

Wayne W. Williams, Ed.D.

EDUCATION

Ed. D.	University of Pennsylvania, Graduate School of Education Higher Education Management Dissertation Title: <i>"Borrowing the Price of Admissions" is a qualitative case study which explores how students who have borrowed to attend a large, urban community college develop their value proposition for postsecondary education.</i> Committee: Joni Finney, Aims McGuinness, Blake Naughton (2013)	August 2013
C.F.P.©	Certified Financial Planner Certified by the CFP Board	August 2021
E.A.	Internal Revenue Service Licensed tax practitioner	January 2011
M.S. Tax	Widener University, School of Management Major: Taxation & Financial Planning	August 1997
B.B.A.	Temple University, Fox School of Business Major: Accounting	August 1994
Diploma	Central High School (242), Philadelphia, PA	June 1983

INSTRUCTION

Certification: Fox School of Business, Temple University June 2020
Fox Online & Digital Certification – Online Teaching Certificate

Temple University, Fox School of Business (2017 – Present)

Promoted to Associate Professor of Instruction from Assistant Professor (non-tenure track) following service as adjunct-faculty member in the Department of Accounting. Student-oriented faculty member providing undergraduate and graduate instruction in accounting with a scholastic interest in financial literacy. Undergraduate tax course coordinator and graduate business tax strategies course coordinator. Additional academic service work as dissertation committee member in the Doctoral of Business Administration degree program.

Temple University, Graduate School of Education (2016 – 2018)

Hired as adjunct faculty member to instruct *"Higher Education & Finance"* in the doctoral studies program. The premise of the course is to provide students with a basic understanding of postsecondary education and finance as future leaders address emerging issues within the increasingly demanding higher education environment, with challenges such as budget cuts, rising institutional costs, tuition pressures, affordability, and access.

University of Pennsylvania, Wharton School (summer only) (2017 – Present)

Program Leader, Essentials of Finance – Wharton Global Youth Program. This course provides students with an introduction to the theory, the methods and the concerns of the world of finance through the fundamentals of both personal and corporate finance for a global high school audience. Stock Market Challenge Program Leader for "The Wharton Global Youth Meetup (GYM)," an online community for students enrolled in Wharton Summer Global Youth courses and programs designed to introduce the intricacies of investing-from the concepts and analysis to the practical application of trading via a virtual investment simulator. Previously worked as Finance Instructor for the Future of the Business World and Leadership in the Business World (LBW) providing the chance for students to begin to identify interests and lay the foundation for future education and career goals.

Babson College, 10,000 Small Businesses Program

(2016 – 2018)

Selected by Babson faculty to teach “*Being Bankable*”, a course designed to help small business owners describe their growth opportunities using financial terms and other metrics and then determine potential sources of funding. This hybrid course (online and live instruction) is offered in Babson’s the National Blended Learning Cohort and has reached its target of 150 small-business owners per cohort.

Community College of Philadelphia

(2004 – 2018)

- **Director of Education Services, Goldman Sachs 10,000 Small Businesses Philadelphia (2013-Present)**

The Education Services Director position actually combines two roles: Lead Faculty and Business Support Services Director. The Lead Faculty role is responsible for the oversight and the integration of the curriculum with business advising and the opportunity to access capital. As a part of the site delivery leadership team, the Lead Faculty is responsible for the recruitment, training, and ongoing development of all site module faculty members. The Business Support Services Director is responsible for the recruitment of scholars and the provision of scholars’ business support services obtained internally or externally to the program including the supervision of the Alumni Manager. Acts as a liaison with other staff to organize and connect all external activities with internal support.

- **Department Chair, Business Administration Department (2007-2013)** Hired as full-time faculty member in Finance (2006) and promoted to Assistant Professor (2009). Received appointment (2007) to the role of departmental academic administrator following nomination and election by faculty colleagues. Primary duties included managing academic and vocational transfer programs for approximately (3,000) students while providing leadership, supervising and direction. Acts as the representative and mission advocate for the department to college administration and outside constituencies. Supervisory responsibilities include acting as a mentor and facilitator for department staff and over (70) unionized full-time and adjunct faculty members in the following disciplines: accounting, economics, culinary arts, hospitality management and automotive technologies. Accomplishments include the creation of consolidated department, overseeing curricular changes to meet state transfer guidelines (PASSHE), strengthening relationships with industry groups through program advisory committees, successful program budget management and the establishment of Alpha Beta Gamma honors society for business students.

