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## **EDUCATION & CERTIFICATION**

Ph.D.	University of Colorado Boulder, CO; Business Administration
MBA	University of Colorado Boulder, CO
MS	University of Colorado Denver, CO; Information Systems
BS	University of Wyoming Laramie, WY; Management Information Systems/Accounting
CMA	Certified Management Accountant
CPA	Certified Public Accountant – Original certificate - Wyoming (Inactive)

### **Overview of academic, professional, and community experience:**

Experienced higher education leader with 25+ years in academic roles, including 20 years of expansive leadership roles at private and public universities. I serve as Executive Vice Chancellor for Academic Affairs and Provost at a leading urban public research university (US News 2026 rankings: #97 national, #46 top public, #9 social mobility). My leadership experience also includes positions in complex organizations as dean, chair of the board of directors, lead director, president, and corporate officer. Other professional experience includes serving as an executive coach, CPA, CMA, and consultant in areas of organizational culture, strategic planning, technology enablement, and risk management. I am active as a community volunteer serving various nonprofit organizations with missions focused on health, welfare, public/societal benefit, and professional development.

## **ACADEMIC EXPERIENCE**

**June 2023-Present**

**Executive Vice-Chancellor for Academic Affairs and Provost  
Rutgers University – Camden**

**Also hold appointment as a full professor of accounting in the  
School of Business**

### **Overview of Rutgers University and the Camden Campus:**

Camden is one of three regional Rutgers campuses. Rutgers-wide enrollment is 67,000+ students with 5,700 students on the Camden campus. All three Rutgers campuses are ranked in the top 100 National Universities and top 50 Public Schools.

### **Camden specific metrics:**

Carnegie Classification: Doctoral University– High Research Activity, also a Community Engaged Institution (R2)

U.S. News rankings 2025-2026: #9 in Social Mobility, #46 in Top Public Schools, #97 in National Universities.

350 full-time faculty, 300 lecturers

Key academic units: Arts and Sciences, Graduate School, University College, School of Business, School of Nursing, Rutgers Law, and Honors College.

### **Key responsibilities, Camden Campus:**

Oversight of academic enterprise includes the following:

- Chief advisor to the Chancellor on all academic matters.
- Oversee all campus academic units and academic centers, including: School of Business, Law School, School of Nursing, College of Arts and Sciences, which includes component units such as the Graduate School and University College.
- Execution of campus strategic plan as it relates to academic endeavors.
- Collaborate with the Vice Chancellor team (Advancement, Community Engagement, Finance/Administration, Research, Marketing/Communications, Student Affairs, Student Success, Admissions) to advance academic activities on the Camden campus and those that intersect with Rutgers-wide initiatives.
- Fulfill the Chancellor's obligations when he is not available. This includes representation and speaking engagements at corporate, civic, nonprofit, community events, award functions, and alumni events.
- Oversee accreditation activities and academic program reviews.
- Serve as the Chancellor's designee for faculty union grievances and related matters.
- Provide direction to the Associate Provost and team on implementation and delivery of on-campus faculty professional development activities.
- Support and collaborate with the Student Governing Association on academic affairs matters.
- Develop, implement, and oversee Rutgers Camden academic program partnerships and collaboration with Rutgers entities, external universities, community colleges and high schools.

- Oversee curricular development initiatives and collaborate with New Brunswick, Newark, and Rutgers Biomedical Health Sciences provosts to maximize academic pathways across Rutgers.
- Serve as a board member of the Joint Health Sciences Center Association - an independent entity that oversees a comprehensive research facility and innovation hub dedicated to advancing science and medicine throughout the region.

**Direct reports:** Deans and leaders of academic units/colleges (business, law, nursing, honors, arts and sciences), affiliated academic centers and institutes, Provost office team, and Instructional Design and Technology Department.

**Rutgers-wide responsibilities:**

- Represent the Chancellor as needed at Rutgers Board of Governors and Board of Trustees meetings. Serve as the Camden representative to the Board of Governors Committee on Academic and Student Affairs.
- Serve as a member of the President's Administrative Council.
- Serve on Promotion and Review Committee (cases from all three campuses, approximately 150 tenure and promotion cases reviewed annually).
- Represent Camden campus at the Academic Strategy Roundtable.
- Serve on leadership committee for Rutgers overall Middle States Commission on Higher Education (MSCHE) accreditation process.
- Collaborate with fellow provosts from Newark and New Brunswick to implement processes that improve degree pathways across Rutgers.
- Review academic program proposals, monitor potential duplication of programs, and find opportunities for academic program collaboration across campuses.
- Work collaboratively with senior leaders across the university to ensure a culture of belonging and inclusion.

**Key accomplishments**

**Development and expansion of:**

- Interdisciplinary programs across academic units on the Camden Campus.
- Interdisciplinary program creation and evaluation with provosts on the New Brunswick, Newark, and Health campuses.
- Professional development and engagement initiatives for non-tenure track and part-time nonfaculty (lecturers).
- Faculty mentoring opportunities for associate to full professor pathway.
- New faculty orientation and onboarding programs for tenure-track, non-tenure track and part-time faculty.
- Engagement and support of growing postdoc community.
- Accelerated degree programs (such as 4+1, 2+2+1).
- Collaboration with Student and Academic Success to elevate pre-professional (medicine, law, health professions) advising and academic preparation.
- Pathways and articulation agreements for community college and other transfer students.
- MOUs, MOAs with other colleges and universities (local, regional and global).
- Graduate and undergraduate stackable certificates.

- Micro-credentials for academic and non-academic units.
- Technology access for faculty to support online course delivery.
- Training, development, and communication pathways for all academic advisors.
- Process evaluation for collaboration with corporate-academic partnerships.
- Experiential learning opportunities for students with record enrollment in learning abroad and experiential learning grants.
- Collaboration with Office of Chancellor in review of the Chancellor's 15-in-5 initiatives for internal faculty grants, visiting faculty appointments, pedagogical grants, and faculty professional development grants.
- Academic unit and faculty participation in nomination process for Rutgers-wide or external faculty recognition opportunities.

**July 2016 – May 2023**

**Dean, Manning School of Business  
Rist Family Foundation Endowed Dean  
University of Massachusetts Lowell; Lowell, MA  
Appointed as a full accounting professor with tenure.**

**Overview of UMass Lowell:** University enrollment: 17,500+ students, 1,050 faculty, #87 in U.S. News public university ranking. Doctoral granting university with high research activity. Currently classified as an R1 institution. One of five universities in the UMass system of 70,000+ students. In the last several years, UMass Lowell earned rankings by the *Chronicle of Higher Education* as one of the fastest-growing public universities in the country. UMass Lowell's undergraduate programs are balanced in science and professional programs with a high graduate coexistence and STEM-dominant programs. Its undergraduate admissions practices are selective, and over 40% of the undergraduate student body includes first-generation college students. UMass Lowell's graduate admissions programs are selective, and the university is classified as a "Community Engagement" institution.

