

UNIVERSITY OF RHODE ISLAND COLLEGE OF BUSINESS

**AACSB Accounting
Gen App I-IV**

2013-2018

UNIVERSITY OF RHODE ISLAND
COLLEGE OF BUSINESS
CONTINUOUS IMPROVEMENT REVIEW REPORT,
ACCOUNTING, July 21, 2018
Appendix I: Strategic Plan

Appendix I: Strategic Plan

Table of Contents

- Appendix IA-Summary of Strategic Plan 2018-2023 - p. 2.
- Appendix IB- Detail of Strategic Plan for 2018-2023 - p. 4.

Appendix I.A-Summary of Strategic Plan

Strategic Goal 1: Enhance and Maintain Academic, Relevance, Innovation, Quality and Value
<i>We strive to ensure that students' learning experience, both at the curricular and class level, is relevant, and embodies innovation, quality, and addresses the latest technological trends.</i>
1.1. Recruit and Deploy a Sufficient Number of Participating and Qualified Faculty
1.1.1 Recruit Qualified Faculty
1.1/2 Deploy Sufficient Participating and Qualified Faculty
1.1.3. The Area Should Provide a High Level of Engagement, Innovation, and Impact
1.2. Recruit and Maintain a Qualified Student Body
1.2.1 Recruit Qualified Students
1.2.2 Maintain a Minimum Grade Policy
1.2.3 Monitor Student Results on the CPA Exam
1.3 Maintain a Relevant Curriculum in Terms of Core Business and Accounting Learning Objectives
1.3.1 General Business Learning Objectives (GBLO)
1.3.2. General Accounting Learning Objectives (GALO)
1.3.3 Critical Accounting Thinking Learning Objectives (CATLO).
1.4 Maintain Instructional Quality Through a Robust and Evolving Assurance of Learning Program
1.4.1 Maintain a Robust Undergraduate Assurance of Learning Program
1.4.2 Maintain a Robust Master of Science in Accounting Assurance of Learning Program
1.5 Pursue Unique Initiatives Which Enhance Curricular Relevance and Quality
1.5.1 Expand the Curriculum to Include Contemporary Topics
1.5.2 Maintain Relevant Instructional Topics
1.5.3 Establish an Accounting Tutoring Center
1.5.4; 1.5.5 Ensure and Maintain Quality Pedagogical Use of Technology as well as the teaching of Accounting Technologies.
Strategic Goal 2- Conduct Impactful Research on the Relation Between Accounting and Business and Society
<i>We strive to conduct high quality impactful research on the relation between accounting and business and society.</i>
2.1 Monitor Research Quantity, Quality, and Impact.
2.1.1 Develop Research Monitoring Lists
2.2 Facilitate Faculty Research through a Formal Development Plan
2.2.1 Formalize a Journal List and Policy
2.2.2/3 Maintain an Environment Conducive to Research at both the College and Area Levels.
2.3 Enhance Research Funding
2.3.1 Obtain Research Funding from the College and the Capital Campaign
2.3.2 Obtain Funding for Research Assistants
2.4 Maintain Faculty Qualifications and Research Productivity by COB Standards.
2.4.1 Encourage Faculty Research Statements
2.4.2. Track Research Productivity by COB Standards

Strategic Goal 3: Prepare Students for a Changing World
<i>We promote diversity and inclusion and strive to enhance students' understanding of accounting's role in the global economy.</i>
3.1 Enhance Diversity
3.1.1 Promote Diverse Interaction
3.1.2 Promote Student Clubs Dedicated to Diversity
3.1.3 Promote Cooperation Between CPA firms and URI Talent Development
3.2 Promote Global Awareness
3.2.1 Increase Global Content Across the Curriculum
3.2.2 Enhance and Adapt MAC 507 (International Accounting) to the Undergraduate Level
3.2.3 Promote Global Literacy and Awareness
Strategic Goal 4: Engagement with Stakeholders at all Levels
<i>We strive to take leadership positions and engage with academic and professional organizations which support the faculty's and students' research, professional development, and provide students with opportunities for experiential learning, internships, and job placement.</i>
4.1 Enhance Academic Engagement
4.1.1 Engage in Academic/Professional Organizational Leadership.
4.1.2 Promote Academic Organizational Participation
4.1.3 Promote Faculty Editorial Board Participation.
4.2 Promote Professional Engagement
4.2.1 Promote Quality Communication Regarding Student Internship and Job Opportunities
4.2.2 Hold Periodic Networking Events
4.2.3 Support Student Clubs Which Hold Networking Events
4.2.4 Hold Special Networking Events
4.2.5 Maintain an Active Advisory Board
Strategic Goal #5: Communication and Outreach
<i>We strive to maintain and enhance our communication with stakeholders, especially regarding activities and projects which enhance our research, students' educational experience, and are worthy of stakeholder support.</i>
5.1 Participate in the University Capital Campaign
5.2 Enhance Communication with Stakeholders
5.2.1 Formalize and Maintain an Alumni List
5.2.2 Develop Modern Communication Channels
5.3 Enhance Area Level Fundraising
5.3.1 Maintain Accounting Advisory Board Scholarship Fund
5.3.2 Use Alumni List to Establish Small Contribution Program
5.3.3 Increase Grants for Faculty/Student Research

Appendix I.B Detail of Strategic Plan for 2018-2023

Strategic Goal 1: Enhance and Maintain Academic, Relevance, Innovation, Quality and Value <i>We strive to ensure that students' learning experience, both at the curricular and class level, is relevant, and embodies innovation, quality, and addresses the latest technological trends.</i>				
Objective	Activity/Event/Program Formalization	Key Players	Measures	Progress/Outcome
1.1 Recruit and Deploy a Sufficient Number of Participating and Qualified Faculty				
1.1. Recruit Qualified Faculty	Faculty Searches	Area Coordinator, Faculty	Successful recruitment of faculty members who contribute to the area's mission and plan.	Successful searches for three new faculty members were conducted in 2015, 2016, and 2017.
1.1.1/2 Deploy Sufficient Participating and Qualified Faculty.	Faculty Scheduling and Deployment Decisions.	Area Coordinator, Faculty	At a minimum, AACSB standards (regarding faculty participation and qualifications) should be attained.	For the 2017-2018 academic year, AACSB standards regarding participation and qualifications were exceeded. See App. II.D
1.1.3. The Accounting Area (as a whole), should Provide a High Level of Stakeholder Engagement, Innovation and, Impact.	Faculty activities of all types. Formalization of an EII list.	Area Coordinator, Faculty	The level of the area's Engagement, Innovation, and, Impact.	Through various roles and activities, the faculty have produced considerable EII. An EII list has been developed (see Appendix IIA).
1.2 Recruit and Maintain a Quality Student Body				
1.2.1 Recruit Qualified Students	Establish and attend accounting student recruiting events, including at high schools, BUS 201 presentations, and organizations such as BETA Alpha Psi, and NABA. Establish and attend events to identify promising MS students.	Area Coordinator, MS Director, Area Faculty	Number of events established, created, and number of students recruited.	The Area consistently recruits through BAP, NABA, and Talent Development. The quantity/quality of MSA students has remained consistent during the current review period.

Objective	Activity/Event/Program Formalization	Key Players	Measures	Progress/Outcome
1.2.2. Maintain Minimum Grade Policy.	Maintain the policy of only allowing students with a “C” or better in BUS 301 to advance to BUS 302.	Area Coordinator, MS Director, Area Faculty	Monitoring of student grades and enforcement of policy.	Policy has been followed, even when students petition for exemptions.
1.2.3 Monitor Student Results on the CPA Exam.	Reporting of CPA Exam results	Area Coordinator, MS Director.	CPA exam results relative to peer institutions,	Undergraduates have been slightly underperforming with peer institutions while MS students have been competitive with peer institutions. A tutoring center and a CPA exam review program have been proposed (See App. IV.A).
1.3 Maintain a Relevant Curriculum in Terms of Core Business and Accounting Learning Objectives.				
1.3.1/2/3. Ensure that core and essential Business and Accounting skills are covered in the curriculum. (1.3.1 GBLO) (1.3.2 GALO) (1.3.3 CATLO)	Ensure that curriculum covers core learning objectives, as identified in AACSB standard A6. Ensure that Accounting Advisory Board opinions are considered in design of curricula (and AOL).	Area Coordinator, MS Director, Faculty	Extent to which curriculum covers core Business and Accounting skills and that Accounting Advisory Board opinions have been considered.	Both undergraduate and graduate curricula cover core learning objectives. AAB suggestions on FASB Codification, Internal Control, and Data Analytics have been incorporated into AOL. Efforts are being made to improve AOL on written and oral communication. The undergraduate curriculum covers General Business Learning Objectives (GBLO); General Accounting Learning Objectives (GALO-Standard A6) and Critical Accounting Thinking Learning Objectives (CATLO) with respect to the accounting cycle. See Exhibit 6 and corresponding text in the report. See Appendices V and VI.

1.4 Maintain Instructional Quality Through a Robust and Evolving Assurance of Learning Program				
Objective	Activity/Event/Program Formalization	Key Players	Measures	Progress/Outcome
1.4.1/2 Maintain Robust Undergraduate and Masters Assurance of Learning Programs	In consultation with Advisory Board, learning objectives for Assurance of Learning should be discussed and possibly incorporated into AOL program.	Accounting Area Coordinator, MSA Coordinator, Specific Faculty	The extent to which the learning objectives identified have been incorporated into the AOL program.	AOL for learning objectives regarding critical thinking and the accounting cycle have been developed and mostly implemented, with results leading to modification in the curriculum and AOL. Communication skills are also covered. However, written communication is weak. Steps are being taken to improve written and oral communication and AOL on ethics and international accounting. Masters program AOL was conducted and led to program changes. See Appendices V and VI.
1.5 Pursue Unique Initiatives Which Enhance Curricular Relevance and Quality				
1.5.1 Expand the Curriculum to Include Contemporary Topics —Ensure that both the undergraduate and graduate accounting curriculums are relevant with respect to contemporary accounting regulation and practice	Benchmark URI curriculum options against competitor institutions. Expand curriculum to include options which are beyond (or complement) the CPA certificate and public accounting.	Area Coordinator, MSA Director, Faculty	Identify curriculum options relative to competitor institutions, considering URI's strategic strengths. Publication of formal curriculum options on website that can be communicated to students.	Based on comparisons, etc., area has identified tracks for CMA, Forensic Accounting, and Dual Accounting Language major. Curriculum sheets are being developed for the three tracks noted above, projected date of Sept., 2018 for CMA track and Sept. 2019 for Language and Forensic Tracks.

Objective	Activity/Event/Program Formalization	Key Players	Measures	Progress/Outcome
1.5.2 Maintain relevant instructional topics	Encourage faculty to attend events and seminars, concerning the latest trends, topics (including technology), and pedagogical developments for courses which they teach.	Area Coordinator, MS Director, Area faculty	Quantity and quality of seminars/events attended and extent to which new topics, methods, and technologies have been incorporated into classes.	Junior and senior faculty have attended events (including webinars) regarding topical and pedagogical trends (including technology).
1.5.3 Establish an Accounting Tutoring Center	Obtain funding and formalize a tutoring center.	Area Coordinator and Proposed Center Director	Establishment, organization and funding of center.	A proposal for a tutoring center has been prepared and been submitted as a capital campaign priority. See Appendix IV.A.
1.5.4 Ensure and Maintain Quality Pedagogical Classroom use of Technology	Encourage faculty to attend workshops and other events on the pedagogical uses of technology (e.g. distance learning tools).	Accounting Area Coordinator, Specific Faculty	Workshops/Events attended and changes to courses.	Some progress has been made on the pedagogical use of technology. Program for more widespread use will be developed. See Appendix II.G.
1.5.5. Ensure and Maintain quality teaching of Accounting technologies	Encourage faculty to attend workshops on emerging technologies in accounting and the best practices for teaching those technologies (e.g. distance learning tools)	Accounting Area Coordinator, Specific Faculty	Workshops/Events attended and changes to courses	Some progress has been made on teaching of technology. A program for more widespread use will be developed. See Appendix II.G

Strategic Goal 2.0 Conduct Impactful Research on the Relation Between Accounting and Business and Society <i>We strive to conduct high quality impactful research on the relation between accounting and business and society.</i>				
Objective	Activity/Event/Program Formalization	Key Players	Measures	Progress/Outcome
2.1 Monitor Research Quantity, Quality and Impact				
2.1.1 Develop Research Monitoring Lists: Develop lists to track number of articles published, quality indicators, and impact indicators	Formal initiation of lists and progress on the three dimensions of research.	Area coordinator and faculty	Research quantity, quality, and impact	Research monitoring lists have been developed. Faculty show improvement in all three dimensions. See Exhibit 8 and Appendices II.F & H.
2.2 Facilitate Faculty Research through a Formal Development Plan				
2.2.2 Formalize a Journal List and Policy: In coordination with the College, the area should formulate a journal list and policy which encourages faculty to publish in quality outlets which reflect faculty's diverse set of expertise.	Development of a formal journal list and journal list policy.	Area's COB Research Committee Representative/TT Faculty	The extent to which the journal policy encourages faculty to aim at quality journals in their areas of specialty.	The area approved a journal list and journal list policy. See Appendix IIB. Faculty have recently published in listed journals.

Objective	Activity/Event/Program Formalization	Key Players	Measures	Progress/Outcome
2.2.2 Maintain a Conducive Research Environment at College Level.	Coordinate with College Doctoral Research Series; Monitor College Support for Research.	Area's COB Research Committee Representative/TT Faculty; College Ph.D. Director.	Accounting participation in College research series. Realization of College support of research.	In 2017-2018, junior faculty have participated in College research seminars. Junior faculty are assigned mentors, a 2-2 teaching load, schedules which facilitate research, and monetary research support. Support for a faculty research fund has been initiated in the capital campaign.
2.2.3 Maintain a Conducive Research Environment at the Area Level.	Assign Area Mentors; Establish area research series; Provide research active faculty with scheduling preferences.	Area's Research Committee Representative/TT Faculty. Area coordinator.	Formalization of research program, number of invited external speakers, and area support.	The area has sponsored three external speakers; mentors have been assigned; junior faculty have received scheduling preferences.
2.3. Enhance Research Funding				
2.3.1 Obtain Research Funding from the College and Capital Campaigns	Work with College administration to ensure that faculty are provided with sufficient funds to present their research at respected forums.	Area's Research Committee Representative/TT Faculty. Area coordinator.	Adequate level of funding.	College and Area faculty have generally been provided with a adequate funding. Funding has been requested in the Capital Campaign.
2.3.2. Obtain Funding for Research Assistantships	Work with College to ensure that research active faculty are provided with sufficient research assistants.	Area's Research Committee Representative/TT Faculty	Adequate level of funding for research assistantships.	College has provided new faculty with research assistants. However, more support will be needed for more consistent, high level research. Capital Campaign funding has been requested.
2.4 Maintain Faculty Qualifications and Research Productivity by COB Standards				
2.4.1 Encourage Faculty Research Statements-All research faculty should place a statement of research on their websites.	Faculty research statements/plans	Area Coordinator-TT Faculty	100% compliance with policy that all TT faculty should have research statement on their profiles.	Near 100% compliance has been achieved.

