

CANDIDATE'S PERSONAL STATEMENT - Treasurer Elect

YULISSA GARCIA

The National Council of University Research Administrators offers an exceptional opportunity, not only for subject matter professional development, but also for the development of leadership skills, networking, and putting our knowledge and skills to the service of our research administrator community. I am excited to express my interest in the Treasurer Elect (2025) position for NCURA's Region VII.

Throughout my 24 years in research administration, I have held departmental and central office roles. Although covering a range of responsibilities, these roles have been mostly focused on financial post award. My financial responsibilities have included financial reporting, account reconciliations, ensuring compliance with sponsor and institutional regulations in the management of funds, budgeting, and accounts payable, among others.

My academic background is in Accounting (BBA), Human Resources Management (MBA), and Public Administration (PhD-BA). I am also a Certified Financial Research Administrator (CFRA) and Certified Research Administrator (CRA) and have volunteered my time to the Research Administrators Certification Council's CFRA Item Writing Committee and CRA Exam Review Committee.

My professional background, passion for research administration, and desire to give back to my profession make me a well-qualified candidate for the Treasurer Elect role. I look forward to continuing to serve the research administration community and contributing to NCURA's mission. I greatly appreciate your consideration of my candidacy.

Yulissa García
y.garcia@colostate.edu

SUMMARY

- Supervisory and management skills, as well as pre-award and post-award research administration expertise acquired through over 20 years of professional experience, advanced education in public administration, accounting, and human resources management, and specialized grants management training
- Exceptional ability to ensure effective management of grants, cooperative agreements, and other sponsored project agreements while building productive relationships with an array of partners at all administrative levels
- Demonstrated ability to effectively work remotely using different platforms and online systems.
- Highly self-motivated with a solid work ethic; experienced in fast-paced work environments while maintaining strong attention to detail, providing excellent customer service and resolving complex situations

PROFESSIONAL EXPERIENCE

Colorado State University

November 7, 2022 - Present

Office of Sponsored Programs (OSP)

May contact supervisor: Director of Post-Award, Kim Melville-Smith, 970-491-7715

Financial Research Administrator (Remote)

Post-award Financial Grant Administration

- Provide effective financial post-award management of a \$320 million and approximately 400 project portfolio consisting of federal, state, private and non-profit sponsors. Federal sponsors include but not limited to the National Oceanic and Atmospheric Administration (NOAA), National Aeronautics and Space Administration (NASA), US Department of Transportation (DOT), Department of Energy (DOE), Department of Defense (DOD), National Institutes of Health (NIH), National Science Foundation (NSF), US Department of Agriculture (USDA).
- Complete periodic financial reports to be sent to sponsor, as required by the award terms and conditions (including SF-425).
- Monitor assigned awards and perform financial and administrative analyses on a regular basis to ensure compliance.
- Consult with Principal Investigators and assigned departments regarding improper account findings such as negative balances, unallowable costs, re-budgeting, among others.
- Work as an administrative resource to investigators, providing assistance, guidance and counsel during management, to verify and ensure ongoing compliance with all applicable regulatory and financial compliance requirements, including institutional policies and procedures, funding agency terms and conditions, and 2 CFR 200 from notice of award to closeout.
- Verify accuracy of award setup, modifications, and budget information in Quali Research and Financial.
- Perform any necessary entries for closeout, sponsor refunds, and adjustments.
- Ensure timely financial closeouts.
- Act as a financial liaison between the University and federal, state, local and private sponsors.
- Respond to inquiries in a timely manner using effective interpersonal communication, critical thinking and problem-solving skills and methods as appropriate to address questions and/or concerns.

- Communicate guidance and recommendations to principal investigators and departmental research administrators to prevent out of balance or compliance situations in project budgets and/or accounting.