Greater Philadelphia Urban Affairs Coalition, Campaign for Working Families

(2004 – 2012)

Developed curriculum and led training sessions that led to certification for participants in the IRS Volunteer Income Tax Assistance program. Provided economic and tax policy advocacy for working families eligible for Earned Income Tax Credit as Advisory Committee member.

City of Philadelphia, Board of Pensions

(2005 – 2012)

Contracted to develop curriculum and serve as seminar speaker (*Taxation Considerations for City of Philadelphia Retirees*) that would address financial decision-making and tax implications of retirement from Municipal Retirement Plan J and Plan Y.

Temple University, School of Social Administration

(2001 – 2003)

Guest lecturer covering the role of policy and budget development for graduate course (*Financial Management of Non-Profit Organizations*) instructed by Phyllis Randall.

Pierce College, Accelerated Degree Cluster Program

(1997 – 1998)

Adjunct faculty member providing undergraduate business instruction (macroeconomics, microeconomics, marketing, and finance) to enrolled students at employer sites.

PUBLICATIONS

Co-Author, “Exploring common correlates of business undergraduate satisfaction with their degree program versus expected employment,” *Journal of Education for Business*, 94, no.1 (September 27, 2018) 31-39, <https://doi.org/10.1080/08832323.2018.1502144>.

Co-Author, “Further Exploring Differences in Business Undergraduate Perceived Outcomes by Preferred Classroom Learning Environment,” *Journal of Education and Learning* 7, no. 5 (June 18, 2018): 20-30, <https://doi.org/10.5539/jel.v7n5p20>.

Co-Author, “Challenges in Valuing Mergers and Acquisitions in the Wine Industry,” *Journal of Wine Economics: Selected Proceedings*, June 2018.

Co-Author, “The Section 199A Passthrough Deduction,” *Real Estate Law Journal* 47, no. 1 (Summer 2018): 78-92.

Co-Author, “The College Financing Crisis,” *PICPA, CPA Now blog* (May 11, 2016): <https://www.picpa.org/articles/cpa-now-blog/cpa-now/2016/05/11/the-college-financing-crisis>.

Author, “This Weekend: Make \$ome \$erious Money!,” *NBC Philadelphia*, February 28, 2009, <https://www.nbcphiladelphia.com/news/business/Cash-in-on-4-Big-Tax-Changes.html>.

PRESENTATIONS

Presenter, “Temple Lenfest Financial Literacy Workshop,” March 12, 2021, at Temple University sponsored by NABA and The Department of Accounting, Fox School of Business, Temple University.

Presenter, “PASCEP Financial Literacy Workshop,” December 18, 2020, at Temple University sponsored by PASCEP (Pan-African Studies) in Philadelphia, PA.

Panelist, “M3505 Entrepreneurial Marketing Shark Tank,” Temple University, November 24, 2020.

Panelist, “Differentiating Your Social Impact Idea or Venture,” Changemaker Challenge Series sponsored by Temple University's Social Entrepreneurship, November 17, 2020.

Presenter, “Accounting Month: Cares Act,” by The Department of Accounting, Fox School of Business, Temple University, September 28, 2020.

Presenter, “Shelter-in-Place: Economic Impact and CARES Act Legislation,” June 24, 2020, at virtual Fox on the Road by The Department of Accounting, Fox School of Business, Temple University.

Presenter, “Tax Update: The CARES Act Overview and Coronavirus Tax Relief,” April 27, 2020, at Virtual Speaker Series by The Department of Accounting, Fox School of Business, Temple University.

Presenter, “Challenges in Valuing Mergers and Acquisitions in the Wine Industry,” June 10, 2018, at 12th Annual AAWE Conference in Ithaca, New York.

