

# *New Directions*

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**Letter from the Editor**

*By Kyra Worrell and Chris Malins*

Howdy, pardner! If you're fed up from reading Rancher's Monthly after a long day on the prairie rustlin' up gophers and ropin' steers, then point your spurs towards this issue of New Directions. We've got a whole wagonload of articles to wet your whistle, like:

"Ridin' Point with your Compadres: Learning to Facilitate Effective Meetings", "A Tumbleweed of Talent Blows through FM" and "Dawgs and Bears Circle Wagons and Share QI Knowledge"

So why don't y'all just mosey on over to the nearest tree stump and set a spell? These rip-snort-in' articles are more entertaining than a load of buckshot and a hound dog!

**Headlines****Dawgs and Golden Bears Circle Wagons and Share QI Knowledge**

*By Jeanne Semura*

On two beautiful spring days at the end of May in Seattle, six members of the Vice Chancellor's Office for Business and Administrative Services from the University of California at Berkeley, joined Financial Management (FM) staff to talk "quality". Tom Holdford, Denise Cronin and Shana Amenaghawon from Business and Administrative Services, Seamus Wilmot, from Recreational Sports, Eric Anglim, from Property Management, and Kira Stoll, from Parking and Transportation met with the FM Dashboard Team to share how performance measures and reports are developed and used by our respective areas.

The Bears demonstrated how their web-based dashboard measures for recreational sports are color coded and displayed. The Huskies discussed the Strategy Map, the FM Operational Performance Dashboard, and how some measures from department dashboards roll-up into the FM-wide dashboard. We also demonstrated how The Wiki is used to share information throughout FM such as charters, meeting minutes, reports, and presentations to the FM Executive Improvement Team. Prior to sitting around the campfire to exchange ideas, both groups had sent copies of program initiatives, organizational charts, and website links to issues of New Directions.

The Bears then joined up with a group of Purchasing and Stores and new FM staff to hear from V'Ella Warren, Ruth Johnston, Shawna Litterski, Vincent Lau, Jeanne Semura, Joe Kerchen, and Lisa Read about FM's journey, values, and culture of continual quality improvement. After the first half of the Quality Awareness class, the Bears joined available members of the Executive Improvement and Dashboard teams at an evening reception of informal sharing and networking.

After class, they joined Ruth, Charles Bennett, Cheryl Hawley, and Jeanne for a working lunch and a question and answer session.

Kyra Worrell, Student Fiscal Services, tour guide extraordinaire, provided a quick main campus tour before our guests rode off into the sunset promising to continue our collaboration someday.

Comments from our guests:

"I wanted to thank you and your team for taking such good care of us during our visit last week. I found your QI training very beneficial and plan to employ your sense of "community" in my operations." .Eric Anglim, Assistant Director for Property Management.

"I just wanted to let you know what a wonderful time I had last week. You were the perfect hosts. You have something special happening there that we are still feeding off of. Although your classes covered a lot of territory, they were fun and at no time was I bored. We are all looking forward to collaborating with you in the future." Tom Holdford, Administrative Analyst, Office of Associate Vice Chancellor for Business Administrative Services



"The discussions pertaining to the Operational Performance Dashboard and our strategic approach using pbviews were very useful and merit future discussion. The team (Strategy Management Team) also briefed me about your excellent training sessions and the value they provide for staff awareness of your efforts in Quality Improvement.

Especially noted by the team was the sincere and skillful manner in which each of you conducted your individual training sessions and the message it sends to your employees about your commitment. It has opened a discussion here of how we can communicate our approach to Strategy Management to our staff.

... I am looking forward to more future collaborations between us." Ron Coley, Associate Vice Chancellor, Business and Administrative Services

### **Yee Haw! It's Travelin' Treats!**

*by Elaine Manion*

May 15th's Traveling Treats give a quick glimpse of the "Sites of Seattle". Visitors could feast on Mike's Chili, tour the Pike Place Market, and check out all the exotic animals at the Woodland Park Zoo. What other historic Seattle landmarks made it? Well, before we get to that, let's look at the purpose behind the fun of Traveling Treats.

Traveling Treats is the annual event that everyone here in Financial Management looks forward to. The event brings fun and excitement to an often busy office environment. Not only does it bring together food and entertainment, Traveling Treats also allows participants to learn more about the departments that make up FM and meet people that they may have only e-mailed or talked to over the phone. The goal is to connect an ever-expanding group of people who all work hard to contribute to the productive FM environment.

The "Sites of Seattle" themed Traveling Treats featured Student Fiscal Services' depiction of the Pike Place Market, Payroll's tasty Bite of Seattle and Payables and Travel's busy waterfront. Management Accounting & Analysis, Decision Support and Controller's Office peeked into the International District while Grant and Contract Accounting got wild with the Woodland Park Zoo. Risk Management displayed their version of the long time favorite Dick's Drive In, while Financial Accounting and Equipment Inventory cooked up Mike's Chili and Treasury kick-started Seafair. New to Traveling Treats, Purchasing started off with a bang, bringing the Seattle Center to life with a realistic dinosaur and rock exhibit similar to what you would see at the Seattle Science Center and also gave guests the opportunity to practice their basketball skills.

Hard work, good food and creative minds all made the event a big hit. Traveling Treats 2007 left many looking forward to next year's event while this year's party left a lasting impression on staff for years to come.

### **Rendezvous at the Alamo**

### **SFS Outreach Wins 2007 Best Practices Award**

*by Kyra Worrell*

It all began in the waning sunlight of a San Antonio evening; and like many of the stories you may hear in these parts, it all started after one of those national conferences. The PDG/ Professional Development Conference to be exact. We were sitting around, sampling some quality Tex-Mex grub, relaxing with our fellow conference attendees; networking, real nice, like. I was sharing chow with the President of the Florida Association of Bursars and Student Accounts Administrators, or FABSAA. His name was Hiram Sem, and he hailed from the University of Miami. We were just sitting around, debriefing as the sun started to set on that three day shindig, and he says to me, "I heard tell that you've got something special going on way out west, partner,

and I think y'all might mosey on over to our neck of the woods and tell us how y'all do it. We got this show-down, this competition, you see, like the O.K. corral; except it's colleges instead of cowboys, practices (best or otherwise) instead of guns..."

