

## Joseph Bittner, MBA CPA

222 East 80<sup>th</sup> Street, #11H, New York, NY 10075 / 595 Beachwalk Circle, M-101, Naples, FL 34108

Mobile: (917) 693-2480 / Email: [JoeBittner@msn.com](mailto:JoeBittner@msn.com)

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I am fortunate to have a unique career in the accounting and financial services education profession as a teacher, trainer, instructional designer and author, and to be recognized as a leader in the field of education, training and professional development.

I offer four distinct skills and types of experience:

1. **Teaching:** My experience includes secondary (high school); post-secondary (undergraduate and graduate); continuing, professional adult education; and, corporate training. This year I celebrated my 20<sup>th</sup> year as an adjunct accounting professor with NYU's School of Professional Studies where I teach non-credit courses in the Division of Programs in Business – Finance, Accounting, Law and Taxation and credit courses in the Division of Applied Undergraduate Studies. I also serve as the Division's Academic Community of Practice (ACP) Leader and am an adjunct professor at Baruch College. Previously served as a full-time Accounting Instructor In-Residence and adjunct professor for the University of Connecticut.

I am honored to have received the NYU SPS *Award for Teaching Excellence* (in 2002 & 2020) and the NYU SPS *Award for Outstanding Service*.

In addition, I also teach Presentation Skills classes for the accounting firms I have worked for.

2. **Instructional Design:** As the Chief Learning Officer for a major accounting firm and previously as the Director of Learning & Development for another major firm, I have:
  - Implemented all phases of the ADDIE instructional design methodology: analyzing learning needs; designing and developing curriculums and training programs; training subject matter experts to teach, facilitate and manage (classroom) training programs; and, assessing and evaluating teaching and learning by comparing desired learning objectives and outcomes to actual outcomes.
  - Designed and developed firm-wide curriculums for multiple services lines (i.e., audit, tax, accounting, consulting) that form a learning path across all levels in the firm, from “staff to senior manager”. The curriculums offer approximately 1500 hours of training and professional development.
3. **Train-the-Trainer:** As a Chief Learning Officer, and previously as the Director of Learning & Development and the Manager of Academic & Career Development for the American Institute of CPAs, I develop and implement national, local and “experiential” training programs focusing on: Program design and development; Teaching, facilitating, and classroom management; and, Assessing and evaluating teaching and learning.

In addition, I have trained new instructors for NYU SPS Division of Programs in Business (DPB) and as the Academic Community of Practice (ACP) Leader I perform classroom observation of other faculty members.

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4. **Author/Developer:** I've created and authored activity-based learning materials for the AICPA (*Takin' Care of Business* Education Handbook, a set of 15 business, accounting and finance lesson plans and activities) and the Connecticut Society of CPAs (*Me, Myself, My Money*, a financial literacy curriculum consisting of 20 lesson plans and activities.) I have also written multiple "Workbooks" for the accounting classes I teach (Financial Accounting, Managerial Accounting) and, as Chief Learning Officer for an accounting firm, I design and develop material and activities for the training programs we deliver.

I chair the National Business Education Association's (NBEA) *Accounting Standards Task Force*, a national task force of post-secondary/secondary accounting educators and business professional charged with developing the national learning standards in business for accounting education. I also started the initiative to create an Advanced Placement (AP) Accounting course and exam and developed the curriculum for the course. I am honored to have received the NBEA *Distinguished Service Award* that recognizes achievements, dedication, and personal and professional commitment to advancing accounting education.

I hold a Master of Business Administration in Accounting and Bachelor of Science in Finance from the University of Connecticut and am a CPA. Through the Master of Education program at the University of New Haven, I earned a Certificate in Business Education from the Connecticut State Board of Education.

Thank you for considering my qualifications and please feel free to contact me at [JoeBittner@msn.com](mailto:JoeBittner@msn.com) and (917) 693-2480.

Joseph (Joe) Bittner

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### **PROFESSIONAL EXPERIENCE**

#### **Mazars USA LLP, New York, NY**

**2016 – Present**

##### *Chief Learning Officer*

- Formulate and implement a professional learning and development strategy; results in exceptional training, enhances organizational culture, improves productivity, and attracts/retains professionals.
- Interact and collaborate with firm leaders, key stakeholders and decision-makers in all service lines and segments.
- Develop firm-wide learning solutions and resources for all service areas (audit, tax, accounting, and consulting) using instructional design methods:
  - Identify and analyze learning needs; document learning needs using specific learning objectives and learning outcomes.
  - Design and develop firm-wide curriculums for all service lines.
  - Create and develop training programs using activity-based learning to create simulations.
  - Train subject matter experts through experiential “train-the-trainer” programs for (1) Program design and development; (2) Teaching, facilitating, and classroom management; and, (3) Assessing and evaluating teaching and learning.
  - Assess and evaluate teaching and learning by comparing desired learning outcomes to actual learning outcomes.
- Develop all learning resources and materials in-house; deliver over 16 weeks of interactive, activity-based training using simulations that blend technical knowledge with leadership/critical business skills.
- All training, 100%, is activity-based and delivered live, in-person or remotely, via Zoom.
- Transform training into a “functional area” by creating a “Learning & Development Team.”
- Create and implement firm-wide systems, structures, processes/procedures for training initiatives.