Objective	Activity/Event/Program Formalization	Key Players	Measures	Progress/Outcome
2.4.2. Track Research Productivity by COB Standards- All faculty should achieve or exceed the research requirements under the standard faculty profile as set forth in the College's Workload Policy Promotion and Tenure Standards.	Track faculty research output against CoB workload standards.	All TT faculty	100% compliance	About 50% of faculty meet standard for 3/2 teaching load.

Strategic Goal 3.0 Prepare Students for a Changing World

We promote diversity and inclusion and strive to enhance students' understanding of accounting's role in the global economy.

Objective	Activity/Event/Program Formalization	Key Players	Measures	Progress/Outcome
3.1 Enhance Diversity				
3.1.1 Promote Diverse Interaction Encourage activities which promote discussion between individuals and groups from diverse backgrounds.	Number of impactful events cosponsored by different student clubs which bring those clubs' members together for discussion on different topics.	Faculty Advisors and Student leaders and members or relevant student organizations. (e.g. BAP, NABA, WIB).	Events which bring together individuals with different backgrounds.	The number of events between student organizations has increased (e.g. NABA, BAP, WIB) See Appendix IV.E.
3.1.2 Promote Student Clubs Dedicated to Diversity Establish and maintain student clubs that support diverse initiatives.	Establishment of a successful chapter of the National Association of Black Accountants. Women in Business, a College-wide organization, also supports and promotes diversity and inclusion.	NABA faculty director, NABA students, especially officers.	Growth in number of NABA members and in events which promote membership, competitions, and networking.	Since its establishment, the URI NABA organization continues to grow. The organization has excelled in the Northeast Case Competition.

Objective	Activity/Event/Program Formalization	Key Players	Measures	Progress/Outcome
3.1.3 Promote Cooperation with Talent Development Work with the Talent Development admissions office to identify and recruit minority high school students and URI freshman with an aptitude for Accounting and Business.	Number of accounting students from underrepresented groups who are recruited and obtain internships and employment	Accounting Area Coordinator, Talent Development Leader, Summer Talent Development Instructor.	Number of Accounting TD students and number of TD students who obtain internships and jobs.	The number of TD accounting students who receive internship and job offers have increased. The number of accounting undergraduates from underrepresented groups has increased. See Appendix IIIA and related text in report.
3.2 Promote Global Awareness				
3.2.1 Increase Global content across the curriculum	Review accounting for global content and promote forms of incorporating global issues (e.g. cases) which correspond “naturally” with the course.	Accounting Faculty	Global content of accounting curriculum	Project to be initiated Fall, 2018
3.2.2 Enhance MAC 507 (International Accounting)	Develop a hybrid version of MAC 507, possibly with overseas institutions (or on J-Term basis).	MAC 507 Instructor	Coordination of MAC 507 with overseas institutions and pursuit of grants for MAC 507 (or new version of MAC 507) enhancement.	MAC 507 currently updated with respect to technology and case studies.
	Offer an undergraduate version of MAC 507 as an elective.	MAC 507 Instructor	Adaptation of MAC 507 to undergraduate level.	An undergraduate version of MAC 507 was taught in China, Fall, 2017. Will be used to develop undergraduate version at URI during Spring, 2019.

Objective	Activity/Event/Program Formalization	Key Players	Measures	Progress/Outcome
3.2.3 Promote Global Literacy and Awareness				
3.2.3.1 Increase Global Awareness of Accounting Students through On-Campus Speakers and Events	On-campus speakers	Accounting Faculty	Number of international speakers brought to COB by accounting area.	The area has sponsored three on-campus speakers who provided presentations on global topics (See Appendix IV.E)
3.2.3.2 Promote Language Studies by Accounting Students	Develop a language/accounting double major curriculum sheet. Since 2013 several students have double majored (or minored) in a language and accounting	Area coordinator and faculty.	Number of students double majoring in Accounting and a Language.	Project initiated Spring, 2018; Full curriculum track should be developed by Fall 2019.
3.2.3.3 Promote Faculty Global Engagement	Recruit Faculty with language skills; encourage faculty to undertake projects (of all types) with overseas institutions.	Accounting faculty	Number of faculty with language skills; number of faculty engaging in research and teaching with overseas institutions.	Since the 2013, faculty's language skills have increased from only Spanish to: Arabic, French, Mandarin, and Spanish. Faculty have increasingly interacted with foreign institutions.
3.2.3.4 Promote Study Abroad Opportunities and visits by international students to URI.	Development of Study Abroad Opportunities.	Accounting Faculty	Number of Study Abroad Opportunities (e.g. J-term courses and distance learning courses)	Study abroad opportunities are under negotiation and visits to URI are under negotiation with schools in Kuwait, China, Mexico, Spain.

Strategic Goal 4: Engagement with Stakeholders at all Levels <i>We strive to take leadership positions and engage with academic and professional organizations which support the faculty's and students' research, professional development, and provide students with opportunities for experiential learning, internships, and job placement.</i>				
4.1 Enhance Academic Engagement				
Objective	Activity/Event/Program Formalization	Key Players	Measures	Progress/Outcome
4.1.1 Engage in Academic/ Professional Leadership.	Leadership positions in the academic organizations, particularly AAA.	Accounting Area	Number and quality of Leadership positions in the academic organizations.	In the last 5 years area faculty have been extremely active in AAA section and regional leadership. These include the President of AAA Government and Non Profit Section; President of the Northeast AAA.
4.1.2 Promote Academic Organizational Participation Encourage faculty to participate in American Accounting Association meetings roles (reviewers, moderators, etc._	Quantity and quality of faculty involvement in activities in AAA and other professional organization meetings.	Area Faculty	Number of Organizational Roles	Area faculty roles increased in recent years. See Appendix IIA for leadership roles.
4.1.3-Promote Faculty Editorial Board Participation.	Quantity and quality of Editorial Board membership	Area Faculty	Number of Editorial Board Memberships	Area faculty are on 6 Editorial Boards. Two are Associate Editors.

Objective	Activity/Event/Program Formalization	Key Players	Measures	Progress/Outcome
4.2 Promote Professional Engagement				
Promote and Expand Student opportunities for Experiential Learning, Internships, and Post-Graduation Employment				
4.2.1 Promote Quality Communication Regarding Student Internship and Job Opportunities Develop a formal proactive protocol for communicating internship and job information to students.	Periodically review and update content on accounting area web page to include new career related information. Develop a Facebook page to quickly communicate career information. Work with Placement and Internship coordinators to ensure information is quickly placed on Rhodynet.	Accounting Area Coordinator.	Quality of webpage information provided to students. Pace at which information is placed on webpage, Facebook, and Rhodynet.	The accounting area webpage is being updated to provide information on the major professional areas of accounting; accounting certifications and the requirements for those certifications. Facebook page is being started.
4.2.2 Hold Periodic Networking Events Hold consistent events which disseminate information about professional accounting opportunities (e.g. tax, internal audit, forensic, international financial reporting)/professional conduct, and promote networking opportunities (for students with companies).	Hold major annual events which promote networking and careers. The principal ones are Public Accounting Night and Career Day.	Accounting Faculty, MSA Coordinator; CBA and College internship coordinators. Talent Development.	Trend in the number of students attending events and results of post-event surveys	Overall, there has been an increase in the number of events and students attending. See Appendix IV.E for some student organization networking events

Objective	Activity/Event/Program Formalization	Key Players	Measures	Progress/Outcome
4.2.3 Support Student clubs which hold networking events Support student clubs and faculty which sponsor periodic networking events for students.	Periodic events sponsored by student clubs and faculty which provide students with placement and networking opportunities in various fields of accounting.	Accounting faculty, student clubs (including faculty advisors), placement and internship coordinators,	Number of events, students attending, etc.	Overall, there has been an increase in the number of faculty and club sponsored events. See Appendix IV.E.
4.2.4 Hold Special Networking Events Hold Special Events which provide information on careers and provide information to students on professional conduct and networking opportunities in various industries and companies.	Special events and promotions which promote networking and job opportunities for sponsoring companies and agencies (e.g. RI Office of the Auditor General).	Area coordinator, faculty	Number of events and placement made.	Special contacts and events have been made with Textron and RI office of the AG. Students have been placed.
4.2.5 Maintain an Active Advisory Board Maintain and expand the area's Advisory Board. Seek and follow Board's advice.	Active AAB meetings and active participation of Advisory Board Members in various activities of the College and Area.	Accounting area faculty and Advisory Board.	Maintenance of Advisory Board Membership, Meetings, and participation in area activities	In the past 5 years, a advisory board membership has been maintained; meetings have been active and consistently held; a advisory board members have been involved in numerous events and activities. See Appendix IV.C.

Strategic Goal 5: Communications and Outreach.

We strive to maintain and enhance our communication with stakeholders, especially regarding activities and projects which enhance our research, students' educational experience, and are worthy of stakeholder support.

Objective	Activity/Event/Program Formalization	Key Players	Measures	Progress/Outcome
5.1 Participate in the University Capital Campaign				
Actively Advocate for Accounting Area in 2018 URI capital campaign	Formulation of capital needs proposal	Area coordinator and faculty	Development of capital needs list	Needs list has been developed.
5.2 Enhance Communication with Stakeholders.				
5.2.1 Formalize and Maintain an Alumni List	Work with University and College administrations to develop formal alumni lists, especially with respect to Masters program alumni.	Area coordinator; MSA coordinator; foundation officials	Formulation of an alumni list	To be developed in conjunction with the capital campaign.
5.2.2 Develop Modern Communication Channels	Establish and maintain modern communication channels with stakeholders, including but not limited to an improved website; accounting area social media (e.g. Facebook page); and online newsletter.	Area coordinator; area faculty; technical personnel	Modernization of channels.	Website is being updated; other channels will be formed during capital campaign.
5.3 Enhance Fundraising				
5.3.1 Maintain Accounting Advisory Board Scholarship fund.	Accounting Advisory Board Contributions	Area coordinator; area faculty; Accounting Advisory Board; COB foundation officer.	100% contribution rate to scholarship fund	100% participation has been maintained
5.3.2 Use alumni list to establish small contribution program.	Formulation of list and establishment of small contribution program.	Area coordinator; MSA Director; area faculty; Accounting Advisory Board; COB foundation officer.	Establishment of small contributor program and increase in fundraising.	To be developed in conjunction with capital campaign.
5.2.3 Increase grants for faculty/student Research	Identification and application for grants	Specific Faculty	Number of grants	Currently, grants have been obtained in the healthcare field (Dr. Jervis). This will serve as a model.

UNIVERSITY OF RHODE ISLAND
COLLEGE OF BUSINESS
CONTINUOUS IMPROVEMENT REVIEW REPORT,
ACCOUNTING, July 21, 2018
Appendix II: Faculty Data

Appendix II: Appendix II-Faculty Data and Policies

Table of Contents

- Appendix II.A-Engagement, Innovation, Impact by Faculty Member-p. 2
- Appendix II.B-Accounting Area Journal List Policy- p.9
- Appendix II.C- Accounting Faculty Participation by Classes Taught (AACSB Table A9-2)-Academic Year 2017-2018- p.10
- Appendix II.D- Summary of Faculty Qualifications (AACSB Table A9-1) – p.11
- Appendix II.E Summary of Engagements Obtained through Impactful Research - p. 12
- Appendix II.F-Accounting Area Peer Review Publications for the Period 2013-2014 through 2017-2018 p. 13.
- Appendix II.G -Use of Technology Across the Area p. 14.
- Appendix II.H- Number of Citations p. 15

Appendix IIA-Engagement, Innovation, Impact by Faculty Member
(Reported by Faculty → E=Engagement; IN=Innovation; Im=Impact)
(See Page 9 for Definitions of Activities: ACAD; PROF; PED)

Stakeholder Organization, Entity	Activity	E	IN	IM
Full Professors (In Alphabetical Order)				
<i>Judy Beckman</i>				
SEC Academic Fellow, 2014-2015; 2015-2016	Worked in Office of Chief Accountant, principally on standards regarding revenue recognition.	PROF	PROF	PROF
Professional Award-SEC	Recipient of Andrew Barr award for outstanding service	PROF	PROF	PROF
Wall Street Journal Series	Writes series for <i>Wall Street Journal</i> which highlights how current "business events" can be used to teach the application of accounting standards.	PED	PED	PED
Guest Editor	During visit to RMIT (Australia)-- was invited to serve as guest Editor on IFRS of special issue of <i>International Journal of Managerial Finance</i>	ACAD	ACAD	ACAD
Officer, AAA Section	International Section of American Accounting Association, Currently Secretary	ACAD		ACAD
Editorial Board and Article Reviewer	<i>Journal of International Accounting, Auditing, and Taxation</i> , Member of Editorial Board	ACAD		ACAD
Guest Speakers in Class, November 2017	Two managers from KPMG's Providence office, Eileen Edwards and Jeff Beckwith, discussed their experiences with clients implementing new revenue recognition accounting requirements, one focusing on the audit issues and one on the accounting topic itself.	PED	PED	
Outside Speaker Jay Hanson, PCAOB Board Member	Spoke on Current Issues Facing the Auditing Profession	PED	PED	
Scholarship Initiation	In 2018, arranged for a student to receive PCAOB scholarship.	PED		PED
<i>Cynthia Blanthorne</i>				
AAA Section President	Incoming President of Northeast Region of the American Accounting Association, 2018-2019	ACAD	ACAD	ACAD
Officer (various capacities) of the NE AAA 2015-2018	Played various roles in organizing NE AAA meeting (e.g. conference coordinator, track chair, etc.)	ACAD	ACAD	ACAD
Sabbatical, Spring 2017, CBIZ & MHM	Sabbatical used to work at CPA firm to update knowledge of tax practices which were adopted to tax class.	PROF	PED	PROF
Teaching Award	Winner, URI Teaching Award, 2015.	PED	PED	PED

