

MGMT 554
Professional Writing for Accountants
Course outline

Instructor information: Leslie Oakes, Ph.D
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Writing tutor: Brian Hendrick Office ASM 2069 has hours T 3-6, W 12-2 and 3-6. Contact him at bhendric@unm.edu. SEE him early and often!

Required Text: May and May, *Effective writing: A Handbook for Accountants*, tenth edition, Pearson, 2015.

Course Objectives:

Students will demonstrate the ability to write clearly and critically in professional settings. The course includes engagement, management advisory and tax research letters, formal and informal memos concerning generally-accepted accounting principles, and formal reports providing advanced level research on current accounting controversies. The course relies on information covered in previous tax, financial reporting and auditing courses.

Students will demonstrate the ability to report quantitative analysis of large data sets to managers in nonprofit, for-profit and governmental organizations.

Students will demonstrate the ability to tactfully edit the writing of others in situations that accountants encounter regularly, for example in audit engagements, SEC 10-K reports, tax research and budgeting memos. Students edit their colleague's work and submit their editing work for grading based on specific criteria covered in class.

Course Requirements:

This class has two primary learning objectives. The first is to deepen graduate student understanding of accounting through analysis and writing. The second is to review general writing skills in situations unique to financial, tax and managerial accounting environments.

Grading will be based on a portfolio of activities. **YOU MUST KEEP ALL YOUR ASSIGNMENT IN A FOLDER AND TURN THE PORTFOLIO IN FOR FINAL GRADING.** Each assignment must be clearly labeled. **IF YOU LOSE YOUR MATERIALS YOU WILL RECEIVE ZERO FOR THAT ASSIGNMENT. BACKUP!!!**

We will have two types of exercises.

- Informal exercises: Six exercises will be assigned that are graded based on satisfactory completion. Each is worth 10 points. One may be dropped. Total fifty points.
- Formal exercises: You will submit a letter, memo, report, and a blog entry. Each will be evaluated on accounting content and writing skill, i.e. your ability to communicate about complex organizational, accounting and auditing issues. These exercises will include a first draft, editing comments, and final draft. Assignments will be graded based on submission of all three requirements as well as

improvement between first drafts and final result.

Grading		Five informal, low stakes assignments (tentative)	50
	IA #1	Engagement letter	
	IA #2	Cultural differences in perceptions of professionalism.	
	IA #3	Review of IFRS versus FASB	
	IA #4	Privacy and public media	
	IA #5	Contingent liabilities--ethical issues	
Weeks	FA #1	Letter:	
		Audits, reviews and compilation engagements	
		First draft (focus: content)	10
		Edit (structure and appropriate tone)	10
		Final draft (integration content, structure and grammar)	30
Weeks	FA #2	Memos	
		Pension accounting, refinancing debt and impairments	
		First draft (focus: legal considerations for internal memos)	10
		Edit (Clarity and organization)	10
		Final draft (integration content, structure and grammar)	30
	FA #3	Blogging	
		Communicating the implications of IRS technical bulletins	
		First draft (focus: updating colleagues and clients on the implications of changes in regulations)	10
		Edit (Tension between generating interest through lively writing and providing accurate representation of complex issues)	10
		Final draft (integration content, structure and grammar)	30
	FA #4	Professional research reports in tax and internal audit	
		First draft (Unique characteristics of accounting reports)	20
		Edit (Organization of complex, quantitative information)	20
		Final draft (integration content, structure and grammar)	60

Course expectations:

Access to materials and course announcements: Most materials are posted on Learn. Most announcements are posted on learn and an email copy is sent to your UNM email account. If you miss class and something is distributed or announced, it is your responsibility to get a copy or have another student take notes for you.

Attendance: Students are expected to attend and participate in all class sessions unless discussed with me ahead of time. If you need to arrive late, let me know and take a seat without disrupting class. If you must leave early, let me know and do so quietly.

Electronic devices: You should have access to either Word or Excel in class, depending on the subject. You may also be required to upload assignments in class. You may only use electronic devices required for coursework, however. Using electronic devices for other purposes is distracting and is not acceptable. If your phone rings during class you must bring snacks for the entire class in the next class period. If I ask you to stop using devices in a disruptive manner and you continue to disrupt the class I will ask you to leave. You may not film or record class without permission. Posting anything from this class on-line without permission is not allowed.

Late assignments: I do not accept late assignments unless the student has an unexpected emergency including significant illnesses or family emergencies; I must be notified and agree to accept late assignments or zero points will be assigned. All late assignments will be penalized 25% of assigned points.

Accommodations: Accessibility Services (Mesa Vista Hall 2021, 277-3506) provides academic support to students who have disabilities. If you think you need alternative accessible formats for undertaking and completing coursework, you should contact this service right away to assure your needs are met in a timely manner. If you need local assistance in contacting Accessibility Services, see the Bachelor and Graduate Programs office.

Respectful campus policy: Freedom of Speech is a shared value on campus but it is also important that every student has access to the best educational experience possible. This sometimes requires compromise and often requires patience and courtesy. If you have concerns about my teaching or the behavior of other students, I encourage you to come talk to me in my office. I care deeply about your education.

Week	Date	Topic	Assignment	Reading
Week 1	21-Jan	Introduction		
Week 2	28-Jan	Content Letters	Distribute FA #1	Chapters 1 and 9
Week 3	4-Feb	Editing	Bring two drafts of FA #1	Chapter 2
Week 4	11-Feb	Audience/ role of writer	Turn in final draft/ first draft and draft with comments	Chapter 3
Week 5	18-Feb	Using PowerPoints to organize papers Memos	FA #2 is distributed	Chapter 4 Chapter 10
Week 6	25-Feb	Editing day	Bring two copies of FA #2	Chapter 5
Week 7	3-Mar	Writing for clarity	Turn in final draft/ first draft and draft with comments Distribute FA #3	Chapter 6 and 7
Week 8	10-Mar			
Week 9	17-Mar	No class	Spring break	
Week 10	24-Mar	Organizing reports	Edit FA #3 Distribute FA #4	Chapter 11
Week 11	31-Mar		Turn in FA #3	
Week 12	7-Apr	Editing date	Bring annotated Bibliography (FA #4)	

Week 13	14-Apr	Blogging and other social writing	Chapter 12
Week 14	21-Apr	Presentation	PP slides First draft of FA #4
Week 15	21-Apr		PP slides Chapter 13
Week 16	28-Apr		Turn in Portfolio