Presenter, Business Builder Workshop – “Part 1 – Understanding the BIRT & Net Profits Tax and Credit Offsets” (January 16, 2018), “Part 2 – Wage & Earnings Taxes and Job Tax Credits” (January 23, 2018), and “Part 3 – Use & Occupancy vs. Property Tax; Sugary Beverage Tax and Fair Chance Hiring Initiative” (January 30, 2018) at PIDC and the City of Philadelphia’s Revenue department.

Presenter, Business Builder Workshop Summer Series – “Navigating through City Taxes: Knowing the Liabilities and Discovering the Credits” (Summer 2017), PIDC and the City of Philadelphia’s Revenue department.

Keynote speaker, “The Courage to Succeed,” April 20, 2017, at Temple University Fox School of Business Accounting Student Professional Organizations 5th Annual Accounting Banquet.

Panelist, “You Can Stop After They Call you Doctor” (March 25, 2017), and “Complete Your Research & Program: No Matter What, Where, or How!” (November 14, 2015) at Options Without Walls Doctoral Studies Symposium, Community College of Philadelphia.

Presenter, Business Builder Workshop Summer Series – “Navigating through City Taxes: Knowing the Liabilities and Discovering the Credits” (Summer 2016), PIDC and the City of Philadelphia’s Revenue department.

Panelist, “Constraint should be catalyst, not excuse,” October 25, 2013, at the Greater Philadelphia Leadership Exchange, WHYY Studios.

TRANSLATIONAL DISSEMINATION OF RESEARCH

Media Contribution, “Temple, professors, and students comment on Biden’s student debt plans”, Temple News, August 30, 2022, <https://temple-news.com/temple-professors-students-comment-on-bidens-student-debt-plans/>

Presenter, “Filing 2020 Taxes – Primer,” sponsored by Chi Upsilon Sigma National Latin Sorority, Inc. at University of Delaware, March 8, 2021.

Media Contribution, “Accounting Concepts to Help Solve Problems for Entrepreneurs,” Fox Brief, February 24, 2021, <https://bit.ly/32d72rF>

Media Contribution, “With relief hard to access, GoFundMe was a small biz lifeline in Philadelphia,” interviewed by Michaela Winberg for BillyPenn, December 30, 2020, <https://bit.ly/3ddt83I>

Media Contribution, “Support community with your wallet this holiday season,” interviewed by Anna E. Batt for Fox Focus, November 25, 2020, <https://bit.ly/3kGW8Dp>

Media Contribution, “Harriett’s Bookshop in Fishtown: 'A space of peace for people in a chaotic world’” by Brandon T. Harden, Updated: February 27, 2020.

Presenter, “The Black Generational Wealth Series: Planting Seeds of Wealth: Transferring Knowledge to the Next Generation,” City of Philadelphia, Office of Black Male Engagement, Muriel Dobbins, February 25, 2020.

Presenter, “Campus Community Conversation: Money Matters,” University of Pennsylvania, African American Resource Center, February 20, 2020.

Presenter, “The Black Generational Wealth Series: Grand Opening, Grand Closing: Building a Business that Lasts,” City of Philadelphia, Office of Black Male Engagement, February 18, 2020.

Presenter, “The Black Generational Wealth Series: Building Blocks: Opportunities to Rebuild with the City of Philadelphia,” City of Philadelphia, Office of Black Male Engagement, February 11, 2020.

Presenter/Facilitator, “The Black Generational Wealth Series: Building a Legacy of Wealth for our Community,” City of Philadelphia, Office of Black Male Engagement, February 4, 2020.

Pitch Competition Judge, “Turning Critical Thinking not Critical Doing” Intellectual Heritage 2 Course, Temple University Entrepreneurship Academy, December 3, 2019.

Media Contributions, “How Philly muralist Jimmy Glossblack went from tagging trains to selling art to Comcast and Google,” *The Inquirer*, November 11, 2019, <https://www.inquirer.com/life/jimmy-glossblack-mural-art-graffiti-paint-comcast-20191111.html>

Consultant and Research Participant, “Nationwide Potential Advisors: HBCU Student Perceptions of the Field of Financial Planning and factors that Influence Student Career Choices”, IRB Protocol #2019/02/03, funded by Nationwide Mutual Insurance Company and Research for Action – the purpose was to better understand the perceptions and awareness of the field of financial planning among African American undergraduate students with the goal of increasing diversity in the field, November 2019.

