

Heather L. Paulsen

PROFESSIONAL SUMMARY AND ACCOMPLISHMENTS

Dynamic executive leader with extensive experience managing financial operations and administrative structures in multimillion-dollar organizations (Higher Education, Department of Defense, Department of Homeland Security and Private Industry). Wide range of management experience that includes a rich mix of finance, operations, internal/external process improvement, and business development. More than 15 years of progressive responsibility and experience in personnel and fiscal management, that includes development, implementation and oversight of shared services models and business centralization efforts. A proven record of success in process improvement and process implementation, effective unit reorganization to gain efficiencies. Experienced in financial and trend analysis, budget processing, team building fundamentals, building client, donor, and community relations along with improving customer relations and rapport. Strong background in forecasting, collaborating with higher and lower levels of management to improve objectives, critical thinking, and project development. Creative problem-solver with the ability to drive revenue growth, arbitrate resolutions, improve morale, and consistently provide excellent customer service. Experience in:

- Quality Assessment, Process Improvement, and Audit Controls
- Fiscal Operations include Procurement, Travel, and Accounting, Budgeting, and Financial and Operations Planning
- Restricted Grant Management to include Personnel Development, Proposal Writing, and Grant Procurement
- Employee Hiring, Training, and Assessment to include Leadership Development
- Strategic Business Planning, Statistical Modeling, and Change Management Implementation
- Contract Negotiations, Financial Planning, and Technology Improvements
- Teaching, Academic Program Improvement, and Curriculum Processes

INSTITUTIONS OF HIGHER EDUCATION RELEVANT EXPERIENCE (Adjunct Teaching Experience Not Included):

University of Alaska Anchorage Experience:	Aug. 2013–Present
Business Enterprise Institute (BEI)	Oct. 2015–Present

Director of Business Development and Grants and Contracts

Business Innovation Zone (BIZ) 501c3 affiliate

Director of Finance

Arctic Domain Awareness Center (ADAC), Department of Homeland Security (DHS), Center of Excellence (COE)	Nov. 2015–Present
---	--------------------------

Finance Director (additional position added)

College of Health (COH)	Jul. 2020–Present
--------------------------------	--------------------------

Chief Financial Officer (CFO) (additional position added)

Responsible for the business operations administrative and financial management of multiple units on campus to include: the first 501c3 affiliate education and economic non-profit approved by the University of Alaska System Board of Regents from startup, the DHS CoE ADAC, the Business Enterprise Institute and Centers, and the College of Health. Collaborated and provided assistance for the following units on campus in a matrix or shared services models to provide financial support and stability, problem and organizational analysis, assist in processing gaps, serve on a variety of search committees, and provide training and instruction:

- | | |
|---|-----------------------|
| • College of Business and Public Policy, Dean's Office
CFO and Team Support | Feb. 2019 – Aug. 2019 |
| • College of Business and Public Policy, Institute for Social Economic Research
Team support | Nov. 2020 – Present |
| • College of Engineering, Dean's Office
CFO, Pre-Award and Grant Management Support | Jul. 2019 – Jun. 2020 |
| • College of Health, Dean's Office
CFO Support, EDA Grant Support | Jul. 2020 – Present |
| • College of Health, Institute of Circumpolar Health Sciences
Business Manager Support | Nov. 2015 – Jun. 2016 |
| • Community and Technical College, Dean's Office and Transportation and Power Division
Recharge Center and Grant Support | May 2018 – Present |

- Honors College, Dean's Office
CFO Support Summer 2014
- Office of Research (Central Office)
Post-Award Support Jun. 2019 – Dec. 2019
- Vice Chancellor for Administrative Services (Central Office)
Recharge Center, Contract Negotiation Support Aug 2018 – May 2019

In current position and while assisting units, maintained a proven record of accomplishments leading financial strategies to facilitate ambitious growth plans. Responsible for the fiscal portfolio of all organizations (\$8M annually in BEI funding, \$100k annually in Business Innovation Zone funding, \$3.5M annually in ADAC funding, \$40M annually in COH funding). Working on streamlining operations and processes resulting in increased revenue growth, operational efficiency, and overall profitability with duties including:

