

**KAREN CONGO FARMER, M.S., CPA, CA (Canada)**

kfarmer@mays.tamu.edu

---

**QUALIFICATIONS**

Especially recognized for:

- Charismatic public-speaking style.
- Writing and reaching targeted audiences.
- Creating customized Exec Ed programs.
- Storytelling in teaching.
- Effective learning methods.
- Budgeting, cash flow, financial analysis.

**ACHIEVEMENTS**

**Author, John Wiley & Sons (Wiley) Cost Accounting: With Integrated Data Analytics**, December 2021, for adoption Summer 2022. As lead author on the text, it will be styled Farmer, Fredin. We have several professors using the text in Spring 2022 as a free-of-charge “class test” and several have already committed to its adoption in Fall 2022.

**Winner of TAMU’s Provost Academic Professional Track Faculty Excellence Teaching Award, February 2022.** This \$5,000 award encourages, recognizes and rewards faculty recipients for exceptional teaching practices that create meaningful learning experiences for students. It illustrates both the impact of an effective teaching approach and the value of student-centered learning.

**Well-respected speaker** at national events within American Accounting Association’s groups: Conference for Teaching and Learning Accounting (CTLA) and Teaching, Learning and Curriculum Subsection, and for Wiley’s academic conferences and webinars.

**Winner of the 2018 and 2013** Baggett Teaching Excellence Award in recognition of extraordinary accomplishments in teaching innovation, curriculum development, and student service.

**EDUCATION**

- May 2009: MS (Accounting), Texas A&M University.
- Feb 2002: Attained CPA (Canada) Designation – February 2002.
- May 1999: Honours Bachelor of Commerce, (Dean’s Honour List) McMaster University, Canada.

## **PROFESSIONAL EXPERIENCE**

**2018 – Present: Author, *Cost Accounting: With Integrated Data Analytics*, Farmer, Fredin, 1<sup>st</sup> Edition, John Wiley & Sons, Inc, December 2021.**

- A massive undertaking requiring the establishment of our mission as authors, a foundation in the science of learning, an understanding of today's students and competing texts, coordinating with reviewers, accuracy checkers, editors, research assistants, continually pitching ideas to Wiley's executives, and working closely with Wiley's sales team and prospective professors (customers) to highlight our value-added features.
- Growing our network of enthusiastic, prospective adopters one conversation at a time.

**2009 – Present: Senior Lecturer, Mays Business School, Texas A&M University, College Station, TX.**

- Create materials and teach ACCT 329 Cost Management & Analysis, BUAD 710 Ethical Decision-Making and Conduct in the MS Business program, and ICPE 607 Energy Accounting for the MS Energy program in the College of Engineering.
- Additionally have prepped and taught ACCT 603 Energy Accounting, ACCT 650 Accounting Ethics, ACCT 646 International Accounting, and ACCT 229 Accounting Principles.
- My self-authored materials called "Karen's Notes" became the basis for a textbook being sold internationally.

**2013 – Present: Lecturer, Center for Executive Development, Mays Business School.**

- Develop and present 2-day "Financial Acumen" and "Finance for Non-Financial Managers" to executive audiences; earned outstanding reviews for eliciting and maintaining participants' interest and enthusiasm. Students said that teaching points would be immediately used.

**2008 – Present: Consultant, Cypress, Texas.**

- Consult on financial information management needs of small business owners. Familiarize owners with financial statements, external users' needs and how to meet them.
- Convert disorganized paper-based systems to online accounting software; initial consultations became monthly bookkeeping services, budgeting, and year-end financial statements.

**2006 – 2015: Controller, Ducerus/College Financial Advisors, Cypress, TX.**

- As co-owner of this business, I meticulously performed daily/monthly accounting functions including payroll, billings, collections, and cash flow projections.
- Advised on business strategies including goal-setting, expansion, and capital asset purchases. Interviewed, trained, and promoted staff, designed, organized office layout, and work flow.

**2003 – 2012: Lecturer, Management and Organizational Studies, Western University, London, Canada.**

- Part-time/Full-time instructor of Intermediate and Managerial Accounting; designed content and delivery methods to stimulate students' learning and enthusiasm for these challenging topics.
- This role provided a segue to facilitate at CPA Ontario's month-long School of Accountancy program, which educates professional students on accounting, assurance, and tax in preparation for their month end exam. Role required a minimum 40 hours of prep.

**2002 – 2005: Financial Officer – Financial Services, Western University, London, Canada.**

- Oversaw financial reporting for restricted funds; prioritized workflow amongst staff to meet objectives. Consultant to campus admin on PeopleSoft and accounting practices related to funds.