Presenter, “Financial Literacy Workshop,” Temple University, October 28, 2019.

Presenter, “Options Without Walls Fifth Annual Doctoral Studies Symposium – 2019 Removing Barriers and Empowering Black Scholars!,” Community College of Philadelphia, October 19, 2019

Facilitator, “Future Industry Leaders,” NABA and IMA-T, Temple University, October 16, 2019

Presenter, “The Earned Income Tax Credit (EITC)”, City of Philadelphia’s Revenue department. April 9, 2019, <https://www.youtube.com/watch?v=D-bKVXZuocI>

Presenter, “Getting EITC is a windfall”, City of Philadelphia’s Revenue department. April 8, 2019, <https://www.youtube.com/watch?v=Fet-cmYqIaM>

Presenter, “Why EITC is so important for Philadelphians”, The Revenue Rundown, Ep. 14, City of Philadelphia’s Revenue department. April 5, 2019, <http://ow.ly/77bb30ooNbC>

Media Contribution, “South Jersey almond beverage company gets juice from Kraft Heinz to make it big,” April 5, 2019, <https://www.philly.com/business/kraft-heinz-incubator-whole-foods-organic-origin-almond-20190405.html>

Presenter, “Episode 14 - The importance of the Earned Income Tax Credit (EITC)”, City of Philadelphia’s Revenue department. April 5, 2019, <https://www.youtube.com/watch?v=OXD4RopalsY>

Presenter “The Mayor's Office of Black Male Engagement Spotlight Series Show 5” December 24, 2018. <https://www.youtube.com/watch?v=9MJpa6vzNQc&t=1s>

Media Contribution, interviewed by Nicole Brewer for CBS Philly 3: “Nordstrom Opening Store with Personal Stylists, But No Clothes”, September 12, 2017 and “How Millennials are Driving Change for Retail Stores”, February 24, 2017: <http://philadelphia.cbslocal.com/2017/02/24/how-millennials-are-driving-changes-for-retail-stores>.

Presenter, “Economics of Our Times: The Good, the Bad, and the Ugly” Community College of Philadelphia CCPTV Production, September 13, 2013.

Presenter, “Economics of Our Times: Federal Deficit” Community College of Philadelphia CCPTV Production, Summer 2012.

Presenter, “Economics of Our Times: Jobs and Unemployment” Community College of Philadelphia CCPTV Production, Summer 2012.

Contributor, “Economics of Our Times: Healthcare Reform” Community College of Philadelphia CC PTV Production, Summer 2012.

SERVICE – COMMITTEE & POLICY APPOINTMENTS

Greater Philadelphia Region

- **GRF HBCU Scholarship Committee** – (Spring 2021) serves on CPA firm scholarship committee to award scholarships to undergraduate students who attends a Historically Black College or University and pursues a career in public accounting.
- **The Chamber of Commerce for Greater Philadelphia (2019 to present)** – serves on State and Local Tax Committee to develop public policy positions as well as industry and subject matter specific initiatives.
- **PIDC Loan Committee (2018 – present)** – Appointed as Vice Chairman, 2022. Consider loan approvals recommended by underwriting for businesses and non-profit organizations undertaking capital. Includes responsibility to provide insight to quarterly portfolio loan loss risk management and loan policy recommendations for a total loan facility of approximately \$500M.
- **YouthBuild Philadelphia Charter School – Finance Committee (2017 – present)** – Provides financial oversight, recommendations for spending and financial decisions and participates in internal finance meetings. Serves as member of audit committee.

City of Philadelphia

- **Participatory Budgeting Steering Committee (2020 to 2022)** – design the Participatory Budgeting process, guiding the city on how to engage the public more collaboratively and inclusively. The Committee will also help build the foundation for how the next physical development plan of the city (known as “The Comprehensive Plan”) is structured.
- **Council Connector program (2019 to 2022)** – provides input and recommendation on how to foster inclusive, neighborhood-focused growth across the city of Philadelphia.
- **PHL Neighborhood Growth Project (2019 to present)** – appointed to committee to four major focus areas of its platform: Inclusive Growth and Good Jobs, Education and Workforce Modernization, Safe and Healthy Neighborhoods and Putting People First at City Hall.
- **Mayor’s Commission on African American Males Committee (2017 to present)** – appointed by Mayor James F. Kenney to serve in local My Brother’s Keeper initiative. Emeritus Member, 2022.
- **Revenue Commissioner’s Tax Advisory Committee Member (2009 to present)** – provides input on department operational issues as well as tax policy.
- **Mayor’s Task Force on Tax Policy & Economic Competitiveness in Philadelphia (2009, 2021)** – provided input and recommendations on tax policy culminating in the report titled “Thinking Beyond Today: A Path to Prosperity”, October 2009.

