

Kate Lancaster

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Accounting and Law
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Education

- Ph D, Texas A&M University, 1997.
Major: Accounting
Dissertation Title: Valuation Analysis of Mandatory and Discretionary Environmental Disclosures
- MS, Colorado State University, 1991.
Major: Accounting
- BS, Fort Lewis College, 1990.
Major: Business, Accounting

Professional Positions

Academic

Tenured, Associate Professor, California Polytechnic State University. (September 1997 - Present).

Military

Spec 4, Army Reserve. (1974 - 1976).

Professional

- Visiting Faculty, Bainbridge Graduate Institute. (December 2003 - Present).
- Various, Purgatory Durango Mountain Resort. (December 1975 - August 1993).
- Lecturer, Fort Lewis College. (September 1991 - May 1993).

Licensures and Certifications

Certified Public Accountant, American Institute of CPAs. (1992 - Present).

Development Activities Attended

- 5th Annual BALLE (Business Alliance for Local Living Economies): Leading the Evolution Toward local Living Economies Conference, Berkeley, CA. (May, 2007).
- Focus the Nation Organizing Conference Las Vegas, NV. (April, 2007).
- Attended Conference, "AASHE 2006: Role of Higher Education in Creating a Sustainable World," Association for Advancement of Sustainability in Higher Education, Scottsdale, Arizona. (October 4, 2006 - October 6, 2006).

Attended Conference, "AASHE 2006: Role of Higher Education in Creating a Sustainable World," Association for Advancement of Sustainability in Higher Education, Scottsdale, Arizona. (October 4, 2006 - October 6, 2006).

Continuing Education, "AME Lean Accounting," Association for Manufacturing Excellence, San Diego, California. (July 12, 2006 - July 13, 2006).

Workshop, "Writing Cases," Evergreen State College and the Native Cases Project, Olympia Washington. (June 29, 2006 - June 30, 2006).

Workshop, "Teaching with Cases," Evergreen State College and the Native Cases Project, Olympia Washington. (June 27, 2006 - June 28, 2006).

GLOBE 2006: The Biennial Trade Fair and Conference on Business and the Environment, Vancouver, BC. (March, 2006).

Continuing Education, "PWC Faculty University," PricewaterhouseCoopers, Princeton, NJ. (June 2005).

Continuing Education, "Implementing the IMA's Practice Analysis Findings in the Introductory Management Accounting Course," American Accounting Association National Meeting, Orlando, FL. (August 2004).

Attended Conference, "AIS Educators Conference," AIS Educators, Denver, CO. (June 2004).

Continuing Education, "KPMG's Faculty Symposium," KPMG, Portland, OR. (June 2004).

Attended Conference, "Colloquium on Change in Accounting Education," Colloquium on Change in Accounting Education, Scottsdale, AZ. (October 2003).

Continuing Education, "Advancing Curricular Change in Technology: Effect and Cost Efficient Means to Introduce ERP Concepts," American Accounting Association National Meeting, Honolulu, HI. (August 2003).

Continuing Education, "Teaching Strategic Cost management," American Accounting Association, Honolulu, HI. (August 2003).

Continuing Education, "VMRC? A Bold New Look at Measurement and Reporting," American Accounting Association National Meeting, Honolulu, HI. (August 2003).

Attended Conference, "In2In Thinking Forum: What's New? What's Next," Boeing, Westlake, CA. (June 2003).

Continuing Education, "KPMG Current Economic Landscape," KPMG, San Francisco, CA. (June 2003).

Fellowship, "KPMG Faculty Attendance Program," KPMG, Los Angeles, CA. (June 2003).

Workshop, "Engaged Department Institute on Service Learning," California State University, Los Angeles, CA. (June 2003).

Attended Conference, "USC Accounting Forum," USC and Wiley Publisher, Los Angeles, CA. (February 2003).

Continuing Education, "Workshop on Accounting Education." (February 2003).

Conference Program, "In2In Thinking Forum: Creating New ROIs," Boeing, Woodland Hills, CA.
(April 2002).

Fellowship, "Boeing Welliver Faculty Fellowship," Boeing, California. (June 18, 2001 - August
2001).

Awards and Honors

Emeritus Faculty Award, Cal Poly. (June 2004).
CFA Distinguished Educator Award. (2002).
Outstanding Teaching Award, Ernst & Young, LLP. (June 2002).