Well, it didn't go down exactly like that; but that's the gist of it. Both Diane Cooley and I have spent the last few years as Student Fiscal Services (SFS) Outreach ambassadors to the world, traveling to national conferences showcasing the SFS Outreach program and how we are able to get our messages about financial literacy and UW financial responsibility out to the students. I met the President of FABSAA on one such occasion, at the PDG conference in San Antonio, Texas. SFS has long had ties with the Florida Bursars Association, which is well on its way to becoming a nationally known and renowned organization. Hiram Sem had seen our presentation about SFS Outreach and was impressed by our ability and the methods we used to reach out to students. He suggested we enter the FABSAA Best Practices competition.

The FABSAA Best Practices competition is a yearly event, open to institutions of Higher Learning across the country. There are three categories: Best Practices in Public Institutions, Best Practices in Private Institutions and Best Practices in Community Colleges. We entered the Best Practices for Public Institutions. The entries are reviewed by the FABSAA Executive Board, which draws its membership from high level officials in various Bursar and Student Account Offices. We were being judged by a panel of our peers and the people who were managing our peers.

We were directed to outline the problem we were addressing and solving in abstract and real life terms. Then we were to indicate how we combated the stated problem, laying out both the design and implementation of the solution. We were looking at different gaps in the financial literacy of our students and customers. We laid out the programs we had created and coordinated to combat the difficulties students may encounter: Money 101 & 102, Managing the UW Financial Maze, and the student tax classes. We talked about maintaining contact and partnerships with various members of the university community and, in particular, the academic advisers who talk directly to students. We outlined how the Outreach unit itself was developed. A link to our initial proposal can be found here:

I:\groups\sfs\outreach\FABSAA

Under "proposal07.ppt"

We were honored when we were awarded FABSAA Best Practices for Public Institutions 2007 for our "Financial Literacy" programs. The Award consisted of a \$1000 check for the UW general scholarship fund and the opportunity to present our winning PowerPoint at the conference.

Our East Coast colleagues were very interested in the ways we've managed to teach our students and customers about financial literacy while educating those same student and customers about different ways they can manage their own business. They were impressed by the high number of students we are able to reach during freshman orientation (over 5,000) and the fact that SFS is able to devote two full time staff members to Outreach work exclusively. Not only were we able to highlight our successes, but we got to receive a "really big check" for \$1,000 on behalf of the University of Washington's general scholarship fund! A link to our PowerPoint presentation can be found at:

I:\groups\sfs\outreach\FABSAA

Under Outreach-FABSAA.ppt

So get on little doggies; SFS Outreach is blazing that financial literacy trail! Yee Haw!



## A Tumbleweed of Talent Blows through FM

*by Chris Malins*

Talent AND diversity. Both were in abundance on May 24th at the Ethnic Cultural Center Theater as the Second Annual FM Talent Show kicked off. A packed house was treated to a blast of classic rock, an African storytelling song, "French" poetry, and even a dog show! It was great fun to see all the talent on display and to be a part of FM's home-grown version of Bumbershoot.

Diane Cooley presided over the event as the Master of Ceremonies. She looked the part in a shimmering purple jacket and black slacks. Diane kicked off the show with an overview of the diversity program and how the wide variety of cultural backgrounds within FM strengthens the division and makes this such a great place to work. Then, without further ado, the purple and green floods came up and the Barstool Pigeons took the stage.

The Barstool Pigeons are a newly formed local band. Its members include Michael Deshazo (vocals), Norm Englund (bass), Bill Christensen (guitar), Wayne Sugai (guitar), and the youngest member, Ryan England (drums). They rocked the house with a powerful cover of "Johnny B. Goode", a rendition of "Proud Mary" that would make John Fogerty tap his toes, a bluesy "Mustang Sally", and a four voice version of "Bye, Bye, Love". As the "Birds of the Barstool" left the stage, the crowd went wild.

Toning it down a notch, the Bard of FM, Kyra Worrell, took the stage next with a selection from her canon of "Princess" poetry. In verse, Kyra examines the lives of princesses after the story ends. The poem she selected "The 12 Dancing Princesses", had a lyrical sensibility, strong visual imagery, and good humor.

Next, Kari Le, accompanied by her brother Thanh on guitar, performed a traditional Vietnamese folk song, "The Song of the Banyan Tree". The simple melody and the beautiful vocals of this wonderful piece kept the audience engaged and excited. During her performance, Kari wore a traditional Vietnamese hat, called a "cornical".

Ann Guss was next on the program with a French poetry recital. Those of us not fluent in French (maybe most of us!) weren't sure what to expect of this performer, but no one was disappointed by her erudite humor. Ann, speaking in a pitch perfect French accent, introduced and read common nursery rhymes... in English! Once the audience caught on, the hall was filled with laughter.

Cute animals can make any show better, and Michael Lanham's Sussex spaniel, "Moose", elicited many "ooh's" and "aah's" from the canine loving crowd. Along with his partner Stephen, Michael introduced FM to the fascinating world of purebred dog shows. At the end of his performance when Moose rolled over, it made a dog lover out of everyone in the auditorium.

Bret Mulholland is a craftsman, a songwriter, a guitarist, and a singer. He played and sung "Sailed", a song he wrote on a guitar he made himself. "Sailed" is a song that Bret wrote about life's journey. Bret's folk stylings are reminiscent of the singer-songwriter era of the early 1970's and harken back to the likes of James Taylor, Cat Stevens, and Jim Croce.

Wearing a traditional African dress Agnes Acholonu lifted spirits and caused us to think as she gave the multimedia treatment to the African storytelling song, "Ugelle", about two brothers that attempt to capture an animal called a ugelle. It is a song with a message that hard work and commitment are the key to success in life. She even got some of us to sing the song "Ugelle" with her!

To close the show, the remarkable vocalist Michael Deshazo (of the Barstool Pigeons) did an encore performance of "Amazing Grace". Those of us that heard Michael perform this song will not soon forget the heart and soul that he put into it.

Jeanne Semura closed the show by thanking the performers and recognizing FM's commitment to diversity. The variety of acts and talents in the show put an exclamation point to the fact that FM is an exciting and diverse place to be.

