

# Jon S. Davis

## Curriculum Vitae

### Contact

1119 W. Daniel St.  
Champaign, IL 61821  
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### Education

Ph.D. in Business Administration  
Major in Accountancy; Minor in Experimental Economics/Org. Behavior  
Dissertation: *Auditor Lomballing and Independence: Experimental Evidence*  
University of Arizona, Tucson, Arizona

Master of Accounting - Taxation  
University of Arizona, Tucson, Arizona

Bachelor of Science in Business Administration  
University of Arizona, Tucson, Arizona

### Academic Employment

#### University of Illinois System (2017 to present)

Interim Director, Institute of Government & Public Affairs (2017 to present)

The Institute of Government & Public Affairs (IGPA) serves the University of Illinois System by supporting evidence-based policy research across the System's three campuses (Champaign-Urbana, Chicago, and Springfield) and by serving as a communication channel for the university to bring this research to state and national policy debates. IGPA communicates regularly with legislators, executive branch policymakers, media channels, and the public.

#### University of Illinois at Urbana–Champaign (2012 to present)

R. C. Evans Endowed Chair in Business (2012 to present)  
Professor of Accountancy (2012 to present)  
Head, Department of Accountancy (2012 to 2017)

Department Profile during my tenure as head:

- ~1500 students; 54 full-time faculty, 25 adjunct faculty, 18 staff. More than 900 degrees conferred each year.
- Programs (BS, MAS, MSA, MSTax, online MSA, Ph.D.) consistently ranked in top 3 by *Business Week*, *Forbes*, *US News and World Report*, *Public Accounting Report*, *Tax Talent*, and others.
- Ranked #1 in research by *BYU Accounting Net*.
- Mission: to lead the world in accounting education and thought.
- In Champaign-Urbana: BBA, Masters of Accounting Science, Master of Science in Accountancy, PhD. In Chicago: Executive Masters of Taxation.
- Bi-Annual Auditing Symposium, Bi-Annual Tax Symposium, Bi-Annual Young Scholars Financial Reporting Symposium, Bi-Annual Young Scholars Managerial Accounting Symposium, Annual International

Accounting Symposium, *The International Journal of Accounting*, Zimmerman Center for International Education and Research in Accountancy, Deloitte Foundation Center for Business Analytics, formal relationships with universities in Taiwan, China, Italy, Singapore, Korea, Brazil and select liberal arts colleges in the United States.

**University of Wisconsin–Madison**

Chairman, Department of Accounting (2006 to 2012)

Professor of Accounting (2004 to 2012)

Arthur Andersen Professor of Accounting (2005 to 2012)

Associate Professor of Accounting (2001 to 2004)

Visiting Associate Professor of Accounting (2000 to 2001)

Department Profile during my tenure as Chair:

- ~550 students, 17 full-time faculty, 1 adjunct faculty, 2 staff.
- Programs ranked in top 20 by *US News and World Report* and #1 for small programs (< 20 faculty) by *Public Accounting Report*.
- Mission: To provide a leadership role in accounting scholarship nationally and to provide meaningful learning experiences to students.
- Consistently ranked in top 5 for CPA Exam pass rates.
- BBA, Masters of Accounting, Ph.D.
- Arthur Andersen Center for Financial Reporting, Robert Beyer Center for Managerial Accounting and Control.

**University of Illinois at Urbana–Champaign**

Associate Professor of Accountancy (1994 to 2001)

**University of Colorado–Boulder**

Associate Professor of Accounting (1992 to 1994)

Assistant Professor of Accounting (1990 to 1992)

**University of Illinois at Urbana–Champaign**

Assistant Professor of Accountancy (1987 to 1990)

## I. Administrative Activities

**Interim Director, Institute of Government & Public Affairs**

University of Illinois System, August 2017 to present.

As interim director, my role is to complete and implement a plan for changing IGPA so that it can more effectively meet its mission and the strategic vision for the University of Illinois System. I report to the Executive Vice President and work with the Provosts of the three universities in the Illinois System. Over the past year, we have fundamentally restructured IGPA after collecting input from faculty committees on the best path. This summer, we will be hosting a retreat involving the leadership of the System, the three Universities and selected policy-oriented faculty to develop a strategy for the future.

**Head, Department of Accountancy**

University of Illinois at Urbana-Champaign

College of Business, April 2012 to August 2017.

As Department Head for Accountancy, I was responsible for the overall operation of the Department, including strategy, programs (both degree and non-degree), human resources, finances, advancement, marketing, and alumni relations. The position is a full-time administrative role because of the size of the unit. The executive director of administration, accountancy program directors, the director of communications in accountancy, the director of the Zimmerman Center, assistant department head and associate department head reported to me. I also served as the liaison between the Department of Accountancy faculty and the Office of the Dean. Below is a description of the progress made by the department under my leadership.

*Strategy*

- Updated the department's strategic plan, with a new set of priorities and metrics.
- Developed metrics for the department to measure impact on research, the profession, the academy (including other countries), students and alumni, the curriculum at other universities, and policy.
- Developed new relationships with universities in China, Brazil, Italy and the United States.
- Renewed existing relationships with universities in Taiwan, Singapore, China and Korea.

