

DAN EDELMAN, PhD, CPA



EXECUTIVE SUMMARY

Experience includes Department Head of Accounting, Interim Dean, Associate Provost and Vice President of Academic Affairs, Executive Vice President for Administration, and Chief Financial Officer. Twice tenured Professor of Accounting (Texas A&M University-Commerce and University of North Texas at Dallas). Well versed with issues in higher education. I received outstanding administrator award from the Faculty Senate at Texas A&M University-Commerce while serving as Associate Provost and Vice President of Academic Affairs. I am strongly committed to student access and success through the lens of diversity and inclusion.

ACADEMIC AND PROFESSIONAL EXPERIENCE

University of North Texas at Dallas (UNT Dallas)

(Regional accredited doctoral granting institution)

July 2014 – Present

Lead the university as Executive Vice President of Administration and Chief Financial Officer and also serve as Professor of Accounting (tenured in College of Business). Responsible for various roles across campus including financial management, enrollment management, strategic analysis and reporting, and other vital areas.

Selected Contributions at UNT Dallas:

Communication

- Prepared and presented complex information to various governing bodies including Board of Regents (BOR), Legislative Budget Board, Texas Senate Finance Committee, and Texas House Appropriations Committee
- Represented University at numerous functions, including Dallas Area Rapid Transit extension of light rail train service to campus, meeting with the South African Ambassador, and many other events
- Taught ethics for CPA's at the Texas Office of Inspector General (2017) and Texas Association of Senior State College and University Business Officers (2014)
- Established beneficial relationships with outside entities (i.e. Dallas VA affiliation agreement)
- Conducted town hall meetings/information sessions regarding budgets and state appropriations
- Successfully worked with bond rating agencies to obtain funding
- Presented speeches pertaining to veteran issues, accounting, and recruitment
- Established and expanded coalitions to improve collaborative environment
- Oversaw marketing campaign that significantly increased enrollment
- Recognized for excellent system-wide working relationships

Strategic Planning, Assessment, and Evaluation

- Assist President overseeing Division of Student Access and Success
- One of three leaders that managed the development strategic plan, policies and procedures to ensure academic growth and safety of the campus
- Lead the Holistic Enrollment Committee which resulted in record enrollment, improved retention rates, and creation of Division of Student Access and Success. Fall 2016 had a 22% increase over 2015's headcount and spring 2017 increased spring 2016 by 23%. Summer 2017 realized a 28% increase in headcount over summer 2016. Fall 2017 increased by 15 over fall 2016. Spring 2018 on track to increase 15% over Spring 2017
- Oversaw marketing campaign that significantly increased enrollment
- Assisted creating and establishing a Veterans Center and recognition as a Purple Heart University
- Managed merger of newly formed College of Law into UNT Dallas (2015)
- Developed structure to expand graduate programs and enrollment

Fiscal Management, Resource Generation, and Fundraising

- Key leader in University of North Texas System financial transformation project responsible for change management, governance, organizational strategy, and financial statement integrity improvements
- Assisted in obtaining \$63 million for new academic building and overseeing project
- Obtained board approval and funding for modern residence hall
- Improved internal controls and thwarted malfeasance
- Streamlined processes to reduce costs and improve efficiency
- Supported and participated in fund raising efforts and maximized revenue streams
- Created a strong culture to utilize HUB (Historically Under-utilized businesses) and received HUB champion award
- Oversaw successful Texas Higher Education Coordinating Board (THECB) space utilization audit after predecessors twice failed

Collegiality/Transparency

- Created University Budget Advisory Council to allow university community to participate in budget process and decentralize budget
- Established University Space Advisory Council to address concerns regarding space shortage and usage
- Temporarily managed Advancement and Foundation activities (1 year)
- Promoted climate of collegiality, trust, and transparency
- Respected for courage, integrity, and ability to be direct, when necessary
- Chaired or served on tenure and promotion committees

Personnel

- Assumed responsibilities for department of institutional effectiveness and reporting
- Temporarily managed Advancement and Foundation activities (1 year)
- Reorganized Marketing/Communications and Grants and research departments

- Nominated and recognized for UNT Dallas Staff excellence Award (2015)
- Recruited and developed highly efficient staff
- Dismissed staff for cause (i.e. theft, performance, etc.)
- Established and expanded coalitions to improve collaborative environment

Texas A&M University-Commerce, TX
(Regional accredited doctoral granting Institution)

August 2007 – June 2014

Final position:

Associate Provost and VP of Academic Affairs
Professor of Accounting (tenured in College of Business)

Prior or Interim positions:

Interim Provost and VP of Academic Affairs
Interim Associate Provost and VP of Academic Affairs
Interim Dean, College of Science, Engineering and Agriculture
Department Head, Department of Accounting (College of Business)
Director of Accounting Programs (initial appointment)