## The Good, The Not-So-Bad and the New RQT Awards...

*by Kyra Worrell, with a nod, to Chris Malins*

High noon. The town's deserted. In the shadows, the women folk are rounding up the children and battering down the hatches; the men folk are hiding behind barrels and on rooftops; cautiously pulling their guns out of holsters, ready to spring into action. Tumbleweeds are a blowin' down the center of the empty street; a horse whinnies nervously and then stomps and pads the dirt ground. There's complete silence for a few tense moments, and then, strangely, without warning or explanation, that silence is broken.

The children hear it first, and then all the townspeople, and it gives them pause, though no one can hear where it's coming from: the simple notes of a strangely haunting song. All eyes turn towards the hills, and then they see him ... the one they've feared, the one they've been waiting for all this time. He is a lone cowboy off in the distance, just out of the line of the horizon; it's impossible to tell for sure if he's wearing a black hat or a white hat.

The town folk can feel change comin' in on the wind. The whole town is tense; they're all watching the mysterious stranger. He's coming into town now; he tips his white hat in greeting. Before you can say "For a few dollars more", he's right there, and has got his gun out of his holster pointed and ready.

"It's time." He says in a low, quiet voice. He looks like a man of few words; a man of action. He starts to aim for a point in the distance that none of the townspeople can see; they're tense, trigger ready; and that's when it happens... Out of gun comes a streamer that says "S.T.A.R", followed by another one that reads, "Team Spirit Award" and then another with "Coffee card now \$3" emblazoned across the top.

The townsfolk slowly creep out of their hiding places. The Stranger speaks, his words carrying on the wind like a coyote's howl. "Now a S.T.A.R. – that's "Successfully Taking Another Route" – some folks might have called it a T.O.P.S., years past– long term, measurable improvement, from a team or individual – yesssss," He draws the 's' out, like a thirsty man taking a long and well deserved drink of the last drop of his canteen. "And the "Team Spirit Award", why, that's a party – even a pizza party – a little hoedown when you've met that goal you've been trying to reach. And the Coffee card/Recognition Treat – I know you know that one." His voice sounds raspy from misuse. He sounds like he hasn't talked to anyone in a long, long time. He looks real old.

The townspeople are all surrounding him now, falling all over themselves to thank him; young girls are giving him bouquets of flowers and weeping men and woman are sobbing, "You saved us! You saved us!"

He waves them away. "Don't thank me," He says, "I'm just the messenger. Thank the Recognition Quality Team members, and those Purchasing and Stores Gentlemen and Ladies; they banged their heads together and took two recognition teams and came up with new and improved recognition matrix for us all."

And then the Mysterious Stranger looks at them with a half smile on his face. "See, these changes in the RQT ain't so scary..." He turns on boot heel and tips his hat to the women folk, but not before they see his true face: it's RQ Teasdale, the Wandering Troubadour of Quality, come again to the rescue. He's come to "school" these folks right, green newbies and old timers alike. Off in the dusty distance, they can see him climbing into his solar powered RV.

And then they all hear that song again coming from both somewhere and nowhere; their heads turn as one to seek its source. When they look back, he's gone, as silently and as secretly as he came.



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And then they all hear that song again coming from both somewhere and nowhere; their heads turn as one to seek its source. When they look back, he's gone, as silently and as secretly as he came.

## Innovations

### Fixin' to Fix the FM Web: Goodbye to the Gargoyles

*by Jon Bostwick*

There is a rumor, totally unfounded, that Peggy Lee got the inspiration for her song "Is that all there is?" after visiting the Financial Management website. The other rumor, unconfirmed, is that the FM website has not changed in 40 years, but this doubtful given that the site has only been in existence since the mid-90s.

A website should be pleasing to look at, easy to use, and chock full of useful information. According to our customers and internal surveys, the Financial Management website falls a bit short in these areas. Efforts are now underway to replace the FM and departmental websites with an information portal that will better serve the University community. We will offer a consistent brand, a simplified navigation, and improved content. With apologies to Peggy Lee, our goal is to hear our customers singing, "Hallelujah"!

#### Bringing together our skills

Financial Management and departmental websites have grown the last several years through the hard work of individuals scattered around the various departments. To leverage the skills of everyone involved, we created two teams: 1) a technical team involving web developers and coders; and 2) a content team made up of writers and editors. Follow this link to see all of the team members:

<https://fmwiki.admin.washington.edu/display/fm/Website+Team+Members>

We are currently in the middle of the development process with both teams. The technical team is working on new templates that will provide a consistent appearance for all Financial Management web pages. The content team has created standards for navigation and for writing web pages. On both sides, the goal is to make it easier for the customers to get what they want.

#### Exciting changes planned

Since development is currently underway, we may change some of the features that are planned. But one of the glaring weaknesses of the current site that must be improved is the search. Currently it is impossible to search across Financial Management or within individual department sites, at least consistently. According to most web studies, users prefer using search over any other navigation tool. The new website will offer a customized Google search feature on every page. Other work is underway to improve the search results.

Another key development: appearance. It's not always easy to know you're in a Financial Management site. The University of Washington has initiatives underway to standardize the appearance of University websites. From the marketing perspective, it makes sense to have all of the websites follow a standard brand. The President's Office rolled out a new website late last year that set a standard purple banner across the top of the page. Human Resources likewise has followed with that look-and-feel.

Financial Management is going to adopt the emerging standards and help define them. What this means is, no more gargoyles at the top of the page. We will have the purple banner across the top of the page with the University of Washington logo and Financial Management underneath. To represent financial assets, coins will be subtly blended into the banner. Now, instead of being frightened away by the gargoyles, visitors to Financial Management and its departments will know they are in a financial site that is part of the University of Washington.

Finally with navigation, we need to simplify the pathways to getting information. On the Financial Management home page, we are going to provide a list of major services that Financial Management provides, but written as a task that the web visitor wants to do. This is a customer-based approach of "What do I hope to accomplish" rather than "FM provides 'xyz' service to me."

Web development is a long and winding road. We do not expect to have everything in place for the first iteration. But we will have major updates go online by the end of September. And then once and for all we can debunk those silly rumors. Except for the one about the code to the secret fortune that is hidden in our current gargoyle banner. But everyone knows that is not true.

To learn more or to participate in website testing, please contact Jon Bostwick at [jonbost@u.washington.edu](mailto:jonbost@u.washington.edu).

