. Course author responsible for the development/modification of course content, syllabus development, and course standards.

2. I incorporate MyAccountingLab into classroom requirements to assist students with homework problems.

3. Summer 2010: Completely reorganized the course to integrate and develop synergies with CBAD 434, Controllershship.

4. Fall 2010: Acted as the focal point for the liaison during the introduction of Gleim products not only for CBAD 333 but, for all CBAD courses using Gleim.

a. Fully integrated the CMA part I portion of the Gleim product into CBAD 333.

b. Developed Gleim online assessment tests for CBAD 333.

2010 - Other Teaching Activities. CBAD 202: Financial and Managerial Accounting II

1. Course author responsible for the development/modification of course content, syllabus development and distribution of course standards to other course instructors.

2. Spring 2010: I introduced The Management Accounting Simulation, 2006 edition, Kenneth Goosen, Micro Business Publications.

a. I worked closely with author of the The Management Simulation, Mr. Kenneth Goosen, to install and tailor the materials of the simulation to the meet the needs of the CBAD 202 instructors and students.

b. Worked closely with the author of the simulation to debug numerous errors in the accounting simulation.

c. Developed tests for the simulation portion of the class. Distributed this information to other course instructors.

3. Summer 2010: I introduced a new text, Managerial Accounting 2nd edition; Braun, Tietz, and Harrison, Prentice Hall Publishers.

a. I developed the syllabus to include:

i. The chapters/materials covered.

ii. Supporting problems.

b. I introduced MyAccountingLab for this course.

Monograph

Mortimer, J. W. (2007). Budget Formulation, Execution, and Issues. Baghdad, Iraq: .

Mortimer, J. W. (2006). Iraqi Financial Management Information System Implementation. Baghdad, Iraq: .

Mortimer, J. W. (2006). Government of Iraq Impediments to Progress. Baghdad, Iraq: .

Other Intellectual Activities

Contribution to Practice

2006: . Special Projects or Assignments. Post-Liberation initiatives were well meaning and focused on developing democratic institutions and their supporting systems. However, several of these initiatives created unintended consequences as they have been taken to extremes and used for other than the original intent. These measures created a climate of bureaucratic fear and indecision and an unwieldy governmental coordination framework that seriously undermines the functions of the GOI, as well as its ability to deliver services to the people of Iraq. The original good faith efforts to implement strong anti-corruption controls and create a balance of power between local and national governments now require modifications to enhance GOI operating and business practices.

Service:

Service to the University

Department Assignments

Chair:

2012-2013: Accounting Search Committee: Search CHAIR Training on November 14, 2012 at 1:30 pm
Event location: HREO Conference Room

Faculty Advisor:

2012: Accounting Advisory Board

College Assignments

Faculty Advisor:

2011: Beta Alpha Psi

2010 – 2011: Accounting Advisory Board

2009-2010: Wall Fellows Faculty

2009 – 2010: Beta Alpha Psi: Beta Alpha Psi recognizes academic excellence and complements members' formal education by providing interaction among students, faculty, and professionals, and fosters lifelong growth, service and ethical conduct

2008-2009: Beta Alpha Psi: Beta Alpha Psi recognizes academic excellence and complements members' formal education by providing interaction among students, faculty, and professionals, and fosters lifelong growth, service and ethical conduct

2008-2009: Rotaract: Rotaract is an international program for adults ages 18 to 30 who want to make a difference. It was founded in 1968 by Rotary International, an association of clubs made up of service-minded business and professional leaders.

2008 – 2009: Beta Alpha Psi: Beta Alpha Psi recognizes academic excellence and complements members' formal education by providing interaction among students, faculty, and professionals, and fosters lifelong growth, service and ethical conduct

2007 – 2008: Beta Alpha Psi: Beta Alpha Psi recognizes academic excellence and complements members' formal education by providing interaction among students, faculty, and professionals, and fosters lifelong growth, service and ethical conduct

2004-2005: Finance and Accounting Club: The finance and accounting club allows all finance and accounting students to interact and participate in financial and accounting social and professional activities.

2004 – 2007: Beta Alpha Psi: Beta Alpha Psi recognizes academic excellence and complements members' formal education by providing interaction among students, faculty, and professionals, and fosters lifelong growth, service and ethical conduct

Member:

2011: MAcc Committee

2011: Finance Advisory Board

2010 – 2011: Wall Fellows Faculty

2009-2010: Accounting Advisory Board: Advisory Board Coordinator

2009-2010: WCOB Search Committee: Curriculum Committee

2009 – 2011: WCOB Curriculum Committee

University Assignments**Member:**

2004-2005: Faculty Welfare and Development Committee

2004-2005: Faculty Senate

Service to the Profession**Academic Conference: Discussant**

2007: Southeast Informs, Myrtle Beach, South Carolina.