Stakeholder Organization, Entity	Activity	E	IN	IM
Highly Recognized Article	JATA Article: <i>Cognitive Responses to the Partitioned Pricing of Consumption Taxes: Consequences for State and Local Revenues</i> cited on AAA website and <i>Accounting Today</i>	ACAD	ACAD	ACAD
Faculty Advisor, Student Club	Faculty Advisor URI V.I.T.A, Program	PED	PED	PED
Faculty Advisor, Student Club	Faculty Advisor URI PWC Challenge	PED	PED	PED
Editorial Board and Reviewer	Editorial Board- <i>Issues in Accounting Education</i>	ACAD		ACAD
Editorial Board and Reviewer	Editorial Board- <i>Advances in Accounting Education</i>	ACAD		ACAD
Highly Recognized Article	Blanthorne, C. and S. Westin. 2016. The Voluntary Income Tax Assistance program - A review of the literature and an analysis of VITA in accounting education in the U.S. Status: <i>Issues in Accounting Education</i> . 31(1): 51-69.	PED	PED	PED
Kathryn Jervis				
AAA Section President	President (2017-2018)- Government and Nonprofit Section of the American Accounting Association	ACAD	ACAD	ACAD
Principal Organizer of AAA Section Meeting	Principal Organizer of 2017-2018 Mid-Year Meeting (Providence, RI) of the AAA Government and Nonprofit Section	ACAD	ACAD	ACAD
Scholarship Initiation	As Area Coordinator, initiated a scholarship program for two Big Four Accounting firms to provide scholarships for TD students to study in MSA program.	PED		PED
Faculty Director- Women in Business (WIB)	Faculty Advisor to Student Club which promotes Diversity	ACAD	ACAD	ACAD
Academic Journal Editorial Board	Journal of Governmental and Nonprofit Accounting.	ACAD	ACAD	ACAD
Director, Academic Program	Director, URI Healthcare MBA Program	ACAD	ACAD	ACAD
Interim Dean-URI College of Business -2014-2015	Led URI COB During part of 2014-2015 Academic Year	ACAD	ACAD	ACAD
Editorial Board and Reviewer	Editorial Board- <i>Research in Government and Non-Profit Accounting</i>	ACAD	ACAD	ACAD
Fellowship	Recipient of ACE Fellowship	ACAD	ACAD	ACAD
URI COB Teaching Awards	Recipient COB Teaching Awards	PED	PED	PED
Research Grant	2016- URI Council for Research Grant for \$14,450 to purchase the American Hospital Association database, with John Ni.	ACAD	ACAD	ACAD

Stakeholder Organization, Entity	Activity	E	IN	IM
Research Grant and Research Team Leader	RI Executive Office of Health & Human Services Healthcare Workforce Transformation Grant (\$30,000). Principal Investigator of team of 7 people.	ACAD	ACAD	ACAD
Henry Schwarzbach				
Online Teaching	Developed and Taught Online Sections MBA 503 and 510	PED	PED	
Overseas Teaching	Taught Ph.D. Course at Hungarian University	PED		
Alejandro Hazera				
Faculty Advisor	Faculty Advisor, National Association of Black Accountants	PED	PED	PED
Innovative and Impactful overseas teaching.	Modified MAC 507 (International Accounting) to undergraduate level and taught it at a Chinese institution (Accepted Invitation from Chinese University to offer course, Nov. 2017). Course has received great review (have received emails, and have been told by colleagues who arranged). The press release had 502 views in two months, and rising.	PED	PED	PED
Sponsored Speaker, URI Distinguished International Scholar Program	Received grant from Provost to Sponsor visit by Salvador Marin Hernandez, President of Spain's Ex-Im Bank	ACAD	ACAD	ACAD
Sponsored Speaker-URI Distinguished Visitor Program	Salvador Ruiz de Chavez, Former UNAM Dean and AAA Distinguished International Lecturer, "Mexico Beyond the Wall."--both for Brown Bag and Career Day.	ACAD	ACAD	ACAD
Sponsored Speaker-Spain Commerce Ministry	Invited Speech--The Mexican financial crisis: What lessons did the U.S. learn?"	PROF	PROF	PROF
Invited Seminar -Jan. 2018- Univeridad Anahuac	Invited Speech--The Mexican financial crisis: What lessons did the U.S. learn?" Have received initial invite to teach in the Joint Anahuac, Univ. de Cantabria banking program.	ACAD	ACAD	ACAD

Stakeholder Organization, Entity	Activity	E	IN	IM
Associate Professors				
<i>Edmund Boyle</i>				
Course Modification	Incorporated Emotional Intelligence into Audit Course		PED	
Course Modification	Incorporated Critical Thinking Case into Audit Course		PED	
Course Modification	Facilitates Learning of Substantive Testing Through Real Documents		PED	
Kate Jelinek				
Editorial Board and Reviewer	Editorial Board Member- <i>Business Horizons</i>	ACAD		ACAD
Journal Leadership	Guest Editor- <i>Business Horizons</i> (Section on Auditing)	ACAD		ACAD
Faculty Advisor, Accounting Honorary Club	Faculty Advisor- Beta Alpha Psi	PED	PED	PED
Organizer of Principal networking night for CPA firms and students	Faculty Organizer of Public Accounting Night	PROF	PROF	PROF
Award Recipient	Winner, Research Award, 2017 NE Meeting of the American Accounting Association	ACAD	ACAD	ACAD
Research Program on Professional Auditor Behavior	Highly Cited Articles on Auditor Behavior	PROF	PROF	PROF
Assistant Professors				
<i>Qi, Liu</i>				
American Institute of Certified Public Accountants, Member AICPA Audit Data Analytic Guide Task Force.	Member of task force assigned with assessing how "Big Data" will impact Analytical Review	PROF	PROF	PROF
New Data Analytics Visualization Teaching Method	Based on meeting of the RI Association of Accounting Professors, developing technique to assess students Data Visualization abilities	PROF	PED	
Associate Editor	Associate Editor, <i>Journal of Emerging Technologies in Accounting</i>	ACAD		ACAD
Committee Member	AAA SET Section, Education - Educational Materials/CPE Committee	ACAD	ACAD	ACAD
Impactful Article	"Big Questions in AIS Research: Measurement, Information Processing, Data Analysis, and Reporting", <i>Journal of Information Systems</i> , Vol. 28, Issue 4, pp. 1-17, Spring, 2014, American Accounting Association. (with Miklos Vasarhelyi)	ACAD	ACAD	ACAD

Stakeholder Organization, Entity	Activity	E	IN	IM
Impactful Article	“The expert systems life cycle in AIS research: What does it mean for future AIS research? ”, <i>International Journal of Accounting Information Systems</i> , Vol. 15, Issue 4, pp. 423-451, December, 2014. (with Glen Gray, Victoria Chiu and Pei Li)	ACAD	ACAD	ACAD
Impactful Article	“The Development and Intellectual Structure of Continuous Auditing Research”, <i>Journal of Accounting Literature</i> , Vol. 33, Issues 1-2, pp. 37-57, December, 2014. (with Victoria Chiu and Miklos Vasarhelyi)	ACAD	ACAD	ACAD
<i>Anis Triki</i>				
Interview with AR Magazine	Interview about one of his published studies. Link: https://soundcloud.com/irmagazine/episode-14-when-does-optimism-go-too-far	PROF	PROF	PROF
Modification of MAC 502	Reworked graduate accounting course to emphasize research methods and complex text	PED	PED	
Federal Grant	Part of team which received federal grant to promote the study of Arabic language and Business	ACAD	ACAD	
URI Grant	One of the recipients of a \$10,000 provost grant to promote URI in the MENA region	ACAD	ACAD	
Global Brown Bag Series	Co-Director of Monthly Series which features presentations on different nations	ACAD	ACAD	ACAD
International Speaker	Sponsored presentation by well-known banking expert from Tunisia	ACAD	ACAD	ACAD
Impactful Article	Triki, A., Cook, G. L., & Bay, D. (2015). Machiavellianism, Moral Orientation, Social Desirability Response Bias, and Anti-intellectualism: A Profile of Canadian Accountants. <i>Journal of Business Ethics</i> , 1-13.	ACAD	ACAD	ACAD

Stakeholder Organization, Entity	Activity	E	IN	IM
<i>Gilberto Marquez Illescas (New Faculty Member)</i>				
Impactful Article	Marquez Illescas, G. (coauthor)-Hear Me Write: Does CEO Narcissism Affect Disclosure?Forthcoming, <i>Journal of Business Ethics</i>	ACAD	ACAD	ACAD
Impactful Article	Cano-Rodríguez, M., Márquez-Illescas, G., & Núñez-Níckel, M. (2017). Experts or rivals: Mimicry and voluntary disclosure. <i>Journal of Business Research</i> , 73, 46-54.	ACAD	ACAD	ACAD
<i>Instructors</i>				
<i>Joseph D'Adamo</i>				
Consultant to CPA firms and Companies on CPA Exam	Consultant on methods for taking the CPA Exam	PED	PED	PED
	Winner, URI COB Best Teacher Award	PED	PED	PED
Curriculum Support Design	Designed original plan for Tutoring Center and cooperation with Becker CPA Review		PED	
<i>Ann Marie Sacco</i>				
Interim student organizations Advisor-Spring 2017	Temporary Advisor to BAP Spring, 2017	PED	PED	PED
Consulting- Children's Hospital, Boston	Consultant for adopting ABC Costing, Improving Supply Chain, and Renegotiating Medicaid	PROF	PROF	PROF
Corporate Consulting	Consulting- Shire Pharmaceuticals, L3 Defense Optics	PROF	PROF	PROF
Institute of Management Accounting (IMA)	Has led teams of students to annual meetings and IMA case competitions	PED	PED	PED
Program Initiation-CMA Track	Initiated Study on Possibility of CMA Curriculum Track	PED	PED	PED
Director, Charitable Foundation	Director of Ali Foundation--benefits Children's Hospital Boston	PROF	PROF	PROF
Course Modification-Top Hat	Adapted Course for Top Hat Software	PED	PED	PED
AACSB Assessment 2017-2018	Chose cases and administered both a critical thinking and writing evaluation for college-wide AACSB evaluation for sophomores and this year's seniors.	PED	PED	PED
Inducted into Delta Sigma Pi	Chosen by students to be 2017's faculty inductee	ACAD	ACAD	ACAD

Stakeholder Organization, Entity	Activity	E	IN	IM
Advisor to a Hydro-robotics Engineering Team	Team is preparing to compete internationally in building an underwater robot. Assisted with fundraising and communication. Paired students to consult on presentation	PED	PED	PED
Advisor to a Directed Study in the MAC Program	Coaching the group to research Block Chain and its likelihood of becoming the platform for a new world currency.	ACAD	ACAD	ACAD
Course Modification BUS 202	Introduced Case-method to the URI Sophomore level Managerial Accounting course	PED	PED	PED
Student Mentoring	Attended the WIB Harvard Leadership Conference with 8 students	PROF	PROF	PROF
Roberta Newell				
Co-Advisor- PWC Challenge	Faculty Advisor to Case Competition	PROF	PROF	PROF
Sponsor-- Guest Speaker	Brought speaker from KLR to Tax Class	PED	PED	PED
Development of AOL Materials	Developed and Administered Cases for Evaluation of Students' Abilities to Use FASB Codification (BUS 301 and 302)	PED	PED	
Course Modification-Top Hat	Adapted BUS 201 for Top Hat Software	PED	PED	PED

In the table above, **Academic (ACAD)** activities are related to research and organizations dedicated to research (e.g. the American Accounting Association). **Pedagogical (PED)** activities are related to all aspects of curriculum, all aspects of teaching, and organizations dedicated to teaching. **Professional (PROF)** activities are related to services performed for professional organizations (e.g. the AICPA), the public accounting profession, private industry, and governmental/nonprofit organizations.

Appendix IIB

Accounting Area Journal List Policy

The purpose of this proposal is to share the accounting area's view on what is an appropriate journal list and on how certain activities should be rewarded. This proposal is the result of an area meeting that occurred on February 7th of 2017. After substantial discussion, the area resolved on the following items:

- 1- We should adopt 4 levels to rank journals. We agreed that the A* (top tier), A, B, and C rankings are appropriate for our purposes.
- 2- If we end-up using a point system, the area agreed that the point assignment below is appropriate: a. 4 points for A* journals. b. 3 points for A journals. c. 2 points for B journals. d. 1 point for C journals.
- 3- We agreed that two criteria can be used to rate the journals: a. The first criterion is the ADBC journal list. This list will determine the ranking for the journals. The second criterion is whether the journal is affiliated with the American Accounting Association (AAA, hereafter). b. We decided that it would be appropriate to rank all of the AAA journals with at least an A. Therefore, if a AAA article is ranked below A in the ADBC list, that article will be ranked as A in our list. c. We all agreed that citation indices and impact factors are biased measures and should not be used to rank journals. Accounting research is a relatively new field and many journals did not have enough time to build a strong impact factor or citation index. This logic applies especially to the new section journals that started recently and are relatively disadvantaged when it comes to citation indices and impact factors. We believe that a combination of the ADBC and AAA affiliation mitigates this problem and works well with our area.
- 4- We discussed whether editorial notes should receive any credit. The area concluded that editorial note should receive credit with a cap of 1 note per year. a. The note should receive the same weight as a publication. The note will be ranked the same way as the journal. For example, if the editorial note is for an A journal, the editor's note should be considered as an A publication. b. We also agreed that the person that is getting credit for the note has to be the editor.
- 5- We discussed whether conference presentations should receive any credit. We decided that they should receive some credit with a cap of 4 presentations per year. a. We agreed, if we follow the point system discussed above, each conference presentation should be awarded .25 points. b. We also agreed that the same articles can be presented at two conferences and earn credit from both places. Articles presented to more than two places won't receive additional credit. For example, if a professor presents the same paper to two separate conferences. S/he should receive .5 points (.25 X 2 times). After that, the article cannot earn points from conference submissions. c. The maximum amount of points that can be earned in a year from conference presentations is 1 point (.25 X 4 times).
- 6- We discussed whether the number of co-authors in a paper matters. We agreed that it doesn't. However, we also agreed that sole authorship should be recognized/rewarded.
- 7- We discussed how much weight should be assigned to book chapters. a. We came to the conclusion that a chapter in a research/scholarly book (not a textbook) should receive 1 point (the equivalent of a C publication). b. Textbook chapters should receive .5 points per chapter with a cap of 6 chapters within any 5-year window.

