

New Directions

Quality Improvement in Financial Management at the University of Washington

Vol 1, No 1

HEADLINES

July 2002

Positive Energy Flows in New Directions

By Chris Malins

After a one year hiatus, Directions is back! The last issue of Financial Management's quality-focused quarterly was published in the Summer of 2001. Since that time, there has been much discussion about the future of this publication and the best way to communicate the Quality achievements and vision of FM to the division, the University, and the broader community. This "new look" Directions is the happy result of those discussions.

Since Financial Management publishes Directions as a "Quality Chronicle", the focus of the articles will be on divisional and departmental quality efforts, i.e. the Dashboard, the Diversity Teams, recognition, and process improvements. The Quality Chronicle concept helped to determine the various sections that will comprise the new Directions.

The regular sections in Directions are as follows:

Headlines —The feature stories of each issue

Innovations —A new section that will attempt to capture the early excitement and energy that staff and leaders pour into improving processes before the improvement is recognized formally.

Kudos—A look at the many thank yous and appreciations that are bestowed upon financial management staff by process partners and customers

RQT/Awards—Articles on recognition awards, new RQT initiatives, or changes in RQT membership

Calendar—Only available on the web version, a forward calendar that tells of future trainings and events

Like any high quality periodical, Directions is organized with an Editor in Chief (in this case there are two) and a small group of highly capable editors, each responsible for a specific department or departments. Each editor's job is to "shake the bushes" to uncover quality efforts in each office, from TOPS awards to the very earliest rumblings of quality. These editors will either write articles or recruit others to write them.

Kate Riley and Chris Malins will share the role of Editor in Chief and are responsible for the overall content of Directions. Kate will focus on the quality orientation of articles and Chris will provide general editorial functions.

The new editors with departmental responsibilities are:

Randi Adair—Equipment Inventory and Travel

Diane Cooley—Management Accounting and Analysis, and Student Fiscal Services

Kristi Dunne—Financial Accounting, Payables Admin, Tax Office

Sharon Langlois—Payroll

Chris Malins—Treasury

Cecilia Pittman—Grant and Contract Accounting

Kate Riley—Quality Improvement Program

Beginning this issue, Directions will be available in two formats and both are available through the Financial Management Quality Program website. The first format is the regular printable format that will be familiar to those who have read Directions before. The second version is web-based and has Hypertext links to each article in the issue.

Finally, the overall look and layout of a successful publication is the key to its success. Michael Fero, FM's resident graphics guru, will act as design con-

sultant for the new Directions. Michael has been involved with Directions since the beginning and

Diversity Audit Shares Findings, Mentoring Program to Begin

By Ann Sarna

What does it take to be successful in Financial Management? How should FM communicate these requirements? Can we level the playing field so everyone has opportunities for growth and advancement?

Driven by these questions, the Diversity Audit of late 2001 developed a number of recommendations to better explore and establish the future goals of diversity in Financial Management. Two separate teams sprung from these discussions, the Organizational Development and Communication Team and the Promotions, Rewards and Merit Team.

While the Organizational Development team continues to refine their diversity recommendation, the EIT has just approved the Promotions, Rewards, and Merit team's proposal for an Employee Mentoring Program and a fall 2002 launch.

The Promotion, Rewards and Merit Team based their mentoring program proposal on the following recommendations from the diversity audit:

- Communication of what it takes to get ahead, in varied modes with specific examples
- Internalize recognition process
- Honor tenure in a more formal way
- Encourage staff to informally recognize each other
- Redefine rewards, success and opportunities
- Think of how to deal with bitterness when there are talented people who don't have opportunities for promotions
- Create avenues for leadership for people of color

The goal is to get 10-15 pairs of mentors/mentorees to participate in a year long program. The program will include a kick-off training event where mentors and mentorees will work together to build their relationships and set goals.

This program is a wonderful opportunity for less experienced staff to gain knowledge and skills by partnering with a more experienced member of Financial Management.

For experienced staff, this program will help them become better mentors and communicators. It's clear that both the mentor and mentoree will gain from participating in this program.

