

Heather L. Paulsen

PROFESSIONAL SUMMARY AND ACCOMPLISHMENTS

Dynamic executive leadership career in multimillion dollar organizations with a rich mix of finance, operations, internal/external process improvement, technical savvy and business development. 15+ years of progressive responsibility and extensive experience in fiscal management and supervision with a record of success in contract negotiations, financial and trend analysis, budget processing, team building fundamentals, building client, donor, and community outreach and customer base, forecasting, partnering with higher and lower levels of management to achieve objectives, critical thinking, forecasting, strategic business planning, statistical modeling, database improvement, and operational project development. Creative problem-solver director 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, Budgeting, and Financial and Operations Planning
- Restricted Grant Management to include Economic Development, Proposal Writing, and Grant Procurement
- Employee Hiring, Training, and Assessment to include Leadership Development
- Strategic Business Planning, Statistical Modeling, and Database Implementation
- Contract Negotiations, Financial Planning, and Technology Implementation

INSTITUTIONS OF HIGHER EDUCATION RELEVANT EXPERIENCE:

University of Alaska Anchorage Experience: **Aug. 2013 – Present**

University of Alaska Anchorage, Business Enterprise Institute **Oct. 2015 -- Present**

Director of Business Development and Grants and Contracts

University of Alaska Anchorage, Business Innovation Zone 501c3 affiliate

Director of Finance

Department of Homeland Security (DHS), Center of Excellence (CoE), Arctic Domain Awareness Center (ADAC)—Added as an additional duty **Nov. 2015 – Present**

Finance Director

Responsible for the operational and financial management of 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 financial management, and the financial and operational management of the Business Enterprise Institute. Proven track record and experience of leading financial strategies to facilitate ambitious growth plans. Responsible for the fiscal portfolio of all organizations (\$7M annually in Business Enterprise Institute in grant funding, \$3M in legislative/foundation funding in Business Enterprise Institute, anticipated revenue of \$1M in Business Innovation Zone, and \$2.5M annually in ADAC funding). Working on streamlining operations and processes which are 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 range financial planning, investing, and forecasting all while ensuring appropriate federal, state, and local compliance and arm's length controls between the organizations to safeguard stakeholders.
- Provide trend analysis and financial modelling to help respond to dynamic budget conditions while ensuring compliance and statutory reporting and high level financial controls with a proven ability to manage and develop a financial team to identify performance indicators, business risks, business objectives, and influence on past and future trends.
- Liaison to develop post-award training procedures and process enhancement to assure effective and efficient management in fulfillment of research goals. Serves on other committees as appointed.
- 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 work is in addition to normal job duties and is done on a billable basis to units within the System.
- Provide grant and contract management training, and agency update clarification information, to business and financial officers, department deans and directors, and takes the lead in coordinating consistency among the UAF, UAA and UAS post-award administrative offices.

**University of Alaska Anchorage, Office of Grants & Contracts
Director, Grants and Contracts**

Aug. 2013 – Dec. 2015

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. 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, memorandums of understandings, joint ventures, cooperative agreements, subawards/subcontracts, cost shares, and private foundations from awards as small as \$500 to excessive of \$5M.
- Monitor and report billing status, oversee set up of restricted fund accounts, age accounts, follow-up to minimize uncollectable 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 engendering teamwork and a strong sense of task ownership. Responsible for budget planning, development and monitoring of departmental budget of approximately \$600K annually.
- Restructuring improvements have allowed for increased efficiency while saving additional money.

University of New Mexico Experience:

Jan. 2005 – Oct. 2013

University of New Mexico, Department of Biology

Jan. 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)

Jan. 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 at least \$52M, state appropriation budget of \$6M, foundation funds of \$2.7M, and \$7.5M in other funding sources annually. Total operational budget yearly exceeds \$68M.
- Responsible for efficiently handling financial and operational difficulties by critically analyzing situations and resolve differences effectively between student and faculty concerns, employee problems, and administration difficulties for a Department with more than 300 employees, 1 museum, 2 RO1 centers, and 9 service centers, 1 field station, and EU administration of faculty multiple campuses. Manage pre- and post-award expenditure and the Federal Office of Management and Budget (OMB) Circular A-110, A-133, A-21 and public and private law compliance for more than 200 active contracts, grants, memorandums of understandings, joint ventures, cooperative agreements, subawards/subcontracts, cost shares, and private foundations from awards as small as \$2,500 to excessive of \$7M.
- Developed and implemented monthly training classes on financial and grant management for 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 teach online grantmanship class for undergraduate and graduate students. These classes have trained more than 500 faculty, staff, and students annually across multiple Colleges and Schools.

- Responsible for a chart of accounts with over 500 active accounts and sub-accounts with an operating budget that is larger than some main campus Colleges and Schools. Results have led me to serve on many special committees to help facilitate additional improvements.
- Improved accounting unit functionality to include upgrades to current financial database allowing for enhanced reporting. New reporting implementation has resulted in a significant decrease in the number of overspent and potential overspent accounts in the department. Restructuring improvements have allowed for increased efficiency while saving additional money.
- Responsible for detailed analysis for the purposes of budget categorizations, projected expenditure levels, budget revisions, grant management, enrollment analysis and all other reportable to the Chair, Dean, and Provost.
- Increased fundraiser donations by 200% to the not-for profit 501c (Biological Society of New Mexico) corporation by helping design a website, contacting donors, and increased 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 manages 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 include speaking to the community about bond issues, holding K-12 educational days, and designing donor communication to include annual newsletter. Accounting and financial duties included assisting with filing 990 IRS tax forms and reporting 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 350 students; 35 direct reports.

Oversee management performance and responsible for professional and personal development of staff, human resource administration, facilities and resource management.

- Managed operational budgetary cuts of more than five percent with no loss of jobs while reducing deficit spending to balance the budget for the first time in 20 years. This resulted in an implementation University wide of cost-saving measures utilizing the Biology Department as a model for Categorization of Reserves.
- Successful new business model designed to improve staff efficiency and department resources. This reorganization resulted in creating a new business model that provides customer service to all of our clients (faculty, staff, students, vendors) in less than a 24 hour turnaround time with no loss in jobs.
- Responsible for the hiring, managing, training, and evaluation of core 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 implementation to completion many operational projects, financial strategies, and department growth proposals 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.
- Acts as a consultant to the Biology Department in all fiscal and administrative functions and is a key member of all Executive Management team and served as a direct advisor to the Department Chair.
- Participated in several committees including interview/hiring, staff development and augmented staff.

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. Saved the company millions annually by allowing more automation and less employee time to manually input information. Developed and implemented special projects, learning strategies, and company growth proposals that fostered education and training strategies that were implemented company wide. Duties include 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.
- Redesigned and engineered 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 EE relations with Federal, State, City, Community, and Corporate entities.
- Create and maintain company databases to ensure efficient and effective operations and accurate reporting on all employees for a startup company division.
- Provide Human Resources support for than 600 active and terminated employees.
- 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 more than 550 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 billings and credit dispensation.

- 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 from idea to realization, business proposals that magnified efficiency of systems generating 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

University of Phoenix

Graduated Aug. 2007

Master of Business Administration in Technology Management with concentrations in Information Technology.

University of New Mexico

Graduated May 2002

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

United States Air Force Academy

Jun. 1994 -- Aug. 1997

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