

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

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**QUALIFICATIONS**

Especially recognized for:

- Charismatic public-speaking style.
- Writing and reaching targeted audiences.
- Instructional design.
- Storytelling in teaching.
- Effective learning methods.
- Budgeting, cash flow, financial analysis.

**ACHIEVEMENTS**

**Invited as Subject Matter Expert** for CPA Canada’s Certification 2.0 program to overhaul its national CPA program, 2022-2023.

**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. Throughout calendar 2022, we have achieved adoptions from 70+ schools in the U.S. and Canada.

**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.

**International Public Speaker.** Respected and engaging speaker at 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, and the Canadian Academic Accounting Association, and CPA Canada.

**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.
- Pepped 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 including Baker Hughes, Haliburton, and CenterPoint Energy. Earned outstanding reviews for eliciting and maintaining participants' interest and enthusiasm and for offering relevant content to each audience.

**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, 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:**

- 2023: American Accounting Association's Sustainability, ESG, and Accounting conference, Washington, DC.
- 2023, 2022: Canadian Academic Accounting Association (CAAA) annual meeting, Quebec City, QB, and Saskatoon, SK.
- 2023, 2022, 2021, 2020, 2018: Wiley's National EdTech Summit for Accounting.
- 2023, 2022, 2021, 2020, 2019: Teachers of Accounting at Two-Year Colleges (TACTYC) Portland, OR, Savannah, GA, Zoom, Zoom, Forth Worth TX.
- 2022, 2021, 2020, 2019: American Accounting Association (AAA) Management Accounting Section Meeting annual conference.
- 2022, 2021: Wiley's Wicked Spring Break, presentation: "Alternative Assessment."
- 2023, 2022, 2021, 2020, 2019, 2018: Conference on Teaching and Learning in Accounting (CTLA within the American Accounting Association (AAA))
- 2022, 2021, 2020, 2018, 2017, 2016: Teaching, Learning, and Curriculum Colloquium (TLC) section of AAA, mid-year meeting.
- 2023, 2022, 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:**

- 2023, 2020, 2019, 2018: TAMU's Transformational Teaching & Learning Conference.
- 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: 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:

- 2023 and 2022: Invited as a cost/managerial accounting subject matter expert as part of the working group to create CPA Canada's Certification 2.0 program – an overhaul of its existing CPA certification program. My contributions included two 2-day weekends (approximately 32 hours) of brainstorming and collaboration to develop learning outcomes for the cost/managerial accounting subject area on the Canadian CPA certification program and final exam, and to offer insights on other subject areas – having been a Canadian CPA student.
- 2022: To be used in ACCT 329, ACCT 710, and ACCT 210, as well as any prospective adopter of my text *Cost Accounting: With Integrated Data Analytics*. I created a set of storytelling videos that integrate real-world decision-making with stories from professionals in my network.
  - Mr. Mackenzie Hughes, PGA Champion Golfer – “Mission, Vision, SWOT Analysis, and Winning”
  - Ms. Marquita McCoy, Founder of Earthen Escapes – “Product Mix, Setting Prices, and Being the Target Audience”
  - Ms. Heidi Lowthorp, Equine Consultant – “The Cost of Horsing Around”
  - Ms. Jillian Grant, RN, Medical Process Consultant – “Re-creating a Process”
  - Dr. Amy Fredin, Professor at St. Cloud State University – “Amy’s Big Decision”
  - Ms. Deidre Henne, CFO of McMaster University – “Capital Budgeting: From Needs Assessment Through Execution and Post-Investment Audit.”
- 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:

- August 2023: Management Accounting Section (MAS) of American Accounting Association (AAA) “Getting Ready for Fall Classes,” webinar, panel discussion.
- August 2023: Conference for Teaching and Learning Accounting (CTLA), Section of American Accounting Association (AAA), Denver CO. Two presentations: “Learning: Is There a Purpose?” and “Immersive Learning: A Manufacturing, ESG, and Ethical Decision-Making Simulation.”