Diversity awareness is an important element of this mentoring program. The kick-off training workshop will include material on diversity and there will be additional mentoring activities that will include diversity issues/topics. The team is currently collecting statistics on FM diversity and is looking for ways to measure success of the mentoring program.

The Promotions, Rewards and Merit Diversity team is comprised of: David Wright, Jaeson Albrighton, Heidi Anderson, Shawn Williams, Erick Winger, Evelyn Jagoring, and Ann Sarna. We will be working hard this summer to plan and implement this program. You will be hearing more about the program as we define the details. If you have questions or comments about this program or the work our team is doing, feel free to contact any one of the team members.

Success can be defined in many ways. The mentoring program, combined with the staff qualities and Employee Development Plan, will aid employees in finding their path to success in financial management.

FM Leaders Set Off on a New Path

by Kate Riley

Leaders at the June 21 Quarterly Event heard the message that, more and more, we're being expected to manage with facts and data. Or, as Dorothy said to Toto in the movie, *The Wizard of Oz*, "... we're not in Kansas anymore." Increasingly, Financial Management is being asked to provide answers to questions like: "How efficient and effective are you?", "What kind of management tools are you using to guide your operations?" and "What data do you have to support your request for resources?"

Our answer is dashboards. A dashboard is a management tool that gives a balanced picture of how well an organization is performing in four important areas: finances, customer satisfaction, internal processes and staff development. The dashboard conveys a message to both staff and customers about what's important and how well we're doing.

The focus of the recent Leaders Event was to showcase the dashboards at both the FM division and department levels. Each department presented key information about its dashboard how it is being used, what challenges arose in development, and what are the plans for the future. The event was energizing, particularly for those who had responsibility for creating the presentations. There was a

shared appreciation of the effort needed to reach this point, because everyone had contributed to developing a dashboard.

What's next in our management journey along the dashboard path? Departments are now asking questions like: "Is this the best way to measure this process?" and "How can we produce our dashboard more easily?" Each department will work to improve the quality of its data and the usefulness of the dashboard approach.

Representatives from each department have been selected to continue support for dashboard development. Responsibilities include working with their leadership group to improve measures and to make good use of the data, and ensuring the dashboard is updated frequently. This group is comprised of: Christi Chapman, RAA; Diane Cooley, SFS; Jeff Follman, Financial Accounting; Tom Phillips, Financial Services; Judy Peterson, Treasury; Heather Norberg Stewart, Payroll; and, Kate Riley, Financial Management.

You can see the FM Division dashboard on-line at the FM QI Home Page (www.washington.edu/admin/finmgmt/qi/) and through the measurement systems link in the QI Pyramid (www.washington.edu/admin/finmgmt/qi/pyramid/index.htm).

Top Ten Things QI has done for Financial Management

A humorous look at Quality Improvement, presented at last year's summer event on the ten year anniversary of the QI initiative in Financial Management

10. Made a great argument for purchasing Flowcharting Software
9. Forced us to look up the word "Rubric".
8. Created more teams than major league baseball, basketball and football combined
7. Caused many of us to absent-mindedly wonder: "What is the difference between Mission, Vision, Values and Objectives?"
6. Made us say, "It's the process, not the person" when we know damned well that IT'S THE PERSON!
5. Made Financial Management the only organization outside of Detroit building a Dashboard.
4. Made it somehow appropriate to refer to a co-worker as a "feeler".
3. Justified the cost of something that has long been missing in Financial Management: a Helium Tank.
2. Created a new pick-up line: "Hey baby, what's your MBTI type?"
1. Two words: Free Food.

GCA Quality Improvements

by GCA Staff

For years there has been a reverberating echo in Grant and Contract Accounting (GCA) indicating the need for a new Accounts Receivable system. The system was written in RBASE for DOS and can no longer handle the volume and complexity of GCA receivables. Proposals have been floating around for the past decade, but funding was scarce. However, recent data collection and positive discussions with the Budget Office led to \$1.2M in initial funding and \$240K in annual operating funds for a new receivables system. The funding was awarded based on projections of timely invoices bringing in faster payment to the University and therefore generating interest savings. The annual savings are projected to be in excess of \$500K annually, growing as grant volumes increase.