Appendix IIC (Table A9-1)
Accounting Faculty Participation by Classes Taught
Academic Year 2017-2018

	SA	PA	SP	IP	Total
Bachelor's	45.28%	7.55%	15.09%	32.08%	100.00%
M.B.A.	20.00%	80.00%	0.00%	0.00%	100.00%
Specialized Masters	62.50%	25.00%	0.00%	12.50%	100.00%
Doctoral Program	0.00%	0.00%	0.00%	0.00%	0.00%
Other	0.00%	0.00%	0.00%	0.00%	0.00%

Appendix IID Summary of Faculty Qualifications (Table A9-1)

Area: Accounting										
Portfolio				Sufficiency *		% of Time Devoted to Mission for Each Qualification Group *				
Member Name	Appt	Degree, Year	Prof. Cert.	Participating	Supporting	SA	PA	SP	IP	Oth
Beckman, Judy	1992	Ph.D., 1991	C.P.A.	4			100.00%			
Blanthorne, Cynthia	2007	Ph.D., 2000	C.P.A.	6		100.00%				
Boyle, Edmund	1988	Ph.D., 1990	C.P.A.	6		100.00%				
Hazera, Alejandro	1989	Ph.D., 1989	C.P.A.	4		100.00%				
Jelinek, Kate	2005	Ph.D., 2005	C.P.A.	5		100.00%				
Jervis, Kathryn	2007	Ph.D., 1997	C.P.A.	4			100.00%			
Liu, Qi	2017	Ph.D., 2014		4		100.00%				
Marquez, Gilberto	2018	Ph.D., 2014		2		50.00%				
Schwarzbach, Henry	1976	Ph.D., 1976	C.P.A.	3			50.00%			
Triki, Anis	2015	Ph.D., 2015		3		100.00%				
Newell, Roberta	2014	M.Acc., 1996	C.P.A.	8				100.00%		
Clements, Alexis	2016	M.S.A., 2016	C.P.A.		2				25.00%	
D'Adamo, Joseph	2004	M.B.A., 1979	C.P.A.	4					100.00%	
Jones, Tanya	2017	M.S.A., 2014	C.P.A.		1				12.50%	
Ryle, Patrick	2017	M.B.A., 2017			3				37.50%	
Sacco, Ann-Marie	2012	M.B.A., 1983		8					100.00%	
Accounting:				61	6	6.5	2.5	1	2.75	0

Benchmarks	Faculty Sufficiency Indicators *				Full-Time Equivalents						Faculty Qualifications Indicators		
School	Participating	Supporting	Total	% Taught by Participating	SA	PA	SP	IP	Oth	Total	SA ^(44%)	SA+PA+ SP ^(66%)	SA+PA +SP+IP ^(94%)
Accounting	61	6	67	91%	6.5	2.5	1	2.75	0	12.75	51%	78%	100%

Appendix IIE
Summary of Engagements Obtained through Impactful Research

Member Name	Appt	Degree	Degree Earned	Validating Factors					
				Journal Editorships	Professional Organization Leadership	Competitive Grants	Invited Fellowships	Invited Presentations, Interviews, professional citation	Invited Research Reports and Consulting
Beckman, Judy, K.	1991	Ph.D	1992	1	1	2	2		1
Blanthorne, Cynthia	2007	Ph.D	2000	1	1			2	
Boyle, Edmund, J.	1990	Ph.D	1990						
D'Adamo, Joseph, M.	2004	M.B.A.	1979						
Hazera, Alejandro	1989	Ph.D	1989					2	
Jelinek, Kate	2005	Ph.D	2005	1					
Jervis, Kathryn, J.	2007	Ph.D	1997	1	1	2	1	2	
Liu, Qi	2017	Ph.D	2014	1	1				
Marquez, Gilberto	2018	Ph.D	2014						
Newell, Roberta	2015	MS	1996						
Sacco, Ann-Marie	2012	M.B.A.	1983						
Schwarzbach, Henry	1976	Ph.D	1976						
Triki, Anis	2015	Ph.D	2015			1		1	
			Totals	5	4	5	3	7	1

Appendix IIF
Accounting Area Peer Review Publications
For the Period 2013-2014 through 2017-2018

	ADBC	
Journal	Category	Count
International Journal of Accounting Information Systems	A	1
Issues in Accounting Education	A	0.5
Journal of Accounting Literature	A	1
Journal of the American Taxation Association	A	1
Journal of Business Ethics	A	2
Journal of Business Research	A	1
Journal of Information Systems	A	1
Advances in Accounting Behavioral Research	B	2
International Journal of Managerial Finance	B	2
Journal of Accounting Education	B	1
Research in Accounting Regulation	B	1
Accounting Educators' Journal	C	1
Advances in Accounting Education: Teaching and Curriculum Innovations	C	2
Business Horizons	C	2
International Journal of Accounting, Auditing, and Performance Evaluation	C	0.66
International Journal of Critical Accounting	C	1
Journal of Emerging Technologies in Accounting	C	4
Journal of Information System Security	N	<u>1</u>
		<u>25.16</u>
Coauthored Articles Counted Once		

Appendix II G- Emerging Use of Technology Across the Curriculum

Class		Software, Database	Use
BUS 201	Financial Accounting	Excel;	Problem Solving
BUS 202	Managerial Accounting	Excel; Top Hat	Problem Solving; Classroom Management
BUS 301	Intermediate Accounting I	Excel; FASB Codification; EDGAR	Critical Thinking; Accounting Research; Financial Analysis
BUS 302	Intermediate Accounting II	Excel; FASB Codification; EDGAR	Critical Thinking; Accounting Research; Financial Analysis
BUS 401	Accounting Information Systems	Excel; Tableau	Critical Thinking; Data Analytics, Visualization
BUS 402	Advanced Accounting	Excel; FASB Codification; EDGAR	Critical Thinking; Problem Solving; Evaluation of Goodwill and Merger
BUS 403	Income Taxation	Excel; CCH Tax Data Base	Problem Solving; Extensive Tax Research Practice
BUS 404	Auditing	Excel; Tableau	Critical Thinking; Internal Control and Audit Cycle Simulation

Appendix IIIH Citations by Faculty Member

Faculty Member	Citations
Cindy Blanthorne	337
Judy Beckman	173
Edmund Boyle	364
Alex Hazera	52
Kate Jelinek	73
Kathryn Jervis	117
Qi liu	93
Gilberto Marquez	0
Anis Triki	20
Total	1229

Sources: Mostly Google Scholar, Researchgate

UNIVERSITY OF RHODE ISLAND
COLLEGE OF BUSINESS
CONTINUOUS IMPROVEMENT REVIEW REPORT,
ACCOUNTING July 21, 2018
Appendix III: Student Data

Appendix III-Student Body Profile and Characteristics- Page 36

Table of Contents

- Appendix IIIA: Number of Accounting Majors by Year with Ethnicity and Gender Indicators- p. 2
- Appendix IIIB: Undergraduate and Graduate Program Exit Surveys- p . 4
- Appendix IIIC: CPA Exam Results-p. 6

Appendix IIIA
Number of Accounting Majors by Year with Ethnicity and Gender Indicators

Undergraduate Students by Ethnicity and Gender

Year	Two or More		Native Amer.		Asian		African Amer.		Hispanic		Non-Res Alien		Not Specified		Pacific Islander		White		Grand Total		
	M	F	M	F	M	F	M	F	M	F	M	F	M	F	M	F	M	F	M	F	Total
2012	2	2	0	0	11	5	11	5	20	14	1	2	20	5	0	0	147	97	212	130	342
2013	4	2	0	0	4	4	12	6	17	18	1	2	21	9	0	0	138	103	197	144	341
2014	5	6	0	0	7	7	16	10	18	20	2		18	13	0	0	181	98	247	154	401
2015	3	6	0	0	8	8	11	9	18	24	4	1	16	10	0	0	186	108	246	166	412
2016	6	1	0	0	7	4	12	11	19	24	3	3	12	11	0	0	146	93	205	147	352
2017	8	1	0	0	11	5	14	8	16	21	2	5	10	9	0	0	138	76	199	125	324

	Summary by Ethnicity				Summary by Gender			
	White		Minority		Men		Women	
	#	%	#	%	#	%	#	%
2012	244	71.35%	98	28.65%	212	61.99%	130	38.01%
2013	241	70.67%	100	29.33%	197	57.77%	144	42.23%
2014	279	69.58%	122	30.42%	247	61.60%	154	38.40%
2015	294	71.36%	118	28.64%	246	59.71%	166	40.29%
2016	239	67.90%	113	32.10%	205	58.24%	147	41.76%
2017	214	66.05%	110	33.95%	199	61.42%	125	38.58%

MS Accounting Students by Ethnicity and Gender

	Two or More		Native Amer.		Asian		African Amer.		Hispanic		Non-Res Alien		Not Specified		Pacific Islander		White		Grand Total		
	M	F	M	F	M	F	M	F	M	F	M	F	M	F	M	F	M	F	M	F	Total
2012					1	1			3		2	1	4	1			10	14	20	17	37
2013	1	1			1		1	1	1		2	2	5	3			24	13	35	20	55
2014							1				2	1	2	3			13	11	18	15	33
2015							1	1		2		2	1	1			14	10	16	16	32
2016		2			2							1	3	1			11	14	16	18	34
2017		1			1		1	1		1				2			15	13	17	18	35

	Summary by Ethnicity				Summary by Gender			
	White		Minority		Men		Women	
	#	%	#	%	#	%	#	%
2012	24	64.86%	13	35.14%	20	54.05%	17	45.95%
2013	37	67.27%	18	32.73%	35	63.64%	20	36.36%
2014	24	72.73%	9	27.27%	18	54.55%	15	45.45%
2015	24	75.00%	8	25.00%	16	50.00%	16	50.00%
2016	25	73.53%	9	26.47%	16	47.06%	18	52.94%
2017	28	80.00%	7	20.00%	17	48.57%	18	51.43%

Appendix IIIB
Undergraduate and Graduate Program Exit Surveys

Undergraduates	2013	2014	2015	2016	2017	2018
Employment						
Number of Graduates	120	95	98	105	110	
Graduates Responding	42.00%	54.70%	48.00%			
Employed Full-Time	44.00%	46.00%	64.00%		49.00%	
Employed Part-Time	2.00%		11.00%		29.00%	
Internship					5.00%	
Graduate School Full-Time						
Graduate School Part-Time						
Unemployed and Seeking Employment	3.00%	8.00%	2.00%		11.00%	
Unemployed and not Seeking Employment					3.00%	
Unavailable for Employment					3.00%	
Other						
Salary Information						
Average	NA	NA	NA	\$52,357	\$52,987	
Mode	NA	NA	NA	NA	\$59,000	
Maximum	NA	NA	NA	NA	\$81,000	
Minimum	NA	NA	NA	\$64,000	\$31,500	
Starting Salary						
Less than \$30,000	0.00%	4.00%	10.00%	NA	NA	
\$30,000-\$35,000	32.00%	9.00%	10.00%	NA	NA	
\$35,001-\$40,000	9.00%	13.00%	7.00%	NA	NA	
\$40,001-\$45,000	9.00%	4.00%	7.00%	NA	NA	
\$45,001-50,000	5.00%	17.00%	7.00%	NA	NA	
Over \$50,000	45.00%	39.00%	60.00%	NA	NA	
Other		13.00%				
Overall Class of 2018 Data**						

Employment	XXX					
Completed an Internship	XXX					
Attending Graduate School	XXX					
All data have been extracted from the CoB's Post-Graduation and Career Placement Reports						
MS-Accounting	2013	2014	2015	2016	2017	2018
Numbers of Graduates	38	24	45	24	27	
% Employed	89.47%	100.00%	82.22%	87.50%	81.48%	
# Employed--	34	24	37	21	22	

Appendix IIIC – CPA Exam Results

2016 CPA Exam Results

Bachelor's Degree

All Testing Events:	% Pass	# of Exam Sections	# of Candidates	Avg. Score
University of Rhode Island	45.4%	317	129	71.8
Bryant University	53.9%	507	187	73.3
AppalachianState University	50.4%	508	200	73.5
James Madison University	58.7%	578	188	75.9
Northeastern University	57.7%	478	172	74.6
Southern Illinois UniversityCarbondale	38.9%	126	50	69.3
University of Arizona	57.5%	494	192	73.9
University of Connecticut	59.5%	837	311	74.8
University of Mississippi	56.3%	567	177	74.7
University of North Texas	43.4%	249	90	70.4
University of Tennessee Knoxville	70.9%	554	220	77.9
Ohio University	48.4%	375	135	71.8
University of New Hampshire	59.4%	283	109	75.5
Babson College	51.5%	99	41	73.3
First-Time Testing Events:	% Pass	# of Exam Sections	# of Candidates	Avg. Score
University of Rhode Island	48.6%	179	95	71.6
Bryant University	59.7%	298	145	74.9
AppalachianState University	53.6%	334	163	73.9
James Madison University	67.0%	391	153	77.6
Northeastern University	67.7%	285	133	76.4
Southern Illinois UniversityCarbondale	48.3%	58	31	69.1
University of Arizona	62.3%	289	151	74.9
University of Connecticut	66.7%	508	251	76.3
University of Mississippi	63.2%	397	146	75.9
University of North Texas	50.4%	117	59	70.4
University of Tennessee Knoxville	78.5%	414	191	79.7
Ohio University	53.1%	224	99	72.3
University of New Hampshire	64.1%	198	92	76.3
Babson College	56.9%	57	28	74.6

Advanced Degree

All Testing Events:	% Pass	# of Exam Sections	# of Candidates	Avg. Score
University of Rhode Island	56.7%	67	25	73.6
Bryant University	67.0%	112	39	76.8
Appalachian State University	-	-	-	-
James Madison University	81.7%	120	38	81.0
Northeastern University	50.4%	351	133	73.3
Southern Illinois University Carbondale	45.7%	70	28	72.9
University of Arizona	66.7%	90	37	77.1
University of Connecticut	47.8%	136	50	71.4
University of Delaware	58.7%	63	23	76.1
University of Massachusetts	45.5%	88	42	69.2
University of Mississippi	59.4%	106	37	75.1
University of North Texas	47.5%	257	86	71.7
University of Tennessee Knoxville	75.4%	171	63	79.2
Ohio University	48.8%	375	135	71.8
University of New Hampshire	59.4%	283	198	75.5
Babson College	51.5%	99	41	73.3
First-Time Testing Events:	% Pass	# of Exam Sections	# of Candidates	Avg. Score
University of Rhode Island	69.1%	42	19	78.7
Bryant University	74.2%	66	29	78.1
Appalachian State University	-	-	-	-
James Madison University	85.9%	92	31	82.4
Northeastern University	54.4%	184	97	73.8
Southern Illinois University Carbondale	59.5%	37	23	74.2
University of Arizona	70.0%	70	32	78.2
University of Connecticut	45.7%	81	41	70.5
University of Mississippi	59.0%	61	25	74.2
University of North Texas	51.0%	147	69	71.1
University of Tennessee Knoxville	80.3%	137	55	79.8
Ohio University	63.2%	19	7	77.1
University of New Hampshire	66.7%	45.0	19.0	79.4
Babson College	45.2%	31	17	72.4