### **Online Timesheets: Coming to a Department Near You!**

*by Christa Woodhull*

Are you tired of trying to read between all of the squiggles or trying to decide if it's a number one or a seven? Have you heard every excuse in the book on why it was turned in late?? Are you fed up with all the excuses? Are you tired of your calculator's attitude and not adding numbers accurately? How would you like to deal with no more messy handwriting, no more lost paperwork, no more missed supervisor signatures, no more Late Timesheet? Yes, that's right folks, no more late timesheets!

What does this mean for you and your department?

Well, I'll tell you what this means. Let me introduce you to the brand new UW Timesheet, an on-line timesheet process currently being used for hourly employees. It's another great system created and developed by the ITL – Integrated Time and Leave team supported by the USER (University Services Renewal) Project. It's a user-friendly system available to employees through their Employee Self Service. No matter where their location is, as long as they have access to a computer and their UWNID and password, hourly employees can sign on and enter in their hours for the day. This system eliminates the need to hunt down supervisors for signatures, having to add up all the hours manually, and even alleviates the stress of turning in a timesheet late.

The UW Timesheet is so easy to use. All it takes is a payroll coordinator to set up the timesheet once, the employee to enter in their time in ESS, submit it, and then for the approver to approve the time. It's as easy as one, two, three! As of May of 2007, there were 15 departments across campus taking advantage of this new system. And the interest and enthusiasm is overwhelming. Just ask Jim Young, Computer Science and Engineering, one of ITL's early adopters, what this system has done for him:

"We think it's dandy! It does the drone work, yields great reports (eliminating the need for a shadow system), looks nice and the administrators listen to suggestions. Employees appreciate its grace enough to submit on time. Thanks for a great tool!"

Although it's currently on a slow roll-out, Payroll will soon be targeting a larger number of departments to go LIVE! Through the help of the early adopters and some of the world's greatest programmers, the UW Timesheet will make your life as a payroll coordinator and supervisor a living dream. Watch for it now, in a department near you! Or for more information, please con-



tact the Client Service and Training Team in the Payroll Office at [pronline@u.washington.edu](mailto:pronline@u.washington.edu).

(Current ITL Team Members: Cindy Gregovich, Pat Bonner, Keli Bort, Linda Braziel, Michele Conrad, Doug Daily, Marie Fjellanger, Mary Friedmar, Cheryl Manekia, Paul Schurr, Sherrie Thissell, Kirk Udovich, Clarity Wolff, Christa Woodhull, May Zhang; Past Members: Lisa McDonald, Beth Mesina, Edward Armstrong)

## **Disaster Recovery for Payroll**

*by Cindy Gregovich*

Planning is one of the key elements to managing any disaster. Like many departments on campus, Payroll was concerned about how we would handle a disaster. For the past year, Payroll has been developing a Business Continuity Plan through a partnership with the UW Office of Emergency Management. Four departments were selected to participate in a pilot program. The process was challenging and time consuming, but ultimately rewarding. We reviewed all aspects of our processes and had to think outside the box.

Our Business Continuity Plan addresses how the business process itself will recover in the event of a disaster. The plan encompasses staff, technology infrastructure, key business processes during recovery, and restoration of business processes. Our goal was to establish a comprehensive plan to minimize disruption of payroll services in the event of a disaster and to ensure payroll information is safeguarded and systems are restored to normalcy with minimum downtime.

The name Katrina will be etched in our memory for years to come. Quite possibly the most damaging of any hurricane, Katrina left a path of despair and destruction in the gulf region. What does this have to do with Payroll, you ask? Many employees were displaced and employers were not able to deliver employees' pay checks in a timely manner.

The last thing that people in the gulf region were concerned about was payroll disbursements. But nonetheless, they needed pay checks. Mailing service was suspended. People were relocated to other parts of the country, and no forwarding information was available. Employees in the gulf region participating in direct deposit programs offered by their employers received their payroll disbursements, those receiving checks did not. Direct deposit allowed money to flow into accounts without delay.

In an effort to better prepare the University, Business Continuity Management planning was mandated in April of 2007 by the Office of the President through UW Administrative Policy Statement (APS) 13.2. The Administrative Policy Statement requires each department to identify and protect their critical operating processes and provide a reasonable amount of time and resources in developing their unit's Business Continuity Plan.

The Office of Emergency Management has established a website (<http://www.washington.edu/admin/business/oem/bcm>) to help departments prepare for unplanned business interruptions. Each year business interruptions account for \$588 billion in lost revenue nationwide. In addition to life-safety, property and the environment, we have revenue and a reputation to protect.

Payroll continues to work on our Business Continuity Plan to ensure employees are paid in the case of a disaster. A good plan is never complete; it is continuously reviewed, updated, and tested.

## **Ridin' Point with your Compadres:**

### **Learning to Facilitate Effective Meetings**

*by Jon Bostwick*

Meetings. We often spend half of our day or more in them. We may think, "If only I didn't have so many meetings, I would be able to get my work done!" But the truth is, as a leader or as a

participant, you need meetings to accomplish your work. Either you need to arrive at a decision point, provide or seek guidance and support, or just share knowledge. Meetings are a necessity. And you need to have everyone involved and contributing.

As useful as meetings can be, when meetings go bad they have the remarkable ability to alter the laws of physics and slow time. When you lead meetings, you want to avoid at all costs the last-day-before-summer-vacation syndrome. Financial Management can help. Financial Management offers a “Facilitating Effective Meetings” course that provides a toolkit for you to get the most out of your meetings.

### *Getting Started – the “Essentials”*

Effective meetings require agreed upon goals and tasks. If you are the meeting facilitator, you need to figure out what you need to accomplish and how to lead the team there. To facilitate meetings effectively:

- **Send out an agenda ahead of time** – State the purpose clearly one day or more before the meeting.
- **Meet only when necessary** – Can you use email or the wiki instead of meeting in person? If so, cancel!
- **Keep “Parking Lot” items** – When you have a discussion that diverts from the goals, add it to the parking lot and make sure to revisit later.
- **Be Prepared** – Make sure the room has whiteboard pens, paper, and so on. Don’t trust in technology. Expect failing projectors, no Internet access, and so on.
- **Establish and review ground rules** – Ground rules include expectations of meeting participants, roles, and so on. Set them, and with ongoing meetings, review periodically.
- **Evaluate your meetings** – Regularly check in with meeting participants to make sure that they are satisfied with the meetings and accomplishments.