Working with an external vendor, Computing and Communications and a team of GCA staff, our team leader, Denise Lim, will guide the planning, development and implementation of the new system. The project is expected to take twelve to eighteen months, with a start date of September 2002.

Some of the expected benefits of an integrated system will be:

- Automated invoicing and reporting using many unique and complex formats
- More frequent billing
- Better monitoring of aged receivables
- More efficient cash application

We expect that our “post” process improvement measures will reflect a significant improvement in timeliness of invoicing and related interest savings, a savings that will only increase in subsequent years with grant volumes.

We have already dived into the planning stage of this process and look forward to the rigorous but exciting time ahead!

Another process improvement that Management Accounting and Analysis (MAA) and Grant and Contract Accounting (GCA) have focused on is the cost share process. Our Strategic Plan identified cost sharing as a top priority, and an action plan was developed. Subsequently, a dashboard measure was set. And in the fall of 2001, a team was formed to address our concerns.

We realized that this process touched not only our two offices but Grant and Contract Services (GCS), Computing and Communications (C&C), and most campus departments. We knew that we had a lot of work ahead of us. A number of ongoing efforts have gone into this process improvement and we have more to go.

We have developed reports to track outstanding cost share. In addition, we have revised the GC-1, allowing for comprehensive cost share information which will aid GCA in recording the information in the Budget Driver. GIM 21 has likewise been revised to give up-to-date guidance to departments. Furthermore, MAA has developed a Faculty Effort Certification (FEC) web page. Lastly, cost share letters were created and are being sent to the Principal Investigator when the budget is established.

Some of the ongoing activities include MAA working with C&C to resolve system errors in the Budget Driver, GCA working on web page for non-FEC cost share, and the writing of policy and procedures. Finally, a team consisting of representatives from GCA, GCS, MAA, Internal Audit and a campus department is in the process of conducting training for campus departments.

In conclusion, these numbers speak to all of our efforts. In the fall of 2001, the unmet cost share was 47.9%. As of May 2002, the unmet cost share has decreased to 28.7%.

LEAD Team Pursues Knowledge

By *Kate Riley*

What is knowledge-driven? One of Financial Management's strategies for achieving good customer service and efficient processes is to move from being "transaction-driven" to "knowledge-driven." But what does this mean and how will we know when we get there? The LEAD Team has been chartered to answer these questions and to help Financial Management act on this important strategy.

The team began meeting in May of this year. We've been collecting information from many sources to better understand knowledge-driven. To launch the team's work, each member asked department staff to define what knowledge-driven means to them. Feedback from staff has produced lots of discussion and ideas for the team.

A useful definition of knowledge-driven is the first step, and once we have one, we will share it with the leadership group and staff in Financial Management. Look for more on this initiative in the fall.

LEAD Team

Linda Braziel, Payroll
Bill Christensen, Financial Accounting
Scott Davies, Treasury
Cindy Gregovich, Equipment Inventory & Travel
Karen Long, Payables Administration
Pam Luther, Student Fiscal Services
Kate Riley, Team Leader
Tami Sadusky, Grant & Contract Accounting
Jane Wiseman, Mgmt Accounting and Analysis
V'Ella Warren, Sponsor

Payroll, Brockovich and Charo: APA Conference in Texas

By *Linda Braziel*

The American Payroll Association's (APA) 20th Anniversary Congress was held in San Antonio, Texas this year and it wasn't all big hair, Erin Brockovich and "cuchi-cuchi." Erin Brockovich, the famed file clerk who made history over the exposure of Hinckley, California residents to toxic waste, delivered the keynote addresses. She was as flamboyant and personable in person as Julia Roberts portrayed her in the film. Her main message to us was to "hear how grit, tenacity and a refusal to accept defeat can help you overcome seemingly insurmountable odds to achieve your goals."