Temple University

- **Department Re-Organization Committee** - Financial Acuity consideration work (Spring, 2021)
- **Faculty Development Committee** – planning and development for Musser, Adrisan-Frank and Experiential Learning Teaching Awards. Support the development of Faculty Mentoring survey instrument (Spring, 2021)
- **Course Coordinator** – ACCT 5209 (MAcc) and ACCT 3531 (UG), Fox School of Business.
- **Dissertation Project** – Kenneth Hudson, “Racial Perspectives of Promotion: Digging Deeper into the Profile of Social networking and Merit-Based Perspectives for the Career Advancement of Minorities within Corporations”, Fox School of Business Doctor of Business Administration, (Defense pending 4/2021), Adjunct Graduate Faculty.
- **Dissertation Project** – Ruben Delgado, "Business Acumen: An Indicator of Chief Human Resources Officer Effectiveness", Fox School of Business Doctor of Business Administration, February 2021, Adjunct Graduate Faculty.
- **Dissertation Project** – Shawn Edwards, "Nonprofit Governance: Barriers to Millennials and Racial Minorities in Nonprofit Board Service", Fox School of Business Doctor of Business Administration, September 2020, External Reader.
- **Collegial Assembly of the Fox School of Business and Management (CAFSBM), Accounting Department Representative (August 2020 to Present)** – Committee shall have the primary responsibility for making recommendations regarding collective instructional responsibilities, including, but not limited to: assessments of teaching effectiveness, design and evaluation of teaching evaluations, use of teaching evaluations in promotion, tenure, and renewal decisions, and the development of programs to improve teaching effectiveness.
- **Temple University Entrepreneurship Academy, Social Entrepreneurship Planning Committee (July 2020 to Present)** – assist with the planning and growth of the social entrepreneurship initiative including committee responsibilities for program scheduling, instructor qualifications, SE Pitch workshops and Spring SE Summit.
- **Fox 2025 - Shared Governance Committee (April 2020 to Present)** – monitor and counsel with respect to the implementation of the Fox 2025 Strategic Plan.
- **Diversity and Inclusion Committee (February 2020 to Present)** – assists with the planning and coordination for the Diversity, Equity & Inclusion Networking Reception held at the Charles L. Blockson Afro-American Collection on February 12, 2020, in support of the Fox School’s Strategic Plan.
- **Equal Opportunity (EO) Ombudsperson for the Fox School of Business (2019 to present)** – investigate concerns and complaints and discuss appropriate resolutions. Develops resources and tools to aid University constituents in fostering a culture of respect, collaboration and problem resolution.
- **Pennsylvania Institute of Certified Public Accountants (PICPA) (2018 to present)** – active member who serves as a resource to other accounting professionals.
- **The National Association of Black Accountants, Inc. (2018 to present)** – serves as Faculty Advisor for Temple University Student Chapter where they recently won Student Chapter of the Year under my guidance. Named National Faculty Advisor of the Year, 2022.
- **Volunteer Income Tax Assistance (VITA) Program (2018 to present)** – serves as Faculty/Return Reviewer for Fox School’s Department of Accounting at Temple’s Ambler campus.
- **Accounting Curriculum Committee (2018 to present)** – serves on the graduate accounting curriculum sub-committee outlined in the Teaching section.
- **Second Annual Accounting Achievement Awards (2018)** – assisted with the planning, coordination and scholarship fundraising for the annual reception and awards presentation recognizing Temple accounting alumni for their post-graduation achievements in the profession hosted by Department of Accounting on May 2, 2018