TEACHING

Teaching Experience

California Polytechnic State University, San Luis Obispo

BUS 214, Financial Accounting, 2 courses.
BUS 215, 11 courses.
BUS 412, 2 courses.
BUS 429, Accounting Process Analysis, 7 courses.
BUS 470, Selected Advanced Topics, Sustainable Business Practices 1 course.
GSB 511, Accounting for Managers, 1 course.

Bainbridge Graduate Institute, Bainbridge Island, Washington

MGT 553, Finance, Accounting, and the Triple Bottom Line I, 4 courses
MGT 554, Finance, Accounting, and the Triple Bottom Line II, 4 courses
MGT 560, Research and Quantitative Methods, 2 Courses

Directed Student Learning

Senior Project, "2005 Earth Day Festival," Marketing. (January 2005 - June 2005). Advised: Chris Cox, Tracy Bronstein
Senior Project, "Campus Recycling Awareness" (July 2002 – August 2003). Advised: Brooke Diskin and Kyla Mullen

RESEARCH

Published Intellectual Contributions

Book Chapters

Lancaster, K. (2002). *Stewardship*. San Luis Obispo, CA: Cal Poly Land: A Field Guide.

Refereed Journal Articles

Savage, A., Strand-Norman, C., Lancaster, K. Using a Movie to Study the COSO Internal Control Framework: An Instructional Case. *To appear in Journal of Information Systems, American Accounting Association*.

Lancaster, K., Crother, C. (2003). Creating effective teams in a classroom environment. *Journal of Business and Behavioral Sciences*, 10(2), pp 46-54.

Lancaster, K., Bellows, W. (2003). Making Better Use of Information: Aiming Towards 'True North'. *International Journal of Management and Decision Making*, 4(4), pp. 367-381.

Lancaster, K. Strand, C. (2002). Training, a Powerful Way to Help Prevent Fraud. *Strategic Finance*, LXXXIV(4), pp. 28-32.

- Lancaster, K. (2002). An Evaluation of the Usefulness of Web-based Financial and Environmental Performance Information Provided by Oil and Gas Companies. *Oil, Gas, and Energy Quarterly*, 50(3), pp. 591-606.
- Lancaster, K., Strand, C., Thorne, J. (2001). Corporate training assessment: Can your employees recognize risk factors associated with misappropriation of assets. *Journal of Forensic Accounting*, 1(2), pp. 193-214.
- Lancaster, K., Robinson, J., Kinney, M. (2001). Evidence on the Effectiveness of Using Tax Credits to Promote Energy Conservation. *Oil, Gas, and Energy Quarterly*, 50(2), 339-367.
- Lancaster, K., Strand, C. (2001). An experimental assessment of business student's abilities to recognize risk factors associated with misappropriation of assets. *Advances in Behavioral Accounting*, 4, pp 333-360.
- Lancaster, K., Jones, R. (2001). Process Mapping and Scripting in the AIS Curriculum. *Accounting Education*, 10(3), pp. 263-278.
- Lancaster, K., Strand, C. (2001). Using the Team Learning Model in a Managerial Accounting Class: An Experiment in Cooperative Learning. *Issues in Accounting Education*, 16(4), pp. 550-567.

Other

- Lancaster, K., Disken, B., Mullen, K. (2003). *Think before for a better after* (4th ed., vol. 71, pp. 14-18). Association of College Unions International, The Bulletin.
- Lancaster, K. and others. (2001). *Final Report 2001 Welliver Faculty Summer Fellowship Program*.

Presentations Given

- Savage, A., Norman, C., Lancaster, K., 2007 AIS Mid- Year Conference, "Using a Movie to Study the COSO Internal Control Framework: An Instructional Case," American Accounting Association, Savannah, GA. (January 2007).
- Lancaster, K. (Presenter & Author), Rowledge, L. (Presenter & Author), Association for the Advancement of Sustainability in Higher Education 2006: The Role of Higher Education in Creating a Sustainable World, "Roundtable: Aligning for Sustainability in Academia," Association for the Advancement of Sustainability in Higher Education, Tempe, Arizona. (October 2006).
- Savage, A., Cerf, D. C., Lancaster, K., Association for the Advancement of Sustainability in Higher Education 2006: The Role of Higher Education in Creating a Sustainable World, "Teaching Accounting and Financial Management to Support Sustainability," Tempe, AZ. (October 2006).
- Savage, A., Lancaster, K., American Accounting Association Western Region Annual Meeting, "A Movie Project Brings the COSO Internal Control Framework to Life," American Accounting Association, Portland, OR. (April 29, 2006).
- Lancaster, K. (Presenter Only), American Accounting Association National Meeting, "Implementing the IMA's Practice Analysis Findings in the Introductory Management Accounting Course," American Accounting Association, Orlando Florida. (August 2004).