**Overview of the Manning School of Business:**

- AACSB Accredited
- Five academic departments
- Home of two centers with university-wide missions: Donahue Center of Business Ethics and Social Responsibility and Jack M. Wilson Center for Entrepreneurship
- Enrollment of 4,040 students (Fall 2021 census - 38% graduate, 62% undergraduate).
- Programs include BSBA, MBA, MS, and Ph.D. with several areas of concentration offered. All master's and most undergraduate business programs are delivered on-campus and online.
- 80+ full-time faculty and staff; 60+ active part-time or senior adjuncts

**Manning School of Business selected recent rankings during my deanship:**

- 2022 U.S. News and World Report:
  - #10 Best Online Master's in Business Programs for Veterans (Master of Science)
  - #21 Best Online MBA Programs for Veterans
  - #23 Best Online Bachelor's Programs for Veterans

- #21 Best Online Master's in Business Programs (Master of Science)
- #31 Best Online MBA Programs
- #35 Best Online Bachelor's Programs
- Fortune Education - #18 Best Online MBA 2021
- Poets & Quants U.S. Top 50 Online MBA program 2021, 2020, 2019
- Poets & Quants Most Affordable Online MBA 2021, 2020, 2019
- Princeton Review – Top 50 Online MBA Programs 2022
- Princeton Review – 2020, 2021 Best Business Schools
- CEO Magazine - Ranked "Tier One" in Global MBA Rankings – 2021

### **Academic Experience – Xavier University (2004–2016)**

Xavier University is a private, nonprofit Jesuit Catholic university in Cincinnati, Ohio. During my tenure from 2004 to 2016, the university enrolled approximately 6,500 students. I held progressive academic and leadership roles in the Williams College of Business and across the university.

**Associate Dean, Williams College of Business, 2014 – 2016**

**Director of Faculty Programs – Center for Mission & Identity, 2013 – 2014**

**Chair, Department of Accountancy and Business Law, 2007 – 2014**

**Professor of Accountancy, 2010 – 2016**

**Associate Professor of Accountancy, 2004 – 2010**

### **Summary of other faculty roles**

2004-2007	Professor-in-Residence (global role) Institute of Management Accountants; Montvale, NJ
Fall 2001-Summer 2004	Associate Professor (tenured and promoted from Assistant to Associate Professor in 2004); focus areas: information systems and accounting; Department of Accounting and Solomon D. Trujillo Center for eBusiness, University of Wyoming; Laramie, WY
Fall 2000 –Spring 2001	Visiting Assistant Professor Teaching/research emphasis – accounting information systems University of Colorado Denver; Denver, CO
1997-2000	Assistant Professor of Accounting Teaching/research emphasis – enterprise systems, business process design, accounting information systems and management information systems.

	University of Wyoming; Laramie, WY
1993-1997	Graduate Instructor & Research Assistant Department of Accounting; University of Colorado; Boulder, CO
1992-1993	Department Chair; Information Systems Division of Accounting & Information Systems Community College of Aurora; Aurora, CO
1990-1992	Instructor; Accounting and Information Systems Division of Accounting & Information Systems Community College of Aurora; Aurora, CO
1989-1990	Instructor; Accounting and Information Systems; Barnes Business College; Denver, CO

## **BOARD OF DIRECTOR ROLES & PROFESSIONAL LEADERSHIP**

### **Board Leadership**

**Global Chair, Institute of Management Accountants (IMA).** Role held: *2010–2011*.

Elected as the 4th academic and 4th woman to chair the IMA in its 92-year history. .

Oversaw strategic governance reforms and advanced global initiatives.

Service period: *1994–present*, with continued board-level and emeritus involvement through 2024 .

**Chair, Ohio Society of Certified Public Accountants (OSCPA).** Role held: *2016–2017* (Chair), *2015–2016* (Chair-Elect), *2017–2018* (Past Chair)

Led one of the country’s most active state CPA societies. Directed advocacy efforts, policy development, and professional outreach. Also served as AICPA Council delegate throughout the board term.

Service period: *2014–2019* .

**Director & Lead Director, COSO (Committee of Sponsoring Organizations of the Treadway Commission).** Role held: *Director (2011–2018)*, *Lead Director (2013–2015)*

Provided strategic leadership in advancing COSO's globally recognized internal control and enterprise risk management frameworks. As Lead Director, facilitated coordination among sponsoring organizations and guided governance and thought leadership during a critical framework update period.

Service period: *2011–2018*.

**President, Beta Alpha Psi International**

Role held: *2017–2018* (President), *2016–2017* (President-Elect), *2018–2019* (Past President)

Guided the international honors organization through strategic planning and expanded engagement with students and professionals across more than 300 chapters.

Service period: *2004–2019* .

**Vice Chair, Massachusetts Society of CPAs.** Role held: 2022–2023.

As Vice Chair, contributed to board strategy, governance, and outreach initiatives supporting Massachusetts' CPA community. Service period: 2020–2024 .

2020-2024	Massachusetts Society of CPAs – Board Director, Vice Chair in final year of board service
2014-2019	Ohio Society of CPAs – Executive Board Director, Chair-Elect, Chair, Past Chair. AICPA Council Representative from 2015-2019
2016-Present	Vice Chair - United Nations (UN) Internal Control Advisory Council Report to UN Assistant Secretary General-Controller
2016-2019	Beta Alpha Psi International <a href="http://www.bap.org">www.bap.org</a> . Honorary professional organization with 320,000+ inductees/members. International Past President (2018-2019) International President (2017-2018) International President-Elect (2016-2017)
December 2011-January 2018	Director - Committee of Sponsoring Organizations of the Treadway Commission (COSO) <a href="http://www.coso.org">www.coso.org</a> . Served as lead director from December 2013-November 2015.
2012-2022	Accounting Program Leadership Group – a section of the American Accounting Association ( <a href="http://www.aaahq.org">www.aaahq.org</a> ) primarily comprised of department chairs and other accounting higher education leaders Multiple years of board service including three year term as President-Elect; President; Past President (2016-2019); historian.
2013-2014	Ohio Region – a section of the American Accounting Association Three- year term as President-elect; President; Past-President.

**Board leadership specifically related to the Institute of Management Accountants (IMA)**

IMA is global professional organization (501(c)(3) status in U.S.) based in Montvale, NJ, USA with offices in China, Dubai, Europe (Amsterdam), Southeast Asia (Singapore). The board has approximately 40 voting board members, 120+ staff members. IMA currently has 140,000+ members mainly from the finance, accounting, technology and related global professional community from over 150 countries. [www.imanet.org](http://www.imanet.org)

2012-Present	Emeritus member of the global board of directors
2024-Present	Board Nominations Committee
2024-Present	Governance Task Force
2016-2018	Member – Volunteer Leadership Committee of the Board of Directors

2014-Present	Co-Founder IMA Women's Accounting Leadership Series (WALS); Program delivered in NYC, Cincinnati, Chicago, Phoenix, Houston, Amsterdam, Amman
2012-2013	Former Immediate Global Board Chair-Emeritus
2011-2012	Global Board Chair-Emeritus
2010-2011	Global Board Chair 4 <sup>th</sup> academic and 4 <sup>th</sup> woman to serve in this role for IMA, in its 92 year history, (IMA founded in 1919); Chair of Governance Committee
2009-2010	Global Board Chair-Elect and chair of Strategic Planning Committee
2009-2010	Trustee, Institute of Certified Management Accountants (ICMA) and IMA Memorial Education Fund
2006-2007	Regent, ICMA Board of Regents. ICMA is the governing body for the Certified Management Accountant (CMA) exam
2006-2007	Chair Emeritus, IMA Foundation for Applied Research; a separate 501(c)(3) entity of the IMA
2004-2006	President (Chair), IMA Foundation for Applied Research
1994-2011	Leadership and board service in multiple areas at the local (chapter), regional (council), national and global level in roles such as treasurer, at-large director, committee chair, executive committee, etc.