**1999 – 2002: Senior Staff Accountant, Ernst & Young LLP, London, Canada.**

- Supervised junior staff on multiple engagements concurrently, to complete high quality assurance engagements within budget. Advanced accounting and auditing experience enabled me to analyze financial data and make recommendations to clients based on my insights.

## **ACADEMIC AND PROFESSIONAL DEVELOPMENT ACTIVITIES**

### **Regional/National/International Conferences Attended for Professional Development:**

- 2022, 2021, 2020, 2018: Wiley's National EdTech Summit for Accounting.
- 2022, 2021, 2020, 2019: American Accounting Association (AAA) Management Accounting Section Meeting annual conference.
- 2021: Wiley's Wicked Spring Break, presentation: "Alternative Assessment."
- 2021, 2020, 2019, 2018: Conference on Teaching and Learning in Accounting (CTLA within the American Accounting Association (AAA)
- 2021, 2020, 2018, 2017, 2016: Teaching, Learning, and Curriculum Colloquium (TLC) section of AAA, mid-year meeting.
- 2021, 2020, 2019, 2018: American Accounting Association (AAA) Annual Meeting.
- 2019: Association to Advance Collegiate Schools of Business (AACSB) International Conference and Annual Meeting, Edinburgh, UK.
- 2019: CAUBO – Canadian Association of University Business Officers, Halifax, Canada. North-American issues in higher education.
- 2019: EY Academic Resource Center Colloquium, Seattle.
- 2018, 2017, 2016: KPMG National Faculty Symposium, which showcases topics applicable to CPA practitioners and academics.

### **Texas A&M Workshops and Seminars Attended:**

- 2020, 2019, 2018, 2017: Participant in Transformational Leadership book group hosted by Executive Director of Innovation and Strategic Planning, Bill Peel, Mays Business School. Books include: *Bad Blood*, by John Carreyrou, *Leaders Eat Last*, by Simon Sinek, *Shoe Dog*, by Phil Knight, and *Shackleton's Way*, by Margot Morrell et. al. Goal of the group is to expand leadership throughout the business school from the ground up.
- 2019, 2018: Presenter, TAMU's Transformational Teaching & Learning Conference. 2019 Presented "Systems-Thinking Mindset" and 2018 Presented "Savvy Storytelling," and "A Novel Idea."
- 2019: Participant in Learn and Lead session "Online Course Development."
- 2018: Participant in Learn and Lead session, the "Future of Digital Education."
- 2017: Collegial group discussion and book review demonstration of Being Mortal, by Atul Gawande, hosted by Dr. Leonard Berry. Demonstration modeled how an instructor might discuss an author's work in a classroom setting.
- 2017: Lunch and Learn – Teaching with Cases, hosted by Dr. Michael Wesson.
- 2016: Wakonse South Conference on College Teaching – a weekend retreat and academic conference for learning and sharing college teaching practices.

## Teaching Innovation, Curriculum Development, Grants and Service:

- 2020: Faculty Mentor, TAMU's First Year Experience/Freshman Business Initiative (FYE/FBI): Advise student peer leaders on teaching and class facilitation; foster relationships with 42 freshmen. \$1,200 stipend.
- 2017: Faculty Mentor: Advise a student instructor on the course she developed and taught.
- 2020, 2019, 2018, 2017: Participant in Mays Transformational Leadership Faculty Learning Community (formerly Scholarship of Teaching and Learning) hosted by Dr. Nancy Simpson. Faculty identify a teaching idea or challenge faced in the classroom, then explore the research or conduct their own in arriving at a solution. Each \$2,000 grant was 100% attributed to me:
  - 2020: Chosen topic: Big-Picture Thinking With Hands-On Production. \$2,000 stipend.
  - 2019: Chosen topic: The Systems-Thinking Mindset. \$2,000 stipend.
  - 2018: Chosen topic: Can I Teach Students How to Learn? \$2,000 stipend.
  - 2017: Chosen topic: Savvy Storytelling. \$2,000 stipend.
- Fall 2017: Awarded a \$10,000 grant as Principal Investigator (100% attributed to me) in the Innovative Pedagogy Grant Program hosted by TAMU's Office of Academic Innovation (formerly ITS) for course development. Program involved in-class course work, individual and group assignments, and the requirements to use technology-based applications and pedagogies learned to create or refine a TAMU course.
- Summer 2017: Awarded a \$2,000 grant (100% attributed to me) for Flipping Your Course Faculty Institute, offered by TAMU's Office of Academic Innovation. 5-Day active workshop in flipped learning – a pedagogical approach that moves instruction from group learning to the individual learner so that class time is spent on more engaging activities that use advanced learning strategies, per Blooms Taxonomy. Developing one flipped course module was required for successful completion.

