

Joseph M. Manzo, CMA

Rauch Business Center
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EDUCATION

Lehigh University, Bethlehem, PA
MBA, Information Systems 2002-2004

Rutgers University, New Brunswick, NJ
BA, Political Science/History 1987-1991

PROFESSIONAL CERTIFICATION

Certified Management Accountant 2015

PROFESSIONAL EXPERIENCE

College of Business and Economics, Lehigh University, Bethlehem, PA
Professor of Practice, Accounting 2009-Present

- Courses taught at the Undergraduate Level: BUS 01 Introduction to Business, BUS 05 Values Based Decisions for Business (Business Ethics), ACCT 151 Introduction to Financial Accounting, ACCT 152 Introduction to Managerial Accounting, ACCT 108 Fundamentals of Accounting.
- Courses taught at the Graduate Level: MACC 403 Professional Issues in Accounting – Ethics, MACC 420 Business Advisory and Practice, ECO 492 Business Integrity.
- Course coordinator for Introduction to Financial Accounting (ACCT 151) 2014 - Present
 - Coordinate faculty so identical content is covered across all sections.
 - Draft and facilitate the development of common final exam questions for the purposes of assessing AACSB learning objectives mapped to the course.
 - Manage the AACSB assessment process and draft the assessment report.
 - Work with faculty to select and order the textbook for the course.
- Excel Competency Program Director from 2002 to 2016
 - Established the program from inception.
 - Write competency exams.
 - Teach seminars and train teaching assistant.
 - Maintain communications and assess student achievement.
- Course coordinator for Introduction to Managerial Accounting (ACCT 152) from 2011 to 2014
 - Coordinate faculty so identical content is covered across all sections.
 - Draft and facilitate the development of common final exam questions for the purposes of assessing learning objectives mapped to the course.
 - Manage the AACSB assessment process and draft the assessment report.
 - Work with faculty to select and order the textbook for the course.
- Developed, directed, and taught business ethics course (BUS 05) from 2009 to 2012.
 - Developed the common syllabus used across all sections.
 - Hired adjunct faculty.
 - Designed all writing assignments and exams.
 - Arranged guest speakers

- o Managed student enrollments and maintained all faculty and student communications.
- Developed strategic planning models for the university (*details in service section*) from 2008 to 2014

Director, Rauch Center for Business Communications 2009-2012

- Manage administrative duties for the center which include budgets, human resources, and communications.
- Developed and administered the writing support program for first year students.
- Developed and administered the Presentation Design program for participating courses at the undergraduate and graduate level.
- Developed and administered the Calculus Competency program with the Math department. Assess student achievement on diagnostic exams and in MATH 21, maintain communication plans, maintain system for posting exam schedule.
- Developed and maintain the CBE central calendar system.
- Developed and maintain the process for posting all content on the monitor display system for the building.

Acting Associate Dean and Director of Undergraduate Programs 2008-2009

- Supervised all registration activity and work with faculty on course roster and demand.
- Managed scholarship selection process.
- Advised students and establish degree plans.
- Established event planning and budget process for the department.
- Worked with faculty to coordinate all AACSB assessments for the undergraduate programs.
- Developed a process to collect and store all AACSB assessments and evidence files.

Adjunct Professor 2005-2009

- Taught multiple sections of BUS 01 and BUS 05
- Taught seminars for the Excel Competency Program

Brinton Eaton Associates, Morristown, NJ

Consulting Engagement 2005-2006

- Designed a portfolio balancing system using Schwab Portfolio Center integrated with Microsoft Excel and Access.
- Designed the firm's billing system with a focus on revenue recognition rules according to GAAP, client contracts, and the firm's revenue generation cycles.

Just Born Candy Company, Bethlehem, PA

Consulting Engagement 2003

- Lead engagement manager on project involving sales analysis and sales growth initiatives.

FL Smidth Cement Company, Bethlehem, PA

Consulting Engagement 2003

- Lead engagement manager on an Enterprise Wide Risk Management project.
- Designed tools to evaluate perceived risks and lack of internal controls as identified by the staff and management team of the firm.
- Developed a risk heat map for the firm along with recommendations on how to mediate the identified risks along with a process for continuous evaluation of risks to the firm.

