

Faculty Development Plan

1. Self-Assessment

1.1. *Strengths, Skills, and Competencies*

- I persist through struggles and have a strong work ethic.
- My problem-solving skills, including in recognizing and addressing potential weaknesses in research projects, are helpful in the long research/publication process.
- I enjoy writing and believe this is one of my strengths in the research process.
- I love the students and am passionate about helping them have the best experience possible while at BYU, including in their educational, personal, professional, and spiritual development.
- I think and care deeply about matters of spiritual importance and about belonging. I strive to help students feel hope and belonging through their spiritual journey.
- I desire to be a good colleague and to help continue to build the positive culture that exists here.

1.2. *Interests and Opportunities*

- Primary research interest: corporate taxation, especially in the intersection of taxes and business strategies with financial reporting and capital markets. I am also interested in the effects of tax policies, including on innovation.
 - Because tax matters are in constant flux, I stay apprised of current tax matters by reading key tax-related news sources, including the Wall Street Journal and POLITICO's Weekly Tax articles.
 - I attend tax academic conferences, which often include panels or discussions by practitioners.
 - I am also grateful to have wonderful mentors and colleagues in the BYU SOA, who have a wealth of knowledge and experience within taxation.
- Outside of tax, I am broadly interested in financial accounting matters such as innovation, corporate governance, and labor market dynamics.
 - I am grateful for opportunities to collaborate with colleagues in the SOA who have research experience in these areas as well.
- Regarding teaching, I have the opportunity to teach both financial and managerial accounting through Principles of Accounting II (ACC 310). In the future, I plan to join tax Junior Core group. I have loved teaching ACC 310, and I look forward to further opportunities.

1.3. *Areas to Develop*

- I am working to develop further coding and data analysis skills, especially through Python. I am primarily doing so through the Python Camp and by working with other colleagues who are strong in this area. I also am working on learning to use AI effectively in my research and plan to continue to do so.

- I am continuing to develop my ability to identify and begin new research ideas. Working with mentors in the SOA has been key in this already, and I plan to continue such collaborations so that I can improve at this skill. I plan to initiate at least two new projects each year.
 - Specifically for 2025: I plan to have the initial data analysis completed for one project by May, and begin a new project in the fall.
- As I am new at teaching, I am committed to intentionally developing my teaching skills, which will be important regardless of the subject that I teach. I am grateful to be working with and learning from fantastic teachers within the SOA.
- In preparation to teach in the Junior Core, I need to increase my tax knowledge, which will require brushing up on old concepts, learning about new developments and regularly updating content appropriately, and staying in communication with tax practitioners. I want to be confident enough in my tax knowledge that I can teach tax in a way that is engaging and that demonstrates applicability for all students, whether they plan to pursue a tax focus or not.
- I seek to be a valuable research colleague by developing my ability to make insightful comments and ask helpful questions in research workshops, both internal and external to BYU.
- I seek to effectively mentor students at BYU, including those in the PhD prep program and those who work with me as RAs.

2. Professional Goals and Plans

2.1. Citizenship

- Mentor students
 - Provide RAs with opportunities to engage in both data work and the accounting literature
 - Attend at least one event per year that centers on mentoring women (e.g., WSOA)
 - Get to know the current PhD prep students and be available to help them in the PhD decision and application process
- Be a good department citizen
 - Attend research workshops and be prepared to participate meaningfully
 - Attend department lunches to build relationships
 - Seek opportunities to coauthor on research projects and to provide help such as reading through manuscripts
 - Serve on committees for the PhD prep track and Junior Core admissions
- Service to the broader academic community
 - Provide thoughtful reviews for journals and conferences
 - Discuss at least one paper at a research conference
 - Serve on the ATA Research Resources Committee and General Planning Committee, especially in preparation for the midyear meeting

2.2. Teaching

- Conduct a spiritually strengthening class
 - Begin class with a prayer
 - Include spiritual thoughts in the majority of classes and as prompted
 - Integrate spiritual conversations in one-on-one meetings, helping students to prioritize spiritual growth alongside academic study.
 - Integrate the BYU Marriott School Mission, Vision, and Values into my teaching and mentoring.
- Personally connect with students
 - Learn students' names
 - Invite students to talk with me in my office about non-academic issues
 - Ask students questions about themselves and write down key facts so I can remember and follow up with them
 - Find ways to make the class more accessible to and representative of diverse backgrounds
 - Create a safe classroom environment by demonstrating and inviting vulnerability and belonging
- Improve teaching skills
 - Watch other teachers to learn new techniques
 - Invite an experienced instructor to sit in on one class session to provide feedback
 - Implement one new teaching strategy each year
- Improve course content
 - Focus on the “why” of what I teach and focus the class on what is most important
 - Personally go through student exams, quizzes, projects, etc. so that I am prepared to answer questions
 - Stay current on accounting/tax topics by reading relevant news, attending conferences, and communicating with practitioners
- Integrate technology
 - Teach students how to find and synthesize company financial statement information (e.g., through SEC EDGAR)
 - Provide opportunities for students to work with Excel
 - Engage in conversations and examples of using generative AI effectively