## Presentations:

- January 2022: AAA's Management Accounting Section Meeting: "Keeping it Real: Alternative Assessments in Cost Accounting."
- November 2021: Teaching, Learning, and Curriculum Colloquium (TLC) Section of AAA. Two presentations: "Help Your Students Become Numerate" and "Learning Your Purpose and Finding Your Purpose in Learning."
- July 2021: CTLA, two presentations: "Who Budgeted for This? Alternative Assessment Captures Students' Attention," and "Make Your Teaching Bloom."
- June 2021: Guest Speaker: Virginia Society of CPAs "Alternative Assessment."
- March 2021: Wiley's Wicked Spring Break, presentation: "Alternative Assessment."
- February 2021: Wiley's Community College Workshop: "Creative Assessment."
- January 2021: AAA's Management Accounting Section Meeting: Coffee Break sponsored by Wiley "Storytelling in Accounting."
- November 2020: Teaching, Learning, and Curriculum Colloquium (TLC) section of AAA. Two presentations: "Guest Speakers in Zoom – Keeping Students Involved" and "High-Level Concept Map Shows the Puzzle and its Pieces."
- November 2020: Virginia Society of CPA's Faculty Roundtable: "Creative Assessment."
- August 2020: CTLA, two presentations: "A Win With Students: Learning by Doing With a Hands-on, Team-based Project Spanning Budgeting, to Production and Performance Measurement," and "Data Analytics: Back to the Basics."
- March 2020: Webinar, Wiley – "Can I Teach Students How to Learn?"
- March 2020: Wiley National Ed Tech Summit for Accounting, New Orleans – "Online Teaching Best Practices."
- Feb 2020: Webinar, Wiley, "Savvy Storytelling Insights in the Accounting Classroom."

- May 2020: Mays' Faculty Learning Community – Electronic poster presentation: “PB&J Project: Hands-On/Sticky Fingers in Accounting.”
- August 2019: AAA, two posters in Effective Teaching Methods poster session: “A Novel Idea,” and “Can I Teach My Students How to Learn?”
- August 2019: CTLA two presentations: “Student Panelists Engage Their Peers With Interviews and Storytelling,” and, “Can I Teach Students How to Learn?” and “
- May 2019: Mays' Faculty Learning Community – Electronic poster presentation: “Can I Get My Students to Use the Systems-Thinking Mindset?”
- November 2018: Teaching, Learning, and Curriculum Colloquium (TLC) section of AAA. TED-type talk – “Can I Teach Students How to Learn?”
- July 2018: 75-minute presentation and workshop to faculty members at Lancashire School of Business and Enterprise, at University of Central Lancashire, Preston, United Kingdom – “A Story on Storytelling.”
- Spring 2018: 10-minute story at TAMU's inaugural Transformational Teaching & Learning Conference. Discussed my insights on storytelling gleaned from participating in the Scholarship of Teaching and Learning group – “Savvy Storytelling.”
- April 2018: Mays' Faculty Learning Community – Electronic poster presentation, “Can I Teach Students How to Learn?”
- May 2017: Mays' Faculty Learning Community – Electronic poster presentation, “Savvy Storytelling.”
- December 2016: Department of Accounting faculty enrichment seminar – “Bringing Mindfulness to the Undergraduate Classroom.”
- April 2016: A Teaching Courageously Workshop sponsored by Mays Academy for Learning and Teaching – “Be Your Own Financial Advocate.”

### **Societal Impact Statement**

A friend and colleague sent me a gift recently. It's a desk sign that says: “Be yourself. Inspire others.”

It took a moment to process; I hadn't *tried* to inspire her. Upon reflection, that's really my mission: Be Myself. Inspire Others. A few standout teachers and professors left indelible marks on me. They caused a shift in my perspective by seeing my talents before I did. They instilled habits that led to self-discipline and excellence: first as a CPA, then as lecturer, and now, as a textbook author for John Wiley & Sons. Some teachers nudged me to take risks. That, with my natural curiosity and empathy for others, reformed my vision of myself. And so, if I can give back by causing a positive shift in students' view of the world or themselves, that's a triumph.

I distill my variety of methods to teach and reach students – whether undergraduate, graduate, or executives – into four principles:

- Prepare them for the future: help students become lifelong learners now.
- Teach students *how* to learn.
- Understand my audience to reach them.
- Make myself approachable, and available for students.