## **PROFESSIONAL EXPERIENCE**

2012-2016	CEO Executive Coach – primary focus on coaching CEOs to elevate relationships with board and C-suite leaders, advise on strategic planning, implementation and evaluation.
2010-2020	Board Consultant – assist boards of directors and CEO's/Executive Directors with issues related to integration of governance, mission, vision, values and strategy and enhance board culture.
1991-2002	Certified Public Accountant; client service in metropolitan Denver and surrounding areas. Focus area: Management advisory, systems consulting and implementation, internal control assessment, tax, assurance services.
1991-1992	Corporate Trainer; Community College of Aurora; Aurora, CO



1991-1992	Consultant; Small Business Development Center - division of the Small Business Administration; Aurora, CO
1988-1990	Certified Public Accountant; Scullion, Beekmann & Co.; Denver, CO
1987-1988	Certified Public Accountant; Nibler & Associates, P.C.; Lakewood, CO

## **RECOGNITION, HONORS, AWARDS, FELLOWSHIPS**

**\*(Nomination criteria or process noted)**

2024 – Administrator of the Year. Award granted by the Rutgers Camden Student Government Association.

2023 R. Lee Brummet Award – Institute of Management Accountants. This award recognizes an IMA volunteer academic member who has distinguished themselves in the management accounting and finance profession.

2023 Appreciation Award from the UMass Lowell Division of Athletics. This was a special award I received as I concluded my service as dean and departed the university for my position at Rutgers Camden.

2013 Ohio Accounting Educator of the Year – (joint award by the Ohio Society of CPAs and the Ohio Region of the American Accounting Association).

2011 Max Block Distinguished Article Award from *The CPA Journal* – Nonprofit Benchmarking Article titled *Analytical Review of Charitable Organizations: Financial Ratios and Benchmarks*.

2011 Lean Enterprise Institute Educator of the Year (National Lean Accounting Summit).

2011 American Women's Society of CPAs Educator of the Year (AWSCPA national organization).

2010 & 2012 One Hundred Wise Women (Deloitte).

2009-2010 Faculty Scholarship – Jack and Mary Kay Downing Scholar/Mentor (Xavier).

2009-2010 Xavier Leadership Academy – one of two faculty members (university-wide) selected for nine month university leadership Program (Xavier).

2009 Ignatian Pilgrimage Participant – (Xavier).

2008-2009 Leadership Cincinnati – Class XXXII; an application based leadership program of the Cincinnati USA Chamber of Commerce (Chamber committee).

2008 Outstanding Professor Award – Fairfield MBA Cohort Program (Student nominated - Xavier).

2008 Outstanding Professor Award – Deerfield MBA Cohort Program (Student nominated - Xavier).

2008 Planting Seeds Award (Nominated by Xavier student leaders).

2006-2007 Lybrand Award (Silver) – award for published organizational ethics research (Global award from IMA based on peer and editorial review).

2007 IMA Special Service Award - three year term as IMA Professor-in-Residence (Selected by IMA leaders).

2007 Dean's Research Award (Xavier).

2007 Faculty Scholarship - Jack and Mary Kay Downing Scholar/Mentor (Xavier).

2006 Dean's Research Award (Xavier).

2005-2008 Department of Accountancy Advisory Board Fellowship (Xavier).

2004-2007 IMA National Professor-in-Residence (Fellowship selected by IMA leaders).

2002-2003 Outstanding Junior Teaching Award – University of Wyoming, College of Business (Nominated by senior faculty).

2003 Microsoft Business Solutions – Pinnacle Award for Excellence in Education. Inaugural recipient of award for academic contribution in business school higher education. (Microsoft Award Committee; Pinnacle awards are highest customer awards granted).

2001 IMA Innovation in Accounting Education Grant (IMA Award Committee).

2000 IMA Faculty Enhancement Grant (IMA Award Committee).

2000 University of Wyoming Mortar Board "Top Prof" Award (Nominated by Mortar Board top student).

2000 University of Wyoming Beta Alpha Psi Outstanding Faculty Award (Nominated by student members/officers).

1999 University of Wyoming Outstanding Junior Teaching Award (Nominated by senior faculty).

1999 University of Wyoming Outstanding Junior Research Award (Nominated by senior faculty).

1999 University of Wyoming Mortar Board "Top Prof" Award (Nominated by Mortar Board top student).

1998 American Accounting Association Government and Nonprofit Section Best Dissertation Award: Nonprofit Accounting (Section Award Committee).

1996 Gerald Hart Doctoral Research Fellowship; University of Colorado (Award Committee).

## **RESEARCH AND SCHOLARLY ACTIVITIES**

### **Selected research under review**

Valentine, S., Greller, M. and Richtermeyer, S. 2024. Perceived Corporate Ethical Values as Catalysts for Accounting and Finance Professionals' Positive Career Experiences and Expected Development.

### **Selected Publications (including refereed journals)**

Oliver, E.G., Peters, G.F., Richtermeyer, S.B., Watkins, A.L., White, C.G. 2025 The Federation of Schools of Accountancy: Its Brief History, Its Lasting Influence. *Accounting Historians Journal*. <https://doi.org/10.2308/AAHJ-2023-010>.

Jackson, E. and Richtermeyer, S. 2021. Using Strategic Finance Leadership to Improve the Lives of Children. AICPA/CIMA Brief: <https://insights.cgma.org/story/cgma-lccs-strategic-finance/page/1>.

Richtermeyer S. 2020. Jump in. *Strategic Finance*. February.

Miller, T., Randolph, D., Richtermeyer, S. 2019. Key ratios for charitable organization audits. *Tennessee CPA Journal*. Jan/Feb.

Richtermeyer, S. 2018. Women in leadership; time for more. *Strategic Finance*. May.

Richtermeyer, S. and V. Whitehead. 2017. Diversity and inclusion: pace matters. *Strategic Finance*. April.

Richtermeyer, S. 2017. 7 Tips for a diverse pipeline. *Strategic Finance*. August.

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Hatfield, P.A., Webb, S. Richtermeyer, S. 2015. The impact of permanently restricted assets on nonprofit organizations' investment policy. *Regional Business Review*. 34(1), 18-25.

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Siegel, G., J. E. Sorensen, T. Klammer, and S.B. Richtermeyer. 2010. The Ongoing Preparation Gap in Management Accounting Education: A Guide for Change. *Management Accounting Quarterly*. Summer 11(4): 29-34.

Siegel, G., J.E. Sorensen, T. Klammer, and S.B. Richtermeyer. 2010. The On-Going Preparation Gap in Accounting Education: A Call to Action. *Management Accounting Quarterly*. Spring 11(3): 41-52.

Lawson, R. A. and S. Richtermeyer. 2010. Aligning Boards for Improved Strategic Performance Oversight. *Cost Management*. March-April 24(2): 6-15.

Richtermeyer, S. and S. Webb. 2010. Aligning Technology with Strategic Performance Measurement. *Journal of Corporate Accounting and Finance*. March/April 21(3): 41-45.

Richtermeyer, S. 2007. Building Processes for a Solid Financial Foundation: The Case of Community Health Initiatives. *Strategic Finance*. August 89(2) p. 52-58.