As for the "cuchi-cuchi" part of this story - Charo provided the Congress entertainment this year. Okay, I admit, I cannot give you an in-person account on fiesta night. I just could not make myself go even though several people tried to persuade me that Charo's guitar playing is legendary. I can tell you that the next day, during the "Charo Look-Alike" contest; there were some guys and gals (Texas talk) who didn't look that great in costume.

As I sat and watched bearded "Charo's", it was interesting to hear about the history of payroll organizing as a profession twenty years ago. As one speaker noted, "We were not quoted by the USA Today or the Wall Street Journal, as we are today." About 2,000 attendees nodded heads in agreement. The talk around the Congress revolved around the pride of working in the payroll profession. No one says it's easy; consensus among "payroll people" is that you have to like to be involved in an environment of constant change. Perhaps networking with people who share similar issues/goals is one of the most valuable components of attending the national conference.

Also, of great worth is the expertise of payroll professionals when it comes to the complexity and variety of issues and how we all have to respond to

change. All agreed how very difficult it can be to respond to legislative changes. Just last December, the administration wanted to grant a “tax holiday” from the social security portion of the FICA tax so that the economy would be stimulated. The APA was instrumental in lobbying, letting the administration know that systems across the country would be impacted negatively, that withholding would be nightmarish and yearend reporting would be compromised.

The workshops were of great value. They ranged in topics from payroll specialties to special forums and from organization and development to technology issues. I don’t think this will be a surprise to anyone in Financial Management - that I found that organizationally we’re either in front or at the

head of the pack. I heard talk of measurements; I didn’t see anything. I heard talk about building a culture; I didn’t see examples of a recognition or diversity initiative. I think we can be proud of the workplace we’re building. As I think about it, perhaps coming away from a national conference with the thoughts that I can put our Payroll Office and staff up against any office and staff in the county far exceeds the value I gained from the socializing, networking, workshops and regulatory updates. I believe I owe my thanks to V’Ella and the EIT for the way we do business, to all my Financial Management colleagues for helping me to grow and to all the people in Payroll who make our office the best. Learning to appreciate what you have is not a bad week of work!

Payroll Leaders Retreat, Come Back Energized

By Ginny Montgomery

With the changes in staff at the Payroll Office, it was time for a restructure of the management team. So, on May 1, 2002, the members of the Payroll Office Management and Operations Teams took a day to examine their purpose, roles and the progression of the Payroll Dashboard.

With the help of Debby Seaman, as facilitator, Linda Braziel, Ginny Montgomery, Heather Norberg Stewart, Christa Woodhull, Mike Fleming and Charles Bennett met at Heather’s home for a busy day of planning.

The team determined early in the day that this group is much more focused than previous management teams. There was consensus that information sharing is important and that unresolved issues need to be dealt with immediately to diffuse any unnecessary conflicts.

Acknowledging that meetings can be a drag sometimes, we decided that our team needs to be a little more exciting. We decided that a breakfast meeting at Café Allegro would be a good idea. It was agreed that by making the meetings a little more enjoyable

(food is always a motivator in the Payroll Office) participation and productivity would increase.

The next discussion focused on group membership and roles of the Management and Operations teams. We agreed that the Management Team would be dealing with issues that are “high-level” and conceptual. The Operations Team would then be charged with working on “day-to-day” issues and any assignments handed down from the Management team. The biggest challenge will be to make sure that the Operations team meetings are not a rehash of the Management meetings.

Feeling confident about our progress, we went to lunch at Rosita’s Mexican restaurant. After a lovely lunch (there really is a food thing with this group!), we returned to Heather’s home feeling full and ready to tackle the Payroll Office dashboard.

There were several questions that we needed to clarify regarding the dashboard. What data needs to be collected (is useful)? What major processes need to be defined? What exactly is the dashboard supposed to accomplish?

After a bit of debate, we came to the conclusion that the dashboard was going to be a tool that Payroll (and others) could use to measure how we were

doing, whether we were meeting our goals, where we needed improvement, and a way to show how we were improving. With this defined, we moved on to the next step - defining the major fields for information gathering.