- Responsible for the financial day to day operational aspects of both organizations from oversight and delivery of annual budgets, to expenditure tracking, operating budgets, and long-term financial planning, investing, and forecasting all while ensuring appropriate federal, state, and local compliance and arm's length controls to safeguard stakeholders. Work with central offices to resolve problems to achieve positive results and overall process improvements.
- Provide trend analysis and financial modelling to help respond to dynamic budget conditions while ensuring compliance, and all reporting requirements are met.
- Implement a high level of financial controls with a proven ability to manage and develop cohesive teams while identifying performance indicators, business risks, business objectives, and strategic plans that are influenced on past and future trends.
- Serve as the primary liaison to assist with and develop post-award training procedures and process enhancement to assure effective and efficient management in fulfillment of research goals.
- Contracted to other campus entities to develop financial management and operational strategies, contract review and negotiations, taxation issues, human resource complications, restructure strategies, IT infrastructure support, and educational reinvesting techniques. This contract work often requires working with Central Services such as SW General Counsel, SW Audit, SW Cost and Fund Accounting, SW Controller's Office, UA Grants and Contract Teams as Major Academic Units (MAUs), and UA Budget Office Teams at MAUs. This work is in addition to normal job duties and is done on a billable basis to units within the System. Success was measured by overall cost savings at the University while exceeding customer service expectations.
- Provide grant and contract management training, and agency updates or clarifying information, to business and financial officers, department deans and directors, and take the lead in coordinating consistency among the UAF, UAA and UAS post-award administrative offices.

Office of Grants & Contracts

Aug. 2013–Dec. 2015

Director, Grants and Contracts

Responsible for the management of the Office of Grants and Contracts, and for restricted fund accounting to insure compliance with all state, federal, and private funding agencies covering a broad spectrum of research grant and contract activities totaling in excess of \$25M in federal funding. As the Authorized Official for the University of Alaska Anchorage (UAA) orchestrated an aggressive growth plan that netted an increase in funding by more than \$3M in less than a year. Primary point of contact between the (UAA) and sponsor agencies. Maintain an audit ready status, and respond to findings from routine formal and infrequent Agency audits. Provide effective accounting, records management, information management and reporting capability within the University academic and research community, to the Board of Regents' and to external agencies and legislative bodies. Direct a team of employees that support the entire financial structure of UAA.

- Primary UAA resource for award administration, and resident authority for contracts and public assistance awards. Authorized university representative with signature authority in support of sponsored projects, including research, professional services, non-personal services, supplies and equipment. Serve as a resource to UAA Procurement and Contract Services for grants subaward compliance.
- Manage pre- and post-award expenditure and the Federal Office of Management and Budget Circular A-110, A-133, A-21 and public and private law compliance for more than 500 active contracts, grants, and memorandums of understandings, joint ventures, cooperative agreements, subawards/subcontracts, cost shares, and private foundations from awards as small as \$500 to more than \$5M.
- Monitor and report billing status, oversee set up of restricted fund accounts, age accounts, follow-up to minimize uncollected or unrecoverable revenues; oversee proper transfers via journal vouchers, assignment of expenses to proper funds, direct timely reconciliation of accounts, including allowance for doubtful accounts; initiate proper controls to highlight irregularities; and track post award activities.

- Provide daily supervision of exempt and non-exempt staff. Responsible for development, maintenance and availability of training opportunities for university staff, enhancement of customer service skills, and teamwork while creating an environment with a strong sense of task ownership. Responsible for budget planning, development and monitoring of departmental budget of approximately \$600K annually.
- Develop and implement restructuring models improvement plans that allowed for increased efficiency while saving additional funding that resulted in less reliance on State Appropriations.

University of New Mexico Experience: **Jun. 2005–Oct. 2013**

University of New Mexico, Department of Biology **Jun. 2005–Aug. 2008**

Finance Operations Manager (Accountant III—held position twice) **Aug. 2010–Oct. 2013**

Biological Society of New Mexico, Department of Biology (501c3 affiliate) **Jun. 2005–Oct. 2013**

Treasurer

Responsible for the fiscal, operational, and project infrastructure and functionality of the largest Department in the College of Arts and Sciences. Direct a team of employees that support the entire financial structure of the Department of Biology. Responsible for overseeing fiscal and budgetary management, coordination of contract and grant (pre- and post-award), development and implementation of operational procedures to include interpretation and application of Federal, State, City, University policies, laws, and procedures. Duties include daily accounting and financial reporting and reconciliation, writing financial and operation reports based on current trend analysis, maintaining budgets, auditing, fundraising, and being a safeguard for the Department's interest.