Bradford, M., S. Richtermeyer and D. Roberts. 2007. System Diagramming Techniques: An Analysis of Methods Used in Accounting Education and Practice. *Journal of Information Systems*. Spring 21(1).

Daugherty, J. and S. Richtermeyer. 2007. Supporting Enterprise Systems Across the Business Curriculum: Microsoft Dynamics Academic Alliance. *Enterprise Systems in the 21<sup>st</sup> Century*. Idea Group Publishing. Hershey, PA.

Greller, M. and S. Richtermeyer. 2006. Changes in Social Support for Professional Development and Retirement Preparation as a Function of Age. *Human Relations* 59(9): 1213-1234.

Valentine, S., M. Greller, and S. Richtermeyer. 2006. Employee Job Response as a Function of Ethical Context and Perceived Organizational Support. *Journal of Business Research* (59): 582-588.

Richtermeyer, S., M. Greller, and S. Valentine. 2006. How Ethical is Your Organization? *Management Accounting Quarterly*. Spring 7(3):23-30. Received Lybrand Medal for publication.

Fleischman, G. and S. Richtermeyer 2005. Tax Planning Strategies to Avoid Intermediate Sanctions. *The Tax Adviser*. July 2005. AICPA.

Mauldin, E. and S. Richtermeyer. 2004. An Analysis of ERP Annual Report Disclosures. *International Journal of Accounting Information Systems*. December. Volume 5, Issue 4.

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Bradford, M. and Richtermeyer S. 2002. Realizing Value in ERP. *Journal of Cost Management* 16 (March/April) 13:19.

Richtermeyer, S. and S. Kovar. 2001. AIS Education: Incorporating Trends in Technology into the Curriculum. *Review of Business Information Systems*. Fall (5).

### **Selected Press Activities/Interviews/Quotes**

Risk Standard-Setter Issues Blueprint for Managing Cyber Risk. *Wall Street Journal*. December 2019. <https://www.wsj.com/articles/risk-standard-setter-issues-blueprint-for-managing-cyber-risks-11576620579>

IMA and BAP: Two turn 100. *Strategic Finance*. August 2019.

IMA Chairs: Memories from volunteer leaders. *Strategic Finance*. June 2019.

Women at IMA: Creating opportunities. *Strategic Finance*. June 2019.

Women's Accounting Leadership Series in Jordan – *Alabawaba*. April 2019. <https://www.albawaba.com/ima%C2%AE-institute-management-accountants-holds-womens-accounting-leadership-series-jordan-1279852>

Massachusetts Society of CPAs announces first early college academy for future accountants. <https://www.cpapracticeadvisor.com/accounting-audit/news/12427228/mass-society-of-cpas-announces-first-early-college-academy-for-future-accountants>. *CPA Practice Advisor*. August 2018.

Insider Perspective: 2018 World Economic Forum <https://www.wbcsd.org/Overview/News-Insights/Insider-perspective/2018-World-Economic-Forum-Davos>. January 2018.

Live from Davos: Will there be a new financial crisis? <http://www.theaccountant-online.com/comments/live-from-davos-will-there-be-a-new-financial-crisis-6035529>. *The Accountant*. January 2018.

Profession in focus. Interview with Center for Audit Quality.  
<https://www.thecaq.org/episode-56-profession-focus-features-sandra-richtermeyer-manning-school-business/>. CAQ Episode 56. January 2018.

Salesforce Works with Higher Ed  
<https://www.zdnet.com/article/salesforce-works-with-higher-ed-to-roll-out-trailhead-for-students/>. ZDNet. October 2017.

Calvin College Adds Master of Accounting Program  
<https://calvin.edu/news/archive/calvin-adds-master-of-accounting-program>. January 2017.

Accountants: beyond inputting numbers. *Cincinnati Enquirer*. September 10, 2015.

Hertz restatement drives home top-level control issues. *Compliance Week*. July 28, 2015.

Revisiting financial I.T. for better monitoring, compliance. *Compliance Week*. June 23, 2015.

Supporting women's accounting leadership. *Forbes.com*  
[www.forbes.com/.../supporting-womens-accounting-leadership/](http://www.forbes.com/.../supporting-womens-accounting-leadership/). February 18, 2015.

COSO tacks towards cyber security. *Compliance Week*. January 27, 2015.

Why the COSO framework matters to you. Interview by the OSCP.  
[www.youtube.com/watch?v=4skTwW6n2Fk](http://www.youtube.com/watch?v=4skTwW6n2Fk). May 15, 2014

Top three trends for CFOs in 2014. *Forbes.com*  
[www.forbes.com/sites/.../top-three-trends-for-cfos-in-2014/](http://www.forbes.com/sites/.../top-three-trends-for-cfos-in-2014/). January 30, 2014.

Vital currencies have real accounting concerns. *Compliance Week*. January 14, 2014.

Big data: its power and perils. Spotlight on Richtermeyer - Valuing big data: problems and solutions. [www.accaglobal.com/bigdata](http://www.accaglobal.com/bigdata). November 2013.

What CFOs can learn from educators (and vice versa). *Forbes.com*  
[www.forbes.com/.../what-cfos-can-learn-from-educators-and-vice-versa/](http://www.forbes.com/.../what-cfos-can-learn-from-educators-and-vice-versa/). July 1, 2013.

What CFOs need to know about COSO. *Forbes.com*.  
[www.forbes.com/.../what-cfos-need-to-know-about-coso/](http://www.forbes.com/.../what-cfos-need-to-know-about-coso/). May 5, 2013.

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[www.forbes.com/sites/.../how-cfos-can-bridge-the-accounting-skills-gap/](http://www.forbes.com/sites/.../how-cfos-can-bridge-the-accounting-skills-gap/). December 7, 2012.

3 questions with Dr. Sandra B. Richtermeyer. *Kforce Kronicle*. September 2012.

The inexact science of making defensible business judgments. *Compliance Week*. March 13, 2012.

COSO Framework update sparks deep debate on internal control. *Compliance Week*. April 24, 2012.

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Canham, C. 2010. Reaching Full Potential: Sandra Richtermeyer Interview. *The Accountant*. August 27.

Interview. 2010. The Value of Professional Associations for Building Your Career. Enhanced Online News. (<http://eon.businesswire.com/news/eon/20101216006389/en/IMA/Institute-of-Management-Accountants>). December 16.

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### **Other Publications**

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Richtermeyer, S. 2011. Women in Finance – Maintaining a Work/Life Balance. *The Glass Hammer*. April. (<http://www.theglasshammer.com/news/2011/04/19/op-ed-women-in-finance-maintaining-a-worklife-balance/>)

Richtermeyer, S. 2011. Successful Succession Planning. *Strategic Finance*. June.

Richtermeyer, S. 2011. Seeing the Bigger Picture. *Strategic Finance*. May.

Richtermeyer, S. 2011. Engaging our Volunteers. *Strategic Finance*. April.

Richtermeyer, S. 2011. Achieving Strategic Clarity. *Strategic Finance*. March.

