

JAN TAYLOR MORRIS
Curriculum Vita – Updated July 10, 2018

Rank: Associate Professor	Title: Associate Professor
Office No: SHB 311D	E-mail: jtm@shsu.edu
Phone No.: 936-294-1127	

Degrees Earned:

2009 PhD, University of San Diego
1988 MBA, University of Houston-Clear Lake
1980 BS, University of Houston-Clear Lake
Major in Accounting (Cum Laude)

Scholarly Contributions: Published and Forthcoming Research

Barsky, N. & Morris, J.T., (2016, Summer). "Corporate Budgeting: Perceptions of a Next Generation of Company Leaders." *Management Accounting Quarterly*.

Robinson, S., Morris, J.T., & Henderson, C. (2015, Fall). "The Effect of Accountability on Individual Brainstorming Preparation," *Journal of Accounting and Free Enterprise*, 1(1).

Lawson, R.A., Blocher, E., Brewer, P., Morris, J.T., Sorensen, J.E., Stocks, K.D., Stout, D.E., & Wouters, M.J.F. (2015, August). "Thoughts on Competency Integration in Accounting Education." *Issues in Accounting Education*, 30(3).

Daigle, R.J., Morris, J.T., & Quarles, N.R. (2015, Jan.-June). "Using Non-Academic Multimedia Resources to Enhance Student Learning of Fact-Based Fraud Cases." *Journal of Forensic & Investigative Accounting*, 7(1).

Brewer, C., Ketchand, A., and Morris, J.T., (2014, February). "Auditing for Usefulness: A New Concern?" *Business Studies Journal*.

Morris, J.T., Kocakulah, M., & Yaeger, M. (2014). Evaluating Commercial Loans with Activity Based Costing: A Solution for Banks in Current Economic Times." *Journal of Performance Management*.

Morris, J.T. (2014, September). "The Impact of Authentic Leadership and Ethical Firm Culture on Auditor Behavior." *Journal of Behavioral Studies in Business*, 7, 99-127.

Daigle, R. J., Louwers, T., & Morris, J. T. (2013, November). "HealthSouth, Inc.: An Instructional Case Examining Auditors' Legal Liability," *Issues in Accounting Education*, 28(4), 887-899.

Kocakulah, M., Cherry, A., & Morris, J.T. (2013, September). "Investing in Company Wellness Programs: Does it make Financial Sense?" *Journal of Health Management*.

Morris, J.T. (2013, Summer). "Rigorous or Not?: A Case of Auditor Judgment for Deferred Tax Issues." *KPMG University Connection*.

Morris, J. T., Grippo, F., & Barsky, N. (2012, May). "A New Era of Accountability: What Accountants and Financial Professionals Need to Know About Proxy Statement Disclosures." *Strategic Finance*, 93(11).

Morris, J.T. & Thomas, W. (2011, June). "Clarified Auditing Standards: The Quiet Revolution." *Journal of Accountancy*.

Kocakulah, M., Morris, J.T., & Kessler, B. (2011, Summer). "Measuring the Profitability of a Hospital Pulmonary Function Laboratory: A Case Study." *Journal of Healthcare Finance*.

Submitted Publications

Morris, J. T. and Porter, J. "Taylor's Dilemma: A Case for Ethical Leadership." Submitted to *Issues in Accounting Education*, June 2018.

Giri, J., Akaaboune, O., & Morris, J.T. "Assessing the Value of Equality: Relationship between Gender, Income, and Service Sector Growth." Submitted to *Asia-Pacific Journal of Accounting and Economics*, July 2018.

Refereed Presentations

Morris, J.T. (March 2017). What Could Go Right? A Moral Leadership Model for Teaching Ethics in Accounting." American Accounting Association – Southwest Regional Meeting, Little Rock, AK.