2004: American Academy of Accounting and Finance, New Orleans, Louisiana.

2002 – 2004: Southeast Informs, Myrtle Beach, South Carolina.

Board Member: Advisory Board

2005: American Accounting Association Financial Accounting Reporting Section, Sarasota, Florida. Performed duties as secretary/treasurer to the FARS committee prior to being deployed to Iraq

Reviewer - Article / Manuscript

2012: Coastal Business Journal, Mt. Pleasant, South Carolina.

2012: International Academy of Business and Economics. The document is very difficult to read. I recommend that the writer seek the assistance of an English speaking editor. The author notes the Tehrani, 2003 argument that the nature of the "relationship" varies from country-to-country. The author further stipulates that Indonesia is a collectivist society. However, the author's models appear to lack a control variable for cultural diversity, both internal and external. Other controls might include the "moderating" factors that the author mentions (mind-set, culture, behaviour, resources, skills, technology, and communication). The results for hypothesis 3 and 4 seem to contain an unintended cut and paste editing error. That is the hypotheses read the same (with differing statistical results). Note the cut and paste from the document that follows: Hypothesis 3 predicts there is a positive relationship between engagement ICT and CRP. Table 3 shows that the relationship between strategic alliance and CRP is significant. The standardized coefficient is 0.346 ($P < 0.05$). Hypothesis 3 is supported. Hypothesis 4 predicts there is a positive relationship between engagement ICT and CRP. Table 3 shows that the relationship between strategic alliance and CRP is significant. The standardized coefficient is 0.485 ($P < 0.05$). Hypothesis 4 is supported.

2011: Southeast Informs, Myrtle Beach, South Carolina.

Reviewer: Conference Paper

2012: Academy of Business Education, Charleston, South Carolina.

Service to the Community

Member of a Committee

2009: U.S. Army, The mission of the Command and General Staff College is to prepare future Army leaders to execute full spectrum joint, interagency, intergovernmental, multinational operations, advances the profession of military art and science, and supports operational requirements.

Other Community Service Activities

2010 – 2012: Command and General Staff College, United States Army

2011: Financial Empowerment Workshop, Wealth Seminar: Provided a one hour seminar covering the fundamentals of wealth formation and management. Key topics includes increasing income, minimizing expenses, investment planning, and tax avoidance.

2006 – 2007: United States Army, Active duty assignment to Baghdad, Iraq.

Positions Held in Civic Organizations

2005 – 2008: Rotary: Member of the Board of Directors, Rotary is a worldwide organization of business and professional leaders that provides humanitarian service, encourages high ethical standards in all vocations, and helps build goodwill and peace in the world. Approximately 1.2 million Rotarians belong to more than 31,000 Rotary clubs located in 167 countries.

Faculty Development

Assurance of Learning - Professional Development

2012: American Accounting Association National Meeting, Washington, District of Columbia.

The McGraw-Hill Managerial Accounting product team is hosting a **Focus Group on Monday, August 6th, from 10:00am – 12:00pm** at the upcoming 2012 **AAA Annual Meeting** in Washington, D.C., and we cordially invite you to attend!

Author Stacey Whitecotton and McGraw-Hill's editorial and marketing personnel will lead discussions about challenges and best practices in teaching the introductory managerial accounting course, and will seek your input regarding how we can provide content and services that engage your students further. You will learn about the forthcoming 2nd edition of Whitecotton, Libby and Phillips' Managerial Accounting and provide oral feedback after reading two sample chapters. Finally, we will preview our exciting new Connect Accounting features, including LearnSmart, Intelligent Response Technology, and Guided Examples.

2010: Finance Advisory Board meeting, Myrtle Beach, South Carolina. Spring Meeting: The purpose of the Finance Advisory Board is to facilitate relations among the Wall College of Business Administrators, Faculty, Students, and External stakeholders. The Finance Advisory Board seeks stakeholder input into the development of Wall College of Business finance programs. Additionally, the Wall College of Business looks to

Finance Advisory Board members for student employment opportunities and fund-raising support. I serve as an accounting faculty liaison representative to this organization..

2010: Finance Advisory Board meeting, Myrtle Beach, South Carolina. Fall Meeting: The purpose of the Finance Advisory Board is to facilitate relations among the Wall College of Business Administrators, Faculty, Students, and External stakeholders. The Finance Advisory Board seeks stakeholder input into the development of Wall College of Business finance programs. Additionally, the Wall College of Business looks to Finance Advisory Board members for student employment opportunities and fund-raising support. I serve as an accounting faculty liaison representative to this organization..

