

Josephine WONG

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CAREER PROFILE

- 8 years of pre- and post- award sponsored project management experience, including proposal preparation and submission, budgeting, forecasting, resource arrangement, contract negotiation, tracking milestones & goals, site visit facilitating and reporting.
- Over 10 years of experience in accounting, financial operations, and analysis with thorough knowledge of office procedures, excellent comprehension, communication and supervising skills.
- Demonstrated interpersonal skills and ability to successfully establish and maintain cooperative and collaborative working relationships in a team-oriented environment.
- Strong analytical and organizational skills; ability to create financial compliance reports, including financial analysis, revenue forecasting, trend analysis and cash flow analysis.
- Competent with computers and numerous financial applications software.
- Skilled in acting as liaison between sponsors, sub-contractors, related university departments, key personnel and administrators.
- **Six Sigma & Fundamental of Continuous Improvement certificate.**
- **B.S., Accountancy; B.S. Computer Information Systems; B.A., Psychology.**
- **Master Business Administration (PM-MBA).**
- **Certified Research Administration (CRA)**

SKILLS & CERTIFICATES

- Cayuse Software Solution, Research Management Application
- Grants.gov, Fastlane, and eRACommons Grant submission and management applications
- MS Office - Excel, Word, PowerPoint, and Outlook.
- Graphics – Visio and Photoshop.
- Project Management - Microsoft Project, and Basecamp.
- Home grown Grant Management database (FileMaker Pro) development, administration and training.
- Financial and Information Systems - Advantage, PeopleSoft (Human resource and financial systems), Hyperion Essbase and Financial Web Reports.
- Six Sigma & Fundamentals of Continuous Improvement Certificate 2005.
- Certified Research Administration (CRA) 2012.
- Certified Meeting Professional (CMP) 2004 – 2009.
- Honors Diploma, Chinese Language & Literature, HK Baptist University, HKSAR, China 1985

PROFESSIONAL EXPERIENCES

AZUSA PACIFIC UNIVERSITY, Azusa, CA

9/12 - Present

Director, Grants Management

- Serve as a leading role to develop and update a university-wide Grants Handbook.
- Work with Principal Investigators to assure the compliance of fiscal and program guideline.
- Work with other university teams to ensure the University in compliance with university policies and funding source requirements.
- Manage various external grants and awards from diverse sources, such as federal, state, industry, non-profit, and foundations.

- Manage over 30 private/state/federal grant programs/projects simultaneously
- Serve as liaison between PI and funding sources externally and internally.
- Negotiate contract terms with external funding sources.
- Develop grant-related forms and procedures to enhance the efficiency of grant process.
- Provide research-related training workshops, such as Budgeting and Effort Reporting.
- Interim and backup of pre-award functions of Office of Research and Grant.
- Set up and administrate CITI RCR training.
- Set up university-wide multi-year budget templates.
- Member of RCR Training Task force committee 2012-13

ARIZONA STATE UNIVERSITY, Tempe, AZ

Program Manager, Hugh Downs School of Human Communication 9/11 – 9/12

- Manage 2 Federal-funded grants: One 5-year \$4.9Million Office of Naval Research (ONR) sponsored project and one 4.5-year \$6.1 Million Defense Advanced Research Projects Agency (DARPA) grant
- Assist the department to prepare grant proposals (A 1-year \$320,000 award from MITRE Corporation was received in June 2012).
- Identify additional grant opportunities for the department.
- Act as the liaison between sponsors, principle investigator and co-investigators, sub-awardees, and contractors.
- Administrative support for all functions of Center for Strategic Communication, a research center, including travel arrangement, formatting and filing reports, coordinating public events and symposia, and site visits.
- Communicate with project personnel, university administration, and the ONR and DoD program manager, as well as consultants and international scholars affiliated with the research project.
- Supervise 4 Research Assistant Professors, 2 Postdoctoral Scholars and 9 Research Assistants.