**University of Puerto Rico at Mayaguez
Sea Grant College Program**

August 1, 2020 – November 4, 2022

May contact supervisor: Director, Ruperto Chaparro, 787-832-3585

Executive Officer III – Full time

Post-award Financial Grant Administration

- Managed and/or monitored adequate management of funds for a federally funded sponsored program with a budget of over two million dollars per year including funding from the National Oceanic and Atmospheric Administration (NOAA) National Sea Grant College Program, the National Marine Fisheries Service (NMFS), and Marine Debris Program as well as non-profit funding.
- Reviewed and approved all program expenditures.
- Maintained internal bookkeeping records and performed reconciliations.
- Effectively responded to auditor requests, as needed.
- Worked with the Finance Department to ensure billing of Program's awards was conducted accurately and in a timely manner.

Subaward Management

- Independently managed a portfolio of 10-20 projects and served as the program's primary point of contact to current and potential subawardees for grant related activities such as timely programmatic and fiscal reporting and providing guidance towards solution of complex fiscal issues. Partners included institutions of higher education and non-profit organizations throughout the nation and its territories.
- Reviewed and improved internal procedures for administrative and fiscal subaward monitoring for compliance with legal and regulatory requirements.
- Reviewed and approved for payment all subawardee invoices and cost share reports.
- Worked with legal counsel in the writing and negotiation of subaward agreements leading to full execution.

Pre-award Grant Administration

- Served as liaison with the pre-award office for preparation and submission of all program proposals. Independently prepared the program's annual budgets and justifications and federal assistance application packages with minimal review of the pre-award office.
- Collected and reviewed all subawardee documentation, reviewed budgets and budget justifications for accuracy and completeness, and conducted financial risk analyses of subaward applicants.
- As member of a team, participated in the writing and distribution of funding announcements as well as conducted technical review panel meetings, resulting in final merit review and selection of subgrantees to be recommended to NOAA for funding.
- Reviewed grant applications and budgets and approved for final pre-award office review.
- Worked with legal counsel in the writing and negotiation of collaborative agreements and memorandums of understanding to formalize funded or unfunded collaborations with multiple partners including other institutions of higher education and non-profit organizations.

Leadership and Supervision

- Served as the program's administrative and fiscal leader and provided authoritative information to other members of the program's leadership and staff ensuring that all programmatic and technical duties were performed within the applicable regulatory framework.
- Established and maintained effective communication with a wide array of collaborators including executives and investigators at institutions of higher education, non-profit organizations, and funding agencies, as well as undergraduate and graduate students and community members benefitting from the program's educational, outreach, and research activities.
- Independently planned, organized, and directed the daily operations through staff ensuring tasks were performed accurately and in a timely manner.
- Supervised the administrative team's duties, assisted other team leaders with the effective implementation of human resource management practices, and trained new employees implementing proven processes to ensure service quality. Provided guidance towards the solution of complex human resource management situations.
- Effectively transitioned work team to remote work as pandemic conditions required, ensuring adequate technology was available and tasks were assigned and monitored efficiently.
- Served as representative of the program in the Sea Grant College Program fiscal officers' network national meetings, establishing collaborative relationships with funding agency officials and fiscal officers representing over 30 state Sea Grant College Programs.
- Coordinated reporting efforts, reviewing program division reports for quality and completeness, and final submission of Research Performance Progress Reports (RPPR) and annual reports in Sea Grant Programs Planning, Implementation, Evaluation and Reporting (PIER) system.
- Served as fellowships and internships coordinator, developing local programs, writing of funding announcements, serving as primary point of contact for applicants and Sea Grant liaison during fellowship or internship term.

**University of Puerto Rico at Mayaguez
Research and Development Center**

May 16, 2019 – July 31, 2020

May contact supervisor: Director, David Suleiman, 787-309-7126

Special Assistant to the Director/Post-Award Supervisor – Full time

Leadership and Supervision

- Supervised post-award grants management offices (Finance, Human Resources, Budgeting, and Procurement) consisting of 20 staff members and 4 supervisors.
- Effectively established relationships with sponsoring agency officials as well as university researchers achieving successful partnerships for the implementation of research, education, and community outreach projects.
- Served on work teams to review and update standard operating procedures followed by the campus post award division as well as regulations and policy documents to be implemented at the university level (11 UPR campuses).
- Guided staff members and researchers towards compliance with programmatic and fiscal regulatory requirements.
- Served as alternate authorized organizational representative (AOR) responsible for reviewing and accepting the terms and conditions of incoming and outgoing grant agreements.
- Led post-award team in the effective response to a National Science Foundation virtual site visit during COVID-19 pandemic.
- Led post-award employee transition towards telework and electronic processes in response to the COVID-19 pandemic ensuring the availability of technological resources.