- June 2023: Canadian Academic Accounting Association (CAAA) conference, Quebec City, QC. Two presentations: "Covid, Caregivers, and Collaborations: Lessons to Guide Us" and "Learning Your Purpose and Finding Purpose in Learning."
- May 2023: Brandon University, Brandon MB, Canada, via Zoom: "Storytelling as a Teaching Tool." This was a paid speaking engagement.
- May 2023: TAMU's Transformational Teaching and Learning Conference. "Learning Your Purpose and Finding Purpose in Learning."
- May 2023: Teachers of Accounting at Two-Year Colleges (TACTYC), Portland, OR. Three presentations: "Do Students Learn Like We Did?" "Set the Stage for Students to Engage," and "How an Accounting Simulation Helped Increase My Students' Understanding of Sustainability in a Manufacturing Context."
- April 2023: Presenter in American Accounting Association's WeARE webinar series. "Do Students Learn Like We Did? Does it Matter?" This event was well-publicized and well-attended, and we garnered wonderful feedback from attendees.
- October 2022: Teaching, Learning, and Curriculum Colloquium (TLC) Section of American Accounting Association (AAA), San Antonio, TX. Three presentations: "Students Don't Learn Like We Did. Now What?", "Set the Stage for Students to Engage", and "Covid, Caregivers, and Collaborations."
- October 2022, Texas Conference on Student Success, Texas A&M University. Two presentations "Can I Teach Students How to Learn" and "Savvy Storytelling."
- August 2022: AAA, San Diego, CA. Two posters in Effective Teaching Methods poster session: "Learning Your Purpose and Finding Purpose in Learning" and "Use Data Analytics to Help Your Students Become Numerate."
- July 2022: Conference for Teaching and Learning Accounting (CTLA) Section of American Accounting Association (AAA), San Diego, CA. Two presentations: "Excel Workshops" and "Covid, Caregivers, and Collaborations: Lessons to Guide Us."
- June 2022: Canadian Academic Accounting Association (CAAA) conference, Saskatoon, SK. "Rethinking Teaching, Learning and Engagement."
- May 2022: Teachers of Accounting at Two-Year Colleges (TACTYC) conference, Savannah, GA. "Does Your Teaching Bloom?" – a reference to Bloom's Taxonomy.
- March 1, 10, 29 2022: A series of three webinars developed for Wiley on storytelling: "The Value of Storytelling and How to Tell an Effective Story," "Use Your Own Experiences to Tell Good Stories," and "How to Use *Cost Accounting 1e* to Engage Students with Great Stories."
- March 2022: Wiley's Canadian Accounting and Business Workshop via Zoom: "Learning Your Purpose and Finding Your Purpose in Learning."
- January 2022: AAA's Management Accounting Section Meeting, via Zoom: "Keeping it Real: Alternative Assessments in Cost Accounting."
- November 2021: Teaching, Learning, and Curriculum Colloquium (TLC) Section of AAA, via Zoom. Two presentations: "Help Your Students Become Numerate" and "Learning Your Purpose and Finding Your Purpose in Learning."
- July 2021: Conference on Teaching and Learning in Accounting (CTLA) Section of American Accounting Association (AAA), two presentations, via Zoom : "Who Budgeted for This? Alternative Assessment Captures Students' Attention," and "Make Your Teaching Bloom."
- June 2021: Guest Speaker, via Zoom: Virginia Society of CPAs "Alternative Assessment."
- May 2021: Teachers of Accounting at Two-Year Colleges (TACTYC) via Zoom: one presentation: "Reach Them to Teach Them."
- March 2021: Wiley's Wicked Spring Break, presentation, via Zoom: "Alternative Assessment."
- February 2021: Wiley's Community College Workshop, via Zoom: "Creative Assessment."
- January 2021: American Accounting Association's Management Accounting Section Meeting, via Zoom: Coffee Break sponsored by Wiley "Storytelling in Accounting."
- November 2020: Teaching, Learning, and Curriculum Colloquium (TLC) section of AAA, via Zoom: 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, via Zoom: "Creative Assessment."
- August 2020: Conference on Teaching and Learning in Accounting, (CTLA) Section of American Accounting Association (AAA) two presentations, via Zoom: "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, LA: "Online Teaching Best Practices."
- Feb 2020: Webinar, Wiley, "Savvy Storytelling Insights in the Accounting Classroom."
- May 2020: Mays' Faculty Learning Community – E-poster presentation: "PB&J Project: Hands-On/Sticky Fingers in Accounting."
- August 2019: American Accounting Association annual meeting, San Francisco, CA. Two posters in Effective Teaching Methods poster session: "A Novel Idea," and "Can I Teach My Students How to Learn?"
- August 2019: Conference on Teaching and Learning in Accounting (CTLA) Section of American Accounting Association (AAA), San Francisco, CA. Two presentations: "Student Panelists Engage Their Peers With Interviews and Storytelling," and, "Can I Teach Students How to Learn?"
- May 2019: Mays' Faculty Learning Community – E-poster presentation: "Can I Get My Students to Use the Systems-Thinking Mindset?"
- November 2018: Teaching, Learning, and Curriculum Colloquium (TLC) section of American Accounting Association, Dallas, TX. 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, E-poster presentation: "Can I Teach Students How to Learn?"
- May 2017: Mays' Faculty Learning Community, E-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 professor, and now, as a textbook author for John Wiley & Sons. Some teachers nudged me to take risks. That, coupled 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.