

## Vita - Dan N. Stone

### Von Allmen School of Accountancy

#### Office Address and Phone

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#### Education

##### Ph. D.

University of Texas. Joint concentration in **Accounting** (Department of Accounting) and **Information Systems** (Department of Management Science & Information Systems), 1987.

##### M.P.A. (Master of Professional Accounting)

Washington State University, 1983.

##### B.B.A. (Bachelor of Business Administration)

University of Oregon, Major in Accounting, Minor in Statistics, 1979.

#### Positions at Colleges and Universities

- Professor, Von Allmen School of Accountancy, July 2022 to present (in phased retirement).
- Director, Center for Business Analytics, Gatton College of Business, 2021– June 2022.
- Director, Minor in Business Analytics, Gatton College of Business, 2018- June 2022.
- Rosenthal Endowed Chair, Gatton College of Business, University of Kentucky, 2019- June 2022.
- Gatton Endowed Chair, Von Allmen School of Accountancy, University of Kentucky, 2000-2019 (renewable appointment).
- Director, WT Lewis Scholars Program, Lewis Honors College, 2014 to 2020.
- Director of Graduate Studies, Director of Ph. D. Program, Von Allmen School of Accountancy, 2005 to 2018.

#### Academic Honors

- Best Research Paper, 2018 (with R. Williamson), for "Creating Community Shared, Validated Data Sets to Benchmark Accounting Systems Students' IT

and Cybersecurity Knowledge," Accounting Information Systems (AIS) Educator Conference.

- Keynote speaker, 2017, Tennessee Accounting Educator's Association.

### **Membership in Academic and Professional Organizations**

- Academic: American Accounting Association, Association for Contemplative Mind in Higher Education, American Mindfulness Research Association, Institute for Operations Research and the Management Sciences (INFORMS), American Statistical Association (ASA)

### **Certifications:**

- Alteryx Designer Core Certification, 2022.
- Alteryx Designer Micro-Credential, 2022.
- Tableau Desktop Specialist, 2018.
- Certified Public Accountant (Inactive), State of Washington, Certificate #07678.
- Koru mindfulness teacher, certified: 2016.

### **Publications in Refereed Journals**

- Zhang, C., and D. Stone, 2022, "Integrating Alteryx Designer and Tableau Desktop into the AIS Course: An Analytics Mindset Model. *Issues in Accounting Education*; doi: <https://doi.org/10.2308/ISSUES-2021-103>.
- Chang, Y.T., D. Stone, and W. Chi, 2022, "Is Client-Specific Information Useful to Investors? Evidence from Key Audit Matter (KAM) Reports," *Journal of Accounting, Auditing and Finance*.
- Chang, Y.T., and D. Stone, 2021, "Impression Management in Public Sector Audit Proposals: Language and Fees. *European Accounting Review*. <https://doi.org/10.1080/09638180.2021.1969260>.
- O'Brien A. and D. Stone, 2021, "[A Case Study in Managing the Analytics 'Iceberg': Data Cleaning and Management using Alteryx](#)," [Journal of Emerging Technologies in Accounting](#).
- O'Brien A. and D. Stone, 2020. "[Yes, You Can Import, Analyze, and Create Dashboards and Storyboards in Tableau! The GBI Case](#)," [Journal of Emerging Technologies in Accounting](#), 17 (1): 21–31.
- Debreceeny, R., Farewell, S., Scarlata, A. and D. Stone, 2020, "[Knowledge and Skills in Complex Assurance Engagements: The Case of XBRL](#)," [Journal of Information Systems](#), 34: 1, 21-45.

- Heath, J., Walmsley, L. A., Aker, R. M., Ferrin, S., Stone, D., & Norton, J. C. 2020. "[CPR to the Rescue!: An Interprofessional Pilot Program: Cultivating Practices for Resilience \(CPR\) Camp](#)," *Clinical Nurse Specialist*, 34(2), 63-69.
- Stone, D. and YT Chang, 2019, "[Workplace Mindfulness in Accounting Practice: Issues, Opportunities and Challenges](#)," *Accounting Horizons*, 33:4, 167-185.
- Chang, YT and D. Stone, 2019, "[Proposal Readability, Audit Firm Size and Engagement Success: Do More Readable Proposals Win Governmental Audit Engagements?](#)" *Managerial Auditing Journal*, <https://www.emeraldinsight.com/journal/maj>, 34: 8, 871-894.
- Chang, YT and D. Stone, 2019, "[Why Does Decomposed Audit Proposal Readability Differ by Audit Firm Size? A Coh-Matrix Approach](#)," *Managerial Auditing Journal*, <https://www.emeraldinsight.com/journal/maj>, 34: 8.
- Zhang, M.C., D. Stone, and H. Xie, 2019, "[Text Data Sources in Archival Accounting Research: Insights and Strategies for Accounting Systems' Scholars](#)," *Journal of Information Systems*, 33:1, 145-180.
- Witherspoon, C. and D. Stone, 2018, "[Tax Preparer Certification, and Organization Form among Uncertified Preparers, Influence Client Satisfaction and Experience](#)," *Journal of Emerging Technologies in Accounting*, 15:2, 117-136.
- Weinstein, N. and D. Stone, 2018, "[Need Depriving Effects of Financial Insecurity: Implications for Well-Being and Financial Behaviors](#)," *Journal of Experimental Psychology: General*, 147: 10, 1503-1520.
- Stone, D. 2018, "[The 'New Statistics' and Nullifying the Null: Twelve Actions for Improving Accounting Research Quality and Integrity](#), *Accounting Horizons*, 32:1, 105-120.
- Cockrell, C., D. Stone and B. Wier, 2018, "[Accounting for Professional Accountants' Dysfunctional Knowledge Sharing: A Self-Determination Theory Perspective](#)," *Journal of Information Systems*, 32: 1.
- Alewine, H., and D. Stone, 2017, "[Accounting systems' design matters: Evaluability and mode influence environmental performance judgments](#)," 20: 23-62, *Advances in Accounting Behavioral Research*, ISSN: 1475-1488.