*Programs*

- Revised learning objectives for all programs and developed new metrics for assessing learning outcomes.
- Implemented a curriculum review process incorporating a series of annual two-day retreats, involving a group of alumni ranging from new graduates to C-suite executives of Fortune 500 companies.
- In response to CPA examination performance data and recommendations from the curriculum review, implemented a variety of changes to the undergraduate major, including improved coordination on coverage across the curriculum, increased consistency of content delivered, addition of a course in advanced financial reporting and modifications to the auditing course. CPA exam pass rates increased from 65% to 73% overall.
- Restructured the Masters of Accountancy Science program in response to recommendations from the curriculum review, with new tracks in auditing and tax and a default three-course specialization in data analytics and machine learning.
- Established a dual degree program in Accountancy with the School of Information Science.
- Introduced a career lyceum series for sophomores and first-semester juniors.
- Restructured the principles of accounting courses in the business core to provide a greater emphasis on accounting fundamentals in response to feedback from upper division course faculty.

- Moved the CPA Review course online.
- Began development of a new online Master of Science in Accountancy degree in partnership with Coursera.
- Improved consistency in grading in the Department through adoption of a grading policy.
- Began a targeted effort to recruit more domestic students in the Masters of Science in Accountancy program, in response to lack of enrollment diversity (increasing domestic enrollment from zero to approximately 15 percent).
- Implemented a framework to increase extracurricular interaction between the Department's international student population and domestic student population to promote a culture of inclusiveness.
- Redesigned the Executive MSTax Program curriculum in response to changes recommended by the program advisory board.
- Revised PhD program admission policy to manage program size and faculty workload in response to recommendations made by AACSB Continuous Improvement Review and Provost's program review.

*Faculty and Staff*

- Revised recruitment process to reduce load on faculty and create a more intimate experience for recruits.
- Secured private funding for and added two new bi-annual research symposia (in financial reporting and managerial accounting) to the department's current repertoire.
- Reduced tenure-track faculty teaching from 12 credit hours to 9 credit hours to increase our competitiveness in the labor market and gain consistency with teaching loads in other College of Business units. The change also improved facilities utilization.
- Added prospective personal development planning and formal mentoring to non-tenure track faculty performance reviews.
- Added an informal OKR system for junior faculty to provide additional career guidance and mentoring.
- Hired 19 tenure-track faculty and 16 non-tenure track faculty (including one tenured associate and a tenured full professor) in a difficult Accountancy labor market.

*Finances, Advancement and Stewardship*

- Changed assistantship assignment policies to enhance utilization efficiency and reduce costs.
- Worked with Department Advisory Board Committee on Advancement to plan a development campaign for the department (departmental endowment increased from \$14.5 million to more than \$20 million).
- Led a successful University Advancement effort to develop and deliver a proposal for a \$7.5 million gift to fund a Deloitte/College of Business Global Center for Business Analytics Education.
- Received a \$500,000 individual gift for Accountancy Ph.D. program excellence.
- Worked with Arthur Andersen and College Communications to obtain a gift of firm artifacts to a new Accountancy museum in the College.

- Regularly met with various alumni, public accounting firms, and donors to update them on progress made by the department.

*Marketing*

- Worked with the Department Advisory Board members, College Communications, and a group of students to develop an inventory of current marketing resources and to evaluate social media and web utilization, with the goal of identifying opportunities for enhancing or extending content and channels to meet constituency needs.
- Worked with College of Business Communications and Office for Information Management on website redesign, with a focus on improving content, aesthetics and navigation.
- Established new partnership with a creative agency to support department marketing efforts, including production of promotional videos and other marketing materials, website review, search engine optimization, etc.

*Alumni and External Relations*

- Established a working advisory board for the department, consisting of alumni and public accounting firm representatives.
- Held numerous alumni receptions at public accounting firms in Chicago to provide updates on department progress.
- Hired a team of advertising, marketing and communications students to work with Advisory Board Committee on Marketing, Branding and Social Media and college staff, with objective of developing content for social media channels.
- Started a *LinkedIn* group for Department of Accountancy alumni, now with over 2500 members.
- Started a private *LinkedIn* group for University of Illinois alumni serving as CFOs.

*General Administration*

- Performed review of compliance with standards and developed requisite documentation for AACSB continuous improvement review, with an outcome of reaccreditation.
- Introduced group collaboration software and group work process software for faculty and staff use, with the goals of enhancing faculty and staff productivity and automation of ongoing accreditation documentation.

**Chairman, Accounting Accreditation Committee**

Association for the Advancement of Collegiate Schools of Business (AACSB), 2010 to 2014.

The AACSB advances quality management education worldwide through accreditation, thought leadership and value-added services. The accreditation standards provide colleges of business with a set of best management practices. Accredited colleges can, at their option, choose to separately accredit programs of accounting. When accounting is separately accredited, the Accounting Accreditation Committee oversees initial accreditation and continuous improvement review processes to ensure consistency of standards application and equity of recommendations across teams and across programs reviewed.