2016 CPA Exam Results (continued)

CPA Examination Pass Rate Comparison with Peer Schools, Competitors and Aspirant Schools

All Testing Events:	<u>Audit</u>	<u>Business</u>	<u>Financial</u>	<u>Regulation</u>
University of Rhode Island	54.1%	47.5%	43.8%	40.0%
Bryant University	49.4%	67.6%	51.6%	57.9%
Appalachian State University	47.9%	58.3%	41.8%	53.1%
James Madison University	63.0%	72.3%	61.5%	54.4%
Northeastern University	52.4%	70.1%	46.6%	55.1%
Southern Illinois University Carbondale	26.2%	50.0%	37.8%	60.5%
University of Arizona	57.5%	68.2%	50.6%	61.7%
University of Connecticut	56.5%	69.1%	50.4%	55.7%
University of Mississippi	54.3%	65.4%	55.8%	52.1%
University of North Texas	43.1%	54.0%	40.4%	47.1%
University of Tennessee Knoxville	64.1%	85.6%	69.6%	69.4%
Ohio University	39.2%	64.4%	54.1%	47.9%
University of New Hampshire	64.4%	64.0%	59.5%	52.0%
Babson College	58.3%	75.9%	45.3%	42.0%
First-Time Testing Events:	<u>Audit</u>	<u>Business</u>	<u>Financial</u>	<u>Regulation</u>
University of Rhode Island	46.0%	54.9%	51.9%	50.0%
Bryant University	57.9%	78.4%	51.1%	62.1%
Appalachian State University	49.5%	57.3%	41.9%	67.9%
James Madison University	70.5%	80.7%	70.2%	61.0%
Northeastern University	60.8%	74.4%	53.4%	66.3%
Southern Illinois University Carbondale	27.3%	66.7%	38.1%	72.7%
University of Arizona	52.2%	80.0%	58.2%	64.3%
University of Connecticut	53.6%	78.3%	57.7%	63.0%
University of Mississippi	61.7%	72.0%	59.8%	55.4%
University of North Texas	46.7%	65.3%	48.1%	46.4%
University of Tennessee Knoxville	71.3%	92.8%	78.3%	70.6%
Ohio University*	53.5%	77.8%	67.4%	52.6%
University of New Hampshire*	61.8%	63.9%	57.1%	61.1%
Babson College*	50.0%	77.8%	58.8%	42.9%

*Appendix C-1, 2016 NASBA Report

2015 CPA Exam Results

Bachelor's Degree

All Testing Events:	% Pass	# of Exam Sections	# of Candidates	Avg. Score
University of Rhode Island	50.7%	225	91	72.6
Bryant University	49.4%	385	154	72.4
Appalachian State University	53.0%	415	155	73.1
James Madison University	62.8%	441	166	76.4
Northeastern University	55.9%	372	148	73.8
Southern Illinois University Carbondale	40.2%	132	53	69.5
University of Arizona	59.9%	518	185	74.9
University of Connecticut	60.3%	738	298	75.3
University of Mississippi	60.4%	465	139	75.8
University of North Texas	46.5%	260	94	71.1
University of Tennessee Knoxville	73.4%	398	182	78.4
Ohio University	63.2%	1046	397	76.0
University of New Hampshire	60.3%	194	73	75.5
Babson College	50.4%	113	42	72.9
First-Time Testing Events:	% Pass	# of Exam Sections	# of Candidates	Avg. Score
University of Rhode Island	52.3%	128	72	73.3
Bryant University	52.5%	221	120	73.6
Appalachian State University	55.0%	273	125	73.2
James Madison University	69.0%	274	118	78.0
Northeastern University	60.9%	235	144	74.4
Southern Illinois University Carbondale	54.0%	50	31	70.0
University of Arizona	67.4%	322	137	76.6
University of Connecticut	66.9%	444	238	76.6
University of Mississippi	66.2%	293	101	77.3
University of North Texas	49.6%	135	68	72.0
University of Tennessee Knoxville	79.5%	302	150	80.2
Ohio University	48.3%	180	86	70.9
University of New Hampshire	63.9%	133	62	76.3
Babson College	62.0%	71	32	74.7

2015 CPA Exam Results (continued)

Advanced Degree

All Testing Events:	% Pass	# of Exam Sections	# of Candidates	Avg. Score
University of Rhode Island	60.5%	43	15	74.2
Bryant University	54.6%	88	35	74.7
Appalachian State University	-	-	-	-
James Madison University	84.2%	120	40	83.5
Northeastern University	51.0%	300	123	72.6
Southern Illinois University Carbondale	44.1%	68	27	68.6
University of Arizona	69.9%	93	36	77.9
University of Connecticut	62.2%	111	43	75.5
University of Mississippi	63.1%	122	41	76.2
University of North Texas	60.5%	200	93	75.1
University of Tennessee Knoxville	86.5%	126	58	83.2
Ohio University	90.9%	11	5	79.9
University of New Hampshire	70.0%	50	21	78.6
Babson College	47.6%	63	22	77.6
First-Time Testing Events:	% Pass	# of Exam Sections	# of Candidates	Avg. Score
University of Rhode Island	63.0%	27	13	75.3
Bryant University	62.1%	58	27	76.0
Appalachian State University	-	-	-	-
James Madison University	90.8%	98	32	84.8
Northeastern University	55.9%	177	97	72.9
Southern Illinois University Carbondale	34.1%	44	23	64.5
University of Arizona	72.5%	69	30	78.4
University of Connecticut	68.3%	82	39	76.6
University of Mississippi	63.5%	85	31	76.7
University of North Texas	61.4%	132	74	75.9
University of Tennessee Knoxville	86.2%	109	54	83.2
Ohio University	not reported			
University of New Hampshire	0.703	37	17	79.3
Babson College	0.529	18	34	73.4

2015 CPA Exam Results (continued)

CPA Examination Pass Rate Comparison with Peer Schools, Competitors and Aspirant Schools

All Testing Events:	<u>Audit</u>	<u>Business</u>	<u>Financial</u>	<u>Regulation</u>
University of Rhode Island	44.1%	77.4%	45.1%	48.6%
Bryant University	51.5%	54.0%	48.1%	47.7%
Appalachian State University	50.9%	54.8%	52.8%	53.7%
James Madison University	64.6%	73.7%	73.5%	58.9%
Northeastern University	49.5%	64.7%	45.9%	54.5%
Southern Illinois University Carbondale	34.4%	50.0%	42.6%	42.0%
University of Arizona	64.1%	72.9%	52.7%	58.6%
University of Connecticut	60.0%	69.6%	53.8%	59.2%
University of Mississippi	51.2%	71.6%	65.3%	60.9%
University of North Texas	48.4%	65.9%	51.2%	48.1%
University of Tennessee Knoxville	80.3%	78.5%	69.2%	76.7%
Ohio University	61.6%	77.4%	60.1%	55.8%
University of New Hampshire	58.3%	70.7%	61.5%	60.6%
Babson College	51.2%	76.2%	43.8%	31.4%
First-Time Testing Events:	<u>Audit</u>	<u>Business</u>	<u>Financial</u>	<u>Regulation</u>
University of Rhode Island	39.5%	83.8%	42.6%	47.4%
Bryant University	56.2%	57.6%	54.4%	52.2%
Appalachian State University	45.2%	62.0%	53.3%	57.8%
James Madison University	71.6%	78.8%	79.3%	69.7%
Northeastern University	54.5%	71.4%	46.1%	63.3%
Southern Illinois University Carbondale	34.5%	60.0%	43.5%	45.5%
University of Arizona	69.7%	77.0%	62.7%	66.0%
University of Connecticut	64.8%	78.4%	61.5%	64.4%
University of Mississippi	60.8%	74.8%	66.7%	60.6%
University of North Texas	45.9%	69.9%	56.0%	48.3%
University of Tennessee Knoxville	85.1%	85.1%	76.7%	77.3%
Ohio University	43.1%	50.0%	50.0%	48.9%
University of New Hampshire	57.5%	80.0%	68.1%	60.0%
Babson College	54.2%	84.4%	48.3%	40.0%

2014 CPA Exam Results

	% Pass	# of Exam Sections	# of Candidates	Avg. Score
<u>Bachelor's Degree</u>				
All Testing Events:				
University of Rhode Island	50.2%	253	91	72.4
Bryant University	55.9%	404	152	73.7
Appalachian State University	57.9%	347	137	75.3
James Madison University	64.2%	559	185	76.9
Northeastern University	54.0%	341	145	73.7
Southern Illinois University Carbondale	44.2%	163	65	70.3
University of Arizona	59.6%	574	204	75.4
University of Connecticut	61.6%	731	279	75.7
University of Mississippi	60.9%	514	160	75.4
University of North Texas	45.0%	200	78	71.6
University of Tennessee Knoxville	70.5%	397	141	78.9
<hr/>				
	% Pass	# of Exam Sections	# of Candidates	Avg. Score
First-Time Testing Events:				
University of Rhode Island	51.3%	152	71	72.0
Bryant University	59.8%	229	115	74.6
Appalachian State University	62.3%	223	105	76.0
James Madison University	72.3%	390	140	78.7
Northeastern University	58.2%	196	102	75.4
Southern Illinois University Carbondale	44.2%	77	41	68.2
University of Arizona	64.3%	364	158	76.6
University of Connecticut	65.9%	458	222	76.8
University of Mississippi	68.3%	350	121	76.9
University of North Texas	51.3%	115	63	72.7
University of Tennessee Knoxville	81.2%	282	105	81.6

2014 CPA Exam Results (continued)

	<u>% Pass</u>	<u># of Exam Sections</u>	<u># of Candidates</u>	<u>Avg. Score</u>
<u>Advanced Degree</u>				
All Testing Events:				
University of Rhode Island	35.7%	42	18	67.2
Bryant University	50.0%	60	23	73.9
Appalachian State University	-	-	-	-
James Madison University	75.0%	92	29	80.6
Northeastern University	52.4%	275	110	73.0
Southern Illinois University Carbondale	37.3%	67	31	70.2
University of Arizona	67.9%	56	26	78.5
University of Connecticut	51.2%	43	18	73.5
University of Mississippi	50.6%	89	32	72.9
University of North Texas	61.5%	195	86	75.4
University of Tennessee Knoxville	69.8%	43	19	77.6
	<u>% Pass</u>	<u># of Exam Sections</u>	<u># of Candidates</u>	<u>Avg. Score</u>
First-Time Testing Events:				
University of Rhode Island	36.4%	22	12	67.6
Bryant University	57.9%	38	18	75.1
Appalachian State University	-	-	-	-
James Madison University	77.3%	66	22	82.3
Northeastern University	52.6%	137	78	72.7
Southern Illinois University Carbondale	35.1%	37	23	69.1
University of Arizona	65.9%	41	22	77.8
University of Connecticut	57.1%	21	13	75.9
University of Mississippi	53.1%	49	24	72.4
University of North Texas	68.2%	129	68	76.5
University of Tennessee Knoxville	80.8%	26	14	79.2

2014 CPA Exam Results (continued)

CPA Examination Pass Rate Comparison with Peer Schools, Competitors and Aspirant Schools

	<u>Audit</u>	<u>Business</u>	<u>Financial</u>	<u>Regulation</u>
All Testing Events:				
University of Rhode Island	34.8%	59.6%	41.2%	49.4%
Bryant University	54.8%	61.3%	49.7%	61.3%
Appalachian State University	50.5%	63.2%	56.5%	66.7%
James Madison University	59.9%	76.3%	69.8%	57.5%
Northeastern University	59.2%	58.7%	50.8%	49.3%
Southern Illinois University Carbondale	39.3%	48.2%	36.7%	45.3%
University of Arizona	50.0%	71.2%	60.6%	61.7%
University of Connecticut	59.5%	66.5%	55.1%	62.8%
University of Mississippi	52.0%	71.2%	60.0%	55.1%
University of North Texas	52.5%	69.4%	41.8%	58.9%
University of Tennessee Knoxville	71.4%	74.2%	70.4%	68.9%

	<u>Audit</u>	<u>Business</u>	<u>Financial</u>	<u>Regulation</u>
First-Time Testing Events:				
University of Rhode Island	34.8%	63.6%	40.7%	50.0%
Bryant University	60.7%	68.8%	55.1%	59.2%
Appalachian State University	51.6%	74.2%	61.7%	64.7%
James Madison University	63.8%	85.7%	77.2%	63.6%
Northeastern University	61.2%	64.4%	55.8%	50.0%
Southern Illinois University Carbondale	37.0%	33.3%	46.7%	48.2%
University of Arizona	51.4%	76.4%	63.4%	66.0%
University of Connecticut	59.4%	77.8%	55.3%	66.9%
University of Mississippi	53.7%	77.5%	72.0%	60.3%
University of North Texas	54.3%	74.7%	46.2%	64.6%
University of Tennessee Knoxville	81.3%	86.9%	80.4%	75.8%

UNIVERSITY OF RHODE ISLAND
COLLEGE OF BUSINESS
CONTINUOUS IMPROVEMENT REVIEW REPORT,
ACCOUNTING, July 21, 2018
Appendix IV: Curriculum/Program Initiatives and
Stakeholder Engagement

Appendix IV: Curriculum/Program Initiatives and Stakeholder Engagement

Table of Contents

- IV.A.- Tutoring Center Proposal- p. 2
- IV. B Accounting Advisory Board Members, Dec., 2017-p. 8
- IV.C Examples of AAB Support- p. 9
- IV.D Accounting Advisory Board Minutes- p. 10
- IV.E Student Organization and General Area Activities- p. 25

Appendix IV.A: Proposal for an Accounting Tutoring Centers (by Joe D'adamo)

Mission:

The Tutorial Center for Accounting and CPA Examination Preparation at the University of Rhode Island will provide high-quality, tutorial services across the accounting curriculum to undergraduate and graduate students. The services will be provided using three approaches:

- Graduate assistant-led tutoring for sophomore and junior-level accounting courses
- Peer-to-peer tutoring for senior-level accounting courses
- Instructor-led CPA examination preparation for senior and graduate students using the Becker CPA Review Course materials

The Tutorial Center will be managed by the Director, Joseph D'Adamo. The Director will be responsible for coordinating of the undergraduate tutorial services and conducting the CPA examination preparation services as discussed below. The Director's activities within the Tutorial Center will be considered to be service to the College of Business Administration.