#### **Wolters Kluwer (CCH) Tax & Accounting Learning Team, New York, NY**

**2015 – 2016**

##### *Director, Learning & Development*

- Developed strategic plans and initiatives for the learning solutions product lines, including programs, products and expansion opportunities.
- Created new curriculum offerings to provide blended learning opportunities.
- Provided consulting services for customers to develop customized learning solutions, including designing curriculums/learning paths, developing courses and programs, and facilitating “train-the-trainer” workshops for subject matter experts/instructors.

#### **EisnerAmper LLP, New York, NY**

**2009 – 2015**

##### *Director, Learning & Development (2011 – 2015)*

##### *Senior Education Consultant (2009 – 2011)*

- Performed needs analysis and developed learning solutions/plans of study in the form of professional education curriculums for the firm’s practice areas (Audit, Tax, Private Business Services) and Leadership College.
- Implemented instructional design process to design, develop, deliver and assess curriculums/training programs.
- Designed, developed and implemented activity-based training programs from staff through experienced manager that blended knowledge-based learning and skill-based learning outcomes.
- Designed and created training binders, guides, activity books, case studies, simulations, and instructor manuals.
- Trained subject matter experts and instructors; Implemented “Train-the-Trainer” programs.
- Created Curriculum Handbooks and Plans of Study to communicate “learning paths” and training programs to professional staff.

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### University of Connecticut, Stamford, CT

2008 – 2011

*Accounting Instructor, In-Residence*

- Taught courses in Financial Accounting, Financial Literacy and Managerial Accounting/Cost Analysis for the undergraduate business program and MBA program.

### Federal Reserve Bank of New York, New York, NY

2006 – 2008

*Manager, Education Programs*

- Formulated education strategies to serve teachers and students.
- Developed a financial literacy program and created personal finance education materials and resources for teachers, students and the general public.
- Coordinated educational outreach efforts across functions within the Bank.

### American Institute of CPAs (AICPA), New York, NY

2000 – 2006

*Manager, Education Programs, Academic & Career Development Team*

- Directed and implemented the strategic initiatives and programs of the Pre-Certification Education Executive Committee; managed various task forces and projects.
- Designed and developed the AICPA's Accounting Education Center and Educational Competency Assessment (ECA) web site – a resource that assists educators with assessing student performance and evaluating courses/programs.
- Authored the *CPA Information Package* and the *Takin' Care of Business* Education Handbook that contains 15 comprehensive lesson plans plus student learning activities.
- Created training programs and trained associates nationwide to deliver workshops/seminars using the AICPA's learning resources.
- Started the initiative to develop an Advanced Placement (AP) high school accounting course and exam, including developing the curriculum.

### Bristol High School, Bristol, CT

1997 – 2000

*High School Accounting & Business Education Teacher*

### East Haven High School, East Haven, CT

1995 – 1997

*High School Accounting & Business Education Teacher*

### Deloitte & Touche, New Haven, CT

1993 – 1994

*Audit and Tax Associate*

### Price Waterhouse, Hartford, CT

1990 - 1992

*Audit and Tax Associate*

## ADJUNCT TEACHING POSITIONS & COURSES

### New York University School of Professional Studies

1998 – Present

### Baruch College, CAPS

2014 – Present

### University of Connecticut

2000 – 2008

### Berkeley College

1996 – 1998

*Adjunct Accounting Professor teaching Financial Accounting, Managerial Accounting, Financial Statement Analysis, and Financial Literacy.*

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### **CERTIFICATIONS & EDUCATION**

#### **University of Connecticut, Storrs, CT**

*Master of Business Administration - Accounting Specialization*

*Bachelor of Science - Finance (Cum Laude)*

#### **University of New Haven, West Haven, CT**

*Master of Education – Business Education (25 of 30 credits completed)*

**Certified Business Education Teacher (CT)**

**Certified Public Accountant (CT)**

### **PUBLICATIONS & EDUCATION MATERIALS**

#### ***Publications:***

“The Accounting Pilot and Bridge Project,” *Issues in Accounting Education*

“The Initiative to Create an Advanced Placement Accounting Course & Exam,” *Business Education Forum*

“Revamping High School Accounting Courses,” *Business Education Forum*

“Using Real-World Scenarios in Accounting Classes,” *Business Education Forum*

#### ***Authored Education Materials:***

Financial Accounting Workbook

Principles of Accounting Workbook

Managerial Accounting Workbook

AICPA *Takin’ Care of Business* Education Handbook - business, accounting and finance lesson plans

*Me, Myself, My Money* - a financial literacy curriculum developed for the Connecticut Society of CPAs

*Analyzing Financial Statements* - project-based learning materials developed for NAF

### **AWARDS & CONTRIBUTIONS**

**NYU School of Professional Studies** - *Award for Teaching Excellence, 2002 & 2020*

**NYU School of Professional Studies** - *Outstanding Service Award*

**National Business Education Association (NBEA)** - *Distinguished Service Award*

**Michigan Association of Certified Public Accountants** - *Chair's Service Award*

**Beta Alpha Psi (BAP) Advisory Board Member**

**AICPA's Accounting Education Center** - *WebCPA Star Award*

**AICPA's Educational Competency Assessment web site** - *NACE Award of Excellence*

**AICPA *Takin’ Care of Business* CPA Information Package** - *NACE Award of Excellence*

**National Business Education Association (NBEA) Task Force, Accounting Standards – Chairman**

Led a national task force of secondary and post-secondary accounting educators to develop the national learning standards in business for accounting education.