### *Meetings are about People*

As project leaders, it’s easy to focus on the task without realizing that the people who work with us have their own needs and goals. To keep everyone involved, you have to make sure their needs are met.

Meetings often live and die by personalities. Some folks may expect detailed agendas, which they will expect to follow with little or no deviation. Others may want to use the agenda as a starting point and expect more flexibility. Make sure that your meetings balance out the needs of both groups.

When meeting for the first time, consider an icebreaker. An icebreaker exercise can go a long way to developing positive relationships. Rather than simple introductions, have your team members write down one thing about themselves that no one knows about. Interview each other. Bring some treats. Warm up the brain with a cartoon. The Single Point of Contact (SPoC) team, for example, starts every meeting with the reading of a Leonard Nimoy poem.

Effective meetings require a lot of preparation. This Financial Management course gives you the tools and ideas that make preparing for meetings much easier. So if you find yourself in meetings that seem like they will never end, consider taking this course. It lasts four hours, but it will seem like only two.

If you would like to find out more information about the “Facilitating Effective Meetings” course and its availability, contact Rae Ann Laubenstein at [raeannl@u.washington.edu](mailto:raeannl@u.washington.edu).



## Other

### RQT Roundup-June 2007

The 2006-2007 Recognition Quality Team (RQT) has just wrapped up their term, but not before presenting a STAR Award (previously TOPS), hosted four Team Spirits (previously Expresses), two Person to Person Gatherings, and of course, Financial Management's annual Traveling Treats, all since February 1st. Also since then, 14 CARE Awards, 184 Bravos, and 462 Recognition Treats (yes, 462 Recognition Treats!) were presented to our peers throughout Financial Management. Wow! Our great enthusiasm for showing our appreciation throughout FM will certainly keep the 2007-2008 Recognition Quality Team busy!

#### STAR Award:

Tom Phillips (Financial Services), Dinah Walters (Decision Support), and Brandon Whitehead (Academic Human Resources) were presented the TOPS (now STAR) Award on Monday, May 21, 2007, at 10am in the Purchasing and Accounting Building.

This great trio was recognized for creating a PAS database that arranges information in a way that is useful and can be generated into reports of various types. This improved overall customer service and is a shining example of quality improvement in Financial Management!

#### Recognition Rewards:

The winner of the quarterly Recognition Rewards drawing for January-March 2007 was Pramilla Chand from Financial Services.

Thank you for saying thank you!

#### Upcoming Events:

The next Person to Person Gathering is scheduled for July 18th.

The Annual Summer Event is scheduled for September 6th from 1-4pm.

Watch for more information to come!

KUDOS (Feb. 1st to present)

To: Jeff Follman (Assistant Controller)

From: Jim Angelosante, Associate Director, Finance and Administration, Washington National Primate Research Center Administration, UW

Re: Western Vivarium Tax Defferal Update

Jeff - thanks so much to both you and Ann Anderson for your outstanding support and perseverance in getting this resolved to a much more manageable amount! Thanks again and look forward to talking soon.

To: Ann Anderson (Controller)

From: Weldon Ihrig, EVP

Re: Western Vivarium Tax Defferal Update

Ann, super work in achieving success in the byzantine world of Olympia tax world. You and your team are awesome. Weldon

To: Elizabeth Cherry (Risk Management)

From: Cheryl Cameron, Vice Provost for Academic Personnel, UW

Dear Elizabeth,

On behalf of myself, Steve, and the students enrolled in EDLPS 583 (Higher Education and the Law), thank you for an excellent presentation on Thursday, March 1, 2007. You brought to life for the students the information they read in the text on liability and risk management. Your willingness to share your expertise was greatly appreciated!!!

To: Judy Peterson, Susan Ball (Treasury )

From: Albert Thurmond, Development Office, UW

Susan and Judy – Thanks for your presentation at our meeting today and the time you spent on our behalf. It was very well received by the Council, informative, and much appreciated. We were sorry you could not stay for the cases. They engendered some interesting discussions that I think you would have enjoyed.

---

To: Judy Peterson, Susan Ball (Treasury)

From: Patricia Char, K&L Gates (following the message above)

Judy and Susan: I'll second Albert's thank you. We appreciated the time you took to talk with us. As I was leaving our meeting, one of the Council members mentioned that he thought it was an excellent presentation.

To: Keith Ferguson, Christina Goldman (Treasury)

From: Rachel Hill, Dragon Capital Markets (Europe) Ltd. (following the message above)

Dear Keith,

Thank you for your email and I've passed it along to John. Can you thank Christina for me as she was fantastic in sorting everything out for John's trip. Ah, how I dream of having a wonderful secretary! It must be great.



To: Judy Peterson, Ann Sarna (Treasury)

From: Courtney Clouse Haneuse, Director of Development, UW World Series

Re: Thank you

Judy & Ann,

Firstly, I would like to apologize once again for giving you such a late start to your well-prepared and tailored presentation. It meant very much to us for you to participate in this meeting. The information you provided was very helpful, both for our board members and for me as we think ahead from a development perspective of strategies on how to encourage others to contribute to the UWWS endowment.

In fact, I need to let you know that your presentation spurred one board member in particular to consider making an endowed gift to the UW World Series in the next few months. He spoke with Matt (and in front of two other board members!) directly afterward telling him that he was very impressed with how the funds are invested, and particularly with very high returns. This would not have happened without you having been there - we are SO grateful!

I will be in touch with you when we have any other board members or donors who might be interested in learning more about this interesting (and persuasive) angle of the CEF.

Again, my sincere apologies for your shortened time, but also my thanks for the doors you have opened for us.

To: David Wright (Financial Services)

From: Ed Rubel, Professor, Virginia Merrill Bloedel Hearing Research Center, UW

Re: travel reimbursement

Dear Mr. Wright

I am returning to Seattle on Monday and I have been informed by Donna that my Travel Reimbursement will be waiting for me. This is entirely due to your efforts on my behalf and I want to thank you for the open, friendly and efficient manner in which you handled this matter. It was a great pleasure to deal with an administrative organization in the University that conceived of their function as one of supporting the faculty and students. Your attitude and your effectiveness should be a model for how we can work together to make UW a better and better place to work.