University of Puerto Rico at Mayaguez
Sea Grant College Program

January 27, 2017 – May 15, 2019

May contact supervisor: Director, Ruperto Chaparro, 787-832-3585
Executive Officer III – Full time

Post-award Financial Grant Administration

- Managed and/or monitored adequate management of funds for a federally funded sponsored program with a budget of over two million dollars per year including cost share.
- Reviewed and approved all program expenditures.
- Maintained internal bookkeeping records and performed reconciliations.
- Effectively responded to auditor requests, as needed.
- Worked with the Finance Department to ensure billing of Program's awards was conducted accurately and in a timely manner.

Subaward Management

- Independently managed a portfolio of 10-20 projects and served as the program's primary point of contact to current and potential subawardees for grant related activities such as timely programmatic and fiscal reporting and providing guidance towards solution of complex project issues. Partners included institutions of higher education and non-profit organizations throughout the nation and its territories.
- Worked with legal counsel in the writing and negotiation of subaward agreements leading to full execution.
- Developed an internal procedure for administrative and fiscal subaward monitoring for compliance with legal and regulatory requirements.

Pre-award Grant Administration

- Participated in the development of requests for proposals and review of grants applications.
- Served as liaison with the pre-award office for preparation and submission of all program proposals. Independently prepared the program's annual budgets and justifications and federal assistance application packages with minimal review of the pre-award office.
- Collected and reviewed all subawardee documentation, reviewed budgets and budget justifications for accuracy and completeness.
- Worked with legal counsel in the writing and negotiation of collaborative agreements and memorandums of understanding to formalize funded or unfunded collaborations with multiple partners including other institutions of higher education and non-profit organizations.

Leadership

- Served as the program's administrative and fiscal leader and provided authoritative information to other members of the program's leadership and staff ensuring that all programmatic and technical duties were performed within the applicable regulatory framework.
- Established and maintained effective communication with a wide array of collaborators including executives and investigators at institutions of higher education, non-profit organizations, and funding agencies, as well as undergraduate and graduate students and community members benefitting from the program's educational, outreach, and research activities.
- Independently planned, organized, and directed the daily operations through staff ensuring tasks were performed accurately and in a timely manner.

- Supervised the administrative team's duties and assisted other team leaders with the effective implementation of human resource management practices. Provide guidance towards the solution of complex human resource management situations.
- Served as representative of the program in the Sea Grant College Program fiscal officers' network national meetings, establishing collaborative relationships with funding agency officials and fiscal officers representing over 30 state Sea Grant College Programs.
- Developed internal procedure to effectively monitor student and contractor attendance for those affiliated to the program ensuring compliance with institutional requirements and effective use of project funds.

**University of Puerto Rico at Mayaguez
Center for University Access**

September 1, 2011 – June 30, 2018

**May contact supervisor: Principal Investigator, Sandra Soto, 787-549-2620
Project Assistant – 10 hours per week**

Post-award Financial Grant Administration

- Provided fiscal and administrative management for a community service project funded by the private foundation, *Fundación Francisco Carvajal*, and cost-shared by the University of Puerto Rico, for a total of \$150,000 per year.
- Guided principal investigators to ensure timely and accurate compliance with fiscal requirements applicable to the project.
- Assisted principal investigators with coordination of educational activities through communication with vendors, timely submission of procurement documents, and ensuring the satisfactory fulfillment of product and service orders.
- Developed internal procedure to effectively monitor the attendance of over 40 college students affiliated to the project ensuring compliance with institutional student attendance requirements and effective use of project funds.
- Effectively communicated with students to clarify administrative requirements for their continued participation in the project.