Graduate Assistant-led Tutoring:

The Tutorial Center for Accounting will operate between 9 AM and 4 PM five days per week to provide tutoring services to undergraduate accounting students. Tutoring will begin during the first full week of each semester and extend through the reading period prior to the beginning of finals. The Center will be staffed by one to three accounting graduate assistants at all times.

Graduate Assistant Selection: The Director will consult with the area coordinator for the graduate accounting program and the accounting faculty throughout the process to select three accounting graduate assistants. They will identify and recruit three senior accounting majors intending to pursue the URI Master of Science in Accounting to serve as the graduate assistant tutors. The Director will refer the selected candidates to the Assistant Dean for hiring.

Accounting Graduate Assistant Responsibilities: The accounting graduate assistants will provide tutoring services to the undergraduate students in:

- BUS 201 Financial Accounting
- BUS 202 Managerial Accounting
- BUS 301 Intermediate Accounting I
- BUS 302 Intermediate Accounting II

The accounting graduate assistants will also assist the accounting faculty in grading of assignments and proctoring of exams as requested.

Accounting graduate assistants will be expected to work a maximum of 20 hours per week throughout the semesters. Fifteen hours will be allocated to tutorial services and five hours to faculty support. The accounting graduate assistants will be required to maintain records of their time as well as a log book that tracks student usage of the Tutorial Center. They will report directly to the Director.

Director Responsibilities: The Director will work with the accounting graduate assistants to:

- Develop tutoring schedules designed to meet the needs of the undergraduate students.
- Develop policies for the tutorial center and the extent of assistance to be provided to the undergraduate students.
- Mentor the graduate assistants in approaches to effectively tutor the undergraduate students.
- Train the graduate assistants in the use of *Wiley PLUS* and *Connect* to support the undergraduate students in completing online assignments.
- Provide academic support to the accounting graduate assistants by reviewing topics that they will be expected to tutor and answering questions as they arise.
- Monitor and evaluate the performance of the accounting graduate assistants as a basis to provide additional training, if needed.

The Director will coordinate with the accounting faculty to schedule requests for assistance with grading and proctoring of exams. The Director will also work with the accounting faculty to determine the level of assistance the faculty would like the accounting graduate assistants to provide to the undergraduate students.

The Director will also coordinate with the faculty moderator of the URI chapter of Beta Alpha Psi to coordinate the use of member-volunteers to supplement the work of the accounting graduate assistants in providing tutorial services to the undergraduate accounting students.

The Director will publicize and promote the Tutorial Center within the College of Business Administration and the University to maximize its usage and enhance its visibility and reputation.

Peer-to-Peer Tutoring:

The URI chapter of Beta Alpha Psi requires its members to volunteer to tutor undergraduate students. As noted above the Director will work with the faculty moderator of BAP to coordinate the use of member-volunteers in the center.

The Director will establish a program through which the BAP member-volunteers provide peer-to-peer assistance with senior-level accounting courses. Ideally BAP member-volunteers will be

available to provide assistance in preparation for examinations in courses such as Advanced Accounting, Auditing, and Individual Income Taxation.

The Director will work with the accounting faculty and the BAP member-volunteers to schedule tutoring hours and provide academic support.

CPA Examination Preparation:

The Tutorial Center with the Becker CPA Review Course will provide senior and graduate accounting students assistance with the preparation for the Uniform Certified Public Accounting Examination.

CPA Exam Awareness: The Tutorial Center will provide access to a variety of resources that accounting students can use to become informed about the process of earning the CPA license including the educational and experience requirements. The Director will make presentations to student groups to raise awareness about the CPA exam and the resources available through the Tutorial Center. The Center will establish and maintain a Facebook page to increase its presence and further raise awareness about the CPA exam, its services, and student experiences.

CPA Counselling: The Director will schedule and post regular hours to provide one-on-one counselling to students interested in pursuing the CPA license. Counselling services will include:

- Assisting and advising students to help them determine how they will meet the specific state requirements for the CPA license.
- Developing customized schedules for sitting for the four sections of the CPA exam within school, work, and personal constraints.
- Guiding students through the application process.
- Developing customized study plans for the CPA exam sections.

CPA Exam Tutorial Sessions: The Tutorial Center will provide formal exam preparation sessions using the Becker CPA Review Course and a flipped-classroom approach. The formal tutorial sessions will be offered such that students will be able to complete the four sections of the CPA exam within one year from the end of their undergraduate studies.

Students with public accounting internships in the summer before beginning their graduate studies will likely complete their work and receive their job offers in early to mid-August. They will then likely be entitled to receive the Becker CPA Review course from their employers. The Tutorial Center will work with Becker to obtain discounts/scholarships for those students who do not qualify for the Becker course through employers.

Under the Becker flipped-classroom approach, students will view videos of the national Becker instructors who will lead the students through the course material presented in the Becker

textbooks. Students will not be expected to do any work or reading prior to viewing the lectures. Each lecture video will require between three or four hours to complete. The lectures per exam section are:

- Auditing and Attestation (AUD) 6 lectures
- Financial Accounting and Reporting (FAR) 10 lectures
- Regulation (REG) 8 lectures
- Business Environment and Concepts (BEC) 6 lectures

The Tutorial Center will provide one two-hour, live session per lecture led by the Director. During those session, the Director will review multiple choice questions and simulation tasks that are representative of the lecture topics. The Director will also answer specific questions from students.

Students will be encouraged to work together in study groups as part of their exam preparation process.

The Tutorial Center will maintain a Sakai site for each exam section. The Sakai sites will be used to:

- Distribute handouts with supplemental course material developed by the Director.
- Maintain a Discussion Forum to accept and respond to student questions on a public, asynchronous basis.
- Provide access to an archive of brief videos prepared by the Director with explanations of course material and the review of multiple choice questions and simulation tasks.

The Sakai site will be available to all CBA students who wish to pursue the CPA exam whether or not they chose to participate in the Becker flipped-classroom sessions.

Scheduling:

The Tutorial Center will offer the flipped-classroom Becker course for the AUD exam section from mid-August through the beginning of September. Students will be prepared to take the Auditing section by the close of the summer testing window on September 10. Two live sessions will be offered over a three-week period to assist the students with their preparation.

During the fall semester, the graduate students will be studying financial accounting in at least two graduate courses. No formal tutorial sessions will be conducted until the end of the semester. At the end of November, the Tutorial Center will begin to offer live sessions for the FAR exam section, beginning with topics in governmental accounting and reporting in support of MAC 505. The live tutorial sessions will continue through the inter-session. Students will be prepared to take the FAR section before the beginning of the spring semester at the end of January.

The REG exam section tutorial sessions will begin in mid-April on a weekly basis. Students will be prepared to take the REG section before the spring testing window closes on June 10.

Finally, the Tutorial Center will offer weekly sessions for the BEC exam section beginning in June, assuming students will be available and are interested in attending. Otherwise, the Tutorial Center will support the students through the Sakai site for the BEC section. Students will be prepared to take the BEC section during the summer testing window.

The scheduled is designed to allow the students to successfully complete the CPA exam concurrently with their graduate studies. Students will be advised, and great care will be taken, to ensure that the exam preparation does not interfere with their graduate studies.

Currently candidates must pass the four parts of the CPA exam within 18 months from the date that they sit for the first exam session that they pass. If candidates fail an exam section, they must re-apply for that section and they cannot re-take that exam section until the next testing window opens.

Typically, students are encouraged to complete the exam within a six to nine-month timeframe. This allows adequate time to prepare for the exams and re-take any failed sections within the 18-month time constraint. This schedule stretches the preparation time to approximately one year. It should allow serious students to complete the exam within the 18-month time constraint even if they need to re-take one or more sections.

Exhibit: CPA Exam Preparation Schedule

July	August	September
Summer Testing Window Open		11 through 30 Closed
	Auditing Sessions AUD Exam by 9/10	

October	November	December
Fall Testing Window Open		11 through 31 Closed
	FAR Sessions	

January	February	March
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Winter Testing Window Open		11 though 31 Closed
FAR Sessions FAR Exam by 1/21		

April	May	June
Spring Testing Window Open		11 though 30 Closed
	REG Sessions REG Exam by 6/10	BEC Sessions

July	August	September
Summer Testing Window Open		11 though 30 Closed
BEC Sessions BEC Exam by 7/31		

Appendix IV.B: Accounting Advisory Board Members, Dec. 2017

Prefix	First Name	Last Name	Employer (optional)
Mr.	Steven	Campo	North Kingstown, RI Business Person
Mr.	Richard	Carroll	IBM (Retired)
Mr.	Daniel	Cataldo	Eaton Vance Corp.
Mr.	Michael	Hanna	Blum-Shapiro
Mr.	Edward	Houde	Hasbro, Inc.
Ms.	Claire	Iacobucci	Kahn, Litwin, Renza & Co, Ltd.
Ms.	Deb	Imondi	Textron, Inc.
Ms.	Susan	Johnson	Bannister House, Inc.
Mr.	Howard	Konicov	CohnReznick Advisory Group
Mr.	Paul	Languirand	CBIZ Tofias
Mr.	Brendan	McCorry	Ernst & Young
Mr.	Mark	McGivney	Marsh & McLennan.
Ms.	Kathleen	Morrissey	Brown University
Mr.	Brian	Schattle	Rhode Island Airport Corporation
Mr.	Tod	Short	KPMG LLP
Ms.	Patricia	Thompson	Piccerelli, Gilstein & Company, LLP
Mr.	Lisa	Ferraro	PricewaterhouseCoopers LLP
Mr.	Matthew	White	Pawtucket Red Sox Baseball Club, Inc.
Mr.	Robert	Edgar	Textron, Inc.
Mr.	Brian	DiBenedetto	Shneider Electric
Mr.	Edmond	Burdon	Ernst & Young (Alternate)
Ms.	Tanya	Jones	University of Rhode Island
Ms.	Andrea	Osorio	American Tower
Ms.	Alexis	Clements	Blum-Shapiro

Appendix IV.C- Accounting Advisory Board Members- Examples of Support 2017-2018

Mr. Mark McGivney and Assoc. — Women in Business Presentation
Ms. Claire Iacubucci — Women in Business Presentation
Ms. Lisa Ferraro (and PwC) — Summer work with TD and NABA
Ms. Brendan McCorry (and EY) — for support of TD and NABA
Ms. Deb Imondi-for Career Day and overall advisor to CBA
Mr. Brian Schattle for support of Strategic Innovation MBA program
Ms. Kathleen Morrissey for teaching at URI
Mr. Robert Edgar for holding a special Textron Career night Fall 2017
Mr. Edward Houde, for participating in career day, 2017.
Mr. Todd Short (and KPMG) for holding recruiting event with NABA, Spring, 2017.
Mr. Michael Hanna (Blum Shapiro) for holding recruiting event with NABA, Spring, 2017.

Appendix VI.D: Accounting Advisory Board Minutes, May, 2015-May, 2018

Minutes of URI Accounting Advisory Board Meeting — May 1, 2015

Prepared by: Alex Hazera, Vangermeersch Professor of Accounting, Accounting Area Coordinator: The meeting came to order at noon

Board Members Present— Richard Carroll; Claire Iocabucci; Brendan McCorry; Brian Schattle; Deb Imondi; Mark McGivney; Joseph Petrella Jr.; Michele Wood; Patricia Thompson; Susan Johnson; Tod Short.

Accounting/CBA Faculty Staff Present- Sarah Lobdell, Lynne Finnegan, Kathleen Jackson, Cynthia Blanthorne, Edmund Boyle, Kate Jelinek, Kathryn Jervis (Interim Dean), Alex Hazera (Area Coordinator), Roberta Newell, Anne Marie Sacco, Andrew Dill, Henry Schwarzbach, Charles Hickox.

Students Present: Maria Pezzullo (graduate student), Samantha Ortner (undergraduate students)

I. College Update—Kathryn Jervis (Interim Dean)- Dean Jervis provided an overview of College's activities/plans regarding-- Discussed MBA health care program; CBA hiring activities, including transformational program faculty hires; Possible merger of Textiles/Fashion merchandising with CBA.

II. New MS in Finance-- Bing Xuan Lin (Professor of Finance and Finance Area Coordinator) provided an overview of the recently announced Masters of Science in Finance program. The program will mainly be aimed at local working professionals.

III. Department Update –(Alex Hazera)

Student accomplishments—There were many student accomplishments during the year—several were highlighted, including:

- A URI chapter of the National Association of Black Accountants (**NABA**) has been officially recognized. The URI Chapter took first place in the 2013-2014 NABA regional case competition. Last year's case championship was followed up by two URI teams taking first and third place in the 2014-2015 case competition. A chapter of the Association of Latino/a Professionals in Finance and Accounting (ALFA) has also been initiated.
- **Rochelle Jimenez** was awarded a University Diversity Award for Academic Excellence and her efforts to establish a URI chapter of the Association of Latino/a Professional in Finance and Accounting.
- **Samantha Ortner** ('15) earned the University Academic Excellence Award.
- **Catie Steffen** ('15) earned the **Elizabeth Holmes Award for Best Student Athlete (Volleyball)**

Faculty Accomplishments—Alex Hazera outlined the faculty's many accomplishments for the year. All faculty members had accomplishments in research, teaching and service. Especially noteworthy, Dr. Cynthia Blanthorne earned the URI Foundation Teaching Excellence Award and published a widely publicized article in *Journal of the American Taxation Association*. Professor Blanthorne discussed both the academic side of the article and its practical implications.

Challenges--

Faculty Hiring— At the time of the 5/1 meeting we were in the midst of a search for a full-time Assistant Professor— *Update—After a careful search, we have successfully hired Dr. Anis Triki from the University of Central Florida (UCF). He will be introduced at the next meeting.* However, one of Dr. Triki's accomplishments at UCF was winning the *graduate student teaching award*. (This corresponds with the importance placed by the URI accounting faculty on quality teaching). The board asked whether the (somewhat below market) salaries offered have been an impediment—So far, they have not.