Reviews are consultative in nature and focus both on deficiencies relative to standards and on identifying opportunities to improve unit outcomes relative to mission. The committee is composed of approximately 15 members, including a Chair and a Vice-Chair. Committee members are either accounting department executive officers or deans. As Chair of the committee, I was responsible for the following:

- Presiding at all committee meetings (three annually).
- Oversight of all aspects of committee operations (with support from AACSB staff), including, but not limited to:
  - Review of continuous improvement reports and initial accreditation reports prepared by mentors and peer review teams and associated documentation provided by accounting programs describing their strategic management processes and standards compliance (from over 150 universities worldwide).
  - Meeting with peer review teams to discuss remand decisions made by the committee.
  - Review of correspondence to universities prepared by AACSB staff communicating decisions of the committee and related actions to be taken.
- Participation in comprehensive revision of accreditation standards that were adopted by member universities in 2013.
- Participation in development of interpretive guidelines and white papers related to accreditation standards.
- Service on the Committee on Accreditation Policy (previously, the Accreditation Coordinating Committee).

The Committee on Accreditation Policy is charged with (a) oversight regarding policy related to accreditation and quality assurance services, (b) recommending changes in the accreditation standards related to accreditation and quality assurance services, (c) coordinating the work of the operating committees, (d) engaging thought leaders from the Committee on Issues in Management Education and Business Practices Advisory Council in advancing accreditation, (d) authorizing improvements to the processes and procedures supporting accreditation activities, and (d) oversight of the review of satisfaction of eligibility criteria by institutions in the application, initial accreditation, and continuous improvement review phases of the accreditation process, as well as determining the scope of the institution's accreditation review.

**Chair, Department of Accounting**

University of Wisconsin–Madison

College of Business

(2005 to 2012)

As department chairman at Wisconsin, I was responsible for the day-to-day operations of the department including management of the department's budget, faculty loads, and course scheduling. I led the department's strategy and implemented decisions made by the department faculty regarding programs and staffing. I was responsible for external communications, alumni relations, and department advancement. I also served as the official channel of communication between the department faculty and the Dean. The department

administrative assistant reported to me. A summary of my activities and department accomplishments under my leadership follows.

*Strategy*

- Implemented a policy of annual strategic planning meetings, including a review of annual progress on strategic performance metrics and annual update of strategic priorities.
- Increased program enrollment was the department's top strategic priority. During my tenure as chairman, we increased the number of graduates in accounting from 130 to over 200 annually.

*Programs*

- Moved from being on one Big 4 firm's priority recruiting list to three of the Big 4's lists (as a result of increased program size).
- Performed a comprehensive curriculum review with select department faculty, department advisory board members and students and provided a list of suggested curriculum reforms to the faculty curriculum committee for consideration.
- Worked to address the department's strategic priority of increasing the diversity of enrollments in the accounting program, including:
  - Facilitated accounting faculty participation in the PEOPLE program, which targeted under-represented minority high school students interested in business.
  - Facilitated the involvement of accounting master's degree students in the KPMG sophomore diversity initiative.
  - Increased the amount of program marketing and press in publications targeting underrepresented minority students interested in business careers (e.g., Winds of Change magazine, which targets Native Americans).
  - Worked with advising staff in the College of Liberal Arts and Sciences to increase awareness among underrepresented minority registered student organizations about opportunities in the Accounting Department.

*Alumni Relations, Advancement and Stewardship*

- Designed and implemented a development campaign with help from the department advisory board, which generated over \$5 million in gifts to the department.
- Worked with the Dean or represented the Dean at various alumni and development events around the United States.
- Started a bi-annual newsletter that was sent to alumni.
- Held annual webcasts with alumni at public accounting firms to provide updates on the Department's progress and to make annual campaign appeals.

*Faculty and Staff*

- Served as the primary advocate on behalf of the department faculty committee for promotion cases.
- Worked with the faculty evaluation committee each year to make recommendations to the Dean regarding faculty compensation and summer support.

*General Administration*

- Developed annual departmental budgets for faculty staffing and operations for the Dean.
- Performed review of compliance with standards and developed requisite documentation for AACSB continuous improvement review, with an outcome of reaccreditation.

**II. Research Activities****Research Interests**

Compliance in regulatory environments, especially with respect to taxation and in organizations, agent-based modeling, psychology of judgment and decision-making, nonlinear dynamics.

**Publications****Journal Articles**

Davis, J., and H. Pesch. 2013. Fraud Dynamics and Controls in Organizations. *Accounting, Organizations and Society* 38: 469–483.

Davis, J. 2011. Insights from Audit Analogs. *Accounting, Organizations and Society* 36: 313–317.

Davis, J., G. Hecht and J. Perkins. 2003. Social Behaviors, Enforcement, and Tax Compliance Dynamics. *The Accounting Review* (January): 39–69.

Davis, J., and D. Mason. 2003. Similarity and Precedent in Tax Authority Judgment. *Journal of the American Taxation Association*, (Spring): 53–71.