Selected Contributions at Texas A&M University-Commerce:

Strategic Planning, Assessment, and Evaluation

- Provided guidance and oversight to ensure favorable reaffirmation of accreditation with Southern Association of Colleges and Schools Commission on Colleges (SACSCOC)
- Responsible for maintaining academic program inventory
- Ensured continued proper program and approvals are obtained from Board of Regents (BOR), THECB, and SACSCOC
- Managed development of the strategic plan for Academic Affairs Division
- Contributed, as necessary, to BOR quarterly meetings
- Developed and expanded public partnership endeavors

International, Online, and Campus Based Learning

- Administered off campus, online and international academic program activities
- Participated in development of Quality Enhancement Plan
- Led student group to Beijing, China and taught International Accounting
- Conducted Venture Capitalism seminar for graduate students in Beijing, China
- Taught Managerial Accounting in Belgrade, Serbia
- Developed and taught multiple tax workshops for international students
- Developed and taught multiple online courses

Personnel

- Recruited and developed faculty and staff
- Promoted climate of collegiality, trust, and transparency
- Conducted annual evaluations for promotion, tenure, and or dismissal of faculty
- Dismissed faculty and staff for cause
- Successfully led efforts to create stand-alone accounting department

Academic, Career Readiness, and Student Learning Initiatives

- Instrumental in procuring officers from Fortune 500 and other entities to speak to classes (i.e. Internal Revenue Service, Federal Deposit Insurance Corporation-Office of Inspector General, World Wide Audit Director, Executive Director of Texas State Board of Public Accountancy, partners from public accounting firms, and others)
- Developed and obtained all necessary approvals for a very successful Master of Science in Accounting degree
- Networked with business leaders to showcase our programs and develop internships
- Instituted accounting tutoring program
- Increased accounting student retention and CPA passage rates

Innovation, Entrepreneurship, and Creative Problem Solving

- Worked with General Counsel at Texas A&M University System Office (System) in revising, modifying, or canceling contracts, personnel actions, and other matters
- Interacted with System internal audit and compliance areas regarding sensitive matters
- Worked across departments to create coalitions and effectively solve problems
- Resolved sensitive faculty and student complaints
- Identified and implemented efficient management processes, techniques, and procedures
- Streamlined electronic personnel action procedures (eliminated approximately 4,000 approvals)
- Instituted procedures to identify SACSCOC unqualified faculty
- Conducted comprehensive forensic investigation of international programs and identified and corrected violations of rules, procedures, practices, and laws. Recommended and implemented significant improvements

Fiscal Management, Resource Generation, and Fundraising

- Complied with accounting rules (i.e. GAAP, FASB, GASB)
- Maximized appropriate formula funding opportunities via prudent management
- Developed opportunities to leverage fundraising while creating new programs and opportunities
- Oversaw Academic Affairs budget (apx. \$60,000,000)
- Solicited and obtained scholarship funds (Trusty/Oxford, ACFE, etc.)
- Created executive advisory committee to enhance curriculum and generate funds
- Collaborated with advancement in multiple strategic fundraising activities

University Service

- Responsible for obtaining and overseeing University Continuing Professional Education approval from Texas State Board of Public Accountancy (TSBPA)
- Arranged and sponsored student field trips to professional events
- Served on numerous committees
- Responsible for completion of sensitive projects for the Provost and President
- Obtain approvals from Caddo Nation, state and federal officials and repatriate Indian remains

Awards

- Received Outstanding Administrator award from the Faculty Senate (April, 2014)
- Received Outstanding Service and Commitment Award (June, 2014)
- Faculty Senate Research Award: "Unfettered thought" 2011
- Nominated for TSCPA Accounting Educator Award, 2010 & 2012

Illinois Institute of Technology, Chicago, IL
(Private regionally accredited doctoral granting Institution)
Adjunct Professor
Teaching/Research Assistant

September 2003 – May 2007

US Department of Justice
Forensic Auditor (Financial Investigator)

January 2002 – December 2006

Joined post 9/11 after obtaining TOP SECRET clearance assigned to investigate and analyze alleged financial crimes (e.g. money laundering, embezzlement, and arson for profit, Racketeering Influenced and Corrupt Organizations act, asset forfeiture, and terrorist activities) for prosecution in federal and state courts. I presented complex information in an easy to understand manner to various high level officials. I also provided assistance to other federal, state, and local officials, including teaching financial investigative analysis and techniques to local investigators.

Nationwide Business Finance, Inc.
Chief Executive Officer
Chief Financial Officer (prior position)

January 1998 – January 2002

Responsible for development and implementation of corporate strategy and management, developed and implemented new products, and raised capital.