Masters in Accounting Program—There is a declining enrollment in the M/S in accounting program. Several observations and possibilities were discussed regarding this trend—

- In the last few years, the program has transitioned from one which included both traditional “5th year students and “adult students” to one which emphasizes the “fifth year of accounting.”
- **Mr. Brian Schattle** suggested designing the M.S. along the lines of an “executive program” and scheduling it in a manner that would be advantageous for working professionals.
- **Ms. Maria Pezzullo** discussed her experiences in returning to graduate school as an “adult” student with “real” world experience.
- **Henry Schwarzbach** and a board member suggested that the program needs better marketing, including attending recruiting fairs, etc.

All of these issues, and others will be considered by the faculty and Board in the Fall.

IV. Strategic Plan Discussion

The rest of the meeting constituted a “run-through” of the “four section” strategic plan. A few members of the board stated that the plan measures should be “tightened.” Alex Hazera has committed to presenting an updated version of the plan at the next meeting.)

Section 1--Enhance academic quality and value—This part of the plan deals principally with curriculum and class assessment— While the College has an assessment system and coordinates at the Dean's (i.e. College level)—at the next meeting we will discuss how we are using it to enhance curriculum, classes, at the “department level.,”

Section 2--Prepare Students for a changing world— Career Placement, Diversity and Globalization—

Lynne Finnegan gave an update on internships (see attachment) . **Kathleen Jackson** gave an update on placement (see attachment). Mr. **Mark McGivney** asked about the adequacy of the placement rate. **Chet Hickox** gave a brief overview of his work with talent development —**Mr. Richard Carroll** stated that outreach to African Americans is very important. Overall, the NABA activities have been important for promoting diversity. The faculty will support this organization. Regarding Languages, a few of the department's best students have recently double majored in accounting and a language—This seems to be a trend. **Samantha Ortner** her experience as a double accounting/Italian major at the end of the meeting.

Section 3—Research and Innovation—(This section generally regards research support and measurement). It was emphasized that URI values all three types of research : Traditional scholarship based research (“deep question”); professional publication (research on professional and regulatory matters; and education research (studies on most effective teaching techniques etc.),

Section 4—Area Effectiveness—Most of this part of the document concerns fundraising--

Sarah Lobdell provided an update on the status of all endowed funds related to the Accounting Department (see attached) including the Accounting Advisory Board Scholarship. She noted that the scholarship now has a market value of \$90,858 which is significantly higher than it was in recent years. She thanked the members of the Advisory Board for their support and pointed out that a \$41,000 transfer was made this year from the Alumni Association into this fund. This transfer was approved by the Dean and was a result of an unused Accounting fund that they wanted to consolidate. Sarah asked the Board for 100% participation each year. Several members of the Board mentioned that they weren't sure if they had made a gift year in the current fiscal year (July-June), so Sarah agreed to send emails to each member to let them know their status.

Sarah highlighted that the Finance Advisory Board that is being established is modeling their Board after the Accounting Advisory Board. They too will look for 100% giving participation and have established an endowed scholarship for their area.

Rich Carroll suggested that the Board consider providing a matching challenge for a donor to set up a scholarship to benefit Accounting students. After much discussion, the Board decided not to move in this direction as it would direct support away from their endowed scholarship.

The meeting was adjourned by Alex Hazera. admitting that he is not a good parliamentarian; Consistent with this characteristic, he forgot to discuss the date for next meeting — which I now propose to be the t Dec. 4, 2015 (First Friday of Dec).

V. Going into the Future (2015-2016):

- 1) Finishing and Refining the Strategic Plan
- 2) Initiating a Monthly Speaker Series
- 3) Assessing the Masters Program and Planning Future Strategies for this program.
- 4) Assessing the Systems course and planning “big data” curriculum.
- 5) Maintaining and expanding: strong support for NABA; contact with Talent Development; and all support we have received from firms regarding diversity.
- 6) Expanding international relations regarding research and student/faculty exchange
- 7) Expanding Internship, Fund Raising Activities, etc.

Any suggestions are very much appreciated.

Respectfully Submitted

Alex Hazera

Accounting Advisory Board Meeting minutes, December, 4, 2015.

1:00 pm-- Meeting was called to order.

I. New Introductions were made—including:

- ***New Board Members:*** Mr. Brian Dibenedetto-CFO, Schneider Electric; Mr. Robert Edgar-Director, -FPA, Textron, Inc.
- ***Student Guests:*** Masters Student- Ms. Alexis Clements; Undergraduate- Ms. Summerly Santos
- ***New Faculty Member:*** Dr. Anis Triki, (Ph.d.—University of Central Fla.)

II. The New Dean was introduced- Dr. Maling Ebrahimpour (Dr. “E”)

III. Special Recognition was given to the following board members:

- Mr. Richard Carroll-for years of dedicated service to URI, especially the Accounting Area, and as a star baseball player!!!
- Ms. Patricia Thompson-for receiving recent AICPA and RISCPA service awards.
- Ms. Deborah Imondi-for having received a URI Distinguished Achievement Award

IV. Recent events included:

- Hiring of New faculty member—Dr. Anis Triki.
- Dr. Judy Beckman was Re-awarded an SEC fellowship for 2015-2016 academic year.
- Dr. Kathryn Jarvis has been appointed to serve as Chair of AAA Public Interest Section.
- Research Presentation Series Initiated—will be expanded
- Accounting faculty awarded URI grant to host Distinguished International Visitor from Spain, (Salvador Marin). He is currently CEO of Spain’s sovereign wealth fund (COFIDES) and former higher education minister of Murcia (Province).

V. Possibility of a Doctoral Program in Behavioral Accounting

Dr. Anis Triki introduced the possibility of starting a Doctoral program in Behavioral Accounting. He discussed: the benefits of the program in terms enhancing the area’s prestige and visibility; the challenges that will be faced in terms of obtaining resources to support the program, especially with respect to obtaining resources for assistantships; and, emphasized the need for possible research support from AAB, especially with respect to data access.

VI. Development and Internships

Ms. Sarah Lobdell summarized the Accounting Advisory Board Scholarship support for Accounting Scholarships and emphasized the goal of 100% Board participation. Ms. Kathleen Jackson discussed the many internship and placement activities that had been organized during Fall, including; the Career Initiatives Four Year Plan, Alumni Career Day, and the Fall, 2015 recruiting cycle.

VII. Accounting Faculty Sponsored/ Related Activities:

- Professor Kathryn Jarvis presented the recent activities of ***Women in Business***, including presentations/activities by Marcia Coné, Founding Executive and CEO of the Women’s Fund (2005 -2014) and Barbara Sokoloff, President of Soloff and Associates (Planning and Development). Professor Jarvis also discussed ***Healthcare MBA*** courses and support for the ***American College of Healthcare Executives***.
- Charles Hickox summarized the increase in ***Talent Development Students*** placed in internships (from 2 to 9) from 2014 to 2019 (ongoing).
- Kate Jelinek provided summary of ***Beta Alpha Psi*** activities—including (among others), a near record accounting night (200 students, 13 firms), “Day for Ali” fundraiser, and Bowling night, etc.

- Cynthia Blanthorne summarized **VITA and X-Tax activities**. She emphasized the need to incentivize VITA participation through possible internships or directed studies.

VIII. Free Discussion Issues/Challenges—

- **Access to Quality Undergraduates for Industry and Not-for Profits:** We truly value the core support that we have received from all of our Public Accounting firm members and alumni. However, we have received requests from some of our “private industry” and “not-for-profit” stakeholders for greater access to students who might want to pursue an “alternative” career path. The AAB had a lively discussion on this issue— suggestions included:
 - 1) Hosting an “Accounting Night” which would include **both** public accounting and private industry and not-for-profit firms;
 - 2) Having a separate event for private industry and not-for-profit firms for both accounting and finance majors;
 - 3) Simply making special efforts to meet requests of “private industry” and “not-for-profits” to access to students through classroom presentation and discussion, and on campus interviews.

Status:

For the short-term, option “3” has been developed to meet demand. But this is a topic which will continue.

- **Use of Excel in the Classroom.** Some recent alumni and firms have raised the issue of the importance for students to graduate with high “Excel” skill levels. We had a brief discussion on this issue. The need was reiterated.

Status: Based on the comments of the AAB and alumni, we have:

- 1) Begun redesigning the accounting information systems (BUS 410) course to include both greater Excel skills and data analytical skills.
- 2) Proposed a new elective course which will provide students with “deeper” Excel skills, including VBA
- 3) Developed a faculty working group which coordinates the Excel skills in the Accounting Systems, Auditing and the (possible) new Elective Course.

Please contact me with any correction, additions, etc.

Sincerely and respectfully submitted

Alejandro (Alex) Hazera, Ph.d.
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Accounting Advisory Board Meeting minutes, May, 2 2016.

1:00 pm-- Meeting was called to order.

I. New Introductions were made—including:

- ***New Board Members:*** Mr. Brian Dibenedetto-CFO, Schneider Electric; Mr. Robert Edgar-Director, -FPA, Textron, Inc.
- ***Student Guests:*** Masters Student- Ms. Alexis Clements; Undergraduate- Ms. Summerly Santos
- ***New Faculty Member:*** Dr. Anis Triki, (Ph.d.—University of Central Fla.)

II. The New Dean was introduced- Dr. Maling Ebrahimpour (Dr. “E”)

III. Special Recognition was given to the following board members:

- Mr. Richard Carroll-for years of dedicated service to URI, especially the Accounting Area, and as a star baseball player!!!
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 - 3) Simply making special efforts to meet requests of “private industry” and “not-for-profits” to access to students through classroom presentation and discussion, and on campus interviews.

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- 2) Proposed a new elective course which will provide students with “deeper” Excel skills, including VBA
- 3) Developed a faculty working group which coordinates the Excel skills in the Accounting Systems, Auditing and the (possible) new Elective Course.

Please contact me with any correction, additions, etc.

Sincerely and respectfully submitted

Alejandro (Alex) Hazera, Ph.d.
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Minutes of URI Accounting Advisory Board Meeting—Dec. 2, 2016

Prepared by: Alex Hazera, Vangermeersch Professor of Accounting, Accounting Area Coordinator

The meeting came to order at noon

Board Members Present— Ms. Lisa Ferraro (for PWC); Ted Burdon (for EY); Claire Iacobacci; Brian Schattle (RI Airport Corp); Ed Houde, Deb Imondi; Howard Konicov; Paul Languirand, Mark McGivney; Robert Edgar; Alexis Clements (for Blum Shapiro).

Accounting/CBA Faculty Staff Present- Sarah Lobdell, Kathleen Jackson, Judy Beckman, Cynthia Blanthorne, Edmund Boyle, Alex Hazera (Area Coordinator), Kathryn Jervis, Roberta Newell, Anne Marie Sacco, Henry Schwarzbach, Deborah Rosen (Associate Dean).

Student Present: Ms. Samantha Aguilar (National Association of Black Accountants)

I. College Update— Associate Dean Deborah Rosen provided a general College of Business Update. She stated that the University is emphasizing entrepreneurship, healthcare; data analytics, innovation, etc. — and how the CBA must fit into this vision.

II. Introductions: Dr. Alex Hazera (re)introduced Dr. Judy Beckman (who just finished two years as an SEC scholar); Dr. Nancy Forster Holt (Assistant Professor and Spachman Professor of Entrepreneurship, who is leading the development of the CBA's entrepreneurship major; and Samantha Aguilar (NABA Accounting Student Representative)

IV. Presentations on a Changing Economy and Accounting Regulation:

- a. **Dr. Judy Beckman (SEC)** : Dr. Beckman discussed how academic fellows help the SEC and on how her experience as a returning fellow will help the URI accounting programs. The latter include the ability to provide our students (especially in the MS program) with a more in depth knowledge of accounting regulation as well as the ability to use new contacts to benefit the accounting program. Both Dr. Beckman and Mr. Ted Burdon mentioned the Fall, 2017 visit of PCAOB member Jay Hanson as an example of the latter.
- b. **Dr. Kathryn Jervis (Healthcare)**- Dr. Jervis discussed the CBA healthcare initiative. The program will involve expertise from many fields. It is still in the initial stages. Healthcare is a University priority.
- c. **Dr.. Nancy Forster Holt (Entrepreneurship)**- Dr. Forster-Holt discussed the CBA's entrepreneurship initiative. She discussed the challenges and opportunities of developing an entrepreneurship major at URI. A survey was performed to survey the student "landscape." The entrepreneurship will focus on both using entrepreneurial skills to start a business as well as working in an entrepreneurial role for another company. The list of courses in the major were described. Also, a list of advisor skills was provided. Some of these skills (e.g. valuation, taxation) involved accounting skills

- d. **Mr. Brian Schattle and Dr. Alex Hazera (Strategic Innovation MBA program(SIMBA))**- Dr. Alex Hazera briefly explained the structure of URI's Strategic Innovation MBA. The program emphasizes experiential projects in local companies. One of these is a case competition. This year's case competition involves "passenger leakage" (losing passengers to competing airports). Mr. Brian Schattle, Board member and CFO of the RI Airport Authority, gave a description of the phenomenon and how the students working on the URI case may help find possible solutions to the problem.

V. Funding Update- Ms. Sarah Lobdell provided an update of the accounting endowment and emphasized the need for 100% participation. She mentioned that Capital Campaign is under considerations—but that a feasibility study was in process.

VI. Placement and Internship—Ms. Kathleen Jackson—provided an overview of placement and internship. She provided an overview of a very successful career day in the Fall.

VII. Departmental Update

- a. **Data Analytics Hire Update**- Dr. Alex Hazera indicated that at the time of the meeting that an offer was being considered by a candidate for a Data Analytics position. **Update: The candidate has accepted the offer and will start in the Fall Semester, 2017.** She is Dr. Qi Liu. She has a Doctorate in Accounting Information Systems from Rutgers (2014). She is coeditor of *the Journal of Emerging Technologies in Accounting* (JETA) and is on an AICPA task force to advise on how Big Data should be incorporated into audit standards. We will be conducting a separate search in the Spring, 2017 for a Cost/Managerial Accounting faculty member.
- b. **Assessment Update**- (Dr. Eddie Boyle, Prof. Roberta Newell). The AACSB will require both area level and College-Level Assessment. Prof. Roberta Newell provided a case study which will be used to assess students' ability to use the FASB Codification (an area level skill). She described the case, showed the rubric and provided the results. Dr. Edmund Boyle described a case for assessing critical thinking skills (a college level assessment).
- c. **Beta Alpha Psi Update**: Prof. Ann-Marie Sacco provided an overview of the many events BAP-sponsored events during Fall, 2016 and planned for Spring, 2017.
- d. **Women in Business (WIB)**: Dr. Kathryn Jervis provided an overview of activities. Mr. Mark McGivney asked about male mentors. Also, there may be future coordinated events between WIB and NABA.
- e. **National Association of Black Accountants(NABA)**. Ms. Samantha Aguiar, gave an overview of NABA activities. These included various activities with CPA firms. Also, an NABA team took second place in the regional case competition.