To: Ann Anderson (Controller), David Wright (Financial Services)

From: Ed Rubel, Professor, Virginia Merrill Bloedel Hearing Research Center, UW

Re: travel reimbursement (following the message above)

David was a joy to deal with from the start AND he followed through in a way that was both efficient and transparent to me – the right way.

To: V'Ella Warren (Treasury)

From: Weldon Ihrig, EVP

Re: travel reimbursement (following the message above)

Another example of your team's super service—much appreciated as Ed's email states.

To: Dave McCone (Purchasing)

From: Mark Fuller, Manager, Consolidated Decision Support, UW Medicine IT Services

Dave:

I have watched you help us for years while working along my old boss Pam Shoberg. Our team has recently been helping the Accounting team and MM team as they prepare to upgrade their systems, letting them know how CDS team has worked successfully with McKesson. I wanted to thank you for your work over recent weeks to help guide those departments into safe and well-designed contracts. I never knew just how much you do to watch out for us, so thanks for the many phone calls to McKesson and guidance on these upcoming contract renewals. I hope you know how much we all appreciate that, especially my boss John Hastings. Thanks for hanging in there for us Dave!

To: Michael Lanham, Scott Schafer (Student Fiscal Services)

From: Shosh Westen, Administrator, Dept of Slavic Lang. & Lit., UW

Re: Outstanding service

Dear Mr. Lanham,

I just wanted to express my appreciation for the outstanding customer service I received from Scott Schafer.

On Tuesday, when the paychecks were delivered, I discovered that I had failed to enter TA appointments for two of our grad students. I immediately did so. Yesterday morning I received an email from one of them, who was concerned that her tuition bill still did not reflect the tuition waiver. I called Student Fiscal Services and was told to leave a voice message for Rachel.

When I did not hear back from her, I decided to combine some other errands with a trip over to Schmitz, where I learned that Rachel was out sick. The person I spoke with immediately called over Scott, who said he'd try to help me. I waited while he did his magic over the computer, and then he came back and asked for my contact information so that he could check that the bills had been adjusted to reflect the tuition waivers and let me know. Scott's confirmation first thing this morning – before I'd even had a chance to think about it – was very welcome and very much appreciated. I hope you will express my gratitude to him.

Thank you very much.

To: Andrew Faris (Risk Management), Kerry Kahl (Management Accounting & Analysis)

From: Maureen Rhea, Director of Audits, Internal Audit UW

Re: great meeting!

Andrew and Kerry,

I really appreciate the great job you do with the Compliance Council. Your good work ensures the meetings are productive and fun...the perfect combination in my book. The level of participation and enthusiasm has everything to do with your thoughtful, considerate and detailed approach to preparing and managing each meeting.

Many thanks for your hard work, patience and persistence!

To: Suzette Ashby (Management Accounting & Analysis)

From: Mary Beth Cunningham, Administrator, UW School of Dentistry Office of Research

Suzette,

You are very welcome. While you are very kind in your comments and I enjoyed learning about FEC's, I also realize that spending four hours helping me with the FEC's, on short notice, went above and beyond the duties of your position. You were very gracious with your time and very



helpful. I cannot begin to tell you how much I appreciated your help in what was a very stressful situation made even more so with a short turn around time.

To: AP Customer Service Team (Accounts Payable)

From: Jan N. Sullivan, Technology Manager, Office of Information Management, UW

Re: AP Customer Service Improvements in PAS

This was another good example of the collaborative efforts on the Purchasing (Anne Barry) and Payables (Pramilla) sides of the Financial Management organization. The ePREP team continues to enjoy working with all!

To: AP Customer Service Team (Accounts Payable)

From: Sara Gomez, Vice Provost/Chief Information Officer (Interim), Office of Information Management, UW

Re: AP Customer Service Improvements in PAS

Thanks for sharing!! And yet another great example of a truly collaborative effort and great teamwork that will really improve how campus does their work!

Bravo!

To: Sophia Meyering, Genevieve Barney (Purchasing)

From: Marie Kroll, Associate Director, Finance & Administration Publication Services, UW

As I said by phone, I'd like to acknowledge Sophia and Gen for doing such a tremendous job of immediately handling a time-dependent order for Publication Services. I'd also like to apologize to you all for getting it to you so late that it became an emergency. Since you took care of the order right away, we'll now be able to collaborate with libraries during summer break to install Husky Card for Dawg-Prints pay-for-print. Thanks for your great client service!

To: Ann Anderson (Controller) and Post- Bac Trainee Task Force

From: Sally Weatherford, Director, Department of Global Health; Assistant Director, Center for AIDS and STDs

Re: legal advice

I wanted to pass along to you how impressed Michael has been with your efforts and with how rapidly you were able to come together to make this happen. He mentioned it a couple of times in a meeting Kathy and I had with him yesterday.

I also want to tell you how thankful I am for all of you and your work on this recruitment. I feel so fortunate to work with such wonderful people. I also think being able to bring this together so quickly is a direct result of the Global Support Project, so special thanks to the GSP and its sponsors and participants.

To: Christa Woodhull and Client Services & Training Team (Payroll)

From: Chong Yi Lucas, Associate Director of Human Resources, Development and Alumni Relations, UW

Hi Christa!

Thank you so very much for your help!! I wanted to tell you that I think that your group is AWE-SOME!! You all have been really great in helping us out (especially when we have been in a

pinch) and have been very very patient with us as we all learn the payroll processes!

You have a great team!

To: Financial Management EDP Program

From: Joanne Matson (Treasury) and Katrina Day (Risk Management) in regards to comments made by Susan Templeton, Career Development Manager, Professional & Organizational Development, UW

Joanne: One of the sessions I attended was "Career Development" led by Susan Templeton, who you may know through LCVI as the new Career Development Manager. She asked if any the attendees had EDP plans in their department and about half a dozen of us raised our hands. She happened to look at me and asked me what department I worked in and, as at least three other people in that session were from FM, I answered FM.

She stopped right there and acknowledged that our EDP plan was very well done and that it was used as a model for the UW's EDP. Great praise and I thought you might enjoy the feedback.

Katrina: I went to that same session, but the one later in the day and she said, "FM is the post-er child for EDPs."