Beck, P., J. Davis and W. Jung. 2000. Taxpayer Disclosure and the Enforcement of Tax Laws. *Journal of Public Economic Theory* (April): 243–272.

Gaylord, R., and J. Davis. 1999. Modeling Nonspatial Socioeconomic Interactions: An Agent-Based Approach. *Mathematica in Education and Research* 8 (No. 2, Spring): 30–33.

Beck, P., J. Davis and W. Jung. 1996. Tax Practitioners and Reporting Under Uncertainty: Theory and Experimental Evidence. *Contemporary Accounting Research*: 49–80.

Davis, J., H. Quirmbach and C. Swenson. 1995. Income Tax Subsidies and Research and Development Spending in a Competitive Economy: An Experimental Study. *Journal of the American Taxation Association* (Supplement): 1–25.

Davis, J. 1995. A Perspective on Behavioral Research. *Journal of the American Taxation Association* (Supplement): 114–122.

Davis, J., and C. Swenson. 1993. Income Tax Accounting Incentives and the Demand for Depreciable Investments: Experimental Evidence. *The Accounting Review* (July 1993): 482–514.

Bonner, S., J. Davis and B. Jackson. 1992. Expertise in Corporate Tax Planning:

The Issue Identification Stage. *Journal of Accounting Research* (Supplement): 1–28.

Beck, P., J. Davis and W. Jung. 1992. Taxpayer Aggression and Tax Complexity under Strategic and Non-Strategic Audits: Experimental Evidence. *Contemporary Accounting Research* (Fall): 86–112.

Beck, P., J. Davis and W. Jung. 1991. Experimental Evidence on Taxpayer Reporting Under Uncertainty. *The Accounting Review* (July): 535–558.

Davis, J., and I. Solomon. 1989. Experience, Expertise, and Expert Performance Research in Public Accounting. *Journal of Accounting Literature*: 150–165.

Davis, J., and C. Swenson. 1988. The Role of Experimental Economics in Tax Policy Research. *Journal of the American Taxation Association* (Fall): 40–59.

### **Books, Monographs, Reports and Pamphlets**

PwC (with J. Davis and J. Williams). 2015. *Data Driven: How Students Can Succeed in the New Business World*. PwC Insights White Paper, New York, NY.

Davis, J., and W. Shaw. 1998. *West's Federal Taxation: Advanced Taxation, 1999 Edition*. Cincinnati, OH: South-Western College Publishing.

Davis, J., and E. Willis. 1998. *West's Federal Taxation: An Introduction to Business Entities, 1999 Edition*. Cincinnati, OH: South-Western College Publishing.

Davis, J. (with ChipSoft, Inc.). 1996. *West's Federal Taxation: Tax Return Preparation with MacInTax*. Minneapolis, MN: West Publishing, Inc.

Davis, J. (Ed). 1995. *Behavioral Tax Research: Prospects and Judgment Calls*. Sarasota, FL: American Taxation Association.

Davis, J. (with ChipSoft, Inc.). 1994. *West's Federal Taxation: Corporate and Partnership Tax Return Preparation with TurboTax*. Minneapolis, MN: West Publishing, Inc.

### **Parts of Books (Chapters)**

Davis, J. 2012. Corporations: Earnings & Profits and Dividend Distributions, Chapter 5 in *West's Federal Taxation: Corporations, Partnerships, Estates and Trusts, 2013 Edition*. Cincinnati, OH: South-Western College Publishing.

Bonner, S., J. Davis and B. Jackson. 1991. Frontiers in Experimental Tax Research: Experimental Economics and Tax Professional Judgment, in C. R. Enis (Ed.), *A Guide to Tax Research Methodologies*. Sarasota, FL: American Taxation Association: 42–91.

Davis, J., and S. M. Young. 1989. Factories of the Past and of the Future: The Impact of Robotics on Workers and Management Accounting Systems, in D. Cooper and T. Hopper (Eds.), *Critical Accounts*. London, UK: MacMillan and Co.: 87–106.

**Work in Progress**

Davis, J. Moderating the impact of multitasking on performance in public accounting tasks. Planning stage.

Davis, J., P. Murphy and H. Pesch. Approaches to amnesty programs and their impact on organizational norms and fraud. Data collection stage.

Andre, S., J. Davis and H. Pesch. Justification, context and accountability in tax professional judgment. Under revision.

**Presentations**

AACSB Accreditation Seminar (with Robert Reid), San Antonio TX (February 2018).

AACSB Accreditation Seminar (with Jan Williams), Phoenix AZ (February 2017).

How to Make Sure That Departments Have Enough Resources (Panel), 2017 APLG/FSA Annual Seminar, Phoenix AZ (February 2017).

VIII Fórum Nacional de Professores de Ciências Contábeis e XI Encontro Nacional de Coordenadores do Curso de Ciências Contábeis, 20th Congresso Brasileiro de Contabilidade, Fortaleza, Brazil (September 2016).

Accounting IS Big Data: Model Cases, Courses and Curricula. American Accounting Association Annual Meeting, New York (August 2016).

Approaches to Dealing with AACSB Standard A7. American Accounting Association Annual Meeting, New York (August 2016).