- Richtermeyer, S. 2011. Thought Leadership through Meaningful Research. *Strategic Finance*. February.
- Richtermeyer, S. 2011. Sharing some Global Perspectives. *Strategic Finance*. January.
- Richtermeyer, S. 2010. Benefits of a Multigenerational Network. *Strategic Finance*. December.
- Richtermeyer, S. 2010. Inside the IMA Board. *Strategic Finance*. November.
- Richtermeyer, S. 2010. A Platform for Leadership Growth. *Strategic Finance*. October.
- Richtermeyer, S. 2010. Gain New Perspective by Volunteering. *Strategic Finance*. September.
- Richtermeyer, S. 2010. Starting Down the Certification Path. *Strategic Finance*. August.
- Richtermeyer, S. 2010. Creating a Professional Development Team. *Strategic Finance*. July.
- Richtermeyer, S. 2010. Top Five Reasons Why Strategic Initiatives Fail. *Industry Week*. February 10.
- Richtermeyer, S. 2010. Starting Your Career on the Right Track. *New Accountant*. Issue 736. January/February.
- Richtermeyer, S. and M. Bradford. 2003. Benefits of Incorporating ERP Systems into Business Curricula. PeopleSoft White Paper Series. May.
- 2003 Survey of Management Accounting. Published jointly by Ernst & Young and IMA. IMA authors: Hudick, J. S. Richtermeyer, and M. Frigo. Ernst & Young authors: Garg, A. and D. Ghosh.
- Richtermeyer, S. 2002. Nonprofit compensation trends: an overview of the 2002 Colorado Nonprofit Salary and Benefits Survey. *Nonprofit Colorado*. November/December.
- Richtermeyer, S. and R. Scheer. Editors. 2002 Colorado Nonprofit Salary & Benefits Survey. *Colorado Association of Nonprofit Organizations*.
- Richtermeyer, S. Sparks Stores, Inc.: Cost allocation and e-commerce strategies. Published in *Instructor's Manual for Cost Management* by Hilton, Maher, and Selto. Irwin McGraw-Hill. 1999.
- Richtermeyer, Sandra. 1996. Ballot initiative threatens nonprofit property tax exemptions. *News Account*. (A publication of the Colorado Society of CPAs). Volume 42 (October).
- Richtermeyer, Sandra. 1996. Case studies on integrated accounting on microcomputers in *The curricular integration of ethics: theory and practice*. Edited by C. David Lisman. Praeger; Westport, Connecticut.

### **Samples of Recent Presentations and Invited Talks**



I have delivered invited talks on six continents, in countries such as Australia, Austria, Brazil, the Cayman Islands, Colombia, Germany, Indonesia, Japan, Jordan, Mexico, the Netherlands, Peru, Singapore, South Africa, Switzerland, Turkey, the United Arab Emirates, and Vietnam.

I have been invited by the governments of developing countries, such as Peru, Colombia, and Indonesia, as well as several Caribbean countries, to provide training to government leaders on topics including risk management, anti-corruption, and internal controls. I have also provided this type of training to U.S. state, local and federal professionals.

Below are examples of recent invited presentations. A full list of presentations is available upon request.

Forthcoming - December 2025. Navigating Multilevel Change During Reaccreditation. Annual Conference of the Middle States Commission on Higher Education. Co-presenter with Kimberly O'Halloran and Michele Deegan. Philadelphia, PA.

November 2025 – Faculty Workshop – Institute of Management Accountants Annual Student Leadership Conference. Co-presenters: Chevonne Alston, Amal Said, and Di Wu. Cleveland, OH.

October 2025 - Future-proofing faculty: Supporting the academic talent pipeline in times of disruption. Co-presenters Eddy Rojas and Joe Bertolino. U.S. University Summit. THE (Times Higher Education). NY USA.

October 2025 – Strategic Transfer Pathways: Building Seamless Educational Journeys from 2-Year to 4-Year Institutions. Co-presenter with Michelle Williams. Coalition of Urban and Metropolitan Universities (CUMU) Annual Conference. Baltimore, MD.

October 2025 – How do Anchor Institutions Sustain Community-Engaged Projects in Challenging Times? Co-presented with David Birdsell, Michael Palladino, Melanie Perreault, and Michelle Williams. Coalition of Urban and Metropolitan Universities (CUMU) Annual Conference. Baltimore, MD.

September 2025 – Redefining the Future: Women Leading the Way. Institute of Management Accountants Women's Leadership Summit. Panel with Esther Alexander, Jackie Oppenheim, Jennifer Pinder. Virtual with attendees from North America, Asia and Europe.

August 2025 – Building Tomorrow's Accounting Leaders: Opportunities for Impact and Integration with Professional Associations, Practitioners, and Experiential Learning. Panel Session with Chevonne Alston, Amal Said, and Di Wu. American Accounting Association Annual Meeting. Chicago, IL.

August 2025 – Trends in Managerial Accounting Education. Panel Session with Chevonne Alston, Amal Said, and Di Wu. American Accounting Association Annual Meeting. Chicago, IL.

August 2025 - Engagement, Access, and Community (EAC), the Path Forward. Panel Session with Chevonne Alston, Amal Said, and Di Wu. American Accounting Association Annual Meeting. Chicago, IL.

June 2025 - Accounting Talent Pipeline: Challenges and Opportunities. Annual Global Conference of the Institute of Management Accountants. Co-presenters Chevonne Alston, Amal Said, Di Wu. Phoenix, AZ.

June 2025 – Emcee for IMA Global Student Case Competition. Phoenix, AZ.

June 2025 - Strategies of Collaboration Across and Up the Organization. AACSB International, Women Administrators Online Conference. Virtual.

May 2025 - Culture Leadership and Managing Burnout through Uncertainty. Financial Excellence and Leadership Summit. Dubai, UAE.

May 2025 – What comes next for academic leadership roles? AAA WeARE Webinar. Series to develop academic leaders and share examples of transition from chair to associate dean to dean to provost. Virtual.

April 2025 - Leadership & Self-Care During Times of Crisis. AACSB International Conference. Vienna, Austria.

February 2025 - The impact of the control environment: establishing a strong and healthy foundation for internal controls and compliance. Arizona State University. Tempe, AZ.

February 2025 – The Rise of Women’s Leadership in Accounting and Finance. Arizona State University in Conjunction with IMA Women’s Financial Leadership Series. Tempe, AZ.

February 2025 – Academic Leadership Issues Panel. American Accounting Association Accounting Leadership Section Annual Meeting. San Antonio, TX.

November 2024 – Faculty Workshop – Institute of Management Accountants Annual Student Leadership Conference. Co-presenters: Chevonne Alston, Amal Said, and Di Wu. Anaheim, CA.

September 2024 and April 2024 – Emcee and commentator for Women’s Accounting Leadership Series. Virtual global event with women accounting and finance leaders from the U.S., Asia, and Europe.

August 2024 – Exploring Bias in Student Evaluations of Teaching. Panel presentation with Stephani Mason, Jason Rinaldo, Kristina Mitchell, Devin Shantikumar. American Accounting Association Annual Meeting. Washington, DC.

June 2024 – Emcee for IMA Global Student Case Competition. San Antonio, TX.

March 2024 – My Turning Points in History, New Jersey History Day. Closing speaker for history with over 600 junior high and high school students, parents, and educators.

January 2024 – How nonprofit organizations can make a societal impact. Beta Alpha Psi International Board of Directors meeting. Virtual

November 2023. Trends in Recurrent Education. Abitus conference. Tokyo, Japan.

June 2023 - ESG Reporting and Trends: Considerations for Governmental Organizations. Presentation for the Association of Government Accountants. Boston, MA.