Building on a previous meeting, the major fields were determined to be: Paying People, Managing Money, Financial Reporting (Tax Reports), Customer Service and Employee Development.

Having made significant progress, we decided that everyone would go back to their individual work groups in the office and clarify what measures need

to be gathered so that the information would be ready for the dashboard presentation in June. We agreed that the next meeting to discuss the dashboard would be held at Café Allegro and would be a breakfast meeting.

We ended the day by reviewing the Payroll Office strategic plan and discussing a few issues regarding the latest on-line application while eating warm, fresh-from-the-oven, chocolate chip cookies (food, again!).

Rapid Process Improvement for SFS Scholarships

By Diane Cooley

In July of 2001, the Student Accounts and Student Loans and Receivables Offices joined forces to create Student Fiscal Services. As a result of this merger and the departure of Deirdre Greene, the newly formed Customer Service Unit found itself with a couple of new teammates and a whole new process to learn. This was a perfect opportunity to use the Rapid Process Improvement (RPI) method to bring the team up to speed on the scholarships process.

A lot of pre-work was needed and Kate Riley and Pam Luther were up to the challenge. They reviewed the current scholarships process, interviewed key people and put together an information binder. The Lead Team (Andrew Monusko, Heidi Anderson, Stepheny Bonner and Lindsay Hendrix) along with their leaders (Nancy Hurja and Pam) then spent a week away from their desks looking at the process this past March. Peggy Fitzwater joined in as computer expert and Kate led the effort.

First the team learned about the RPI process and then dove into a review of the current scholarship process. Lists were made and processes charted. After everyone felt that they had a good, basic feel for scholarships, an ideal process for managing scholarships was created. Plans to achieve the team's vision were then developed.

After two days of studying the old process and designing the new one, the team went to work. For the next three days, everyone worked hard on their project "To Do" lists. Experts (Diane Cooley, LiChang Wong and Ken Haines) were called in as needed. The final task of the week was to prepare a presentation to be shared with everyone in Financial Management who was interested in scholarships or the RPI process.

The STS Lead Team continues to learn about the intricacies of the scholarships process and move forward with their streamlining efforts. One immediate benefit to the customers so far has been that there is no longer a separate scholarships counter students can get their questions answered at any customer service position on the first floor of Schmitz.

Kudos

Compiled by Sharon Langlois

Diane Harker: I just want to let you both know how much I appreciate Diane's willingness to help and how she always finds answers for the many travel questions that I have. Recently, she was extremely helpful with the CTA/Travel Visa issue. I wanted to make sure that you know that our office is very glad that she is in the Travel Office. *Kim Dinh, Office of the President*

Calvin Tran: provided courteous and professional service. Calvin took on the challenge, kept me informed, and came through. Calvin is an asset to your department and I'm sure that his competence, attitude and manners will carry him far and bring him much reward. *Anthony Gonzales, MD, UW School of Medicine, 1994*

Kate Riley: Thank you for volunteering as an examiner in the Washington State Quality Award Program's 2001-2002 award cycle. I understand that serving as an examiner requires many hours of preparation, training, and team meetings, and I appreciate your willingness to support Washington businesses with you time and expertise. As an examiner, you were essential to the success of the WSQA. Again, Kate, I extend my deep appreciation for your dedication and hard work. Congratulations on a job well done! *Gary Locke, Governor, State of Washington*

Alma Prepotente: I just wanted to let you know how much I appreciate Alma. She is wonderful! She is patient, professional, prompt and incredibly helpful. I always know I am in good hands. It's a comfort to know that there are individuals of her caliber on campus, please pass along my appreciation for her outstanding service. *Susanna Westen, Department of Slavic Language and Literature*

Heidi Gustafson: has been extremely helpful and cooperative with equipment tagging and inventory questions. She has been instrumental in

our establishing a new system at FHL for scanning equipment. Without her help in the design and production of the tags, we would not be able to realize our expected efficiency improvements. *Scott Schwinge, Friday Harbor Laboratories*