New Heads and Chairs Preconference Workshop Panel on Strategic Planning, American Accounting Association Annual Meeting, New York (August 2016)

Innovative Approaches to the Development of Auditor Talent (Panel), with Tim Ryan (PwC), Lynne Doughtie (KPMG), Cathy Engelbert (Deloitte), Carolyn Slaski (EY), and Chris Hogan (Michigan State University), Center for Audit Quality Symposium, New York, NY (August 2016).

An Accounting Singularity: Navigating the Changing Course of Accounting Education. Congresso IX, Associação Nacional de Programas de Pós-Graduação em Ciências Contábeis, Rio de Janeiro, Brazil (August 2014).

AACSB Update: Experience with the New 2013 Accreditation Standards. American Accounting Association Annual Meeting, Atlanta, Georgia (August 2014).

Data Driven: How Students Can Succeed in the New Business World. American Accounting Association Annual Meeting (August 2014).

Analytics, The Accounting Curriculum, and the Practitioner of the Future. PwC Faculty Symposium, Atlanta, Georgia (August 2014).

The Future of Accounting Education and Research. The *International Journal of Accounting* Conference (July 2014).

Tax Compliance and Transparency. Congrès Européen Éthique et Gouvernance, OECD, Paris France (March 2014).

The Illinois Project Discovery Curriculum. Faculdade de Economia, Administração e Contabilidade, University of São Paulo, Brazil (February 2014).

A Brief History of Corporate Tax Transparency in the United States. Conference on Taxation, Transparency, Democracy and Development, Center for Fiscal Studies, Fundação Getúlio Vargas, São Paulo, Brazil (October 2013).

Successful Strategies for Accounting Accreditation: Value, Strategies for Success, and New Standards. AACSB Annual Accreditation Conference, St. Louis, MO (September 2013).

An Update on Pathways Commission Implementation Progress. American Accounting Association Annual Meetings, Anaheim, CA (August 2013).

How External Agencies Drive Scientists and Researchers to Think About Ethics. Third Annual Conference on Ethics in the Curriculum: Connecting Silos. Champaign, IL (May 2013).

Successful Strategies for Accounting Accreditation: An Overview of the New Standards and Value of Accounting Accreditation Initiatives. AACSB International Conference and Annual Meeting, Chicago IL (April 2013).

A Look at the Proposed AACSB Accreditation Standards for Accounting. APLG/FSA Annual Seminar, San Diego, CA (February 2013).

Forces Reshaping Accounting Education—A Discussion of the Pathways Commission Report. APLG/FSA Annual Seminar, San Diego, CA (February 2013).

An Introduction to Agent-Based Modeling. Xiamen University, Xiamen, China, (October 2012).

Exploring the United States Federal Budget. Faculdade de Economia, Administração e Contabilidade, University of São Paulo, Brazil (September 2012).

AACSB Accounting Accreditation Update. American Accounting Association Annual Meeting, Washington DC (August 2012).

Accreditation Strategies. AACSB Dean's Conference, New Orleans, LA (February 2012).

AACSB Accounting Accreditation. AACSB Annual Accreditation Conference, Philadelphia, PA (September 2011).

An Open Discussion on Business Accreditation (Plenary Session), AACSB Annual Accreditation Conference, Philadelphia, PA (September 2011).

Accounting Education on the Move: An AACSB Update. American Accounting Association Annual Meeting (August 2011).

An Open Discussion on Business Accreditation (Plenary Session). AACSB International Conference and Annual Meeting (April 2011).

On Finding a Research Topic and Funding. AICPA Accounting Doctoral Scholars Consortium, Chicago, IL (September 2010).

Invited Keynote Address. Advanced Fraud Research Conference, Queens University, Kingston, Ontario (September 2009).

Fraud Dynamics and Controls in Organizations. Florida International University (January 2010).

The Justification Gap: Exploring the Interactive Effects of Context and Accountability in Accounting Decisions. Emory University Accounting Workshop (April 2006); Texas A&M Accounting Workshop (September 2006); University of Waterloo (December 2007); University of Arizona (October 2008).

Agent-Based Modeling in Accounting Research. American Accounting Association/Michael Cooke Doctoral Consortium, Lake Tahoe, CA (July 2007).

Behavioral Tax Research: Prospects and the Past. 2005 American Taxation Association Doctoral Consortium (February 2005).

The Impact of Technology on Education. Deloitte and Touche Enhancing the Learning Experience Seminar, Colorado Springs (July 2001).

Social Behaviors, Enforcement and Compliance Dynamics. University of Wisconsin-Madison Accounting Workshop (March 2000); American Accounting Association Annual Meetings (August 2000); National Tax Association Annual Meetings (November 2001).

Tax Policy, Social Networks and Agent-Based Modeling. American Sociological Association Annual Meetings (August 1999).

Future Frontiers for Tax Research: A Triangulation Approach. American Taxation Association Mid-Year Meeting (February 1999).