- Lancaster, K. (Presenter & Author), Sayre, T. (Author Only), AIS Educators Conference, "Business Processes and Internal Controls: Learning by Doing," AIS, Denver, Colorado. (June 2004).
- Lancaster, K. (Presenter Only), Colloquium on Change in Accounting Education, "Using Team Learning to Motivate Students to Read Your Text Assignments," Colloquium on Change in Accounting Education, Scottsdale, Az. (October 2003).
- Lancaster, K. (Presenter & Author), Crother, C. (Presenter & Author), American Accounting Association International Conference, "Creating effective teams in a classroom environment," American Accounting Association, Honolulu, Hawaii. (August 2003).
- Lancaster, K. (Presenter Only), USC/Wiley Accounting Forum, "Managing a Managerial Accounting Classroom: Active learning and student accountability," USC/Wiley, Los Angeles, CA. (March 2003).
- Lancaster, K. (Presenter & Author), Crother, C. (Presenter & Author), American Society of Business and Behavioral Sciences Conference, "Creating effective teams in a classroom environment," American Society of Business and Behavioral Sciences, Las Vegas, Nevada. (February 2003).
- Lancaster, K. (Presenter Only), Business Starts Here, "Accounting as a Career," California Society of CPAs, Los Angeles, CA. (October 2002).
- Lancaster, K. (Presenter & Author), Bellows, W. (Author Only), Asian Pacific Decision Sciences Institute, "Making Better Use of Information: Aiming Towards 'True North'," Asian Pacific Decision Sciences Institute, Bangkok, Thailand. (July 2002).
- Lancaster, K. (Presenter & Author), Carr, J. (Author Only), Strand, C. (Author Only), American Accounting Association Western Regional Meeting, "Assessing Knowledge Retention of Managerial Accounting Material from a Cooperative Learning Environment," American Accounting Association, San Diego, CA. (May 2002).
- Lancaster, K. (Presenter & Author), T. (Presenter & Author), Boeing University Relations sub-Process Council Meeting, "2001 Welliver Faculty Fellow Summary of Observations and Recommendations for Process Improvements and University Relations to URPC Members," Boeing, Saint Louis. MO. (August 2001).
- Lancaster, K., Boeing's University Relations Process sub-Council Quarterly Meeting, "Summary of Welliver Experience and Personal Development Plan," Boeing, Saint Louis, MO. (August 2001).
- Lancaster, K. (Presenter & Author), Cal Poly Land Faculty Seminar, "Developing a Balanced Scorecard to Evaluate the Use of and Stewardship for Cal Poly Land," Cal Poly, Swanton Pacific Ranch. (June 2001).
- Lancaster, K. (Presenter & Author), Carr, J. (Presenter & Author), American Accounting Association Western Regional Meeting, "Accounting Programs in California and the Impact of the 150-hour Education Requirement," American Accounting Association, San Jose, CA. (May 2001).
- Lancaster, K. (Presenter & Author), Carr, J. (Author Only), Strand, C. (Author Only), American Accounting Association Western Regional Meeting, "Internet Availability of Company-Provided Information for the Environmentally Responsible Investor," American Accounting Association, San Jose, CA. (May 2001).

Lancaster, K. (Presenter & Author), Carr, J. (Author Only), Strand, C. (Author Only), Central California Assessment Conference, "Assessing Long-term Knowledge Retention of Managerial Accounting Material from a Participative Learning Environment," California State University System, Bakersfield, CA. (April 2001).

Lancaster, K. (Presenter & Author), Kay, G. (Presenter & Author), Faculty Seminar, "Improving the success of using teams in the classroom," OCOB, San Luis Obispo, CA. (February 2001).

Lancaster, K. (Presenter & Author), Jones, R. (Presenter & Author), Accounting Information Systems Educator Conference, "Process Mapping and Scripting in the AIS Curriculum," Accounting Information Systems Educator, Denver. (August 2000).

Lancaster, K. (Presenter & Author), Glasgow, K. (Presenter & Author), American Society for Competitiveness National Meeting, "Organizational Transformation in the Classroom," American Society for Competitiveness, Las Vegas, NV. (October 1999).