Morris, J.T. (October 2016). "Big Data is a Big Deal: How to Effectively Incorporate Big Data into the Classroom." Texas Society of CPAs 2016 Accounting Educator Conference. Dallas, TX.

Morris, J.T. and Caratan, K.L. (March 2016). "A Case of Fraud in U.S. Governmental Funded Projects." Forensic Accounting Section of American Accounting Association, Charlotte, N.C.

Morris, J.T., Kocakulah, M., & Yeager, M. (2014, October). "Community Bank Commercial Loan Evaluation with ABC: A Case Study." American Accounting Association – Midwest Region 2014 Annual Meeting, Minneapolis, MN.

Morris, J.T., Kocakulah, M., & Yeager, M. (2014, August). "Community Bank Commercial Loan Evaluation with ABC: A Case Study." American Accounting Association 2014 Annual Meeting, Atlanta, GA.

Robinson, S., Morris, J.T., & Henderson, C., (2014, March). "The Effects of Accountability on Individual Brainstorming Performance." American Accounting Association – Southwest Region 2014 Annual Meeting, Dallas, TX.

Daigle, R., Morris, J.T., & Quarles, R. (August 2013). "Using Multi-media to Enhance Student Learning of Fact-Based Fraud Cases." American Accounting Association Annual Meeting, Anaheim, CA.

Morris, J.T., Daigle, R. & Robinson, S. (August 2013). "An Excel-Based Expenditure Cycle Auditing Case." Presented at American Accounting Association Annual Meeting, Anaheim, CA.

Daigle, R., Morris, J.T., & Quarles, R. (March 2013). "A Multi-media Approach to Fact-Based Financial Statement Fraud Case Study Analysis." American Accounting Association Forensic and Investigative Section Meeting, New Orleans, LA.

Daigle, R. J., Louwers, T., & Morris, J. T. (2013, January). "HealthSouth, Inc.: An Instructional Case Examining Auditors' Legal Liability." American Accounting Association Auditing Section Midyear Meeting, New Orleans, LA.

Morris, J.T. and Donmoyer, R. (2012, October). "Ways of Knowing, Practical Reasoning, and Graduate-level Leadership Education." International Leadership Association Annual Meeting, Denver CO.

Daigle, R. J., Morris, J. T., & Quarles, R. (2012, August). "A Video Approach to Financial Statement Fraud Case Study Analysis." American Accounting Association Annual Meeting, National Harbor, MD.

Daigle, R. J., Louwers, T., & Morris, J. T. (2012, March). "HealthSouth, Inc.: An Instructional Case Examining Auditors' Legal Liability." American Accounting Association Forensic and Investigative Accounting Mid-Year Conference, Chicago, Illinois.

Kocakulah, M. & Morris, J.T., (2011, October). "Investing in Company Wellness Programs: Does It Make Financial Sense?" American Accounting Association Meeting-Midwest Region

Morris, J.T. (2011). "The Slippery Slope to Criminal Behavior." American Accounting Association Forensic and Investigative Accounting Section Meeting, New Orleans, LA.

Morris, J.T. and Pattison, D. (2011, March). "Incorporating Leadership into the Accounting Curriculum." 2011 Southwest Region American Accounting Association meeting, Houston, TX. Won Best Manuscript for Teaching, Learning, and Curriculum section.

Morris, J.T. (2010, October) "The Impact of Authentic Leadership on Ethical Organizational Culture and Dysfunctional Auditor Behavior." 12th International Leadership Association Annual Conference. Boston, MA. One of 12 papers accepted for prestigious Scholarship Referred Track paper presentation.

Morris, J.T. (2010, August). "Teaching Leadership to Accounting Students." American Accounting Association Annual Meeting, San Francisco, CA. Effective Learning Strategy Poster Session.

Morris, J.T. and McCoy, R.L. (2010, January) "Client Assessment of Professional Services Quality of Public Accounting Firms." 2010 Global Conference on Business and Finance. Hawaii. Won "Best in Session" Paper Presentation Award.