Toys R Us, Wayne, NJ

Manager of Strategic Planning 2000-2002

- Developed growth strategies under the direction and training of McKinsey & Co.
 - Developed strategies and delivered presentations with the McKinsey team to TRU officers.
 - Evaluated growth and core business strategies on the basis of EVA and NPV.
- Founded a start-up grocery concept called the *Toys R Us Toy Box*.
 - Established a strategic alliance with the Ahold corporation (Giant-Landover division).
- Developed the concept and strategy for the Toys R Us *Geoffrey* stores (rural market strategy).
- Established and implemented the company process for evaluating real-estate investments.

Information Systems Advisor 1998-2000

- Managed system design and requirements for warehouse and store planning reports.
- Managed system design and requirements for the company financial gross margin reports.
- Partnered with several consulting firms and internal business managers to build relational databases, provide data analysis, and conduct extensive data mining projects.
- Designed curriculum and taught classes on database software and systems.

Assistant Manager of Inventory Control 1997-1998

Ann Taylor, New York, NY

Senior Merchandise Analyst 1996-1997

- Managed all inventory investments and financial plans for the Casual Sportswear Division.
 - Evaluated investments based on historical performance and cash flow.
 - Prepared monthly budgets and presented results directly to the CEO and CFO.
- Under my direction, divisional same store sales in Fall 1996 were highest in company (+21%).
- Co-authored the merchandise analysis and planning methods for Ann Taylor.

Merchandise Analyst 1995-1996

Phillips Van Heusen, Bridgewater, NJ

Merchandise Planning Manager 1993-1995

- Created a desktop application for production plans being issued to offices in the Far East.
- Managed production plans for sportswear merchandise sourced for JC Penney and VH Retail stores.
- Managed financial budgets which include sales, gross profit, and inventory.

TEACHING

College of Business and Economics, Lehigh University, Bethlehem, PA

Data Analytic Skills for Accountants (not for credit seminars) 2014-present

- Voluntary seminar series for accounting majors.
- Students are trained to analyze two large data sets that accompany accounting related cases using advanced Excel skills.
- Emphasize process for identifying key questions students should identify which lead data analysis.
- Designed custom 30,000 record data set to accompany cash handling case. Students analyze data to identify five employees pilfering cash.
- Designed 200 record data set of bond transactions. Students are trained to parse data and create fields that will enable an analysis of a hypothetical company's bond portfolio.

- Excel skills featured in the seminars include pivot tables, vlookup function, text functions, date functions, conditional statistic functions (i.e., sumif, sumifs, countif, etc.), and nested if functions.

ACCT 152 (3 credits): Introduction to Managerial Accounting 2011-present

- Required undergraduate course for second year students.
- Addresses fundamental skills of managerial accounting.
- Content includes cost accounting systems, cost volume profit relationships, budgets, activity based costing, make buy decisions, and pricing decisions.

ACCT 151 (3 credits): Introduction to Financial Accounting 2010-present

- Required undergraduate course for second year students.
- Addresses fundamental skills of financial accounting.
- Content includes the financial accounting system, preparing financial statements (including cash flows), acquisition and disposition of assets, time value of money concepts, pricing and accounting for bonds, and financial statement analysis.

ACCT 108 (3 credits): Fundamentals of Accounting 2010

- Undergraduate course for students majoring in engineering or arts and sciences.
- Addresses fundamental skills of financial and managerial accounting.
- Financial accounting content includes the financial accounting system, preparing financial statements (including cash flows), acquisition and disposition of assets, and financial statement analysis.
- Managerial content includes cost accounting systems, cost volume profit relationships, and budgets.
- Worked with publisher to compile a custom textbook for this course.

BUS 05 (1 credit): Values-Based Decision Making for Business 2009-2012

- Business ethics course for first year undergraduate students.
- Co-developed the course in 2008.
- Content includes ethical theories and guidelines, corporate governance, leadership and ethics, accounting fraud, and social responsibility.
- Case studies include Worldcom, Enron, Tyco, Ben and Jerry, and Malden Mills. In the case of Worldcom, includes a fundamental overview of how capitalizing expenses impacts the balance sheet and the income statement.

BUS 01 (3 credits): Introduction to Business 2005-2010

- Undergraduate course for first year students.
- Content includes fundamental overview of the accounting equation, financial statements, breakeven analysis, finance, marketing, supply chain management, and product development.
- Students develop a comprehensive business plan and must present an income statement to a guest banker.
- Developed the Excel planning tool that is used for the business plans. The tool produces a comprehensive income statement which includes depreciation projections, tax expense, and interest expense based on required inputs. Required inputs include detailed sales plan, capital expenditures, detail expense projections, and expected debt contracts.