Suzette Ashby-Larrabee, Brion Norton, and Ruchi Aggarwal: FEC class and the trio of MA&A classes have all exceeded my expectations, and I believe MA&A training helped me obtain my recent strategic position. Keep up the fine efforts. *Mark Ondrake, Department of Otolaryngology*

EVP: Regarding the NIH site visit; a job well done - both the review and the hard work that you do all the time to make the grants management process work. *Harlan Patterson, Planning and Budgeting*

EVP: Regarding the NIH site visit; All are to be complimented not only for a successful audit, but more importantly for creating an approach to dealing with grants/contracts in such an effective manner each and every day. *Weldon Ihrig, Executive Vice President*

Lynn Duong: is extremely helpful and prompt in assisting us in processing a number of RST's on short notice. Her professionalism and helpfulness is very much appreciated. *Randy Tanfer, Washington Technology Center*

Shawna Litterski and Anna Mirza: Marianne Miller's wallet was stolen and she had to close her bank account and change the direct deposit. This was a very stressful situation and Shawna and Anna rose to the occasion. They let her into the Payroll office shortly after 5PM and expedited the prenote process. Marianne wanted me to be sure to put a compliment letter in their files. *Heather Norberg Stewart, Payroll, for Marianne Miller, a very satisfied customer.*

Lynn Duong: Thank you for responding so quickly to my RST questions. You are always quick to reply, whether by phone or e-mail. Your humor shows the bright side of things. *Sandra Scott, College of Forest Resources*

Lindsay Hendrix and **Nancy Hurja**: You guys have been marvelous this year for getting everything done. I do realize that the medical students have something new happening or changing every other minute! I will be making you guys some goodies. *Diane Noecker, UW School of Medicine Financial Aid Office*

Lindsay Hendrix: appreciation of the help we have been receiving in processing some very last minute checks, especially several award checks which we wanted to give our students at graduation. *Resat Kasaba, Jackson School of International Studies*

Ruth Johnston: I appreciate all the help you have given me in addressing the ID and other related issues for visiting students. I am also grateful to all for responding positively and in a timely manner

to help solve the problem. We want the students to come back to the UW, and making them feel welcome is a great way to accomplish our goal. *Fanaye Turner, UW Engineered Biomaterials*

Treasurer's Office: Goodness knows we are blessed to have such capable colleagues in the Treasurer's office, along with the team of advisors and managers. Thank you for all you do to invest donors' contributions with such wisdom and success. You are greatly appreciated. *Connie Kravas, Development Office*

Paul Jeganathan: gave excellent help in clarifying issues and answering questions. In fact, he went beyond the specific questions to give a broader perspective. *Joyce Robertson, Development and Community Relations, School of Pharmacy*

RQT / AWARDS

Gregovich Nominated for Distinguished Staff Award

by Randi Adair

Recently, Cindy Gregovich joined an elite group of Financial Management employees, those who have been nominated for a Distinguished Staff Award. This award is the most prestigious form of recognition that a University of Washington staff member can receive. Cindy was nominated by members of Equipment Inventory (EIO), the Travel Office, and Computing and Communications.

As the leader of both Travel and Equipment Inventory Offices, Cindy manages time, resources, and people with efficiency. This means balancing direct involvement in the operation of her departments with trust in her employees' abilities to handle situations on their own. Diane Harker, Travel Card Administrator and a member of the nominating team, commented on Cindy's participatory style: "She is both a leader and a team player, and has developed an exceptional working partnership with the staff of EIO and Travel."

Cindy's employees stress her commitment to staff development as a key reason for her nomination. Linda Arcand, a Fiscal Specialist in EIO, explains that Cindy delegates tasks that challenge staff members' abilities. She remembers an incident last summer where Cindy found a way to turn a relatively mundane task into a networking opportunity:

"Last year, our pending asset count was getting rather high. Those are assets that have been received by the department, but not tagged. Cindy came up with the innovative idea of having an internal contest. All of the employees in Equipment Inventory were given several departments to work with in getting the pending assets cleared. She made getting the pending assets cleared fun, rather than a chore. She is always looking for ways to make our work more interesting."