- Accountable for all levels of oversight and management of the largest main campus department with a grant portfolio of approximately \$52M, state appropriation budget of \$6M, foundation funds of \$2.7M, and \$7.5M in other funding sources annually. Total operational budget exceeds \$68M annually.
- Responsible for efficiently handling financial and operational issues by critically analyzing situations and resolving differences between student and faculty relations, employee grievances and administration difficulties for a Department with more than three-hundred employees, one museum, two RO1 centers, nine service centers, one field station, and administration of faculty on multiple campuses. Manage pre- and post-award expenditure and ensure compliance with the Federal Office of Management and Budget (OMB) Circular A-110, A-133, A-21 and public and private law compliance for more than two-hundred active contracts, grants, memorandums of understandings, joint ventures, cooperative agreements, subawards/subcontracts, cost shares, and private foundations. Awards ranged from \$2,500 to more than \$7M.
- Developed and implemented monthly training classes on financial and grant management for a variety of departments within the College of Arts and Sciences; perform semester finance training classes for the Office of Vice President for Research, Graduate Student Initiative; co-developed and taught online grantsmanship class for undergraduate and graduate students. These classes provided training for more than five-hundred faculty, staff, and students annually across multiple Colleges and Schools.
- Responsible for effective management of over five-hundred active accounts and sub-accounts with multi-million dollar operating budgets
- Served on numerous task forces, committees, and town halls to facilitate improvements, efficiencies, and shared services.
- Improved accounting unit functionality that included upgrades to current financial databases allowing for enhanced reporting. New reporting implementation resulted in a significant decrease in the number of overspent and potential overspent accounts in the department. Restructuring improvements allowed for increased efficiency while saving additional funds.
- Responsible for detailed analysis for the purposes of budget categorizations, projected expenditure levels, budget revisions, grant management, enrollment analysis and all other reportable items to the Chair, Dean, and Provost.
- Increased fundraiser donations by more than 200% to the not-for profit 501c (Biological Society of New Mexico) corporation by helping design a website, contacting donors, and increasing donor awareness of the Biological Society and the Biology Department.
 - Hold the position as Treasurer, which includes monthly reconciliations, filing appropriate taxes, and tracking donor money. Responsible for an operation budget of more than \$50k and manage assets in excess of \$1M.
 - Duties include the retention of current donors, recruitment of new donors, holding quarterly fundraising events, and community outreach programs which included speaking to the community about bond issues, holding K-12 educational days, and designing a newsletter to improve donor communications
 - Accounting and financial duties included assisting with filing 990 IRS tax forms and reporting Unrelated Business Income Tax (UBIT) activities.

University of New Mexico, Department of Biology**Department Administrator III****Aug. 2008 – Aug. 2010**

Managed all personnel and their administrative functions for the largest academic department on campus to include more than 40 tenured professors, 75 research professors, 150 staff members, and over 350 students. Maintained 35 direct reports throughout this term. Responsible for providing oversight, management, and ensuring high performance of employees. Further responsible for all professional and personal development of staff, human resources administration, facilities and overall management of resources.

- Managed operational budgetary cuts of more than five percent annually that included no loss of positions or employees while reducing deficit spending to balance the budget for the first time in more than two decades. This resulted in an implementation University wide of cost-saving measures utilizing the Biology Department as a model for Categorization of Reserves.
- Served as key personnel to develop and implement a successful new business model that was designed to improve staff efficiency and department resources. This reorganization resulted in a new business model that provided customer service to all clients (faculty, staff, students, vendors)
- Responsible for the hiring, managing, training, and evaluation of staff.
- Development of Standard Operating Procedures (SOPs), Job Description Analysis, Annual Report Review, and Evaluation and Assessment Reports for the Department of Biology.
- Executed from conception to completion operational projects, financial strategies, and strategic plans for department growth that focused on the changing needs of the Department with respect to academic resources and funding.
- Additional duties outside finance include organizing various departmental functions to include annual donor, alumni, faculty, staff, student, and community outreach events.
- Production of departmental newsletter.
- Preparation of human resource paperwork for more than 300+ faculty, staff, and students.
- Served as a consultant to the Biology Department in all fiscal and administrative functions
- Served as a member of the Executive Management team and advisor to the Department Chair.