2.3. Scholarship

- Publish in top-tier journals
 - Progress current research projects:
 - R&R for Judd, McGuire, Weaver, and Xia
 - R&R for dissertation
 - Submit Fox, Judd, Kerr, and Thornock
 - Complete bulk of data work for a work-in-process by May
 - By the end of the year, begin a new research project that I can start building into a working paper

- Present at least one paper at a workshop or conference
- Improve my data analysis skills
 - Use the Python Camp to improve my Python abilities
 - Learn to effectively use ChatGPT and AI more generally to improve and streamline my data analysis

3. Relationship between Goals and University Expectations/Needs

My goals align well with department, school, and university expectations.

My citizenship goals align well with the aims of a BYU education, including character development, especially as I mentor other students. As I interact with individuals outside of the university such as at research conferences, I also aim to demonstrate Christlike leadership, which is part of the vision of the BYU Marriott School.

My teaching goals directly relate to the university's expectations, especially regarding promoting a spiritually strengthening and intellectually enlarging environment. These also address the Marriott School's values of faith in Christ and respect for all, and the guiding principle of centering on students. These are also consistent with department goals of increasing belonging.

My scholarship goals relate to the university aims of providing an intellectually enlarging education and the school's value of excellence.

4. Resources Needed to Accomplish Goals

To accomplish my goals, I will need:

1. Funding to submit papers to journals
2. Funding for travel to academic conferences
3. Access to research databases such as WRDS
4. Funding for research and teaching assistants

5. Activities and Accomplishments to Date

Citizenship:

- Work with RAs and PhD prep students
 - I have been assigned two RAs (Sabrina Gooch and Emily Wheatley) in my first two years at BYU, with whom I have worked closely. I gave both opportunities to learn Python skills and critically read research papers. One RA completed the Python Camp in its entirety. I also got to know them individually and to provide mentorship in career and other goals.
 - I worked closely with a team of RAs on a co-authored project (Mason Ethington, Read Hadfield, Sabrina Gooch, Claire Bryant). We actively gave them opportunities to learn and experiment with AI in data analysis.
 - I worked with Mason Ethington in developing machine-learning analysis for my coauthored project that identifies 10-K disclosures revealing an "attitude" toward tax enforcement.

- I helped mentor students through the PhD interview process: Read Hadfield (UT Austin), Robyn de Kock (University of Washington), and Kenadee Bailey.
 - Robyn de Kock was a non-traditional, international student coming out of the MBA program. I provided mentoring and helped her revise her personal statement.
- I worked with Trey Johnson through a data collection process for my coauthored work-in-process with Abigail Allen and Melissa Western.
- I continue to mentor BYU graduates who are currently in (or recently completed) their PhD programs.
- Women in accounting/business//PhD events:
 - I was on a panel of female faculty put on by the Women in Management Club. This panel included other faculty such as Dean Madrian and Bonnie Anderson. (Fall 2023)
 - I participated in a lunch for female students potentially interested in the PhD prep program. (Winter 2024)
 - I attended a WSOA evening event that included networking with students and sharing possibilities of careers in accounting. (Winter 2024)
 - I attended a WSOA lunch that included a panel of professional women with accounting degrees. (Winter 2024)
- Other department citizenship activities
 - In my first year at BYU, I attended all department meetings and workshops and actively participated. In my second year, while I was not able to attend all department meetings, I worked hard to attend as many as possible, attended via Zoom where possible, and contacted at least one workshop visitor to read and provide feedback on their papers.
 - I serve on the Junior Core Admissions Committee as an active participant in admitting students to the Junior Core.
 - I represented BYU at the KPMG dinner at the 2024 ATA midyear meeting.
 - I participate in other department service-oriented events, including attending the annual graduation celebration and convocation ceremony, junior core dinner, and other events involving alumni and/or professionals.
- Service to broader academic community
 - As a member of the ATA research committee, I help to review papers for the ATA midyear meeting.
 - As a member of the ATA general committee, I am helping to prepare for the midyear meeting by working with faculty members from other universities to organize research and non-research sessions. Specifically, I participate in a subcommittee planning and implementing a “pecha kucha” concurrent session entitled “From the Classroom to Practice.”
 - I reviewed a paper in 2025 for *Review of Accounting Studies* and in 2024 for *Journal of Accounting and Public Policy*.