To: Ray Hsu, Denise Grizzell (Purchasing)

From: Tim Nguyen, Manager, Waste Management & Environmental Services, UWMC

Re: Walsh Mobile PO# 384331

Ray & Denise,

Again THANK YOU for all your help! We just received a confirmation from our vendor that they received the PO and are now processing our order. This is EXCELLENT SERVICE provided by University of Washington Purchasing. You have made our job more efficient.

To: Student Fiscal Services

From: Karen Lovejoy, former temp at SFS

Ruth, today is my last day and I wanted to express my appreciation for the warmth and caring I have experienced here at SFS. The staff and students have been a delight to work with, hard working, knowledgeable, sharing and caring with both coworkers and customers.

The management is exceptional. I have never worked with such caring management. Every day, Miriam, Nancy, and Sandie came through the office and spend time with each employee, checking in with them and asking how they are doing. They are always available to answer questions and help out, and I have never witnessed any of them in an ill humor even when there were problems, either personal or work related. This is, in my experience, a truly extraordinary management group. I feel honored to have spent time working here with these people. Thank you for a wonderful experience.

To: Sam Castro (Payroll)

From: Eva Greulich, Laboratory Medicine, UW

Re: check ready for H. Kim 0772

Sam,

You are wonderful!! This is what I call excellent Customer Service. Good job!!! I really appreciate it.

Thanks.



To: Ruth Johnston (Student Fiscal Services)

From: Brent Ruben, Professor, Rutgers University

Re: Away Message

Ruth,

This is a very nice "away from my email" – much better than others I've seen. I think you've got a small, but significant "best practice" here.

The above is in response to Ruth's Away Email Message:

Thanks for writing. I'll be away from the office facilitating meetings/events but will read and respond to email as possible.

Please call 206 543 4990 if you need immediate help, or in case of emergency, I can be contacted.

Thank you.

Ruth

Email from Elizabeth Cherry (Risk Management) in regards to comment made by Judy Hart regarding ERM Program (Risk Management):

In the course of renewal discussions with underwriters, I presented quite a lot of information about our ERM program. Judy Hart, the head of insurance operations for a major reinsurer, Endurance in Bermuda remarked that our program is the most comprehensive and sophisticated that she's seen. She said "It's fantastic".

Nice!

To: Susan Lowney (Purchasing)

From: Gayle Gray, Assistant Director, University of Washington Police Department

I have been working with Susan Lowney the past several months on some large purchases with Bank & Office Interior. I wanted to let you know that Susan has been so helpful. She gets the orders through in a matter of minutes. She created a system for us that I forward the quote by email so she can get started on it. I get her approval immediately and then I am able to let BO&I know the purchase order. BO&I laugh every time because no one else can get this done so quickly. I owe it all to Susan. She is pleasant, efficient and professional.

To: Sophia Meyering (Purchasing)

From: Pam Eisenheim, Manager, Electrical Engineering

Re: PO# 372254

Sophia,

You're fabulous!!! If you ever need a letter of support for your yearly evaluation, please let me know. I'll be happy to write one.

Thanks again for your efforts turning this around so quickly.

To: Ann Anderson and Global Support Project Team

From: Ann Downer, Health Services, UW

Re: UW Global Support Project Newsletter

Ann, I thought you might like to know just how much we appreciate you and the work of your team! (BTW, a PDSA is a quality improvement cycle and stands for plan, do, study and act.)

To: Ann Anderson and Global Support Project Team

From: Raleigh Watts, Health Services, UW

Re: UW Global Support Project Newsletter

To me, this newsletter demonstrates both the commitment and the progress made by the UW administration in improving global functions. It also demonstrates "PDSA" in that some of the recommendations from the focus groups are already implemented. Ann Anderson and many others deserve a huge amount of credit for listening to I-TECH, "feeling our pain," and working really really hard to make things better. There still is a long ways to go, but seeing this newsletter reminds me that progress has already been made.

To: Ann Anderson and V'Ella Warren

From: Lawrie Robertson, Director, Finance and Administration, Office of the Dean, School of Public Health and Community Medicine, UW

Ann and V'Ella:

Thank you for taking the time to brief Dean Wahl on the Global Support Project, the accomplishment to date, and the work ahead. It was very informative and captured your commitment to removing barriers to global engagement. In the end, everyone will benefit.

To: Kathryn Harrington (Purchasing)

From: Alice Rose, FS II, Department of Medicine, UW

Re: Statement of Work: PO 395790

Kathryn:

You're the best. Thanks for your guidance on these POs.

To: Gina Salois (Financial Services)

From: Lily Gebrenegus in regards to comment by a UW department

Hi Gina,

I just heard of a very good customer service interaction with you. You're always so helpful and nice and willing to listen to a problem and help figure out an answer. Karen- There was miscoded petty cash transaction on one of our grants which the department has been trying to clear up for years. We took it back to a few people (including Carolyn) but Gina was the only one who actually got the issue resolved. She went out of her way and consulted different departments to make sure it was done correctly. This isn't the first time that something like this has happened but Gina's always there to help. Thank you!

To: Sue Camber, Nancy Linde, Lily Gebrenegus (Grant & Contract Accounting)

From: Marc Provence, Administrator, Fred Hutchinson/UW Cancer Consortium

Dear Sue,

I just wanted to send a big "Thanks!" to you and your staff for your assistance in reviewing and submitting the invoice for the prostate cancer research funds. Both Nancy Linde and Lily Gebrenegus demonstrated great patience and responsiveness. Your customer service is to be commended!



To: Raymond Hsu, Susan Malysiak (Purchasing)

From: Eric Johnson, Program Operations Manager for Transportation, Property & Transport Services, UW

Ray,

I wanted to let you know how much we have enjoyed working with Susan. She has been great! She is responsive and timely with our purchase requests. She is professional and provides excellent customer service (she is always willing to follow up with the vendor directly). We have thrown a lot at her at the close of this biennium and her hard work

has been appreciated.

To: Cindy Gregovich (Payroll) and Ann Anderson (Controller)

From: Chris Kealy, Associate Administrator, Center for AIDS and STDs, Harborview

Re: Foreign UoW staff/wired paychecks

Dear Ann & Cindy:

Thank you very much for your efforts to get this set up! We will let you know how this works for our new employee in the coming pay periods.