- f. **Vita Program**- Cynthia Blanthorne emphasized the need to incentivize vita participation through internship or directed study.

VIII. Curriculum Update and Discussion—Alex Hazera gave a quick curriculum update—the Ph.d. program is still in play, the advanced systems course should come online this Fall. Given the latter, **the discussion issue was:**

What is the best way to integrate Big Data and STEM into the Curriculum in a manner which adds value to prospective employees?

The following notes were taken by **Dr. Judy Beckman** on the discussion and Board feedback—

Question Topic: Big Data and Science/Technology/Engineering/Math (STEM) topics: how to integrate into the accounting curriculum.

Themes we took away from the discussion fall along three main lines:

- status of using data in accounting practice from the perspective of our board members;
- skills we should help our students develop; and
- suggestions for accessing data for use in the accounting curriculum.

Status in the accounting profession:

1. Use of the data can be challenging: integrating across platforms and sources to access the data in a usable form is often a difficulty for auditors.
2. Auditing no longer requires “hoping one finds the needle in the haystack” through a selection process. Data access allows examining the entire population of interest, observing the outliers and investigating those items.
3. Obtaining needed data can be challenging because sources of useful data are unstructured: TF Green Airport has parking data, but the airlines and even Starbucks have more data regarding the passengers actually coming through the terminal than does the airport.

Skills we should develop in our students:

1. Students must enter public accounting ready to review work—the staff level of manually working with accounting details no longer exists in at least the largest public accounting firms. However, fulfilling this role simply requires a higher level of skill development: our graduates must have critical thinking skills as well as understanding the underlying accounting phenomena

Minutes of URI Accounting Advisory Board Meeting; May 5, 2017

Prepared by: Alex Hazera, Accounting Area Coordinator Vangermeersch Professor of Accounting,

The meeting came to order at noon

Board Members Present— Brendon McCorry (for EY); Claire Iacobacci (Kahn, Litwin, Renza & Co, Ltd.); Brian Schattle (RI Airport Corp); Ed Houde (Hasbro), Howard Konicov (CohnReznick Advisory Group); Robert Edgar (Textron); Brian Dibenedetto (Schneider Electric).

Accounting/CBA Faculty Staff Present- Sarah Lobdell, Kathleen Jackson, Edmund Boyle, Alex Hazera, Kathryn Jervis, Roberta Newell, Anne Marie Sacco, Anis Triki, Henry Schwarzbach, Maling Ebrahimpour (Dean).

Students Present: Ms. Ogochukwu Igwe, President, URI Chapter of the National Association of Black Accountants (NABA); Ms. Arly Cortez, special student presenter on Study Abroad.

I. College Update— Dean Maling Ebrahimpour provided a general College of Business Update. He stated that the University is emphasizing entrepreneurship, healthcare; data analytics, innovation, etc. —and how the CBA must fit into this vision.

II. Introductions: Dr. Alex Hazera introduced the two student presenters: Ms. Ogochukwu Igwe and Ms. Arly Cortez.

IV. Presentations on a Recruiting a Diverse Workforce and Study Abroad:

Professor Alex Hazera provided a brief overview of the concept of the meeting. Generally, the state of Rhode Island has a very diverse population, originating from many parts of the world. This diversity becomes a bigger part of the URI “fabric” every year. Thus, the concepts of diversity and globalization complement each other. This dynamic is being recognized by the nature of the CBA’s student organizations, study abroad efforts, and diverse events. ***Most importantly, URI CBA recruiters, including many Accounting Area recruiters, are placing a greater importance of recruiting a qualified, diverse workforce.***

NABA and Opportunities to Recruit Individuals from Underrepresented Groups

- e. Ms. Ogochukwu Igwe (upcoming URI Accounting Senior and Summer, 2017 Intern at JP Morgan) discussed NABA and how it can help URI recruiters recruit students from underrepresented groups. Her presentation emphasized both the **philosophy** and **challenges** of recruiting and retaining employees from underrepresented groups.
 1. **Philosophy (at J.P. Morgan)**—At J.P. Morgan efforts are made to recruit, retain, and develop talent within the company.
 2. **Challenges of recruiting ((NABA Accounting Career Awareness Program- (ACAP):**
The major challenge in recruiting is obtaining an early exposure to the underrepresented groups. NABA provides a pipeline to underrepresented groups. The NABA ACAP program

provides opportunities for promising high school seniors to be made aware of careers in accounting. *Overall, the key to recruiting individuals from underrepresented groups is gaining an early exposure to those students.*

Opportunities in Study Abroad

- b. Ms. Arly Cortez discussed a recent study abroad experience in Costa Rica. She gave a very picturesque presentation of her experience. Also, she discussed how it changed her personal outlook and how it improved her ability to understand and communicate with others (a very important workplace skill).

V. Funding Update- Ms. Sarah Lobdell provided an update of the accounting endowment and AAB scholarship fund. She emphasized the need for 100% participation. She mentioned that the Capital Campaign will be starting soon.

VI. Placement and Internship— Ms. Kathleen Jackson and Lynne Finnegan provided a placement and internship update.

VII. Departmental Update

a. Curriculum Update—

- Prof. Alex Hazera gave a quick curriculum update—a Ph.d. program is still under consideration for the future. The advanced systems course should come online this Fall or shortly thereafter.
- Prof. Anis Triki emphasized that all of the URI Accounting Community stakeholders want to maintain a high level of quality in our Masters program.

- b. **Hire Update-** Dr. Alex Hazera indicated that at the time of the last meeting that an offer was being considered by a candidate for a Data Analytics position. ***Update: The candidate has accepted the offer and will start in the Fall Semester, 2017.*** She is Dr. Qi Liu. She has a Doctorate in Accounting Information Systems from Rutgers (2014). She is coeditor of *the Journal of Emerging Technologies in Accounting* (JETA) and is on an AICPA taskforce to advise on how Big Data should be incorporated into audit standards. We have also recruited for a cost position. Unfortunately, the individual who was offered the position may not be able to join our faculty due to immigration issues.

- c. **Assessment Update-** Prof. Roberta Newell-- The AACSB will require both area level and College-Level Assessment. Prof. Newell updated the case study which will be used to assess students' ability conduct the accounting research using the FASB Codification (an area level skill). She described the case, showed the rubric and provided the results. Dr. Edmund Boyle is assessing critical thinking skills in his audit classes (a college level assessment).

- d. **PWC Challenge-** Professor Roberta Newell discussed the PWC challenge and provided the names of the awardees.

- e. **Beta Alpha Psi Update:** Prof. Ann-Marie Sacco provided the names of the incoming BAP officers. She also provided an overview of the many BAP- sponsored events during the 2016-2017 year. These included, among many, Public Accounting night, bowling, the BAP/NABA panel discussion (noted above), etc.
- f. **Institute of Management Accountants (IMA)**-Professor Ann-Marie Sacco noted that she and students had attended the IMA leadership conference. The Area is exploring establishing an IMA chapter.
- g. **Women in Business (WIB):** Dr. Kathryn Jarvis provided an overview of WIB activities. Among many activities, one of the year's premier events was the presentation by board member Mark McGivney & associates (Marsh & McLennan Companies) of Diversity and Inclusion (at M& M).
- h. **National Association of Black Accountants (NABA).** Ms. Ogochukwu Igwe gave the highlights of the year's NABA events. These included events with CPA firms, such as the Ernst and Young Fall, 2017, BAP/ NABA panel on advice for success in Public Accounting. She also mentioned the case competition and the URI NABA team's second place award. (URI NABA has placed every year that it has participated in the competition).

All errors or omissions in these minutes are my responsibility. Please contact me with any that you may notice.

Respectfully Submitted

Alex Hazera

Minutes of URI Accounting Advisory Board Meeting; Dec. 5, 2017

Prepared by: Alex Hazera, Accounting Area Coordinator Vangermeersch Professor of Accounting,

The meeting came to order at 1pm.

Board Members Present — Ms. Kathleen Morissey (Brown University); Ms. Patricia Thompson (Piccerelli, Gilstein); Ms. Claire Iacabucci (KLT); Mr. Mark McGivney (Marsh and McLennan); Mr. Edmond Burdon (EY); Ms. Lisa Ferraro (PWC); Andrea Osorio (American Tower); Tanya Jones (URI); Alexis Clements (Blum Shapiro).

Accounting/CBA Faculty Staff Present - Qi Liu, Prof. Kathryn Jervis; Anis Triki; Henry Schwarzbach; Kate Jelinek; Cindy Blanthorne; Alex Hazera; Edmund Boyle; Roberta Newell; Joe D'Adamo; Ann-Marie Sacco; Ms. Kathleen Jackson

I. College Update — Dean Maling Ebrahimpour provided a general College of Business Update. He emphasized the importance of rankings.

II. Introductions: The following people were introduced and welcomed — New Board Member Ms. Kathleen Morrissey; New first generation members Andrea Osorio; Tanya Jones; Alexis Clements.

IV. Appreciation for Board Activities - Dr. Alex Hazera thanked the Board for the many and varied activities with which they have helped us — He only mentioned a few, but in retrospect, the last twelve months have included (at least —)

Mr. Mark McGivney and Assoc. — Women in Business Presentation
 Ms. Claire Iacabucci — Women in Business Presentation
 Ms. Lisa Ferraro (and PwC) — Summer work with TD and NABA
 Ms. Brendan McCorry (and EY) — for support of TD and NABA
 Ms. Deb Imondi - for Career Day and overall advisor to CBA
 Mr. Brian Schattle for support of Strategic Innovation MBA program
 Ms. Kathleen Morrissey for teaching at URI
 Mr. Robert Edgar for holding a special Textron Career night Fall 2017
 Mr. Edward Houde, for participating in career day, 2017.
 Mr. Todd Short (and KPMG) for holding recruiting event with NABA, Spring, 2017.
 Mr. Michael Hanna (Blum Shapiro) for holding recruiting event with NABA, Spring, 2017.

So thanks for this support.

V. Presentation on Data Analytics.

Presentation by Professor Qi Liu on her work with the AICPA Audit Data Analytics Guide. This group is writing the new AICPA Data Analytics Guide, which will replace the AICPA Analytical Review Procedures Guide (to incorporate Big Data). The Rutgers Data Analytics Research Initiative (RADAR), will support these functions. (Dr. Liu leads the Visualization Effort). She also discussed implications for the accounting curriculum.

VI. Open Discussion on Data Analytics and Curriculum—Opinions were mixed on the immediate impact of Data analytics on auditing and the curriculum. Many participants agreed that change is hard and that many financial professionals would continue to use more basic Excel techniques. Others argued that strong coverage of internal control is still the most important audit topic, given PCAOB.

VII. Fundraising—The new Senior Director of URI-CBA Development discussed the coming capital campaign. He emphasized the importance of alumni connections with former faculty and the importance of small donors.

VIII. Placement and Internship—Ms. Kathleen Jackson discussed career day—the event emphasized how technology, especially artificial intelligence, will affect the future of business.

VIII. Departmental Report—

- NE AAA—Dr. Cindy Blanthorne discussed NE American Accounting Association mid-year meeting. Attendance was high, speakers discussed contemporary technology topics, Dr. Kate Jelinek received a research award.
- Curriculum initiatives and Assessment—The area is looking at starting program options emphasizing forensic accounting, the CMA exam, and a double accounting major and language major/minor. The area is assessing critical thinking, writing, data analytics and Excel, and ability to use the FASB Codifications. **Participants emphasized and gave examples of the importance of oral presentation and communication, which is being assessed in Advanced Accounting.**
- Prof. Roberta Newell and Cindy Blanthorne discusses V.I.T.A. and PWC Challenge competitions.
- Masters program update--Dr. Judy Beckman noted that the Minority student scholarships had been awarded and that graduates' CPA score exams need to increase. In response we are planning a tutoring center.
- Healthcare program—Dr. Kathryn Jarvis-the program is growing; URI is hosting the American Accounting Association Government and Nonprofit section (mid-year) meeting in Providence, March 9-10, 2018.
- Professors Roberta Newell and Ann-Marie Sacco provided presentations on the assessment of FASB codification and critical thinking that will be used for AACSB accreditation.
- Dr. Kate Jelinek described public accounting night and BAP activities. Public accounting night had a high turnout and BAP has many activities. One noteworthy event was an event dedicated to working for *small accounting firms*.

VI. Dr. Alex Hazera noted that the Annual CBA banquet may be converted to smaller (expanded banquets for each area). Please email with any corrections. (Next Meeting, May, 4, 2018)

Alex

Appendix IV.E Examples of Student Club Events 2017-2018

Beta Alpha Psi
Fall, 2017
Preparing for Public Accounting Night
Public Accounting Night
Public Accounting: A Small Firm Perspective
Volunteer Income Tax Assistance (VITA)
Bowling
Spring, 2018
Junior/senior initiation and new officer elections
Financial Literacy (PwC)
Ali Day (Charity Fundraising)
Internal Audit Presentation (MetLife, IGT)
CPA Exam Presentation (Joe D'Adamo – Becker)
Tax vs. Audit Presentation (E&Y)
Banquet (officers received honors cords and sashes)
National Association of Black Accountants (NABA)
Fall, 2017
Presentation Sponsored by NABA and FMA: Francis P. Carr..Thought of Investment Banker
Boston Minority Case Competition (second place finish)
Presentation by Judy K. Beckman-The Advantages of Obtaining an MS in Accounting
Ms. Kathleen Jackson- Special Presentation on LinkedIn
Spring, 2018
General Body Meeting: PwC Interviewing skills and internship info
General Body Meeting: URI MSA Informational
General Body Meeting: Textron internship opportunities
General Body Meeting: EY Preparing for Presentations
General Body Meeting: KPMG Corporate Communication and Business Ethics
Some Departmental Events
March 2016: University Distinguished Visitor Program: Salvador Marin Hernandez (President Cofides Bank, Spain): Spain's Financial Crisis and Austerity Policy Response
October, 2018: Brown Bag Lunch Series and Career Day: Salvador Ruiz de Chavez; Mexico, Beyond the Wall