MACC 403 (1 credit): Professional Issues in Accounting - Ethics 2010- 2013

- Graduate course in the Masters in Accountancy program.
- Addresses fundamental skills for making ethical decisions in domestic and international engagements.

- Content includes recognition of ethical dilemmas, ethical frameworks, the role of moral courage, ethical leadership, foreign corrupt practices act, accounting fraud cases.

ECO 492 (1 credit): Business Integrity

Fall 2010

- Graduate elective course offered to MBA and Health and Biopharma MS students.
- Addresses fundamental skills for making ethical decisions in domestic and international engagements with a focus on the pharmaceutical industry.
- Content includes recognition of ethical dilemmas, ethical frameworks, the role of moral courage, ethical leadership, bio medical ethics, and cases in the pharmaceutical industry.

MACC 420 (3 credits): Business Advisory and Practice

Fall 2008

- Graduate course in the Masters in Accountancy program.
- Content includes fundamentals for professional consulting engagements and case study analysis to demonstrate key success factors and flaws in consulting engagements.
- Course required students to development and present a professional RFP. Students were trained on presentation design techniques and how to respond to unexpected and aggressive client questions.

Excel Competency Program

2002-present

- Not for credit competency requirement for all first year students.
- Responsible for developing the program from its inception in 2002.
- Prerequisite for Introduction to Financial Accounting (ACCT 151), Introduction to Information Systems (BIS 111), and Statistical Methods (ECO 045).
- Developed a collection of videos that demonstrates the applications of Excel in the disciplines of financial accounting, managerial accounting, and economics.
- Responsible for scheduling, developing content, creating all exams, teaching seminars, and training teaching assistants.

PUBLICATIONS

Manzo, Joseph M. (2012). *How to Use Microsoft Excel 2010 The Careers in Practice Series*. Irvington, NY: Flat World Knowledge.

Manzo, Joseph M., Piziak, Dee R., and Rhoads, C.J. (2009). *Microsoft Office 2007 In Business (2nd Ed.)*. Upper Saddle River, NJ: Pearson.

Manzo, Joseph M. (2008). *Microsoft Office Excel 2007 In Business (Comprehensive)*. Upper Saddle River, NJ: Pearson.

Manzo, Joseph M. (2008). *Microsoft Office Access 2007 In Business (Comprehensive)*. Upper Saddle River, NJ: Pearson.

Manzo, Joseph M. (2008). *Microsoft Office Access 2007 In Business (Comprehensive) Student Video DVD*. Upper Saddle River, NJ: Pearson.

Manzo, Joseph M. (2008). *Microsoft Office Excel 2007 In Business (Comprehensive) Student Video DVD*. Upper Saddle River, NJ: Pearson.

Manzo, Joseph M. (2008). *Microsoft Office Excel 2007 In Business (Core)*. Upper Saddle River, NJ: Pearson.

Manzo, Joseph M. (2008). *Microsoft Office Access 2007 In Business (Core)*. Upper Saddle River, NJ: Pearson.

Manzo, Joseph M. (2008). *Microsoft Office Access 2007 In Business (Core) Student Video DVD*. Upper Saddle River, NJ: Pearson.

Manzo, Joseph M. (2008). *Microsoft Office Excel 2007 In Business (Core) Student Video DVD*. Upper Saddle River, NJ: Pearson.

Manzo, Joseph M., Piziak, Dee R., and Rhoads, C.J. (2008). *Microsoft Office 2007 In Business (Core)*. Upper Saddle River, NJ: Pearson.

Manzo, Joseph M. (2008). *Microsoft Office PowerPoint 2007 In Business (Core) Student Video DVD*. Upper Saddle River, NJ: Pearson.

Manzo, Joseph M. (2008). *Microsoft Office Word 2007 In Business (Core) Student Video DVD*. Upper Saddle River, NJ: Pearson.

Manzo, Joseph M. (2006). *Foundations in Business: Access 2003*. Upper Saddle River, NJ: Pearson.

Manzo, Joseph M. (2006). *Foundations in Business: Excel 2003*. Upper Saddle River, NJ: Pearson

PRESENTATIONS

Manzo, Joseph M. (2013, November). *Ethics and Taxes (Ethical Decision Making)*. Presented at Lehigh Tax Forum, Lehigh University and PICPA, Bethlehem, PA.

Manzo, Joseph M. (2009, March). *The Value of Multimedia Technologies*. Presented at Prentice Hall Information Technology Regional Conference for Educators, Baltimore, MD.