St. Xavier University, Chicago, IL
(Four-year private regionally accredited liberal arts institution with approximately 4,500 students)
Accounting Program Chair (one year)
Assistant Professor of Accounting

September 1991 – May 1996

Daniel Edelman & Co, CPA's
Chief Executive Officer

June 1989 – December 1997

Developed and wrote strategic business plans for clients, advised clients on best management practices, testified as an expert witness for fraud, dissipation, taxes, and business valuations. Provided traditional types of accounting services to diverse clientele and responsible for all phases of auditing, accounting, tax, and consulting engagements, including business evaluations, forensic examinations, tax and business strategies for individuals, not-for-profits, and business entities.

Roosevelt University, Chicago, IL
(Private regionally accredited doctoral granting Institution)
Adjunct Professor of Accounting
Graduate Teaching Assistant

September 1989 – May 1992

Illinois Institute of Technology, Chicago, IL
(Private regionally accredited doctoral granting Institution)
Adjunct Professor
Teaching/Research Assistant

September 2003 – 2007

St. Xavier University, Chicago, IL
(Four-year private regionally accredited liberal arts institution)
Accounting Program Chair (one year)
Assistant Professor of Accounting

September 1991 – May 1996

Roosevelt University, Chicago, IL
(Private regionally accredited doctoral granting Institution)
Adjunct Professor of Accounting
Graduate Teaching Assistant

September 1989 – May 1992

COURSES TAUGHT (at VARIOUS INSTITUTIONS)

- Accounting and Finance for Lawyers (Graduate, Spring 2017)
- Accounting Ethics (Graduate & Undergraduate)
- Accounting Theory (Graduate)
- Advanced Accounting (Graduate & Undergraduate)
- Advanced Income Taxes (Graduate & Undergraduate)
- Auditing (Graduate & Undergraduate)
- Entrepreneurial Courses (Business & non-business majors)
- Financial Accounting (Graduate)
- Financial Statement Analysis (Graduate)
- Forensic and Investigative Accounting (Graduate & Undergraduate)
- Forensic Investigations (law enforcement seminars)
- Fraud Examination (Graduate & Undergraduate)
- Governmental and Non-for-Profit Accounting (Graduate & Undergraduate)

- International Accounting and Taxes (Undergraduate and Graduate)
- International Financial Reporting Standards and GAAP (Graduate)
- Independent Accounting Research (Graduate)
- Individual Income Taxes (Graduate & Undergraduate)
- Intermediate Accounting I & II (Graduate & Undergraduate)
- International Accounting (Graduate)
- Managerial Accounting (Graduate & Undergraduate)
- Money Laundering Investigations (Graduate)
- Principles of Accounting (Undergraduate)
- Principles of Finance (Undergraduate)
- Qualitative and Quantitative Research Methods (As TA, not Primary Instructor)
- Seminars for business and individuals (Forensics, taxes, and general business)
- Statistics I & II with SPSS and Minitab (Graduate & Undergraduate)
- Strategy and Policy (Graduate & Undergraduate)
- Venture Capital (Graduate)

SELECTED PEER REVIEWED PUBLICATIONS

- Edelman, D., & Owens, J. (2014). *Collusion in the workplace: Tuition reimbursement, excessive payroll and fraud*. *Fraud*, 28-34.
- Harness, N.J., Edelman, D. & Loving, A. (2013). *Estate Planning Opportunities in 2012 and Beyond*. *International Journal on GSTF Business Review*, 2, 1-3.
- Desal, D. & Edelman, D. (2011). *Mark to Market Accounting: Fuel for A Financial Crisis?* *Journal of Business and Accounting*, 4-1, 119-132.
- Edelman, D. & Nicholson, A. (2011). *Arthur Andersen Auditors and Enron: What happened to their Texas licenses?* *Journal of Finance and Accountancy*, 8, 58-63.
- Wilson, T. & Edelman, D. (2011). *Lessons from WorldCom*. *Journal of Applied Financial Research*, Vol. II.
- Schuster, M., Edelman, D., & Kapp, L. (2011) *Internal Controls-From the Bottom Up for Financial Institutions*. *Internal Auditing*, 26-3, 32-39.
- Edelman, D. (2010) *Masters of Science in Accounting Degree*. Degree, approved by Department, College of Business and Technology, several University committees, Faculty Senate, Dean, Provost, Assistant to the President, President, Texas A& M System, Vice-Chancellor, Texas Higher Education Board, Texas Board of Public Accountancy (courses only), and SACS. Estimated 40-50 peers approved approximate 150 page proposal and numerous revisions.
- Wilson, T. & Edelman, D. (2011). "Bank Secrecy: A Compromise between Transparency and Individual Rights." *Academy of Business Journal*. Vol. I.
- Edelman, D. (2008). *Rising Star*. *Internal Auditor*, 69-3, 77-81.
- Edelman, D., et al (2008). *Internal investigations and transparency: The end of Mr. Dominick's distinguished career*. *International Journal on Governmental Financial Management*, 8-2, 139-144.
- Edelman, D. & Heslop, G. (2009). *Forensic Accounting: Accounting at its most fascinating*. *New Accountant*, 730, 18-19.