Morris, J.T., McCoy, R.L., Buchanan, J., & Sulpizio, L. (2008). "Shaping Future Leadership Programs: The Scholar-Practitioner Approach and the Power of Community to Completing a Dissertation and Obtaining a PhD." 10th International Leadership Association Annual Conference, Los Angeles, CA.

Morris, J.T., McCoy, R.L., & Buchanan, J. (2007). "The Impact of a Culture of Embeddedness on Leadership Development in Organizations." 14th Annual ASBBS Conference, Las Vegas, NV.

Panel and Other Presentations

Morris, J.T., Askew, S., King, G.H., Stopek, J. (August 2017). "AICPA Core Competency Framework: Deconstructing the Update." American Accounting Association Annual Meeting, San Diego, CA.

Morris, J.T. (August 2017). "Meeting the Challenge of Incorporating Analysis and Evaluation into the Auditing Course." American Accounting Association – Conference on Teaching and Learning, San Diego, CA.

Morris, J.T. and Caratan, K.L. (May 2016) "Financial Management and Development of NGOs: Further Audit Requirements and USAID Compliance." USAID. Kiev, Ukraine.

Morris, J.T., Gallagher, R., and Louwers, T. (June 2016). "Preparing for the Next Version of the CPA Exam: Will You Be Ready?" Auditing Section of AAA Webinar.

Morris, J.T., Gallagher, R., Louwers, T. (2016, January). "Auditing Education: Response to Proposed Changes to Uniform CPA Exam." American Accounting Association – Auditing Section Midyear Meeting, Scottsdale, AZ.

Morris, J.T. and Caratan, K.L. (December 2015) "Financial Management and Development of NGOs: Introduction to Audit Requirements and USAID Compliance." USAID. Kiev, Ukraine.

Panelist: (2014, August). American Accounting Association Annual Meeting, Atlanta, GA. Session 4.05: "Implementation of the Integrated Competency-Based Framework for Accounting Education"

Panelist: (2012, August). American Accounting Association Conference on Teaching and Learning in Accounting, Washington, D.C. "Collaboration Best Practices and Service Learning Opportunities from VITA, Beta Alpha Psi, and Others."

Morris, J.T. (2011, August). "Teaching Leadership to Accounting Students." American Accounting Association - Conference on Teaching and Learning in Accounting, Denver, CO.

Morris, J.T. (2010, August). "Preparing a Case for a Not-for-Profit Organization's Request for Proposal" Beta Alpha Psi Annual Meeting, San Jose, CA.

Panelist: (2009). American Accounting Association – Western Annual Meeting. “Building Community: Academics and Practitioners Supporting Each Other.”

Morris, J.T., (2006, August). “Expenditure and Revenue Cycle Simulation.” American Accounting Association Annual Meeting, Washington, D.C. Effective Learning Strategy Poster Session.

Panelist: (2006, August). American Accounting Association Annual Meeting, Washington, D.C., “Dealing with Difficult Students.”

Morris, J.T. (2004 and 2003, August). “New Faculty Advisor Workshop.” Beta Alpha Psi Annual Meeting, Honolulu, HI and Orlando, FL.

Working Papers

Morris, J.T., Brewer, W., & Carrington, L., “Auditing Subculture: A 50-year Perspective”

Morris, J.T., Daigle, R., & Robinson, S. “An Excel-Based Expenditure Cycle Auditing Case.”

Morris, J.T. & Barsky, N., “Teaching Ethics: A New Model.”

Black, E.L., Morris, J.T., & Burton, G. “Gender and Ethics: A Multicultural Study.”