Lancaster, K. (Presenter & Author), Strand, C. (Author Only), American Accounting Association Western Regional, "Becoming a Lead Goose in a Managerial Accounting Class," American Accounting Association, Newport Beach, CA. (May 1999).

Lancaster, K. (Author Only), Strand, C. (Presenter & Author), American Accounting Association Western Regional Meeting, "The Effect of Self-Efficacy on Performance: Assessing the Possibility of Misappropriation of Assets," American Accounting Association, Newport Beach, CA. (May 1999).

Contracts, Grants and Sponsored Research

Lancaster, Kate, "Developing a module on Sustainability for an introductory Business Course." Sponsored by OCOB Summer Research Grant, \$5,000. (June 2007).

Lancaster, Kate, Attend the Business Alliance for Local Economies 5th Annual Conference. Sponsored by the Eugene O'Connor Award, \$2,000. (June 2007).

Lancaster, Kate (Co-Principal), Riener, Ken David (Co-Principal), "OCOB," Sponsored by Undergraduate Course Development Grant, Cal Poly, SLO, \$2,000. (July 2004 - September 2004).

Lancaster, Kate, "Adapting Alan Savory's Holistic Management Model to Business Applications," Sponsored by OCOB Bank of America. (June 2003 - September 2003).

Lancaster, Kate, "Course Development - Advanced Accounting Process Analysis," Sponsored by Boeing's OCOB Faculty Development Program, \$2,500. (June 2003 - September 2003).

Lancaster, Kate (Co-Principal), Carr, Janice (Co-Principal), "California Schools - Response to 150-hour requirement," Sponsored by Faculty Development Grant Program, Cal Poly, SLO, \$1,000.00. (February 2001 - April 2001).

Lancaster, Kate, "Environmental Disclosures," Sponsored by Faculty Support Grant, Summer Fellowship, Cal Poly, SLO, \$2,000.00. (June 1998 - September 1998).

Lancaster, Kate, "Environmental Disclosure," Sponsored by Faculty Development Grant Program, Cal Poly, SLO, \$2,725.00. (November 1997 - July 1998).

SERVICE

General Service

College

Committee Member, Graduate Programs Committee, Member. (September 2006 - Present).

Advisor, Sexual Harrassement Advisor. (September 2002 - June 2005).

Committee Chair, Team OCOB, Member. (September 2002 - June 2005).

Guest Speaker, Choosing your Concentration. (April 2005).

Member, Ad-hoc committee. (February 2004 - May 2004).

Department

Course Coordinator, BUS215 Course Coordinator. (September 2000 - June 2005).

Member, Accounting Area Advisory Board. (September 1997 - June 2005).

Committee Member, Accounting Curriculum Committee. (September 1997 - June 2005).

Course Coordinator, Course Coordinator. (September 2003 - December 2004).

Other

DeMeritt for Council Campaign. (June 2004 - Present).

Guide Dogs of America. (October 2003 - Present).

Committee Member, Ethics Committee, Member. (September 2005 - December 2006).

Committee Member, Curriculum Committee, Member. (September 2005 - November 2006).

Coastal Alliance for Plant Expansion. (February 2005 - September 2005).

Advisor. (September 2003 - June 2005).

Professional

Member, San Luis Obispo Chamber of Commerce Sustainability Committee. (March 22, 2007 - Present).

Board Member, American Accounting Association Western Region. (April 2006 - Present).

Member, SLO Toastmasters, President/Elect/Past. (February 2001 - September 2005).

Attendee, Meeting, California Society of CPAs. (September 2004).

Student Organization

Student Organization Advisor, EmPower (July 07 – present)

Student Org Advisor (Professional Org), Cal Poly Accounting Club. (September 2001 - June 2005).

University

Steering Committee, Focus the Nation, Member. (November 2006 - Present).

Committee Member, Senate Sustainability Committee. (September 2006 – Present, chair since September, 2007).

Sustainability Curriculum SubCommittee, Member. (September 2006 - Present).

Committee Member, Sustainability Research Group for the Environment (SuRGE). (September 2006 - Present).

Co-chair, Sustainability Committee. (September 2004 - June 2005).

Attendee, Meeting, 1st Generation College Student Workshop. (April 2005).

Member, Status of Women. (September 2002 - July 2004).

Member, Resource Use Committee. (September 2002 - June 2004).