April 2023 - CPA Evolution: Curriculum Mapping and Planning Workshop. University of Texas, El Paso. El Paso, TX,

January 2023 - Internal Controls and Risk Management. Considerations for Good Governance. Massachusetts Society of CPAs Annual Nonprofit Conference. Boston, MA.

October 2022 – Governance and Board Engagement: Considerations to Maximize Performance. Institute of Internal Auditors. Boston, MA.

October 2022 - The Role of COSO in Performance Management. India Chapter of the Institute of Management Accountants.

October – December 2021 – Dean’s Boot Camp. Co facilitated and developed six week leadership program for deans from a variety of U.S. colleges. Program sponsored by Academic Impressions. Virtual.

November 2021. Global Trends in Risk Management. Invited by Escuela Nacional de Control, Controller General of the Republic of Peru. Virtual due to Covid.

October 2021. Building boards of the future. Governance panel for Aurora 50, a social enterprise working with leading organizations in the Middle East to accelerate gender balance in the boardroom. Audience was key business leaders in the Middle East. Virtual due to Covid.

June 2021. Global social purpose panel for ACCA Global University Conference. Participated in global panel discussion on university social impact initiatives. Virtual due to Covid.

May 2021. Dean’s perspective panel on the tenure process. Invited by the Eastern Academy of Management for their Junior Faculty Consortium. Virtual due to Covid.

February 2021 – Career Development Strategies for Impactful Leadership. Northeast Intergovernmental Audit Forum and Boston Chapter of Association of Governmental Accountants. Virtual.

November 2020 – Emotional Intelligence for Deans. Academic Impressions Dean's Conference. Virtual.

November 2020 – COSO Framework. United Nations key unit leaders. Virtual, global participation.

June 2020 – Higher Education Shaped by COVID-19. Eastern Academy of Management. Virtual.

February 2020 – The Academic View for Women. Women in Accounting & Finance Leadership Summit (virtual – national audience).

February 2020 – Women's Leadership in Higher Education; invited presentation for women leaders at Elon University. Elon, NC.

January 2020 – Risk Management: Critical trends for accounting and finance; Contemporary Issues in Finance, Banking and Accounting for Sustainable Development. Hanoi, Vietnam.

October 2019 – IMA Women's Accounting Leadership Series – Chicago, IL; hosted by DePaul University; Moderator to provide synthesis and commentary for program review.

July 2019 – Alumni Boards. Speaker for 2.5 day Academic Impressions workshop. Area of focus on setting board strategy and board culture. Boston, MA.

July 2019 – Risk Management Workshops- La Contraloria General de la Republica – Lima, Peru. Provided three days of training for government leaders in Peru at their National School of Internal Control.

June 2019 – Risk Management. IMA Annual Conference and 100<sup>th</sup> Anniversary. San Diego, CA.

June 2019 – Bogota Learns – Invited expert to work with leaders from Mayor of Bogota's office as well as national level top Colombian leaders. Speaking engagements and three days of workshops for government leaders.

April 2019 – IMA Women's Accounting Leadership Series – Servant Leadership presentation and panel discussion for Jordanian CFOs. Amman, Jordan.

April 2019 – IMA Women's Accounting Leadership Series. CFO panel. Baruch College, New York, NY.

March 2019 – World Business Council on Sustainable Development – panelist for their global leadership program. New York, NY.

December 2018 - COSO Frameworks - Implications for Anti-Corruption. ACFE. Boston, MA.

December 2018 - Risk Management Workshops- La Contraloria General de la Republica – Lima, Peru. Provided three days of training for government leaders in Peru at their National School of Internal Control.

December 2018 - Continuous Auditing: Implications of Processes and Related Activities. United Nations. Presented to the chairs of audit committees of all United Nation primary organizations. New York, NY.

October 2018. World Business Council on Sustainable Development. Council Meeting. Final release of WBCSD/COSO ESG Risk Management guidance. Singapore.

October 2018. New Metrics. ESG Risk Management Guidance. Philadelphia, PA.

October 2018. IMA Women's Accounting Leadership Series. Listening to the Numbers. Boston, MA.

June 2018. Salesforce Trailhead program. Eduventures. Boston, MA.

June 2018. COSO Certificate Training. AICPA training conducted at the Colorado Society of CPAs office. Englewood, CO.

May 2018. Enterprise Risk Management and Internal Control. Full day CPE workshop sponsored by the Internal Auditor's office of South Dakota. Pierre, SD.

April 2018. Women in Accounting and Finance Leadership Positions. Meonske Conference. Kent, OH.

March 2018. Equity in Higher Education. Salesforce Higher Ed Summit. Washington DC – National Harbor.

March 2018. Extending the Connected Campus to Students through Real World Experience. Salesforce Higher Ed Summit. Washington DC – National Harbor.

January 2018 – World Economic Forum - World Business Council on Sustainable Development launch event for WBCSD COSO ESG risk guidance. Davos, Switzerland.

November 2017 - Millennials in the Workplace. New England Intergovernmental Audit Forum. Portland, ME.

October 2017 – IMA Women's Accounting Leadership Series. Quick bytes of insight. New York, NY.

July 2017 – Associate for Government Accountants Annual Meeting. Three presentations on topics related to multigenerational issues in internal auditing and risk management. Annual Meeting. Boston, MA.

June 2017 – COSO ERM Update Webinar. For Intel controllers and finance professionals (global audience).

May 2017 – Enterprise Risk Management. Oslo, Norway. Provided a risk management workshop to CFOs of Norway's leading companies (organized by PWC) and COSO ERM update for members of IIA Norway.

February 2017 – La Contraloria General de la Republica – Lima, Peru. Internal control and risk management. Presented to Controllers General and their teams from the majority of Central American and South American countries.

October 2016 – Women's Accounting Leadership Series. The role women play in driving business performance. Hosted by Pace University. New York, NY.

July 2016 – COSO Workshop. Provided 2.5 day COSO certificate training and workshop for corporate and governmental leaders. Singapore.

May 2016 – Closing Generational Gaps. Insurance Accounting & Systems Association. Cincinnati, OH.

April 2016. A Mission Conscious Women's Leadership Seminar to Boost Institutional Effectiveness. Higher Learning Commission conference. Chicago, IL.

March 2016. Alumni Boards. Speaker for 2.5 day Academic Impressions workshop. Area of focus on setting board strategy and board culture. Cincinnati, OH.

October 2015. Improving Organizational Performance & Governance with the Adoption of the COSO Framework. IIA Singapore. Singapore.

October 2015. COSO Academy Roundtable: Singapore Management University.

Sept/October 2015. How Risk Management and Internal Controls Enable Performance. Association of Legal Administrators. (Presentations in New Orleans, Atlanta and Las Vegas in September and October 2015).

April 2015. The Role Women Play in Driving Business Performance. Women in Accounting Leadership Series. Pace University and IMA. New York, NY.

September 2015. A Practical Approach to Implementing the COSO Internal Control Integrated Framework. Northeast Regional Council of the IMA. Mystic, CT.

August 2015. COSO Enterprise Risk Management; IIA Mexico. Mexico City.

July 2015. Setting Board Strategy. Academic Impressions. Alumni Boards: Strengthening Strategy, Growing Engagement. Baltimore, MD.

May 2015. COSO Essentials. Bank Audit Conference. Boston, MA.