To: Rachel Reichert (Student Fiscal Services)

From: Wendy Clark, UW student

Rachel-

My name is Wendy Clark and I'm a student at the ischool's MCIS program. I'm sorry it took my so long but it's been crazy with my gardening business and graduate school, but I really wanted to thank you for all of your help getting my \$E10,000 load from Sallie Mae in April. You were great and thanks to you my tuition was paid on time! Many, many thanks!

To: Nancy Hurja (Student Fiscal Services)

From: Leah Van Kirk, parent of UW student

Nancy,

I can't thank you enough for all of your attention, kindness, and follow-through with my son, Beau. He really is a worthy young man. Being far away is difficult; I am so glad he has people like you on site there. Bless you.

Respectfully,

Leah Van Kirk

To: Andrew Monusko (Student Fiscal Services)

From: Robin Chang, Financial Aid Coordinator, Intercollegiate Athletics, UW

Andrew,

Thank you for all the work you have done on our student-athlete accounts. Your efforts each quarter are a huge help to me and the Athletics Department.

To: Nancy Hurja (Student Fiscal Services)

From: Louise Handelman Smits, parent of UW student

Dear Nancy,

I wanted to thank you so much for coping so ably with all the hassles associated with the tuition account of my son, Peter Smits. I could tell you what a relief it was to finally see a "zero" on his Tuition Account Balance. Your cooperation is truly great!

To: Miriam Garvey (Student Fiscal Services)

From: Megan Prest, Fiscal Tech, Evans School, UW

Something tells me you probably rack up a lot of "stars" Miriam. Thank you so much for rolling up your sleeves and diving in over your head to rescue my CT documents last week! It was a much appreciated rescue for this newbie. I am training their permanent person next week, so I will make sure she has the drill down! Cheers!

To: Frannie Gladney (Student Fiscal Services)

From: Yassaman Raouf, UW student

Dear Ms. Gladney,

I want to express my immense gratitude to your kind and helpful services for the past two years. With college being as expensive as it is, having to pay off an over-award was a huge burden. However, from the first day I walked in your office, not only did you ensure me that everything will be ok, but that I should put my education first. Having two jobs and a full load last year, I would constantly worry about my expenses. The thought of walking into Schmitz hall overwhelmed me with how I was ever going to pay off my account. What made things different, however, was your understanding of my background and difficulties. Your willingness to work with my financial situation and encourage me to just stay focused on school gave me the strength to keep going. The door to your office was always open and your continued encouragement left me with a positive energy every time I walked out of your office. It is the dedicated work of employees like yourself that make the experience of such a large institute familiar and fulfilling. Most importantly though, I want to acknowledge your ability to accept and communicate with students of diverse backgrounds and financial standings.

I wish you every success in your career and know that you are a key asset to our university and community.

Sincerely,

Yassaman Raouf

To: Michael DeShazo (Grant and Contract Accounting)

From: Jessica Roshan, Associate Administrator-Finance, School of Aquatic & Fishery, UW

I just wanted to take a moment to say that Michael DeShazo has been so helpful and thorough in his assistance with compliance issues and especially cost share. He is a pleasure to work with.

To: Sue Camber, Mena Nguyen (Grant and Contract Accounting)

From: Mike Winans, Grants Administrator, School of Social Work, UW

Thanks for all of your hard work on this. I so appreciate your efforts on this and everything else you do for us.

To: Stanley Schubert (Grant and Contract Accounting)

From: Maura Murphy, Budget/Fiscal Analyst Lead, Department of Pharmaceuticals, UW

Once upon a time...late on a Friday afternoon (3/16/07 around 5 minutes 'til 5pm), I needed



a copy of an NEA and a e-GC1 from a budget file. Even though I knew it was a long shot that someone would still be at GCA (and if so, probably closing up for the day - and who wants to answer the phone then?) - I got lucky - and Stanley answered! (Team 1 member)

Stanley not only answered the phone, he took my request to go and 'find' a Budget file, from which I needed the NEA and GC1 in order to put the pieces together on a problem I had been working on for a week. He copied and faxed the pages over to me - and they had all of the missing information that was needed to solve the mystery!

I told myself I was not leaving for the weekend until I had done everything I could to solve the problem, and thanks to Stanley, I did solve the problem, and was able to go home after all! (Even though he isn't with Team 2 - Great!)

I do appreciate the effort that your Teams take to help us in the Departments.

Thanks!

To: Brenda Grayson, Monique Bradley, and Team 5 (Grant and Contract Accounting)

From: Joyce Carlson, Manager of Program Operations, Finance & Administration, Washington National Primate Center, UW

Just a little note thank you and the crew of Team 5 for allowing all those advance budgets for the Primate Center's main award. A particular thanks to Brenda Grayson. She is the one who had to do all that inputting. \*Many\* people on this end are grateful; you made that possible.

Aside from the advance budgets, a note on Monique - she has been working very closely with us on this end; she takes the time to meet with us and her staff on "our little issues" - she is appreciated for that.

If there were others who worked on this "project" please share this with them. No disrespect is intended; they should not be overlooked.

To: Alice Bukengolts (Grant and Contract Accounting)

From: Doug Mounce, Program Manager, UW MRFM Program

Always a comfort to know you're there.

To: Sue Camber and Grant and Contract Accounting Staff

From: Lawrie Robertson, Director, Finance & Administration

Please express the School of Public Health and Community Medicine's sincerest appreciation to your staff for this sacrifice of weekend time for our benefit.

It is a wonderful thing to work in a place that has this degree of commitment to the greater good.

To: Farida Ablang (Payroll)

From: Carolyn Morgan, Payroll Coordinator and HR Specialist, Office of Development and Alumni Relations, UW

Re: Correction to employee's hours worked

I just wanted to pass this email on to you to show what great customer service Farida offered to-

day. She has always been so helpful to us in regards to payroll issues and she once again went over and beyond today and assisted very willingly in getting a hand drawn check prepared for one of our student callers even though it was due to a mistake made by one of our managers! She was great in returning my call and advising me in how to handle this situation. I filled out a customer survey, but I just wanted to make sure that you knew the great customer service she offers! I really appreciate that she is very knowledgeable in payroll issues and always so willing to help.