Program Manager, University Technology Office 2/06 – 8/11

- Conduct project financial analysis and account reconciliation includes cost analysis, revenue forecast and expenditure projection for program proposals.
- Manage and analyze the monetary resources and affairs of 30 sponsored/grant projects (\$13 Million over 6 years), prepare and maintain supporting documentation for project updates.
- Manage daily projects activities including communicating with sponsors, clients, consultants and supporting teams; prepare reports to grant sponsors and management; analyze and monitor department financial status and evaluate existing process procedures.
- Assist with due diligence for Associate and Assistant Vice President at UTO to prepare state and local budget reports and financial compliance reports.
- Set up revenue receipts tracking system for online training courses and annual conference for different payment types including credit card, check and purchase order.
- Supervise and train 4 staff members to support the business and operation functions.
- Handle hiring, resume screening, recruiting, payroll distribution and effort reporting.

Project Manager, University Technology Office 5/05 -1/06

- Project lead for conducting financial analysis of a state government grant for *Integrated Data to Enhance Arizona's Learning*. Responsibility includes budgeting, cost analysis, revenue forecast and expense projection for decision making and strategic planning.
- Provide direction and oversight of university-wide technology cost analysis of additional 100,000 students' enrollment project.
- Ability to effectively extract financial data (revenue and expense) from the data warehouse via Hyperion, Advantage, or Financial Web Report, analyze it, and present information to directors and Associate Vice President.
- Provide support and recommendations to supporting teams to plan, develop, deploy, test and maintain

the *IDEAL* web portal and help desk.

Conference Manager, Microcomputers in Education Conference (MEC) 3/00-4/05

- Manage operation of annual national education technology conference for Arizonian educators; Tasks includes strategic planning and policy implementation.
- Document conference financial analysis and present revenue forecast and expense projection report to Associate Vice President.
- Manage business operation functions such as account payable, invoicing, account receivable and marketing.
- Develop online databases for conference registration and scheduling.

AKH COMPANY, INC. / DISCOUNT TIRE CENTERS, Anaheim, CA

Cash Manager / Accountant

8/93 – 1/99

- Coordinate upgrading to an automated accounting information system.
- Supervise the cash management and sales audit department.
- Analyze financial data and prepare compliance reports to assist Vice President, CFO & controller.
- Prepare balance sheet, Consolidated Income Statement and cash flow statement.
- Prepare budgets for 75 retail stores and 15 departments.
- Prepare account reconciliations.
- Communicate with internal, external partners and customers.
- Provide training of cash and credit card receipt policies to district and store managers.
- Provide GAAP consultation to Accounts Payable clerks.

EDUCATION

School of Global Mgmt and Leadership, Arizona State University, Tempe, AZ
Master Business Administration (PM-MBA)

W. P. Carey School of Business, Arizona State University, Tempe, AZ
B.S., Computer Information Systems & B.S., Accountancy

College of Liberal Arts and Sciences, Arizona State University, Tempe, AZ
B.A., Psychology

Northcote College of Education, Hong Kong SAR, China
Certificate, In-service Teachers Registration

Hong Kong Baptist University, Hong Kong SAR, China
Honors Diploma, Chinese Language & Literature

PROFESSIONAL MEMBERSHIP

National Council of University Research Administrators (NCURA)
Society of Research Administrators (SRA) International

CHURCH SERVICE

Living Stone Alliance Church, Hacienda Height, CA Financial Assistant	2012 - present
Metro Phoenix Chinese Alliance Church, Tempe, AZ Mentor of College Students Fellowship	2007 - 2012
Metro Phoenix Chinese Alliance Church, Tempe, AZ Sunday School Teacher	2002 - 2012
Living Stone Alliance Church, Hacienda Height, CA Financial Assistant	1996 - 1997

PRESENTATIONS

Yu, C. H., & Wong, J. W. (2005, March). *Visualize your invisible creativity: Empowerment by digital photography*. Paper presented at the 23th Annual Microcomputer in Education Conference, Tempe, AZ.

Yu, C. H., & Wong, J. W. (2003). *Using SAS for classical item analysis and option analysis*. Proceedings of 2003 Western Users of SAS Software Conference.

Yu, C. H., & Wong, J. W. (2003, March). *Digital photography and imaging*. Paper presented at the 22th Annual Microcomputer in Education Conference, Tempe, AZ.

Yu, C. H., & Wong, J. (2001, January). *Digital imaging and creativity*. Paper presented at Teaching and Technology Conference, Tucson, AZ.