**University of Puerto Rico at Mayaguez
Sea Grant College Program**

November 1, 2014 – January 26, 2017

**May contact supervisor: Director, Ruperto Chaparro, 787-832-3585
Executive Officer I – Full time**

Post-award Financial Grant Administration

- Managed and/or monitored adequate management of funds for a federally funded sponsored program with a budget of 1.9 million dollars per year.
- Reviewed and approved all program expenditures.
- Maintained internal bookkeeping records and performed reconciliations.

Subaward Management

- Independently managed a portfolio of 10-20 projects and served as the program's primary point of contact to current and potential subawardees/grantees for grant related activities such as timely programmatic and fiscal reporting and providing guidance towards solution of complex project issues. Partners included institutions of higher education and non-profit organizations throughout the nation and its territories.

- Worked with legal counsel in the writing and negotiation of subaward agreements leading to full execution.
- Assisted in the development of requests for proposals for accuracy of administrative requirements and reviewed potential subawardee grant application budgets for accuracy.

Pre-award Grant Management

- Served as liaison with the pre-award office for preparation and submission of all program proposals. Independently prepared the program's annual budgets and justifications and federal assistance application packages with minimal review of the pre-award office.
- Worked with legal counsel in the writing and negotiation of collaborative agreements and memorandums of understanding to formalize funded or unfunded collaborations with multiple partners including other institutions of higher education and non-profit organizations.

Leadership and Supervision

- Served as the program's administrative and fiscal leader and provided authoritative information to other members of the program's leadership and staff ensuring that all programmatic and technical duties were performed within the applicable regulatory framework.
- Established and maintained effective communication with a wide array of collaborators including executives and investigators at institutions of higher education, non-profit organizations, and funding agencies, as well as undergraduate and graduate students and community members benefitting from the program's educational, outreach, and research activities.
- Assisted the director in planning and organizing the daily operations through staff ensuring tasks were performed accurately and in a timely manner.
- Supervised administrative team's duties and oriented team leaders about the effective implementation of human resource management practices. Provide guidance towards the solution of complex human resource management situations.
- Served as representative of the program in the Sea Grant College Program fiscal officers' network national meetings, establishing collaborative relationships with funding agency officials and fiscal officers representing over 30 state Sea Grant College Programs.
- Developed internal procedure to monitor student and contractor effort.

University of Puerto Rico at Mayaguez

August 25, 2008 – October 31, 2014

Sea Grant College Program

May contact supervisor; Director, Ruperto Chaparro, 787-832-3585

Administrative Officer II – Full Time

Post-award Financial Grant Management

- Managed and/or monitored adequate management of funds for a sponsored program funded by the National Oceanic and Atmospheric Administration and cost-shared by the University of Puerto Rico, with a combined contribution of 1.9 million dollars per year.
- Reviewed and approved all program expenditures.
- Maintained internal bookkeeping records and performed reconciliations.

Subaward Management

- Served as the program's primary point of contact to current and potential subawardees for grant related activities including higher education institutions and non-profit organizations throughout the nation and its territories.

- Worked with legal counsel in the writing and negotiation of subaward agreements leading to full execution.
- Reviewed potential subawardee grant application budgets for accuracy.

Pre-award Grant Management

- Served as liaison with the pre-award office for preparation and submission of all program proposals. Independently prepared the program's annual budgets and justifications and federal assistance application packages with minimal review of the pre-award office.
- Worked with legal counsel in the writing and negotiation of collaborative agreements and memorandums of understanding to formalize funded or unfunded collaborations with multiple partners including other institutions of higher education and non-profit organizations.