The Role of Similarity in Tax Authority Judgments: Theory and Experimental Evidence. Notre Dame Accounting Workshop (November 1994); University of Wisconsin at Madison Accounting Workshop (November 1994); Université Laval Accounting Workshop (February 1995); American Accounting Association Annual Meeting (August 1995); Michigan State University Accounting Workshop (November 1995); Virginia Tech Accounting Workshop (February 1996); Boston College (December 1996); University of Memphis Accounting Workshop (March 1997).

Judgment Calls in Behavioral Tax Research. American Accounting Association Annual Meeting (August 1994).

Research Methods in Tax. American Taxation Association Midyear Meeting (February 1994).

Experimental Economics and Behavioral Research in Accounting: Interactions and Differences. Big 10 Accounting Doctoral Consortium, Ohio State University (May 1993).

Tax Practitioners and Reporting Under Uncertainty: Theory and Experimental Evidence. Third Annual Conference on Financial Economics and Accounting, New York University (November 1992); University of Arizona Accounting Workshop (February 1993); University of Colorado Accounting Workshop (April 1993); University of Illinois at Urbana-Champaign Accounting Workshop (September 1993).

Tax Professional Expertise and Corporate Tax Issue Identification. Arizona State University Accounting Workshop (February 1991); University of Illinois/Arthur Andersen Biannual Tax Research Symposium (September 1991); Indiana University Accounting Workshop (October 1991).

New Frontiers in Tax Research. American Taxation Association Mid-Year Meetings, Albuquerque, NM (February 1991).

The Role of Tax Practitioners in Taxpayer Reporting: A Signaling Game. McMaster University Centre for Accounting Research and Department of Economics Joint Conference on Monitoring the Performance of Economic Entities, Hamilton Ontario (April 1990).

Uncertainty and Taxpayer Aggressiveness: Experimental Evidence. American Accounting Association Annual Meetings, Honolulu, HI (August 1989); University of Michigan Accounting Workshop, Ann Arbor, MI (November 1989); Texas Tech University Accounting Workshop, Lubbock TX (November 1989).

The Economic Determinants of Taxpayer Aggressiveness. University of Southern California Fourth Annual Tax Research Symposium, Newport Beach, CA (January 1989); Joint Meetings of the Public Choice Society and Economic Science Association, Orlando, FL (March 1989); Southern Illinois University Accounting Workshop, Carbondale, IL (April 1989).

Experimental Economics and Accounting Research. Second Annual Ray Dein Accounting Colloquium, University of Nebraska, Lincoln (September 1988).

Auditor Bidding and Independence: A Laboratory Markets Investigation. Joint Meetings of the Public Choice Society and Economic Science Association, San Francisco (March 1988).

The Role of Experimental Economics in Tax Policy Research. University of Southern California Third Annual Tax Research Symposium, Los Angeles (January 1988).

An Introduction to Laboratory Markets. American Taxation Association Annual Meetings, Cincinnati, OH (August 1987).

The Application of Laboratory Market Methods to Auditing. American Accounting Association Continuing Education in Research Program, Cincinnati, OH (August 1987).

Factories of the Past and of the Future: The Impact of Robotics on Management Control. Critical Accounts Conference, University of Manchester Institute of Science and Technology, Manchester, UK (June 1985).

**Media Coverage**

*Financial Times, Fast Company, National Public Radio, Wisconsin State Journal, WKOW 27 (ABC News), Illinois Public Radio, Racine Times-Journal, Champaign News Gazette*

**Awards and Grants**

**Awards**

Executive MS Tax Outstanding Professor Award, University of Illinois, 2016  
Robert A. Jered Distinguished Service Award, School of Business, University of Wisconsin–Madison, 2010.  
Outstanding Reviewer of the Year Award, *Journal of Information Systems*, 2003.

**Grants**

Fundação Instituto de Pesquisas Contábeis, Atuariais e Financeiras, 2013–2018, \$97,500.  
AICPA Center for Audit Quality Research, 2010, \$22,000.  
Center for International Education and Research in Accounting, 1999, \$7,000.  
Illinois Critical Research Initiatives, 1997, \$10,000.  
KPMG Tax Research Opportunities, 1994, \$24,000.  
KPMG Tax Research Opportunities (with S. Bonner and B. Jackson), 1991, \$39,500.  
KPMG Tax Research Opportunities (with W. Jung and P. Beck), 1991, \$30,000.  
Deloitte and Touche Summer Research Fellow, 1990, \$10,000.  
KPMG Tax Research Opportunities (with W. Jung and P. Beck), 1989, \$39,000.  
KPMG Tax Research Opportunities (with C. Swenson), 1989, \$39,500.