Chris Wall, Federal Program Coordinator for EIO and another nominator, commented that in so many ways, Cindy exemplifies the goals that Financial Management's Quality Improvement

Program seeks to promote. Cindy does not offer her staff support and encouragement in order to garner popularity, but because she truly cares about their well-being. "Cindy is so respected because she does what is necessary, not what people want her to do. Her managing skills tap into her staff's strengths and motivations [encouraging them] to reach

higher standards in their work and personal lives. She is definitely a strong, strong leader."

Although Cindy was not among the finalists, being nominated by co-workers and process partners for such an important recognition is a real reflection of Cindy's positive impact on Financial Management.

Recognition Review

Compiled by Kyra Worrell

LINQ

Deirdre Greene (Student Fiscal Services) received a LINQ award for the quality of Approachable on November 19, 2001. Her staff said that "Deirdre has accomplished that rarity: leaving her staff alone to do their jobs and still managing to stay involved in the process and making sure they get whatever support they need. Deirdre is always available, and she "makes sure that everyone's input is included and that everyone is comfortable before making decisions."

Pramilla Chand (Financial Services) was awarded a LINQ award for the qualities of Trustworthy and Approachable on December 10, 2001. Pramilla is very supportive of her staff - "Pramilla creates an open atmosphere as a leader. She is always on the floor le." Pramilla is very knowledgeable in her job (she is called a "real rock" in terms of understanding processes), but "despite this knowledge she still seeks input from others and is committed to improvement."

Charles Bennett (Financial Accounting) was honored with a LINQ award for the qualities of Trusting of Others and Approachable on February 11, 2002. Charles is described as always being open and honest - that there is never any topic that is "off limits." He is seen as always willing to take time out and talk to people, and that "his approach ...is...very relaxed and has helped me to gain confidence in my abilities." Charles also understands that "in order

to the best at one's job, many different skills would be needed. He encouraged not only the technical aspects of the position, but also the 'people' skills required to do a good job."

Cathy Sleipnes (Payables Administration) was recognized with a LINQ award for the qualities of Trustworthy and Approachable on February 21, 2002. Cathy is seen not only as mentor and coach for many in Payables Administration, but as a team player as well. "Cathy's willingness to take on leadership responsibilities...as well as her outstanding reputation for knowing EVERYTHING makes her a trustworthy 'most valuable player' for Payables." "Cathy makes herself available to help out where ever she is needed."

Ken Haines (Student Fiscal Services) was awarded a LINQ award for the qualities of Trustworthy and Approachable on June 17, 2002. People have confidence in Ken: "If you ask Ken to do something, it gets done." Many people interviewed pointed to his exhaustive knowledge of the Student Data Base. Ken is also seen as always calm and someone whose door is always open.

QSTEP

Bob Smith (Treasury) was honored with a QSTEP on October 16, 2001 for all four qualities: Trustworthy, Trusting of Others, Collaborative, and Committed. Bob is seen as not "just occasionally demonstrating these qualities - he lives them." Once Bob takes over any area, both his supervisor and co-workers know he will "take care of the issue thoroughly and well" because "Bob always

follows through on commitments.” Bob is also seen as “unfailingly courteous. If someone is talking to him, they get his undivided attention... he doesn’t interrupt and his response will be thoughtful.” Bob also “never misses an opportunity to encourage, recognize and support” his colleagues, truly exemplifying the spirit of Recognition.

Mei Wu (Payables Administration) received a QSTEP award on July 13, 2001 for the qualities of Trusting of Others and Trustworthy. Mei “thoroughly understands her assigned tasks; not only does she know the procedures, but understands why they are followed.” Mei is also “unfailingly courteous in dealing with others - both co-workers and customers.”

