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New Directions

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Letter from the Editor—Jeremy Eknoian

Hey, man . . . prepare yourselves for the “Psychedelic ‘60s” issue of New Directions!

With the budget crisis and these uncertain times, the Editors felt we needed a throwback to the days of Wine and Roses, of Peace, Love and Happiness, and Make Love, Not War – or, more appropriately: Make Loans, Not War.

Join us on the journey as we discover the Organizational Zen of Balanced Scorecard, go Trippin' with eTravel, relive the Summer of Love at the Student Fiscal Services' “Happening” at South Campus Center, and more. You'll swear you're having a re-freak!

In this Issue

Headlines

Universal Truths in Balanced Scorecard Measures—Vincent Lau

For a groovy vibe, check out some of the Balanced Scorecard work happening in your area. It might be a bit funkier than what you are used to, but don't freak out cause there is heavy flower power when it comes to using the Balanced Scorecard around here. The Balanced Scorecard is a related set of information tools that serve a variety of purposes, one of which is providing a way to collect, measure and interpret results to improve and grow an organization. Unlike traditional systems and metrics that only look at the financial bottom line to determine the viability of an organization, the Balanced Scorecard provides a balanced view. It basically says that there are four perspectives that indicate the health of an organization:

(A) Customer: Are customers happy? Are their needs being met? Will they do business with us again? Will they provide us a good reference?

(B) Operational excellence: Are current processes efficient and effective? How does our operation compare to our peers?

(C) Learning & growth: Does the organization support a culture that promotes employee growth and learning? Is the organization open to change?

(D) Financial: As a public institution, do we meet our financial obligations? Are we good stewards of funds?

Did someone say measurements? Nobody likes being measured! It's a drag and a downer, but in this challenging economy, where the UW's budget is under intense scrutiny, being accountable and transparent is more important than ever. But don't worry; it's about measuring process and business outcomes, not individuals. If you're still freaked out about that, plan to attend the Quality Awareness or Process Improvement class.

You'll learn that measurements are never punitive, and instead are a way to show that today's business is getting done and there is a framework for future success.

It's like driving your VW micro-bus, dude...can you imagine driving without a dashboard? How do you know when you're out of gas or if something is wrong with your engine? Without a dashboard to tell you how fast you are going, you might get pulled over by the fuzz ... what a bad trip!

If you want to score some real information about Balanced Scorecard, just ask your metrics coordinator, Jeanne Semura (FM) or Susan Freccia (Treasury). You could even sock it to LuAnn Stokke and Vincent Lau, the metrics "gurus" for Finance & Facilities. They'll help to explain all of the lingo like: Strategy Maps, Strategy Scorecards, Dashboards, Initiatives, targets, and leads/lags.

Peace

Gems, Pearls and…Dinosaurs?! Groovy!—Ashley Scharbach

Treasury Group is rolling out their new recognition program, fondly known as T-REX. The founding T-REX representatives are Katrina Day (Risk Management), Paula Ieng-Howard (Real Estate), Ron Oestreich (Real Estate) and Ashley Scharbach (Treasury Office).

This group was given just five weeks to come up with a proposal for a new recognition program before presenting to sponsors Steve Kennard (Real Estate), Jill Lee (Risk Management) and Chris Malins (Asset Liability Management). Using the RQT program as a starting point, the first T-REX reps scaled back the program and adjusted some of the awards in order to fit the smaller size of the Treasury Group. The final T-REX program consists of both informal and formal awards, with something suitable for every "thank you" occasion.

For something small, but nonetheless noteworthy, there are some less formal awards. These awards include simple thank you cards, eCards (the UW has some great cards here), and the good old coffee card. With no formal nomination process, these rewards make an immediate impact.

For the more formal awards, a nomination must be submitted to the T-REX team through the T-REX website.

The GEM Award is given for a one-time achievement in which someone went above and beyond, or for a consistent demonstration of valued qualities. The reward is a $25.00 gift card to one of several locations, a certificate awarded at a staff meeting and an email to all of Treasury explaining the achievement.

The PEARL Award is given for long term achievements that will continue to impact the way business is done in Treasury. The reward is a $75.00 gift card to one of several locations and a certificate presented by Doug Breckel at a staff meeting.

The treasure chests will open mid-April, and the T-REX team will present at upcoming Treasury Group staff meetings to explain the details and feature the website.

Expand Your Budgetary Mind without Meditation through GrantTracker—Al Larsen

GrantTracker won't bring you to Nirvana, but you will get up-to-date grant and contract information to manage existing and new awards.