Instructional-Related Conference

2012: Pearson Meeting, Charleston, South Carolina. Integrating Sustainability into an Introductory Accounting Course Karen Braun, Case Western Reserve University and 'Managerial Accounting 3e' Author.

2012: Pearson Meeting, Charleston, South Carolina. IFRS in the Classroom Elizabeth Gordon, Temple University and forthcoming 'Intermediate Accounting' author.

2012: Pearson Meeting, Charleston, South Carolina. Beyond Email: Social Media Tools for Class Communications Wendy Tietz, Kent State University and 'Managerial Accounting 3e' Author.

2012: Pearson Meeting, Charleston, South Carolina. Active Learning in Accounting Tracie Nobles, Austin Community College.

2012: Pearson Meeting, Charleston, South Carolina. Using MyAccountingLab to Improve Grades Alison Haskins, MyAccountingLab Marketing Manager.

Other Professional Development

2012: International Academy of Business and Economics, Key West, Florida. Students today are more technologically sophisticated and more accepting of technological innovation than those of previous generations. Coastal Carolina University recently adopted the Gleim Online Software" system to support the Certified Public Accountant (CPA) and Certified Management Accountant (CMA) tracks within the Accounting curriculum. This study uses data gathered from the Perpetual Modality Preference Survey and student performance from two sections of the Intermediate Accounting II class. The purpose of this study is two-fold. First, the study reports on overall student performance in a course that weds conventional lecture, with a focus on problem-solving, and the on-line requirement of Gleim, with an emphasis on a multiple choice type of assessment. Second, the study investigated which learning styles were more highly correlated with examination performance..

2011: Command and General Staff College, Charleston, South Carolina. The purpose of this 2-hour lesson is to introduce students to the challenges of organizational leadership in a changing and uncertain environment and analyze how they can lead change in organizations. "While the same core leadership competencies apply to all levels of leadership, organizational leaders usually deal with more complexity, more people, greater uncertainty, and a greater number of unintended consequences." Nowhere is this more apparent than within the operational environment. Organizational leaders today face a kaleidoscope of complex, ambiguous situations that challenge their mental agility, ethical foundations, and fundamental leadership competencies. When dealing with the challenges of a multifaceted organization, organizational leaders must be able to embrace uncertainty, adapt to a continually changing environment, and lead change. We will examine a leader facing such a challenge in William Bratton, the police commissioner of New York City, as he attempted to change the methods for fighting crime within a city with a crime rate spiraling out of control..

2011: Command and General Staff College, Fort Dix, United States of America. This is the first of three lessons that emphasize how to think rather than what to do. This lesson introduces the fundamental concepts in problem solving and reasoning. The first hour will cover the relationship between critical thinking, creative thinking, decision making, and problem solving, using the Army's Seven Step Problem-Solving Model. In the second hour, we will introduce the fundamental concepts of thinking by means of a model developed by Richard Paul and Linda Elder. The model consists of the Elements of Thought and Universal Intellectual Standards. You will gain an understanding of the model from the readings and classroom discussion, and practice using the model throughout C120 in a teaching case designed to highlight the importance of sound thinking when dealing with unfamiliar situations. The third hour of this lesson will address gathering facts and assumptions. This lesson will also look at the effect mental models, paradigms, bias and metacognition have on making decisions and reasoning critically for both individuals and groups. During the fourth hour of this lesson you will continue your problem solving exercise using the case study introduced earlier..

2011: Command and General Staff College, Fort Dix, United States of America. In this lesson you will gain

awareness into possible barriers to effective self-development, and insights into how you can contribute as a leader and learner, to building and maintaining a learning environment. Understanding how people learn and develop is essential to not only your personal development as a leader, but also in how you approach developing others. This will help you in crafting an Individual Development Plan (IDP) which is central to effective individual development during the ILE course and for the rest of your career. The skills associated with promoting effective learning are broadly applicable to all that follows in the ILE curriculum..