Gerry Acuesta (Payroll) was awarded a QSTEP on June 24, 2002 for all four qualities: Committed, Trustworthy, Collaborative and Trusting of Others. Gerry is seen as a delight to work with and a team player by both his supervisors and co-workers. “Gerry is always willing to pitch in.” “When Gerry is given a new assignment, he accepts it with eagerness and dedication.” “I never have to ask Gerry more than one time to do something. He never forgets and follows through right away.” “Gerry highly values meeting customer needs and improving work processes.”

TOPS

CAS Compliance team (Tami Sadusky, Rita Jensen, Joel Searles, Zenaida Shattuck and Jane Wiseman) was recognized with a TOPS award on July 11, 2001. The CAS (Cost accounting standards) Compliance team was created to improve the process of cost allocation practices in campus departments. An Internal Audit review found that campus departments generally did not understand federal regulations or UW policies in regards to these matters. This lack of understanding leads to costs added on to grants among other things. The team found that written communications did not seem to be sufficient to educate the different departments, and so the team developed a 45

minute PowerPoint presentation is be taken out and shared with campus administrators and support staff working with grants and contracts. These workshops have been well received and also show the state and federal auditors that the university is committed to making our grant administrative processes error-free.

The Fastrans Team (Ruchi Aggarwal and Sam Senturia) was awarded a TOPS award on October 29, 2001. The team designed, developed and implemented an Excel application that could automatically create a file to electronically submit information to the FASTRANS system and then automatically create invoices to send to customers. The team had discovered that the billing was often received late by customers, and that, though they could receive the billing information via the FASTRANS system, customers had a difficult time extracting the information sent to them by the FASTRANS system. The team was able to streamline the process using the Excel application and was able to save time for Financial Services and the customers.

Sandie Rosko, Peggy Fitzwater and Fred McWhirter were recognized with a TOPS award on November 27, 2001 for streamlining the process of transferring students’ emergency loans (also called “BEL” loans) from the Student Data Base system to the University’s loan billing system. The old process was a manual process that took up about 120 hours of staff time. The team has now almost fully automated the process, for example, utilizing computer file transfers instead of manual input, sending out automated email messages informing students of the change, and putting automated holds on the student’s account on SDB. This will save hours of time for the SFS’s Receivables collection staff - time that can be spent contacting and counseling student loan borrowers.

The Pacman Team (Mei Wu, Mary Girgis, Randi Adair, Sue Vadman, Cora Buenafee, Carolyn Adams and Pramilla Chand) received a TOPS

award on January 24, 2002 for devising a better process for on-line purchase orders for payments to individuals. The team created documentation for the new processing procedure, added foreign vendors to the on-line process and trained staff members in the new process. With the new process, the team was able to save time and improve the channels of communication between Payables Administration and Purchasing.

Express

Student Hourlies in Payroll—4/7/02

Processing, Administration & Customer Login
- 4/29/02

Spirit of RQT

By Kris Jaeger

In June 2002 the RQT and the EIT sponsored a Financial Management-wide contest to promote involvement in recognition events. The aim was to create a centerpiece that would be used at RQT events. Prizes in the form of gift certificates were given to the first through fourth place winners. The entries will remain on display for a short while on the RQT website at <http://www.washington.edu/admin/finmgmt/qi/rqt/>.

The winners were:

- 1st....Accounts Receivable Section - Grant and Contract Accounting
- 2nd ..Rae Ann Laubenstein - Controller's Office
- 3rd ...Mike Fleming, Amy Wallock, Farida Ablang – Payroll
- 4th...Chris Malins, Cathy Billings - Treasury

In addition to increasing involvement in “The spirit of Recognition,” the RQT saw the centerpiece contest as a way to spice up recognition events. The rules left the contest open to a wide variety of ideas and creativity. The centerpieces ranged from beautiful and ornate to thoughtful and festive. The centerpieces will be circulated throughout Financial Management during future award ceremonies.

All areas of Financial Management participated in the contest by either submitting an entry or by voting online. The RQT and EIT appreciate all the involvement and the excitement put into the contest.

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Please visit the web site at:

www.washington.edu/admin/finmgmt/qi/directions/july02/
for the on-line version of this newsletter.