**III: Teaching**

**Courses Taught**

**Undergraduate**

Introduction to Financial Reporting  
Introduction to Management Accounting  
Individual Income Tax  
Accounting for Decision Making (similar to Intermediate Cost Accounting)  
Taxation of Business Entities  
Advanced Federal Income Tax  
Auditing

**Graduate**

Taxes and Business Strategy  
Corporate Taxation  
Tax Planning  
Selected Tax Topics  
Federal Tax Policy  
Tax Research and Administration  
Advanced Auditing Research Doctoral Seminar

Behavioral Accounting Research Doctoral Seminar  
Partnership Taxation

**Law School**  
Partnership Taxation

**Mean Teaching  
Rating**

University of Illinois: 4.6/5.0 (Instructor); 4.5/5.0 (Course)  
University of Wisconsin–Madison: 4.7/5.0 (Instructor); 4.3/5.0 (Course)  
University of Colorado–Boulder: 3.6/4.0 (Instructor); 3.4/4.0 (Course)

Most recent course taught: Taxes and Business Strategy in Executive MS Tax program - Spring, 2016, 4.9/5.0 (Instructor); 4.8/5.0 (Course)

**Dissertation  
Committees**

Dissertation Committees Chaired: 4  
Dissertation Committee Reading Member: 10

Placements: University of South Carolina, Queens University, University of Wisconsin, Northern Illinois University, University of Georgia, Emory University, UCLA, University of Virginia, University of Wyoming, Iowa State University, University of Missouri–Columbia.

## **IV: Professional Service Activities**

Illinois Public Radio Citizens Advisory Board, 2017 to present.  
Board of Directors, Illinois CPA Society, 2015 to present.  
Board of Directors, Federated Schools of Accountancy, 2016 to present.  
AICPA Center for Audit Quality Academic Advisory Group, 2016 to present.  
Commissioner, Pathways Commission, 2012–2013.  
PwC Tax Faculty Symposium Organizing Committee, 2007–2017.  
Deloitte Bi-Annual Tax Symposium Organizing Committee, 2007–2008.  
AICPA National Tax Education Steering Committee, 2002–2008.

**Association for the Advancement of Collegiate Schools of Business**  
Accounting Accreditation Committee, Vice-Chair, 2008–2009; Chairman, 2010–2014.  
Committee on Accreditation Policy, 2013–2014.  
Accreditation Coordinating Committee, 2009–2013.  
Accounting Standards Working Group, 2012–2013.  
-Charged with drafting the 2013 accounting standards.

**American Taxation Association**

Vice President, 2011–2012.  
Finance Committee, 2012–2013.  
Strategic Planning Committee, 2011–2013.  
Annual Meeting Committee, 2012–13.  
Midyear Meeting Committee, 1991–1992, 2002–2003, 2006–2007, 2012–13.  
Assessment and Accreditation Issues Committee, 2009–2011.  
Finance Committee, 2009–2010.  
Doctoral Consortium Committee, 2004–2005.  
Education Research Committee, 2004–2005.  
Legal and Education Journal Committee, 2000–2001.

Publications Committee, 2000–2002.  
Outstanding Manuscript Award Committee, 1999–2001.  
*Journal of the American Taxation Association* Conference Committee, 2001.  
Chairman, New Faculty Concerns Committee, 1997–1998.

Research Resources and Methodologies Committee (Chairman, 1993–1995), 1989–1990,  
1992–1995.

**American Accounting Association**

AAA/Deloitte/J. Michael Cook Doctoral Consortium Speaker, 2007.  
APLG Doctoral Program Committee, 2006–2007.  
Nominations Committee, 2002–2003.  
Council Member At Large, 2002–2003.  
Journal Vitality Task Force, 2000–2001.  
Notable Contributions to the Literature Committee, 1996–1998.  
Human Subjects in Research Committee, 1995–1996.  
Program Advisory Committee, 1992–1993.

**Editorial Boards**

Associate Editor, *Economic Bulletins*, 2000–2008.  
Associate Editor, *Mathematica in Education and Research*, 1999–2001.  
Editorial Board Member, *Accounting Horizons*, 2003–2006.  
Editorial Board Member, *Journal of Information Systems*, 2001–2006.  
Editorial Board Member, *Advances in Taxation*, 1993–1995.  
Editorial Board Member, *The Accounting Review*, 1992–1994.  
Editorial Board Member, *Journal of the American Taxation Association*, 1989–1992.

**Other Review Service**

**AACSB Continuous Improvement Reviews**

Hong Kong University of Science and Technology, 2019 (forthcoming).  
Texas A&M University, 2018.  
University of Indiana – Bloomington, 2017.  
National Chengchi University, Taiwan, 2016.  
University of Houston, 2016.  
University of Hong Kong, 2015.  
University of Southern California, 2014.  
Texas A&M University, 2013.  
University of Washington, 2010.  
Arizona State University, 2009.

**V: University Service Activities**

**University**

**University of Illinois System** (2017 to present).  
Council on Government and External Relations, 2017 to present.

**University of Wisconsin–Madison** (2000 to 2011).

Advisory Board, Center for Financial Security, 2006–2007.  
Graduate College Social Studies Division Doctoral Fellowships Committee  
(Chairman, 2005–2006), 2003–2006.

**University of Illinois at Urbana–Champaign** (1994 to 2000)  
University of Illinois Faculty Senate, 1997–1999, including Admissions Committee and University External Affairs Committee.

**College** **University of Illinois at Urbana–Champaign** (2012 to Present)  
Online/Coursera MBA Planning Committee, 2014–2015.