2011: Command and General Staff College, Fort Dix, United States of America. This 4-hour lesson builds on the idea of self-awareness introduced in lesson C131. You will use three self-assessment instruments and read one article to identify your preferences, styles, strengths, and developmental needs. Effectively using these instruments will help you become aware of your particular gifts and, through this process, to understand and appreciate the ways in which people differ. The facilitator will provide you the interpretation tools necessary to understand the results of each instrument and how to integrate the information into a developmental plan that may lead to enhanced job performance and personal growth. This lesson will prepare you to receive one-on-one feedback from your assigned faculty advisor during personal developmental sessions. This lesson provides the formal, instrument-based portion of self-assessment that feeds into the student's individual development plan. Students and faculty alike should make continual connections between this self-assessment, the developmental plan, and all that follows during the academic year. Individual developmental sessions are ideal times for students and faculty to reconsider the initial self-assessment..

2010: Accounting Advisory Board, Myrtle Beach, South Carolina. Spring Meeting: The purpose of the Accounting Advisory Board is to facilitate relations among the Wall College of Business Administrators, Faculty, Students, and External stakeholders. These external stakeholders include but, are not limited too: Local/State/Regional Accounting Firms, local/state/national governmental representatives, Chief Financial Officers, Horry Georgetown Technical College representatives, and other interested parties. Specifically, the Accounting Advisory Board seeks stakeholder input into the development of Wall College of Business accounting programs. Additionally, the Wall College of Business looks to Accounting Advisory Board members for student employment opportunities and fund-raising support..

2010: Accounting Advisory Board, Myrtle Beach, South Carolina. Fall Meeting: The purpose of the Accounting Advisory Board is to facilitate relations among the Wall College of Business Administrators, Faculty, Students, and External stakeholders. These external stakeholders include but, are not limited too: Local/State/Regional Accounting Firms, local/state/national governmental representatives, Chief Financial Officers, Horry Georgetown Technical College representatives, and other interested parties. Specifically, the Accounting Advisory Board seeks stakeholder input into the development of Wall College of Business accounting programs. Additionally, the Wall College of Business looks to Accounting Advisory Board members for student employment opportunities and fund-raising support..

Professional Seminars / Workshops

2011: Command and General Staff College, Charleston, South Carolina. The topic of L102, Organizational Power and Influence, includes six essential elements of organizational-level leadership (the "Big Six"): power, influence, commitment/compliance, influence tactics, emotional intelligence, and leadership styles. These elements have been, in varying degrees, experienced by CGSC students. When reading the core L102 article (Reading A, The Application of Power and Influence in Organizational Leadership), they will connect the information to the leaders they have served with previously and also their own leadership practices. What makes this article unique is that it defines terms, gives examples, and relates the various elements with one another. In so doing, it provides a foundational and practical model for the application of power and influence in changing attitudes, beliefs, and behaviors of others to gain commitment within an organization. This is the basic purpose of this lesson..

2010: Beta Alpha Psi, Orlando, Florida. Attended the Beta Alpha Psi Southeast Regional Conference with six students (Mr. Long, Mr. Fryar, Mr. Pagano, Ms. Geceviciute, Ms. Wilkes, Ms. Calvieri). Attended the keynote address, Team Dynamics, Best Practices, and Faculty Advisors meetings..

2010: United States Army Command & General Staff Training, Fort Dix, New Jersey. C121 Introduction to Critical Thinking and Problem Solving: This is the first of three lessons that emphasize how to think rather than what to do. This lesson introduces the fundamental concepts in problem solving and reasoning. The first hour will cover the relationship between critical thinking, creative thinking, decision making, and problem solving, using the Army's Seven Step Problem-Solving Model. In the second hour, we will introduce the fundamental concepts of thinking by means of a model developed by Richard Paul and Linda Elder. The model consists of the Elements of Thought and Universal Intellectual Standards. You will gain an understanding of the model from the readings and classroom discussion, and practice using the model throughout C120 in a

teaching case designed to highlight the importance of sound thinking when dealing with unfamiliar situations. The third hour of this lesson will address gathering facts and assumptions. This lesson will also look at the effect mental models, paradigms, bias and metacognition have on making decisions and reasoning critically for both individuals and groups. During the fourth hour of this lesson you will continue your problem solving exercise using the case study introduced earlier..

2010: United States Army Command & General Staff Training, Fort Dix, New Jersey. C122 Creative Thinking, Logic, and Decision Making: This is the second of three lessons that emphasize how to think rather than what to do. The first hour of the lesson looks at processing information to make a decision. This lesson covers developing criteria for making a decision and the role of creativity in reasoning and examines techniques for enabling creativity. The second hour involves continuing group work on the SS Mayaguez case study. The third hour explores logic, fallacies, analytic and intuitive decision making. In the fourth hour, students present a decision briefing on the Mayaguez..