Teaching:

- I taught three sections of ACC 310 during Winter 2024. I learned all my students' names and used them frequently. I received access to course materials and adjusted as needed to fit the needs of the classroom and my teaching style. I invited an experienced instructor to watch my teaching and provide feedback, in addition to the required teaching observation. I also learned by watching recordings of another course instructor. I opened each class with a prayer and often shared spiritual thoughts, which were at times connected to the course material and other times my own experiences or as prompted. I also introduced my students to the Noble Health app promoted by Jeff Wilks for mental health. My teaching evaluations were on the whole positive, especially regarding the classroom environment. One student told me that while she often feels intimidated by business school classes, she always felt safe in my class. Going forward, I want to improve at my confidence, at maintaining management of the classroom, and at my overall mastery of the subject material and related topics.
- Adjustments made in Winter 2025: Because I have more than twice as many students as in the prior year, learning students' names is taking more time; however, I am making progress in that direction. I also implemented a beginning-of-semester student survey, where students can share information about themselves and goals for the class, to better get to know the students and tailor the class as needed.
 - I feel that I have improved in my confidence, both by being more of a master of the material and by implementing techniques to have a more confident presence (e.g., not being overly apologetic for not knowing something perfectly, not being overly self-deprecating), while still aiming to be approachable.
 - I also am working to improve my classroom management; e.g., I am more willing to ask students individually to minimize their side conversations while I am lecturing, or by being willing to move the class discussion along if we're falling behind on time.
 - I try to increase representation through the visuals in slides and pronouns in my speaking (e.g., using "she" for a CEO)
 - I have been more involved in quiz editing and exam updating, and I keep notes on edits to be made in future coursepacks.
 - In preparing for class, I have also watched the recordings of a different instructor than I did last year in order to learn multiple approaches teaching a subject.
 - I provide more direct mentoring to students regarding being successful in my course and applying to the accounting program. Doing so has sometimes resulted in difficult conversations involving likelihoods of admissions into the junior core based on current grades; I try to approach the conversations from a place of charity for my students and to provide them with as much full information as possible to make informed decisions, support to reach their goals, and encouragement in trusting in God's care for them.
 - I am more intentional about talking with students about spiritual matters in one-on-one settings and encouraging them to remember to prioritize their spiritual development alongside their educational pursuits.

Scholarship:

- I submitted a co-authored paper for third-round and final review at JAE, where it was accepted.
- I submitted my dissertation for first-round reviews at JAE and JAR, and submitted a co-authored paper (JMWX) to RAST for first-round review. While these were rejected, I am revising both to submit to other top journals.
- My dissertation was accepted for presentation at the 2024 ATA Midyear Meeting, where I received valuable feedback.
- I presented a research paper (co-authored with BYU colleagues) at a brown bag workshop (2024).
- I spearheaded submitting a coauthored paper (JMWX) to the 2025 NC State Risk Governance Symposium, where it was one of seven papers accepted out of over 50 submissions. Because of the proximity of the conference to the due date of my baby, I will not be presenting the paper but will be actively involved in the process.
- I began several research projects with both BYU and non-BYU colleagues. While not all the projects have continued to fruition, they have sparked ideas for further papers, which I plan to pursue.
 - Most significantly, I am currently in the data process of a project with Abigail Allen and Melissa Western regarding the effects of certain family-supportive policies on firm innovation.

Course Development Goals

See Sections 2.2 and 5 of my Faculty Development Plan, as well as the included ACC 310 syllabus for course purpose, learning outcomes, evidence of achievement (e.g., exams, projects), schedule, etc.

Other goals/plans for teaching (first semester):

1. Begin each class with a prayer, and include spiritual thoughts in the majority of classes/as prompted
2. Invite an experienced instructor to sit in on one class session to provide feedback, and observe at least one experienced instructor teach
3. Include at least one intentional discussion in class surrounding mental health/belonging during the semester (*belonging*)
4. Teach students how to find and integrate company financial statement information (e.g., through SEC EDGAR), and provide opportunities to interact with accounting data through Excel (*integration of technology*)

Report on first-semester goals for teaching:

1. I believe I was successful at including spiritual thoughts in the majority of my classes, and I began each class with prayer. I received many positive comments (both in official student evaluations and unofficial communication) regarding how I brought spiritual insights and discussions into the classroom.
2. In addition to the required evaluation of my teaching, I invited another experienced teacher whom I greatly respect to observe my teaching and provide feedback. Her feedback was valuable in helping me to know how to better use group work time to enhance student learning.
3. I introduced my students to mental health resources, was vulnerable in sharing some of my own experiences as appropriate, and overall sought to create an environment of belonging. One student told me that while she often feels intimidated by business school classes, she always felt safe in my class.
4. I gave students opportunities to interact with real financial statements online and encouraged use of Excel.