PRIVATE INDUSTRY RELEVANT EXPERIENCE:**Limited Brands, Inc.****Aug. 2004 – Jul. 2005****Sales and Merchandise Supervisor**

Responsible for the performance and functionality of the Corporate Merchandise Department and a Sales Department. Directed a team of 40 inbound sales associates and 14 customer service merchandise specialists supporting all divisions and departments of the company netting for the first time a profit of \$1B in revenue.

- Exceeded performance goals by successfully implementing new consultative selling strategies to over 100 employees.
- Responsible for over \$25 million in revenues quarterly. Results produced one of the top performing sales team in the company.
- Redesigned and upgraded database allowing for fewer wasted resources and enhanced company revenues. Developed strategies that resulted in annual savings of over \$1M that included increasing automation activities. Developed and implemented special projects, learning strategies, and company growth proposals that fostered education and training strategies that were implemented throughout the company nationally. Duties included writing business plans based on current trend analysis, as well as coaching and developing all levels of employees, maintaining budget and target staffing for departments.
- Designed a new web-based program that allowed consultants to increase revenue by \$10 per customer per phone call on average.

Phase2Solutions/eTelecare Inc.**Jan. 2003 – Sept. 2004****Center Administrator**

Independently managed and supervised the day-to-day operations for an aggressively growing startup company of more than 550 representatives and 50 members of management in the telecommunication and computer industry.

- Researched, secured, and administered a \$1 million dollar economic development grant that promoted and fostered employee training in customer care relations for 334 active employees.
- Utilized conflict resolution and crisis management skills effectively resolving employee relations with Federal, State, City, Community, and Corporate entities. Provide Human Resources support for all employees
- Create and maintain company databases to ensure efficient and effective operations and accurate reporting on all employees for a startup company division.

- Responsible for accurate accounting and budgeting of operations.
- Responsible for representative and management growth by developing corporate training modules administered to more than 300 members of leadership resulting in a 12% increase in internal promotions with more than 100 individuals professionally certified.
- Designed training documents emphasizing negotiation tactics, best sale practices, and customer service techniques now used company wide by more than 1500 employees and 300 managers.
- Responsible for facility infrastructure, procurement, petty cash, weekly payroll for employees, budgeting, benefits administration, and financial oversight.

America Online, Inc.

Aug. 2002 – July 2003

Payment Services Specialist

Responsible for the day to day review, analysis, and processing of more than 100,000 member accounts with more than \$500,000 in billing and credit dispensing.

- Recovered \$8 million dollars in revenues annually through effective and efficient conflict resolution caused by a system error affecting 300 members. Innovation and system automation increased productivity by 55%.
- Facilitated and implemented training techniques that improved the personal development of co-workers and generated corporate savings over \$1 million dollars.
- Conducted and supervised training programs and presentations for more than 25 employees that emphasized system instruction, best business practices, and developmental advancement for all levels of employees.
- Assessed and audited confidential financial account information for over 35 million members.
- Established project management expertise by developing business proposals that significantly improved efficiency resulting in greater profits.
- Contract signature authority and responsible for all customer negotiation and agreements.
- Responsible for fiscal and training operations for CompuServ (division of America Online, Inc.).

EDUCATION

The European Business School of Barcelona

Master's in Project Management

Program Completed

Graduation Spring 2021

University of Phoenix

Master of Business Administration in Technology Management

Graduated Aug. 2007

University of New Mexico

Bachelor of Science in Mathematics (Pure), Distributive Minor with concentrations in Mathematics, Management, Computer Science and Economics.

Graduated May 2002

United States Air Force Academy

Dean's List, Honors Program, Studied Mathematics (Applied) and Operations Research minor

Jun. 1994 -- Aug. 1997

PROFESSIONAL AWARDS AND CERTIFICATIONS

Green Belt Lean Six Sigma Certification
 White Belt Lean Six Sigma Certification
 Spanish for Business Certification
 NCURA Financial Research Administration Certification
 NCURA Level 1 Fundamentals of Sponsored Project Administration Certification
 NCURA Level 2 Fundamentals of Sponsored Project Administration Certification
 CITI IRB, IACUC, and Conflict of Interest Certifications
 Maximus Grant Management Certification Program
 Outstanding Staff UNM Awardee
 Numerous Management Awards at Victoria Secret to include Supervisor Quarterly Award for Employee Retention and Supervisor Yearly Award for Excellence Recognition
 United Way Women in Philanthropy Mentor Program
 Five Military accommodations
 Rotary Club Womanhood award
 Congressional Appointment to the Air Force Academy