2010: United States Army Command & General Staff Training, Fort Dix, New Jersey. C123 Assessment: This is the third of three lessons that emphasize how to think rather than what to do. During the first hour the Cambodian Group briefs work they have completed on the SS Mayaguez case study. The second hour covers assessment through examining measures of effectiveness and measures of performance. You should find that you are beginning to use the elements of reasoning and the universal intellectual standards habitually in your discourse and in your problem solving..

2010: United States Army Command & General Staff Training, Fort Dix, New Jersey. C131 Leader Development: In this lesson you will gain awareness into possible barriers to effective self-development, and insights into how you can contribute as a leader and learner, to building and maintaining a learning environment. Understanding how people learn and develop is essential to not only your personal development as a leader, but also in how you approach developing others. This will help you in crafting an Individual Development Plan (IDP) which is central to effective individual development during the ILE course and for the rest of your career. The skills associated with promoting effective learning are broadly applicable to all that follows in the ILE curriculum..

2010: United States Army Command & General Staff Training, Fort Dix, New Jersey. C133 Self Awareness: This 4-hour lesson builds on the idea of self-awareness introduced in lesson C131. You will use three self-assessment instruments and read one article to identify your preferences, styles, strengths, and developmental needs. Effectively using these instruments will help you become aware of your particular gifts and, through this process, to understand and appreciate the ways in which people differ. The facilitator will provide you the interpretation tools necessary to understand the results of each instrument and how to integrate the information into a developmental plan that may lead to enhanced job performance and personal growth. This lesson will prepare you to receive one-on-one feedback from your assigned faculty advisor during personal developmental sessions. This lesson provides the formal, instrument-based portion of self-assessment that feeds into the student's individual development plan. Students and faculty alike should make continual connections between this self-assessment, the developmental plan, and all that follows during the academic year. Individual developmental sessions are ideal times for students and faculty to reconsider the initial self-assessment..

2010: United States Army Command & General Staff Training, Fort Dix, New Jersey. C171 Writing to Persuade: This two-hour lesson is the foundation for the techniques and preferred format you must use in writing a persuasive or argumentative essay. The lesson focuses on written communication; specifically to persuade others to agree or accept the decisions presented. The first hour provides a brief overview, and addresses the value of persuasive writing, several pre-writing strategies (i.e., brainstorming and/or mind mapping, categorizing, and topic groupings), and thesis statement development. The second hour addresses how to build and use the outline prior to writing the paper, and a detailed discussion of the critical elements of an argumentative or persuasive essay. The lesson will end with a brief discussion of the C100 End of Theme Essay..

2010: United States Army Command & General Staff Training, Kings Bay, Georgia. Fundamentals of BlackBoard training..

2010: Sexual Harassment Training, Conway, South Carolina. The upcoming sexual harassment workshops are important events for the institution and for you, personally, which is why I have made attendance mandatory for all University faculty, as well as staff who have supervisory roles. I understand the time constraints for this requirement and have provided advance notice of more than a month. The training will not be available through on-line sources. Full participation of the faculty and staff supervisors is necessary to fulfill certain legal requirements. We also have responsibilities toward one another as co-workers and the workshop will address those, as well. Our goal is to educate and your participation is appreciated. We're trying to be proactive and to take preventive measures to head off situations that may result in litigation against you and

the University..

Technology-Related Training

2011: Coastal Carolina University Teal Training (Respondus Test Generation), Conway, South Carolina. Respondus is a Windows-based authoring tool that makes it easy to create and manage exams for Blackboard, ANGEL, Desire2Learn, eCollege, Moodle, and other learning systems..

2011: Camtasia Training, Charleston, South Carolina. Camtasia Studio is the complete professional solution for recording, editing and sharing high-quality screen video on the Web, Youtube, DVD, CD and portable media players, including iPod..

2011: Teal Center, Coastal Carolina University, Conway, South Carolina. This is Web-based Blackboard training..

Honors-Awards-Grants

Award

2007: Bronze Star U.S. Army.

2007: Iraq Campaign Medal U.S. Army.

Honor

2003: Meritorius Service Medal U.S. Army.

2002: Army Commendation Medal U.S. Army.

1999: Teaching Assistant of the Year Florida Atlantic University.

1993: Army Commendation Medal U.S. Army.

1992: Joint Service Commendation Medal U.S. Army .

1987: Army Commendal Medal U.S. Army.

1987: Army Achievement Medal U.S. Army.

1987: Army Achievement Medal U.S. Army.

1986: Army Commendation Medal U.S. Army.

Computer Skills

SAS, Compustat, Access, WordPerfect, and Microsoft Office Products (Word, Access, Excel, ... etc.)

Qualification: Academic/Professional

Academically Qualified

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