Goals for teaching (second semester):

1. In response to feedback from an instructor who observed my teaching, I am working to exude greater confidence in how I present myself in the classroom. I am doing so through two key ways:
 - a. (1) Increasing my mastery of the material itself, including by watching the video recordings of a different instructor than I watched last year in order to learn multiple approaches to teaching a subject, and by staying up to date on current events relevant to classroom topics.
 - b. (2) “Soft” strategies such as positive self-talk. Especially as a professional woman, I want to demonstrate that it is possible to be both humble and successful/confident.
2. One area in which I can improve is in my classroom management, as some students expressed frustration with other students talking during class time. I am actively seeking feedback from other faculty members and implementing their ideas to have greater

control over the classroom, including in managing my time, speaking to students in one-on-one settings, etc. I feel that so far, I have been more successful in this regard than in my prior teaching semester. I am also working to better manage the timing of the class.

3. In addition to student names, learn about students' lives to better serve them.
4. Actively improve course content by making changes or notes for changes to be made in future semesters.
5. Continue to integrate spiritual discussions, *including* in one-on-one settings with students. Make this a more natural part of my interactions with students.

Scholarship Development Goals

See Sections 1.2, 1.3, 2.3, and 5 in Faculty Development Plan. Broadly, I aim to publish high-quality research in top-tier journals, present my work to receive feedback and contribute to the overall knowledge of the academy.

Specific goals to complete by December 2024:

1. Begin 2 new working papers
2. Present at least one working paper at a major conference
3. Progress current WPs to next publishing steps (e.g., additional R&R or publication for HJR; R&Rs for JMWX and dissertation)
4. Improve data analytic skills through Python Camp and AI

Specific strategies to use more effectively to increase productivity:

1. Read “How to Write a Lot” and implement at least one strategy to increase my writing productivity (e.g., start writing as soon as I begin a project)
2. Involve RAs more throughout the research process, including in data processing and literature reviews

How to evaluate success in using these strategies:

1. Can point to one writing strategy I implemented
2. Can use Python to scrape basic data, and/or can use trained RA to scrape data

Report:

1. I have one new working paper as of the end of 2024. While I began other projects, they have not yet been fruitful in being turned into working papers; however, I am continuing to progress early ideas. I learned in this process that I need to break apart my annual goals into small steps. Therefore, for this year I seek to finish the data work on one project by May, and then by the end of the year begin the data work for a new project. While these goals may appear smaller, they allow me to focus on more attainable steps; further, I will be on maternity leave for much of 2025.
2. I presented my dissertation at the ATA midyear meeting and received valuable feedback. I also workshopped a coauthored paper at an external brownbag session (NC State University).
3. I did what was in my control to progress my papers to the next steps. I successfully published HJR and submitted my dissertation and JMWX to journals. I am working to resubmit the latter two papers to new journals. In 2025 we will also submit another coauthored paper (FJKT) to a top journal.
4. I am continuing to work through the Python Camp, and I read newsletters on AI and seek to find new ways to incorporate it into my research and teaching.
5. I have read parts of “How to Write a Lot” and have implemented more intentional “blocking” of my time to dedicate blocks of time to needed projects.
6. I have worked with several RAs and seek to actively involve them in research projects and paper reviews. I have also worked with these RAs to implement machine learning/AI data techniques.

Citizenship Development Goals

See Sections 2.1 and 5 of my Faculty Development Plan.

Goals for last year:

1. Attend 1-2 events that center on mentoring women (e.g., WSOA dinner) (Student mentoring/experiential learning)
2. Reach out to students within the PhD prep track or who demonstrate interest in the prep track, including those of diverse backgrounds (belonging)
3. Actively participate in research workshops
4. Volunteer to discuss at relevant conferences

Report on goals:

1. I attended three women-focused events in 2024 (in addition to one in 2023), actively seeking opportunities to mentor women interested in business, academia, and/or accounting.
2. I mentored multiple students through the PhD application and decision process. However, I was not as good at knowing the other students as I would hope to be; see goals for next year.
3. In my first year at BYU, I attended all department meetings and workshops and actively participated. In my second year, while I was not able to attend all department meetings, I worked hard to attend as many as possible, attended via Zoom where possible, and contacted at least one workshop visitor to read and provide feedback on their papers.
4. I will discuss a paper at the ATA midyear meeting in 2025. I also reviewed a paper for a journal in 2024 and another at the beginning of 2025.

Goals for next year:

1. Continue to be involved in mentorship of RAs, women, and PhD prep students. To improve my mentorship of the PhD prep students, I plan to learn their names and find out how I can be more involved (e.g., by attending a workshop lunch with them).
2. Continue to provide reviews, discussions, etc. for the broader academic community.
3. Successfully implement plans for the 2025 ATA midyear meeting.