Edelman, D. (in press). *KPMG and the U.S. Department of Justice: A case of coercion?* Journal of Accounting Ethics and Public Policy.

Edelman, D. & Shuster, M. (in press). *The Bank Insider: Preventable embezzlement and money laundering.* Commercial Lending Review.

PRESENTATIONS

Edelman, D. (2017, July) Ethics for CPA's, *Navigating Ethical Dilemma's: How to Avoid the Slippery Slope.* Presentation to the Office of Inspector General training retreat.

The four hour course is approved by the Texas State Board of Public Accountancy.

Edelman, D. (2015, Aug) *Financial Issues in Higher Education.* Presentation at Texas A&M University - Central Texas.

Edelman, D. (2015, Apr) Current Events in Higher Education. Presentation at Texas A&M University – Commerce.

Edelman, D. (2014, July) Ethics for CPA's, *Navigating Ethical Dilemma's: How to Avoid the Slippery Slope.* Presentation to the Texas Association of Senior State College and University Business Officers (TASSCUBO) summer conference. The four hour course is approved by the Texas State Board of Public Accountancy.

Richardson, J. & Edelman, D. (2011, July) *Accounting: An Asset to Student Achievement.* Presentation to Career and Technology Association of Texas, Dallas, TX

Wilson, T. & Edelman, D. (2011, Mar) *Lessons from WorldCom: Bernie Ebbers' Contributions to Financial Reporting.* Paper presented at Journal of the Academy of Business Research. BEST PAPER AWARD

Wilson, T. & Edelman, D. (2011, Mar) *Bank Secrecy: A Compromise between Transparency and Individual Rights.* Paper presented at Journal of the Academy of Business Research.

Richardson, J. & Edelman, D. (2010, July) *High School Education: An Asset to Student Achievement.* Presentation to Career and Technology Association of Texas, Dallas, TX.

Edelman, D. & Nicholson A. (2009, Feb) *Arthur Andersen auditors involved with Enron: Did Texas revoke their CPA license?* Paper presented at SW American Accounting Association Meeting, Oklahoma City, OK.

Edelman, D. (2008, March). *Redistributed components of the Tax Reform Act of 1986.* Paper presented at the Southwest American Accounting Association, Houston, TX.

Wilson, T. & Edelman D. (2008, March). *Bernie Ebbers' contribution to U.S. financial reporting.* Paper presented at the Midwest American Accounting Association meeting, Detroit, MI.

Edelman, D. (2008, February). *Teaching Accounting: Choosing constructivist or rote (Direct) learning environments.* Paper accepted for presentation at American Society of Business and Behavioral Sciences Proceedings, Las Vegas, NV.

Edelman, D. (2008, February). *Expert Witness Testimony: Federal forensic accounting "Experts".* Paper accepted for presentation at the American Society of Business and Behavioral Sciences proceedings, Las Vegas, NV.

- Edelman, D. (2006, August). *Stochastics and the learning environment*. Paper presented at American Statistical Association meeting, Seattle, WA.
- Edelman, D. (2005, November). *Probability Misconceptions: A case study of graduate students*. Paper presented at NSTA, Chicago, IL.

EDUCATION

Ph.D.	Illinois Institute of Technology, Chicago, IL Mathematics Education Dissertation: <i>Stochastics learning environment: Recognition and action related to statistics anxiety in accounting and business students</i> .	2007
MS Acct	Roosevelt University, Chicago, IL (GPA 4.0/4.0)	1990
B.B.A.	Loyola University, Chicago, IL	1987

PROFESSIONAL CERTIFICATIONS

Certified Public Accountant
Certified Fraud Examiner
Certified in Financial Forensics
Certified Information Technology Professional
Chartered Global Management Accountant

EXECUTIVE DEVELOPMENT TRAINING

Governor's Executive Development Program (GEDP) University of Texas - Austin	2013
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GEDP is an intense educational program for top executives in Texas state agencies and universities. The program is designed for individuals responsible for charting the strategic direction of their organization. The program is organized around four key areas (1) organizational strategy (2) infrastructure management (3) personnel effectiveness and (4) resource management. Admittance to the program is highly competitive.