May 2015. Revised COSO Implementation and Adoption. Protiviti panel in Cincinnati and Indianapolis.

April 2015. Building Leadership Capacity. Women in Accounting Leadership Series. Xavier Campus (Joint initiative with Pace University and IMA).

March 2015 - Enterprise Risk Management; Cayman Islands Society of Professional Accountants. Grand Cayman.

February 2015. Sensitive Situations: How to Help Faculty Reset, Reengage, Phase Out or Retire. Accounting Program Leadership Group of the American Accounting Association. Nashville, TN.

February 2015. Graduate Education: An Incredible Investment in Yourself! Fifth Third Bank Graduate School Conference. Cincinnati, OH.

November 2014. Auditing Governance Frameworks. Professional Development Week. Cayman Island Government. Grand Cayman.

September 2014. Internal Controls and Risk Management for Today's Small Businesses: A Look at the COSO Frameworks. Louisiana Society of CPAs. New Orleans, LA.

September 2014. Regulatory Compliance Using the COSO Framework. CMS Energy. Lansing, MI.

July 2014. Transitioning and Implementing the New COSO Framework. AICPA NAATS.

June 2014. A Practical Approach to Implementing the COSO Internal Control – Integrated Framework. IMA Annual Conference. Minneapolis, MN.

March 2014. Auditing Governance Frameworks – Masterclass. IIA SOPAC. Melbourne, Australia

February 2014. Combining a Tech Background with Leadership Development. Kentucky TRIWIC (program for women I.T. leaders). Cumberland Resort.

January 2014. COSO Framework. Association of Government Accountants Winter Seminar. Nashville, TN.

September 2013. COSO Framework – IIA Brazil. Fortaleza, Brazil.

August 2013. COSO Update – IIA Mexico. Mexico City, Mexico.

November 2012. Diversity in the Profession. International Federation of Accountants. Cape Town, South Africa.

September 2012. Master of Ceremonies for Lean Accounting Summit. Orlando, FL.

August 2012. APLG Panel on Strategic Planning– Annual Meeting of the American Accounting Association. Washington, D.C.

June 2012. COSO Strategies. IMA 93<sup>rd</sup> Annual Conference and Exposition. Las Vegas, NV.

May 2012. Enabling Performance: Trends in Corporate Governance. Dallas, TX Chapter of the IMA. Dallas, TX.

April 2012. Professional Development Strategies for Long Term Career Impact. Arcadia College, PA.

April 2012. SNIA Conference. Two presentations on COSO update including keynote. Surabaya, Indonesia.

April 2012. Technical Expectations for New Hires. Midwest Regional Beta Alpha Psi Conference. Chicago, IL.

March 2012. Technical Expectations for New Hires. Rocky Mountain Regional Beta Alpha Psi Conference. Laramie, WY.

March 2012. Professional Development Strategies for Long Term Career Impact. Akron, OH Chapter of the IMA. Akron, OH.

March 2012. Career Development Strategies. Keynote for Denver IMA Chapter Student Night. Denver-Centennial Chapter of the IMA. Denver, CO.

February 2012. Professional Development Strategies for Long Term Career Impact. Boulder Valley Chapter of the IMA. Boulder, CO.

September 2011. Master of Ceremonies for Lean Accounting Summit. Multiple presentations. Orlando, FL.

September 2011. Long Term Career Impact Strategies. IMA Heartland Council. General Session. Springfield, MO.

September 2011. Technology Enablement for Management Accounting: A Digest of Current Software Applications. IMA Heartland Council. Concurrent session. Springfield, MO.

June 2011. Trends in Corporate Governance. ANEFAC. Sao Paulo, Brazil.

May 2011. Professional Development Strategies for Long-Term Impact. CFO Council. Savannah, GA.

May 2011. Finding Your Way to Strong Governance. IMA Gulf South Council. 2011 Leadership Training Program. Orange Beach, AL.

April 2011. Finding Your Way to Strong Governance. IMA Mid-America Council 2011 Leadership Training Program. Rockford, IL.

March 2011. Pursuing a PhD in Accounting. Beta Alpha Psi Rocky Mountain Regional Meeting. Salt Lake City, UT.

March 2011. 10 Stages for Aligning Technology with Strategic Performance Measurement. SAP. B.I., Financials, HR GRC conferences. Las Vegas, NV.

March 2011. Learning Leadership in your Career: Strategies for Long-Term Impact. Beta Alpha Psi Rocky Mountain Regional Meeting. Salt Lake City, UT.

February 2012. Pathways Commission. Expert Panel Representative and speaker at Public Meeting. Atlanta, GA.



February 2011. Starting Your Career on the Right Path. IMA Grand Valley Chapter. Grand Rapids, MI.

February 2011. CFO Panel Discussion. Moderator. Accounting Program Leadership Group of the American Accounting Association. Savannah, GA.

November 2010. Corporate Governance and Leadership: Finding the Right Balance. IMA Germany Chapter. Stuttgart Germany.

November 2010. Corporate Governance and Leadership: Finding the Right Balance. IMA Turkey Chapter. Istanbul, Turkey.

November 2010. Creating a Professional Development Plan for Long-Term Career Impact. University of St. Gallen. St. Gallen, Switzerland.

November 2010. Creating a Professional Development Plan for Long-Term Career Impact. IMA Canton Chapter. Canton, OH.

November 2010. Master of Ceremonies. 11<sup>th</sup> Annual IMA Student Leadership Conference. Anaheim, CA.

October 2010. Leadership in a Volunteer Organization. Winds of Change Conference. University of Wyoming. Laramie, WY.

September 2010. Creating a Professional Development Plan for Long-Term Career Impact. Cincinnati North Chapter of the IMA. Cincinnati, OH.

August 2010. Starting Your Career on the Right Path: Strategies for Long-Term Impact. Beta Alpha Psi International Conference. San Jose, CA.

May 2010. Creating a Professional Development Plan for Long-Term Career Impact. Texas Council of the IMA. Houston, TX.

March 2010. Trends in Corporate Governance. India Ministry of Corporate Affairs. (Delivered via WebEx for India delegation visiting the U.S.

March 2010. Professional Development for Early Career Accounting and Finance Professionals: Strategies for Long-Term Career Impact. Indiana University. Bloomington, IN.

March 2010. Investment in professional development: Tips and Strategies for Early Career and Beyond. Beta Alpha Psi Rocky Mountain Regional Conference. Fort Collins, CO.

1997-2009 presentations available on request.

## **Appendix 1 – Community Engagement and Volunteerism**

I have maintained a long-standing commitment to community engagement at the local, regional, national, and global levels. I have served as a board member for multiple health-focused nonprofits, including a hospital-affiliated outreach program and an autoimmune disease foundation, providing leadership in fundraising, financial oversight, and technology strategy. My community service extends to a wide array of health and welfare organizations, including children's homes, shelters, arts and cultural institutions, and Dress for Success. I advise university alumni boards and mentor entrepreneurs in sectors ranging from aviation to nonprofits and mid-market technology. Additionally, I have collaborated with global technology leaders—Salesforce, Microsoft, Oracle, and PeopleSoft—advising on curriculum integration and educational innovation, including service on multiple academic advisory boards. I also volunteered with Scouts BSA Troop 750 from 2009 to 2016, supporting youth leadership development through civic programming and outdoor education as an Eagle Scout parent.