Community College of Philadelphia

- **Strategic Planning Committee (2017)** – Workforce & Economic Innovation campus facilitator and co-author of college-wide five-year strategic plan.
- **Assessing Community College of Philadelphia – (2015)** – Provide insight to the PEW Charitable Trust during their research of student outcomes and improvement strategies at the college.
- **Self-Study Steering Committee Members (2014)** – Analyzed and prepare self-study report related to Standards 2, 3, 7: Planning, Resource Allocation, and Institutional Renewal (2), Institutional Resources (3), Institutional Assessment (7) submitted for reaccreditation to the Middle States Commission on Higher Education.
- **Center for Male Engagement (2010)** – Advisory member providing grant oversight for college program designed to promote and track success among males of color.
- **Title VIB International Business Fellow (2010)** – authored funding narrative for study-abroad program.
- **College-wide Student Learning Outcomes Communications Committee (2008)** – worked across disciplines to co-author one of five student learning outcomes for graduates of the college: effective communication.
- **Achieving the Dream (2006)** – served as core team to promote the College’s culture of inquiry, reflection and commitment to student success; assist in identifying existing values, assumptions, structures and systems at the College that nurture or impede student success; and engage students, faculty, community members and others in dialogue focused on the College’s student success agenda.
- **Minority Fellow in Finance (2006)** – Provided research and made recommendation to revise finance curriculum.

PROFESSIONAL WORK EXPERIENCE

KEY MILESTONES

- Organized and facilitated the student-led Inaugural Black Business Leadership Symposium at the Fox School of Business, Spring 2021 hosted by the Temple Chapter of the National Association of Black Accountants resulting in the chapter being named Eastern Region Chapter of the Year and national Faculty Advisor of the Year, 2021.
- Obtained Certified Financial Planner™ to exemplify a commitment to further promote the importance of financial literacy and financial acumen.
- Recipient of the 2018 Professional Member of the Year, National Association of Black Accountants
- Launched and manage entrepreneurship education program (largest grant award to date) at Community College of Philadelphia in January 2013. Provide curricular oversight and managerial leadership in highly regarded entrepreneurship program for over 350 small business representing revenue of approximately \$450M in revenue to the local regional economy. The public-private partnership program model is fully funded by the Goldman Sachs Foundation and uses a dynamic experiential curriculum developed by Babson College in partnership with community college faculty at (14) sites across the nation. The competitive scholarship helps entrepreneurs create jobs and economic opportunity by providing access to education, capital and business support services.
- Economy League of Greater Philadelphia – participated in World Class Philadelphia fora and accepted to the Leadership Exchange (Philadelphia, 2013) and (Boston, 2014) to forge new connections, share best practices and to engage in discussion about ways to help the Greater Philadelphia region meet its full potential.
- Appointed and served on Mayor’s Task Force on Tax Policy and Economic Competitiveness (2009) which was given broad mandate by former Philadelphia Mayor Nutter to attract and retain businesses; invest in growth sectors; support small businesses; and educate and train Philadelphians for the demands and opportunities of the 21st Century.

AXA Advisors, LLC

2001 – 2003

Financial Consultant - Started and sold a financial planning practice providing investment and insurance planning services to individuals and small businesses within the framework of a global company.

Milligan & Co., LLC

2000 – 2001

Senior Business Analyst - Provided business management consulting to regional entrepreneurs at mid-sized CPA firm.

WWWTax, Inc.

1999 – Present

Principal - Founded professional tax preparation and planning practice serving businesses and individuals including seminars/workshops.

City of Philadelphia Mayor’s Office of Community Services

1996 – 1999

Promoted from Accountant, to Executive Assistant, to Director of Operations. As Director of Operations supervised (75) staff in fiscal, procurement, personnel, information technology, facilities maintenance and messenger services in the administration of various community-based programs including Empowerment Zone, Foster Grandparents, Workwise Welfare-to Work and Mural Arts program(s) in Mayor Edward G. Rendell administration.

REFERENCES

- Cory Ng, DBA- Deputy Department Chair of Accounting, Fox School of Business, Temple University
- Rashidah Andrews, Ed.D. – Dean of Butler College, Princeton University
- Judith Gay, Ph.D. – Vice President Emerita, Community College of Philadelphia