Professional Employment Experience:

- 2009 – current Sam Houston State University. Assistant Professor, Department of Accounting. Primary teaching field: Auditing. Primary research area: Behavioral auditing, ethical culture. Served as faculty advisor to university chapter of Beta Alpha Psi, 2009-2012.
- 2003-2009 University of San Diego. Visiting Professor in Accounting. Primary teaching fields: auditing, financial accounting, accounting information systems, leadership, and personal finance. Served as faculty advisor to Accounting Society and university chapter of Beta Alpha Psi, 2004-2009.
- 2001-2004 Inwood Management. Chief Financial Officer / Controller (part-time).
- 1990-2003 University of Houston-Clear Lake. Lecturer in Accounting. Primary teaching field: financial accounting. Faculty advisor to university chapter of Beta Alpha Psi, 1991-1998.
- 1988-1990 Mosher, Sieffert, and Co., CPAs. Tax Accountant and Audit Manager.
- 1982-1988 Self-employed. Accounting related assistance to local businesses and not-for profit organizations, including audit, compilation, tax, and review services.
- 1980-1982 Arthur Andersen and Co. Staff / senior accountant.

Public – Professional Service, Consulting Engagements

- 2016-2019 Chair, 100th Anniversary Steering and Planning Committee, Beta Alpha Psi International.
- 2015-current USAID (United States Agency for International Development). Develop curriculum and present to auditors of NGOs in Ukraine, Moldova, and Belarus receiving funds from USAID
- 2015-current American Institute of CPAs (AICPA) Pre-Certification Education Executive Committee. Member.
- 2015-current AICPA Women's Initiative Executive Committee Champion Task Force. Member.
- 2012-2015 Beta Alpha Psi, 2014-2015 Immediate Past President, International Board of Directors. Served as 2013-2014 President and as President-elect 2012-2013.
- 2013 Beta Alpha Psi Annual International Meeting Chair. Coordinating a three day program with more than 60 concurrent sessions and three general sessions and KPMG-sponsored Community Day of Literacy event for approximately 1200 attendees.
- 2013-current IMA-AAA Joint Task Force, Member.

2005- current	KPMG, External Professor. Instruct at technical training courses for experienced in-charge/senior auditors and at Audit Fundamentals courses for newly hired auditors.
2010- 2012	Beta Alpha Psi Co-Chair, Project Run With It (international team competition to develop proposals for not-for-profit organizations, held in conjunction with the Beta Alpha Psi International Meetings in San Jose, CA, 2010, and Denver, CO, 2011, and Baltimore, MD, 2012).
2010; 2008	Frank Rimerman & Co. LLP. Wrote and conducted a business writing, ethics, and fraud workshop; presented to accounting, tax, and auditing professionals, and staff.
2007	Beta Alpha Psi Annual International Meeting Program Chair. Coordinated a three day program with more than 50 concurrent sessions and two general sessions and a community service event for approximately 1200 attendees.
2002- 2005	International Board of Directors, Beta Alpha Psi. Director of Administration and Development. Oversaw all publications and finances of Beta Alpha Psi.
2001- 2004	Accounting and Auditing Committee, Houston Chapter of Texas Society of CPAs. Vice-chair, 2000-2003; Chair, 2003-2004. Primary charge was to develop and conduct seminars related to accounting and auditing for CPAs.
2000- 2003 2001- 2002	Member, San Jacinto College School of Business Advisory Council, Pasadena, TX. Provided advice to the faculty and administration of the business school for local community college.
	Beta Alpha Psi 2001 and 2002 Annual National Meetings Program Chair. Coordinated two day programs for each year with more than 60 concurrent sessions and two general sessions for approximately 1200 attendees at each meeting.
2001- 2002	Beta Alpha Psi 2001 and 2002 Annual National Day of Service Chair. Coordinated a one day service project for 400-600 participants who provided service to multiple charitable organizations each year.
2000- 2003	Membership Committee, Houston Chapter of Texas Society of CPAs. Promote membership in chapter and society.
1994- 2003	Accounting Educators' Programs Committee, Texas Society of CPAs. Chair 1997-1998. Developed and conducted an annual seminar for accounting educators.
2000- 2003	External Relations Council, Texas Society of CPAs. Promote accounting as a career among middle and high school students and promote the CPA profession within the business community.
2000- 2002	Educational Foundation's Accounting Education Council Steering Committee, Texas Society of CPAs. Develop programs of interest and opportunities for accounting educators.