### **Active engagement as a local, regional, national, and global volunteer**

**Dan Beard Council** – Volunteer leader for Scouts BSA Troop 750 (2009-2016). Sponsored activities for scouts to earn the Snow Sports Badge, Citizen in the Nation, Citizen in the Community, Citizen in the World. Assisted with coordinating multiple scout activities, including mulch sales, camping, backpacking, and scout camp. Eagle Scout mom.

#### **Greater Miami Rowing Club**

Volunteer for local and regional regattas

#### **Health-related nonprofits**

- Served as board member for hospital affiliated health program serving adults without health care (Health S.E.T.).
- Served as board member for autoimmune disease related organization (Lupus Foundation). Assisted with fund-raising, process design, technology enablement, and financial oversight.

#### **Voluntary health and welfare organizations**

Volunteer to board of directors for multiple nonprofit organizations with the following missions:

- Children's home
- Music museum
- Association for the blind and visually impaired
- Animal shelters
- Homeless shelters
- Dress for Success
- Outdoor recreation camps
- Community theater

### **University alumni boards**

Serve as a volunteer for multiple nonprofit universities and provide training and consultation to help strengthen their alumni boards and develop best practices in governance.

### **Volunteer advisor for entrepreneurs and start-up community**

Serve as volunteer advisor for entrepreneurs in the following industries:

- Aviation – private jet service
- Professional services
- Manufacturing
- Nonprofit
- Mid-market technology firms
- Salon

### **Advisor for global technology groups**

- **Salesforce** – 2017-2022. Work with Salesforce Trailhead initiative and serve as speaker at conferences and provide input on use of Salesforce in university curricula.
- **Microsoft Academic Alliance Advisory Board** - 2008 - 2010. Service on U.S. advisory board and assisted European group with board establishment (Copenhagen; 2008).
- **Oracle Academic Initiative Advisory Board** - May 2005 - May 2006. Provide advice to Oracle regarding integration of their applications suite into college of business curricula.
- **PeopleSoft On-Campus Advisory Board** (national program) – May 2003 - January 2005. Provide advice to PeopleSoft on curriculum integration issues. Prepare workshops and presentations for faculty members implementing PeopleSoft into their business programs.
- **Microsoft Business Solutions, Inc.** – 1998-2008 - (formerly Microsoft Great Plains) Educational Alliance Network Advisory Committee – January 2000 - 2002. Provide advice and assistance to universities and colleges implementing Microsoft Business Solutions in the classroom. Recipient of first Pinnacle Award in education category (awarded to the University of Wyoming).

### **Global sustainability volunteer:**

**World Business Council on Sustainable Development (WBCSD)** – co-chaired committee to release global guidance on risk management of environmental, social, and governance (ESG) risks - 2018.

- Presented guidance with WBCSD leaders at 2018 World Economic Forum launch event in Davos, Switzerland.
- Presented guidance with WBCSD leaders at launch event in Singapore (2018)
- Served as volunteer for WBCSD Leadership program (NYC 2019)

### **U.S. Government volunteer activities:**

**U.S. GAO**      Green Book Advisory Council – committee convened by the U.S. Comptroller General  
2013-2018      Purpose of Council: to develop internal control standards for use by all U.S. federal agencies and adopted by many state and local entities.

### **Professional volunteer activities:**

#### **American Institute of Certified Public Accountants (AICPA)**

2015-2020      Delegate for the AICPA Council

#### **American Accounting Association (AAA) – multiple roles**

**Please note – the AAA will provide my AAA service record on the board nominations website.**

#### **Beta Alpha Psi International (BAP)**

2019-present      Volunteer  
2018-2019      Past-President  
2017-2018      President  
2016-2017      President-Elect  
2013      Volunteer - Project "Run-With-It" at International Annual Meeting  
2008-2013      Professional Partners Program (previously Forum) participant as needed for annual and regional meetings (IMA Representative)  
2004-2007      Member, International Advisory Forum (representing IMA)  
2004-2011      Dozens of speaking engagements for local, regional and national BAP events

#### **Educational Foundation for Women Accountants (EFWA)**

2007-Present      Board of Directors – at-large member, Director of Development

#### **Institute of Management Accountants (IMA) (also see roles under board leadership above)**

Present      Global Board of Directors, member of Performance Oversight and Audit Committee  
2022-2024      Strategic Planning Committee  
2012-2024      Master of Ceremonies – Global Student Case Competition  
2015-2018      Volunteer leadership committee (board committee)  
2012-2013      Former Immediate Chair Emeritus  
2011-2012      Global Chair Emeritus  
2010-2011      Global Chair  
2009-2010      Global Chair-Elect  
2009-2010      Global Chair, Nominating Committee of Global Board  
2009-2010      Chair, Planning and Development Committee; lead strategic planning for IMA global  
2009      Developed and hosted first IMA Women's Leadership Forum at Annual Conference  
2008-2009      Member, Global Board of Directors; Governance Committee  
2007-2008      Chair, External and Member Relations Committee  
2007-2008      Member of Governance Committee  
2006-2007      ICMA Regent; Board of Regents for the Certified Management Accountant (CMA) exam  
2004-2007      National Professor-in-Residence  
2006-2007      Chair Emeritus; IMA Foundation for Applied Research  
2004-2006      Chair, IMA Foundation for Applied Research  
2002-2004      Chair, National Committee on Students; Member of IMA National Executive Committee

2000-2002	Member, National Committee on Students – Subcommittee Chair for Student Chapters
2001-2002	Regional Director, Colorado/Wyoming Border, Pikes Peak and Boulder Chapters
2000	Program Chair/Co-Founder – First Annual Student Conference (this conference is currently in its 26 <sup>th</sup> year)
2000-2001	President, Denver Chapter
1999-2001	Trustee, Foundation of Applied Research
1999-2000	Faculty Mentor, University of Wyoming Student Chapter
1998-2000	Secretary, Rocky Mountain Council
1998-2000	Vice President of Education, Denver Chapter
1997-1998	Academic Liaison, Rocky Mountain Council
1995-1998	Treasurer, Denver Chapter

### **Lean Accounting Summit**

2010-2013	Master of Ceremonies – Lean Accounting Summit (professional conference featuring best practices of leading edge organizations).
2007-2015	Developed, implemented and monitored faculty/student paired scholarship grant program that enabled professor/student pairs from dozens of universities to attend leading edge professional conference featuring best practice organizations and lean thought leaders.

### **State CPA Societies**

#### **Massachusetts Society of CPAs**

2020-2024	Member of Board of Directors including one year as Vice Chair
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#### **Ohio Society of CPAs**

2014-2019	Executive board member, Board Chair-Elect, Board Chair, Board Past-Chair
2015-2020	AICPA Council delegate
2007-2011	Co-sponsor of multiple initiatives related to Xavier University student ambassador

#### **Colorado Society of Certified Public Accountants**

2001-2002	Member of Summit Committee - special task force assembled to address lack of entrants to the accounting profession.
1994-1996	Member of Nonprofit Technical Committee
1990-1994	Member of Career Education College Committee

#### **Wyoming Society of Certified Public Accountants (WYOCPA)**

1997	Member, Continuing Professional Education Committee
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### **Other Professional Affiliations/Certifications**

- Beta Gamma Sigma (member)
- National Association of Corporate Directors (member)
- Leadership Cincinnati USA – Chamber of Commerce (Class of XXXII alumni)