### **Publications – Books**

- Prentice, R. A., G. Granath, A. H. Bizzell, D. Stone, and B. D. Clinton, 2021 (current edition), "CPAexcel CPA Exam Review: Business Environment and Concepts," John Wiley & Sons Publishing.

### **Publications – Online and Non-Referred**

- Stone, D., video lecturer for, and author of, [CPAExcel](#) (CPA Review Course; John Wiley & Sons Publishing, Hoboken, New Jersey) modules (2009 - present):

- \* Data Analytics
- \* Corporate Governance and Internal Control
- \* Information Technology Fundamentals and Systems
- \* Information Technology Risks and Controls

### **Editorial Service**

Editor, Behavioral Research in Accounting, 2020-2023.

Editor, *Journal of Forensic Accounting Research*, 2015-2018.

Member, Research and Publications Committee, *American Accounting Association – Forensic Accounting Section*, 2012-2018.

Chair (2017-18) and Member (2015-2017), Research and Publications Committee, *American Accounting Association – Emerging Technologies Section*, 2015-2018.

Ad hoc reviewer for:

- *The Accounting Review*
- *Accounting, Organizations and Society*
- *Auditing: A Journal of Practice and Theory*
- *Organizational Behavior and Human Decision Processes*
- *Management Accounting Research*
- *Accounting, Management, and Information Technologies*
- *International Journal of Accounting Information Systems*
- *ACM Transactions on Information Systems*
- *Advances in Accounting Information Systems*
- *Behavioral Research in Accounting*
- *Contemporary Accounting Research*
- *Cultural Studies <--> Critical Methodologies*
- *Issues in Accounting Education*
- *The International Journal of Accounting*
- *Management Information Systems Quarterly*
- *Management Science*
- *Motivation and Emotion*
- *National Science Foundation Decision and Management Sciences Program*

### **Editorial Boards**

- *Accounting and the Public Interest* (2005 – 2009, 2016 - 2019)
- *Journal of Information Systems* (2013 - current, 1993 – 2001)
- *Advances in Accounting Behavioral Research* (1997 - current)
- *SSRN History of Accounting eJournal* (2008 – current)

## Grants and Contracts

- Grant from the UK Women & Philanthropy Network (\$41,334) to fund Heath, J., Walmsley, L. A., Aker, R. M., Ferrin, S., Stone, D., & Norton, J. C. 2020. ["CPR to the Rescue!: An Interprofessional Pilot Program: Cultivating Practices for Resilience \(CPR\) Camp,"](#) *Clinical Nurse Specialist*, 34(2), 63-69.
- Igniting Research Collaborations (IRC) Grant (with Nathan Jacobs (Computer Science), Mark Lauersdorf (Linguistics), Hong Xie (Von Allmen School of Accountancy)), 2018, University of Kentucky, \$33,315, "Listening to Markets—A Temporal Convolutional Net (TCN) Analysis of Conservatism in Company Reporting."

## Refereed Presentations

- \* Stone, D., and R. Williamson, 2018, "Digital Dysfunction, Discernment, and Dexterity: Lessons for Accounting Professionals," *AIS Educator Conference*.
- \* Stone, D., 2017, "Digital Dysfunction, Discernment, and Dexterity: Lessons for Accounting Professionals," Institute of Management Accountants' Annual Conference.
- \* Stone, D., 2017, "Digital Dysfunction, Discernment, and Dexterity: Topics for the Advanced Accounting Systems or Accounting Professionalism Course," AIS Educator Conference.
- \* Bundy, S., M. Sooy, P. Mohapatra, and D. Stone, 2017, "Aristocracy or Meritocracy? The Role of Pedigree and Research Performance in New Accounting Faculty Placements," *American Accounting Association annual meeting*, 2017 Canadian Academic Accounting Association (CAAA) Annual Conference.
- \* Chang, Y.T, and D. Stone, 2017, "Proposal Readability, Firm Size and Engagement Success: Do More Readable Proposals Win Governmental Audit Engagements?" *American Accounting Association annual meeting*.
- \* Chang, Y.T, and D. Stone, 2017, "Proposal Readability, Firm Size and Engagement Success: Do More Readable Proposals Win Governmental Audit Engagements?" *European Accounting Association annual meeting*.