Sherer, Susan A. and Manzo, Joseph M. (2007, August). "Differences in National IT Investment: What Really Matters?" *Proceedings of the Thirteenth America's Conference on Information Systems*, Keystone, Colorado.

SERVICE

University

Class of 61 Ethics Speaker Series Committee, 2011-2016

Faculty Advisor for MUS 32 and Section Leader, Lehigh University Choral Union, 2004-Present

University Strategic Planning Model, 2008-2014

- Developed ILE project with the Finance and Administration department for the CSB program to develop a custom database and strategic planning tool over several years.
- Develop the financial planning scenario tool for the Capital Structure Service Committee for the Board of Trustees.
- Co-developed the financial strategic planning model for the university.

- Model includes a detailed bottoms-up scenario assessment based on fundraising targets, faculty growth, and capital projects.
- Model produces an income statement and balance sheet based on the scenarios that are evaluated.

Lehigh Symposium Guest Speaker, 2013, 2014, and 2015

Summer Success and Aid Program Guest Speaker, 2013 and 2014

Academic Transitions Advisory Committee, 2014

Diversity Life Orientation Guest Speaker, 2013

University Center Renovations Committee, 2013

Kappa Sigma Fraternity Guest Speaker, 2013

First Year Seminar Curriculum Committee member, 2012

Integrated Lehigh Experience Committee member, 2012

First Year Experience Committee, 2011

Presentation on Business Ethics Education for the Class of 1961 reunion, 2011

Ropes Course Strategic Planning, Student Affairs Office, 2005

- Developed the strategic plans for the university's experiential learning ropes course.
- Plan was executed and facility remains in operation today.

College of Business and Economics

ACCT 151 Introduction to Financial Accounting Course Coordinator, 2014 – Present

Data Analytic Skills for Accountants (Seminar Series), 2014 - Present

Accounting Department Meet the Firms Night Director, 2013 - Present

Program Level Assessment of Understanding the Roles Played by Accountants in Society providing and Ensuring the Integrity of Financial and Other Information for Decision-Making Learning Objective for AACSB assurance of learning, 2015

- Facilitated meetings with faculty teaching courses that map to this learning objective to identify action plans that support continuous improvement in supporting student achievement for this LO.

Program Level Assessment of Ethics and Regulatory Learning Objective for AACSB assurance of learning, 2012 and 2014

- Drafted ethics framework and principles document to be used in all accounting courses mapped to this learning objective.
- Facilitated meetings with faculty teaching courses that map to this learning objective to identify action plans that support continuous improvement in supporting student achievement for this LO.

Presentation Design Workshops Director, 2013 - 2015

ACCT 152 Curriculum Review Committee Chair, 2013

Beta Alpha Psi Faculty Advisor, 2011 – 2013

National Association of Black Accountants Faculty Advisor, 2012 – 2014

Excel Competency Program Director, 2012 - 2016

MBA Orientation Ethical Decision Making Workshop, 2012, 2013, 2014, and 2015

MBA Nottingham Exchange Program Ethical Decision Making Workshop, 2012 and 2013

Beta Gamma Sigma Selection and Planning Committee member, 2012 - Present

Volunteer Income Tax Assistance (VITA) Program Coordinator, 2012

ACCT 152 Introduction to Managerial Accounting Course Coordinator, 2011 - 2014

Associate Advisor for the Accounting Club, 2010 – Present

Accounting Department Student Satisfaction Survey Development, 2010

Communications Learning Objective Assessment Committee, 2010

Accounting UG Curriculum Committee, 2010

Accounting Department Scribe, 2010

Director for the Rauch Center of Business Communications, 2009-2012

Advanced Excel Seminar, Finance Club, 2008-2009

Professional

Pearson Author Consultancy Board, 2006-2008

Awards

College of Business and Economics Excellence in Teaching Award, 2015

Commitment to Universal Design for Learning (UDL), Lehigh University 2013

Honored Lehigh University Faculty Author, Lehigh University 2013

Faculty Advisor of the Year, Lehigh University 2012

Honored Lehigh University Faculty Author, Lehigh University 2012

Toys R Us Presidents Award, 2001

Ann Taylor Heart Award, 1996

Memberships

American Accounting Association (AAA)

The Association of Accountants and Financial Professionals in Business (IMA)

The American Institute of CPAs (AICPA)

Institute of Certified Management Accountants (ICMA)