Leadership and Supervision

- Served as the program's administrative and fiscal leader and oriented other members of program's leadership and staff regarding the applicable regulatory framework.
- Established and maintained effective communication with a wide array of collaborators including executives and investigators at institutions of higher education, non-profit organizations, and funding agencies, as well as undergraduate and graduate students and community members benefitting from the program's educational, outreach, and research activities.
- Assisted the director in planning and organizing the daily operations through staff ensuring tasks were performed accurately and in a timely manner.
- Performed quality reviews of administrative team's duties and oriented team leaders about the effective implementation of human resource management practices.
- Served as representative of the program in the Sea Grant College Program fiscal officers' network national meetings, establishing collaborative relationships with funding agency officials and fiscal officers representing over 30 state Sea Grant College Programs.

University of Puerto Rico at Mayaguez

July 1, 2004 – August 24, 2008

Sea Grant College Program

May contact supervisor; Director, Ruperto Chaparro, 787-832-3585

Administrative Officer I – Full time

Post-award Financial Grant Management

- Assisted the director in the management of funds for a sponsored program funded by the National Oceanic and Atmospheric Administration and cost-shared by the University of Puerto Rico, with a combined contribution of 1.5 million dollars per year.
- Assisted the director in all administrative and fiscal responsibilities and oriented staff regarding the applicable regulatory framework.
- Reviewed and approved all program expenditures.
- Maintained internal bookkeeping records and performed reconciliations.

Subaward Management

- Collaborated with the research coordinator and director to effectively monitor subawardees' grant related activities.
- Reviewed potential subawardee grant application budgets for accuracy.

Pre-award Grant Management

- Served as liaison with the pre-award office for preparation and submission of all program proposals.
- Independently prepared the program's annual budgets and justifications guaranteeing the necessary resources were adequately allocated.
- Prepared all application packages for sponsored funding routing for review.

Leadership and Supervision

- Established and maintained effective communication with investigators at institutions of higher education, non-profit organizations, and funding agencies, as well as undergraduate and graduate students and community members benefitting from the program's educational, outreach, and research activities.
- Assisted the director in planning and organizing the daily operations through staff ensuring tasks were performed accurately and in a timely manner.
- Performed quality reviews of administrative team's duties and oriented team leaders about the effective implementation of human resource management practices.
- Served as representative of the program in the Sea Grant College Program fiscal officers' network national meetings, establishing collaborative relationships with funding agency officials and fiscal officers representing over 30 state Sea Grant College Programs.

University of Puerto Rico at Mayaguez

May 14, 2003 – June 30, 2004

Sea Grant College Program

May contact supervisor; Director, Manuel Valdés-Pizzini, 787-209-3698

Administrative Assistant IV – Full time

Post-award Grant Management

- Assisted the director in the management of funds for a sponsored program funded by the National Oceanic and Atmospheric Administration and cost-shared by the University of Puerto Rico, with a combined contribution of 1.5 million dollars per year.
- Assisted the director in all administrative and fiscal responsibilities and oriented staff regarding the applicable regulatory framework.
- Developed internal procedure for effectively monitoring project expenditures and requesting necessary adjustments ensuring compliance with applicable regulations.
- Reviewed and approved all program expenditures.
- Maintained internal bookkeeping records and performed reconciliations.

Pre-Award Grant Management

- Served as liaison with the pre-award office for preparation and submission of all program proposals, preparing program budget narratives in collaboration with the pre-award office and program director.

Leadership and Supervision

- Established and maintained effective communication with investigators at institutions of higher education, non-profit organizations, and funding agencies, as well as undergraduate and graduate students and community members benefitting from the program's educational, outreach, and research activities.
- Assisted the director in planning and organizing the daily operations through staff ensuring tasks were performed accurately and in a timely manner.

- Served as representative of the program in the Sea Grant College Program fiscal officers' network national meetings, establishing collaborative relationships with funding agency officials and fiscal officers representing over 30 state Sea Grant College Programs.