1998- International Board of Directors, Beta Alpha Psi. Regional Director of Southwest Region and
2002 Southern California/Arizona Region.

University-Level Leadership:

2018 - Faculty Senate, Member (term begins Fall 2018).
2021

Member, Women's Advisory Committee, Faculty, Sam Houston State University.

2015-
current

Member, The Woodlands Campus Faculty Advisory Committee, Sam Houston State University.

2013-
2017

2008- Member, Catholic Social Thought Transition Committee, University of San Diego. Chair,
2009 Budget sub-committee.

2006- Chair, Budget Committee, Catholic Social Thought Strategic Initiative, University of San
2007 Diego.

2000- Chair, Bookstore Advisory Committee, University of Houston-Clear Lake (UHCL)
2003

School-Level Leadership:

2017 Chair, COBA Teamwork and Leadership Committee.

2014 COBA Meta-Assessment Committee, December 2014 – January 2015.

2010 - Accounting Department Liaison, Faculty / Staff Annual Fund Campaign (SHSU)
current

2009- COBA Tailgating Committee, Sam Houston State University (SHSU).
current

2010 - COBA Academic Appeals Committee (SHSU).
current

2012 COBA Summer Research Grant Committee (SHSU).

2010 COBA Faculty Evaluation System (FES) Committee

2006- Chair, Strategic Task Force 2.3: Integrating Values-Based Leadership Experiences, University
2009 of San Diego

2000- Scholarship Committee, UHCL. Chair, 2001-2002.
2002

Program-Level Leadership:

- 2009-
current Member, Curriculum Committee
Member and Chair, Stakeholder Relations Committee, Chair: 2014-2017
Member, Scholarship Committee
Member, Faculty Recruiting Committee
Member and Chair, Graduate Faculty Committee, Chair: 2018 –
Member, Student Grader Committee
Member, Intermediate Tutoring Committee
- 2009-
2012 Faculty Advisor, Kappa Mu Chapter, Beta Alpha Psi, SHSU.
- 2005-
2006 MACC/MTax programs, University of San Diego: Assist in compilation and review of applications for admissions.
- 2002-
2003 Co-author, AACSB Accounting Program Self-Evaluation Report, UHCL
- 2001-
2002 Chair, Accounting Program Web Page Development Committee, UHCL
- 2000-
2002 Chair, Financial Courses Curriculum Committee, UHCL

Honors and Recognitions:

- 2015 Best Teaching Innovation Award” from the Forensic and Investigative Accounting presented at the AAA Annual Meeting in August 2014 for: Daigle, R. J., Louwers, T., and Morris, J. T. (2013, November). HealthSouth, Inc.: An Instructional Case Examining Auditors' Legal Liability”.
- 2014 “Innovation in Auditing and Assurance Education Award“ from the Auditing Section presented at its Midyear Meeting in January 2015 for for: Daigle, R. J., Louwers, T., and Morris, J. T. (2013, November). HealthSouth, Inc.: An Instructional Case Examining Auditors' Legal Liability”.
- 2013 President’s Award, Beta Alpha Psi
- 2013 Educator of the Year, American Woman’s Society of Certified Public Accountants.
- 2011 Best Education Manuscript Award winner: American Accounting Association – Southwest Meeting, Houston, TX. Co-authored paper presentation: “Incorporating Leadership into the Accounting Curriculum.”

2002 2002 Outstanding Accounting Educator award, Texas Society of CPAs.

Certifications and Licenses:

1988- Certified Public Accountant, licensed in Texas.
current

2014- Chartered Global Management Accountant, AICPA.
current