In February, GCA launched GrantTracker, a new, expanded online system that UW researchers and staff can use to track post award budget information.

(http://www.washington.edu/research/gca/budget/granttracker.html)

Kudos have been pouring into GCA as campus welcomes the update, which was designed to reduce the amount of time to close budgets, provide information in a timely manner, and decrease the number of requests for information to and from GCA.

Unlike the previous system, which was limited to receivable budgets only, all GCA budgets are now displayed online. All sub-budgets related to a parent budget are visible, and the administrator of a sub budget can view parent information at the summary level (not including detailed expenditure transactions).

GrantTracker shows more budget information, adds search functionality and displays invoices online. Using GrantTracker, campus can submit requests and send attachments to GCA, and track the history of previous requests and attachments.

GCA welcomes questions and ideas for changes to GrantTracker; send to gcagt@u.washington.edu.

Risk Management Website Reaches Full Consciousness—Angie Kritenbrink

In the fall of 2008, a complete redesign of the Risk Management website served as the pilot project for the new F2 web development process. By December, along with a record-breaking snowstorm, the Office of Risk Management received a special holiday treat: a new website. Check it out at http://f2.washington.edu/treasury/riskmgmt/home!

The new site is the product of many months of collaborative planning by a departmental work group sponsored by Becky Bullock, and including Yong Lee, Jeff Slater, Elena Williams, Carolyn Wenzl, Felicia Carnes, Katrina Day and Angie Kritenbrink, the team leader and project manager for the website project. Once the group established organizational, navigational and content guidelines, staff throughout Risk Management contributed content.

The RM website moved to the new F2 web address, and a different technical system to create and maintain it was implemented. F2 Web Manager Dan Druliner, and Nigel Heinsius of Creative Communications, helped provide initial training and resources for self-guided study of the new system, called Drupal. Since Drupal is easy to use for those who don't have a lot of web experience (though there are plenty of bells and whistles for expert developers to play with), it saved Risk Management the cost and time of purchasing extra software and training.

The basic look and feel of the website, and the system behind it, are managed by F2. This made it easy to implement changes along the way during the development phase, and will continue to make content updating by RM staff a breeze. In addition, members of the F2 Web Developers team helped to test the site and provided valuable feedback before it went live.

Since the new site went live in December, RM staff continue to notice improvements in efficiency. Program Coordinator Garrett Stronks, who processes insurance certificate requests, notes that "more requests are coming from the website, which makes it easier to turn around and get a certificate out." The page regarding insurance certificates was redesigned to make3

information more navigable for customers, with information about each type of certificate now in table form. The Equipment Insurance portion of the site has also been given rave reviews by customers for improved navigation and clarity. Visually speaking, the old, text-heavy site had been designed about a decade ago; the new design is easier on the eye, more in line with current user expectations, and will be consistent for sites across F2.

Ultimately, improved systems and a collaborative team spirit led to a greatly improved website for the Office of Risk Management. If RM's experience as the pilot project is any indication, we anticipate smooth sailing during the remainder of the F2 web development process.

New Accounts Goes Paperless: Can You Dig It?—Lily Gebrenegus

Here's the skinny: One of Grant and Contract Accounting's (GCA) most manual processes, setting up new accounts in FAS, has taken a step in the right direction. The second phase of this project was launched in January of this year. It allows the Office of Sponsored Programs (OSP) to send award information electronically to GCA. It's totally far out!

The previous process required someone from OSP to use a dot matrix printer, print six carbon copies of a cover sheet, and walk down the award documentation to GCA every day. What a drag! But those are the old days, man. Without the collaboration between OSP, GCA and the Office of Research Information Services team, this wouldn't have happened!

The system that GCA uses to process grants is called the System for Electronic Research Accounting (SERA). It's an extension of the system that departments use to prepare proposals and what OSP uses to review them.

The next phase of this project is called eAward. This will consolidate the information that OSP, GCA, researchers and their campus departments need to manage their grants in one place.

The first phase of this project was launched in July of 2008. It streamlined the advance budget request process by allowing departments to submit their requests electronically.

Catch you on the flip side!

SFS Accounting Unit loooooo-king Goooooood!—Shannon Corcoran and Joanna Medina

The Student Fiscal Services (SFS) Accounting Unit Process Improvement Project was formally kicked off in November 2007 and the project wrapped up in June 2008 and it feels ooh soooo good!! Some of the impacts include a projected annual cost saving of $31,700, improved internal controls, and a great foundation for future operational measures. Here is a closer look at some of the accomplishments:

Training

The accounting staff often had different methods of completing tasks, which led to inconsistent work and communication problems. Additionally, available resources and tools were not being fully utilized. Based on this need for uniformity, the process improvement team implemented a series of training sessions.