Illinois Center for Professional Responsibility in Business and Society Advisory Board, 2012–2017.  
Faculty Associate, Illinois Center for Business and Public Policy, 2012–2017.

**University of Wisconsin–Madison** (2000 to 2011)  
School of Business Subcommittee of the Executive Committee (Chairman, 2008–2009), 2005–2006, 2008–2011.

This is a committee of six full professors elected by the School of Business faculty. The committee is responsible for evaluating School-wide promotion and tenure decisions (including new appointments), faculty grievances, faculty salary and equity reviews, mandatory periodic faculty performance review, and advising the Dean on a variety of issues of concern to the faculty, including college strategy. It plays a central role in the shared governance model in the School of Business.

Academic Planning Council, 2002–2003, 2005–2006, 2008–2011.

This is a committee of elected tenured faculty. It is responsible for advising the Dean on matters concerning allocation of college resources, including program review, staffing, future development or contraction of academic programs in the School and other matters related to resource allocation.

Awards Committee, 2007–2011.

Equity and Diversity Committee, 2007–2010.

Computing and Information Technology Committee, 2007–2010.

Undergraduate Curriculum Committee, 2007–2009.

School of Business Admission Appeals Committee, 2006–2009.

Chairman, Professorship Review Committee (Mark Covaleski, Accounting), 2009.

Building Space Allocation Committee, 2004–2008.

Masters Degrees Curriculum Committee, 2007–2008.

Professorship Review Committee (Neeraj Arora, Marketing), 2008.

Chairman, Professorship Review Committee (Larry Rittenberg, Accounting), 2008.

School of Business Accreditation Committee, 2006–2007.

Scholarship Administration Study Group, 2005–2006.

Ernst & Young Professorship Review Committee, 2006.

Chairman, Ph.D. Program and Research Committee, 2001–2005

This role was subsequently retitled Associate Dean of Research.

**University of Illinois at Urbana–Champaign** (1994 to 2000)  
College of Commerce Ph.D. Programs Committee, 1994–2000.  
College of Commerce Research Policy Committee, 1997–1998, 1999–2000.  
College of Commerce Computing Committee, 1997–1998.

<b>Department</b>	<b>University of Illinois at Urbana-Champaign</b> (2017 to 2018) Promotion and Tenure Committee, 2017-2018.
	<b>University of Wisconsin-Madison</b> (2000 to 2011) Advisor, Deloitte Tax Student Case Competition Team, 2000–2009. National finalists in 2000, 2002, 2005, 2006, 2007, 2008. National honorable mention in 2001 and 2004. 2nd place in 2008, 3rd place in 2009. Advisor, PwC XTax Student Case Competition Team, 2002–2008. National champions in 2003, 2005, 2007. National finalists in 2003, 2008, 2009. Director, Master of Accounting-Taxation Program, 2003–2008. Chairman, Robert & Monica Beyer Professorship Committee, 2007–2008 Chairman, Lesar Professorship Committee, 2007–2008. Chairman, Department Accreditation Committee, 2006–2007. Master of Accounting Curriculum Revision Committee, 2005–2006. Chairman, Joint JD/MBA Program Committee, 2005. Director, Ph.D. Program, 2001–2005.
	<b>University of Illinois at Urbana-Champaign</b> (1994 to 2000) Director, Ph.D. Program, 1994–2000. Department Advisory Committee, 1995–1999. Chairman, ACCY 302: Decision Making and Controls Course Design Committee (for Project Discovery). Chairman, Curriculum Committee, 1999–2000. Recruiting Committee, 1994–1998, 1999–2000. Promotion and Tenure Committee, 1995–1999. Coordinator, Accountancy Forum Series, 1994–2000. Project Discovery Curriculum Committee, 1994–1997. Human Subjects Committee, 1995–2000. Computing Committee, 1995–1997. Chairman, Internal Operations and Strategic Planning Committee, 1994–1997. Grade Policy Committee, 1996–1997. Advisor, Arthur Andersen Tax Challenge Team, 1994–1998. Finals in 1994; 3rd place in 1995; 2nd place in 1996; 3rd place in 1997. Audit Research Symposium Committee, 1996, 1998. Tax Research Symposium Committee, 1995, 1997, 1999. Project Discovery Assessment Committee, 1994–1995.

## **VI: Professional Employment and Consulting**

### **PwC**

Continuing Education Instructor and Consultant, 2008–present.

### **Deloitte**

Continuing Education Instructor, 2008–2009.

### **Florida International University, College of Business**

Consultant, 2009.

### **U.S. Internal Revenue Service**

Consultant (with IBM Research), 2008–2009.

July 2018

**American Institute of Certified Public Accountants**  
Instructor, National Tax Education Program, 1988–2008.

**Arthur Andersen**  
Continuing Education Instructor and Curriculum Consultant, 1995–2002.

**Litigation Support**  
Expert Witness in dissolution cases dealing with required expenses and valuation of closely held stock, 1998.

**Deloitte**  
Tax Consultant

## **VII: Licenses and Certifications**

Certified Public Accountant (Arizona), retired.