**University of Puerto Rico at Mayaguez
Sea Grant College Program**

June 16, 2000 – May 13, 2003

May contact supervisor; Director, Manuel Valdés-Pizzini, 787-209-3698

Administrative Assistant III – Full time

Post-award Grant Management

- Assisted the director in the management of funds for a sponsored program funded by the National Oceanic and Atmospheric Administration and cost-shared by the University of Puerto Rico, with a combined contribution of 1.5 million dollars per year.
- Assisted the director in all administrative and fiscal responsibilities and oriented staff regarding the applicable regulatory framework.
- Established internal bookkeeping procedure for improved expenditure monitoring.
- Established and maintained effective communication with investigators at institutions of higher education, non-profit organizations, and funding agencies, as well as undergraduate and graduate students and community members benefitting from the program's educational, outreach, and research activities.

EDUCATION

- Northcentral University
Doctor of Philosophy in Business Administration, February 2017
Major: Public Administration
Dissertation: "The Path Towards Public Service Motivation in the Federal Government: Satisfaction of Employees' Basic Psychological Needs"
- University of Puerto Rico at Mayagüez
Master of Business Administration, June 2008
Major: Human Resource Management
- University of Puerto Rico at Mayagüez
Bachelor of Business Administration, June 2002
Major: Accounting

ADDITIONAL SKILLS

- Bi-lingual Spanish/English – Advanced Speaking, Reading, and Writing
- Microsoft Office suite including Word, Excel, and Outlook
- Accounting software: Quicken, Quickbooks
- Grants management systems: Grants Online, Grants.gov, Kuali Coeus, GrantSolutions, ezFedGrants, Project Management Center (DOE-Office of Energy Efficiency & Renewable Energy), DOE ePIC, eRA Commons, DHHS Payment Management System (PMS)
- Remote work using a variety of systems including cloud storage (Dropbox, OneDrive, Google Drive), online meeting and webinar platforms (Teams, Zoom, Google Meet, GoToMeeting, GoToWebinar)

CERTIFICATIONS

- Certified Financial Research Administrator (CFRA), 2020-2025, Research Administration Certification Council
- Certified Research Administrator (CRA), 2016-2026, Research Administrators Certification Council
- Grants Management Certificate Program: Recipient Track, 2015, Management Concepts
- Grants Management Certificate Program: Pass-through Track, 2014, Management Concepts,

PUBLICATIONS AND PRESENTATIONS

Garcia, Y. (2022, December). Basics of cost sharing: Where the new research administrator should start. NCURA Magazine, 54(6), p.19-21

Basics of Cost Sharing, *SRAI International Annual Meeting*, Las Vegas, NV, October 2022

Garcia, Y. (2020, August). Public service motivation: Under the hood of research administrators? NCURA Magazine, 52(4), p. 54.

Garcia, Y. (2018, May/June). Anecdotes in the making. NCURA Magazine, 50(3), pp. 19-21.

Garcia, Y. (2017, October/November). Communicating with your principal investigators: An educational opportunity. NCURA Magazine, XLIX(5), pp. 34-35.

MEMBERSHIPS AND VOLUNTEERING

Research Administrators Certification Council (RACC)
Certified Financial Research Administrator (CFRA) Item Writing Committee
Volunteer member January 1, 2023 – December 31, 2024

Research Administrators Certification Council (RACC)
Member, Certified Research Administrator (CRA) Exam Review Committee
Volunteer member March 1, 2022 – February 28, 2024

National Council of University Research Administrators (NCURA)
Active member since 2015

Society of Research Administrators International
Active member since 2024

NATIONAL COUNCIL OF UNIVERSITY RESEARCH ADMINISTRATORS

REGION VII

NOMINATION FORM ELECTION 2024

Nominator:

Name: Yulissa Garcia

Institution: Colorado State University

Position: Financial Research Administrator

Phone: 970-491-8409 Email: y.garcia@colostate.edu

Candidate Information:

Select One: Chair-Elect (2025)

Treasurer-Elect (2025)

Member-at-Large – 2 year term (2025-2026)

Regionally Elected Member of the National Board of Directors (2025-2026)

Name: Yulissa Garcia

Institution: Colorado State University

Position: Financial Research Administrator

Phone: 970-491-8409 / 787-244-0797 Email: y.garcia@colostate.edu