## Seminar and Conference Presentations

- \* Stone, D., 2021, "The Hidden Life of Words: Introduction to Text Analytic Applications in Accounting, Auditing, and Forensics," Kentucky Society of Certified Public Accountants, Spring Business Conference.
- \* Stone, D., and C. Cheng, 2020, "Learn the Tricks of Alteryx," Institute of Internal Auditors (Seattle chapter) Conference on Business Analytics.
- \* Stone, D., and A. Irwin, 2019, "How to Win Firms and Influence Students - Teaching Accounting Data Visualization" American Accounting Association

Conference on Teaching and Learning in Accounting (CTLA). url: <http://aaahq.org/Meetings/2019/Annual-Meeting/Program/CTLA-Program>. Accessed: June 2019.

- \* Stone, D., M. Corbett (Tableau), J. Adams, 2019, "Tableau Desktop Specialist Exam: Resources and Strategies," Intensive Data and Analytics Summer Workshop, AAA.
- \* Stone, D. "Practicing Mindful Living," 2019, Intensive Data and Analytics Summer Workshop, AAA.
- \* Stone, D., 2019, "Data visualization for accountants: Teaching Accounting Data to Speak," Kentucky Society of Certified Public Accountants, Spring Business Conference.
- \* Stone, D., 2018, "Digital Wisdom and Dysfunction," Updating the Professional Accountant conference, Lipscomb University.
- \* Stone, D. 2017, keynote speaker, "Digital Professionalism for Accountants," keynote speaker, *Tennessee Society of Accounting Educators*.
- \* Stone, D., 2017, "Digital Dysfunction, Discernment, and Dexterity, *Institute of Management Accountants (IMA) Annual Conference*.

### **Motivational Interviewing, Contemplative Practices, and Mindfulness Workshops and Presentations**

- \* Stone, D., Teach Co-Curricular Mindfulness Courses ([Koru](#)) through UK Wellness program (2019-present).
- \* Stone, D. 2018, "Mindfulness: An Introduction for Student Advisors," University of Kentucky, Gatton College of Business, Undergraduate Resource Center.

### **Formal Development and Renewal -- Conferences Attended & Training Completed**

- \* AIS Educator's Conference, 2022
- \* Alteryx Annual Conference, 2022
- \* AAA Data Analytics Conference, 2019
- \* AACSB Data Analytics Conference, 2019
- \* Data Analytics – An Introduction Using Alteryx and Tableau, PWC, San Francisco, CA, 2019
- \* Data Visualization Using Excel, online course, 2019.
- \* American Accounting Association annual meeting, 1999 – 2012, 2014-2015. 2017-19.

**Doctoral Dissertation Committees** (all at University of Kentucky)

Chair or Co-Chair

- \* Alicia Irwin, Chair, passed qualifying examination (2020).

Committee Member

- \* Michael Zhang, PhD (2021).

Doctoral Dissertation Committee – Graduate School Member

- Erin Hannon, College of Fine Arts, 2020-21.
- Jennifer Siebenthaler, College of Education, 2019-20.
- Zack Morris, College of Fine Arts, 2018-19.
- David Baker, College of Fine Arts, 2018-19.

**Doctoral Committee – Paper Supervision**

- \* Alicia Irwin, co-supervisor, first and second-year student paper.
- \* Michael Zhang, co-supervisor, first and second-year student paper.

**Service – Von Allmen School of Accountancy - University of Kentucky**

- \* Director of Graduate Studies: 2005 to 2018
- \* Director of Ph. D. Program, 2005 to 2018
- \* Ph. D. Program Committee, 2000 - 2018.

**Service – Gatton College of Business - University of Kentucky**

- \* Director, Minor in Business Analytics, 2018- June 2022.
- \* Chair, Business Analytics Task Force, 2018-19.
- \* Research Excellence Team, 2017-19.

**Service -- University of Kentucky**

- \* Retreat Co-Facilitator, College of Nursing, “hCATS (health Colleges Advancing Team Skills) to CPR Camp (cultivating practices for resilience),” five weekend retreats 2018 and 2019.
- \* University of Kentucky KORU Teachers Association 2017-18.
- \* KORU mindfulness teacher, University of Kentucky, 2016-19.
- \* Faculty Instructor, College of Nursing, summer 2018 class, Facilitating Mindfulness and Resilience in Nursing and pre-nursing students.
- \* Financial Wellness Advisory Board, 2016-19.
- \* Instructor, Koru Mindfulness courses at Univ. of Kentucky, 2015 – present.
- \* Director, WT Lewis Scholars Program, 2014-2020.

- \* Assistant Trip Leader, Outdoor Pursuits Program, 2012-2014.
- \* Graduate Council (elected position), 2012-2015.

**Service -- Community**

- \* Certified Interpretive Guide – National Association for Interpretation (certification completed March 2018).
- \* Volunteer – Floracliff Nature Center, 2021 to present.

(Revised, September 2022)