Procedures

With staff turnover and reorganization, documentation was saved in various locations or lost when the primary process owner moved on. The solution was to identify the core processes, and then adopt a standard document format and location for storage. Currently, 80% of the procedures have been documented and the rest will be completed by the end of this year.

Bank Reconciliation

There are a total of five accounts that SFS reconciles between the General Ledger (GL) and the Bank Statements. There are a total of 10 to 15 million dollar deposits and one to five thousand transactions a month. Reconciling the Bank Statement against the General Ledger account manually was a tedious process. In order to streamline this process, the computing staff developed a "Reconciliation Module" within the SFS Database to automate the reconciliation process. The automation process eliminated the potential for manual data entry errors through automated data transfers. It also allowed the accounting staff to focus on higher value activities (e.g. research and resolution) and to reconcile and resolve variances in a timely manner.

Budget Reconciliation

Budgets need to be reconciled on a regular basis to ensure that the charges are accurate. All discrepancies need to be detected, investigated, and resolved. There are a total of 40+ budgets that SFS reconciles and each one was handled differently. The solution was to develop a standard template in Excel so that the individual budget reconciliations could have a common format. In addition, the staff members also had a centralized place to enter the summary data for each reconciliation so that a manager could get up-to-date information.

Journal Voucher Automation

The high volume of Journal Vouchers (JVs) being created in the Accounting Unit brought about a need for a more organized and efficient process. A "Journal Voucher" module was developed that allowed staff members to create a JV and then send it by email to be processed. The electronic journal vouchers not only reduced the reliance on paper forms, but it provided better internal controls.

Cashier Activity

The cashiers in Customer Service used to fill out multiple paper forms to balance at the end of the day. This manual process contributed to errors in calculations and missing data, which the Accounting Unit was responsible for resolving. To address this problem, a "Cashier Module" was created that allowed the cashiers to directly enter their information. The module did all the calculations automatically and provided a better audit trail.

Electronic Funds Transfer (ACH) / Wire Deposits

In the past, there were often problems with identifying Electronic Funds Transfer (ACH) or Wire Transfer payments from vendors in a timely manner. This resulted in subsequent reconciliation issues. The Computing Unit created a system for those involved in this process that helped with the identification of payments. The results of this process improvement were a quicker turnaround for depositing payments to UW department budgets, a more timely reconciliation of the SFS budgets involved, and fewer outstanding reconciling items per month.

This would have not be possible without the support from the SFS Managers: Sandie Rosko, Jeff Petersen, Tess Domingo-Herrera and the tremendous team work from staff: Arlene Lalas, Colin Sachs, Dick Simmons, Jaeson Albritton, Joanna Medina, Mailin Chua, Mark Brady, Norm Englund and Shannon Corcoran.

Overall the process improvements have helped to save money by reducing labor, paper, and storage costs. Internal controls have also improved since there is more transparency and better audit trails. Ooh sooooo groooovy! The Accounting Unit is totally jazzed and is now enjoying the fruits of its labor.

Groovin' on Tower Synergies—Jeremy Eknoian

"If you're going to UW Tower,
be sure to wear some flowers in your hair...
If you're going to UW Tower,
You're gonna meet some gentle people there."

Like those coming to San Francisco in 1967, UW departments flocked to the Tower from the far flung reaches of Seattle – some from campus, others from downtown, still others from Northgate. Some of us came willingly - seeing the chance to be a part of something big, something beautiful. Would it be the next "Human Be-In" – a place to gather the great talents and minds of the University and harness our creative resources? Yeah, man! But for the Real Estate Office, the call to gather at the Tower was not one we answered promptly. After being here a few months, however, the benefits of togetherness are beginning to emerge.

We can now work closely with our process partners in Planning and Budgeting, the Attorney General's (AG) Office, Treasury, and Risk Management. Rather than a conference call or bus ride to the U-District from downtown – meetings take place in person, often informally. A quick exchange in the elevator lobby or while standing in line to use the communal microwave (ok – this isn't UTOPIA) can answer a question or move projects along without the need for lengthy meetings. Leases needing AG approval can be walked upstairs rather than sent by courier, which saves time and money and improves turn-around time.

Many of the properties we manage are located in the U-district – some in the shadow of the Tower itself. Closer proximity to our buildings and tenants allows us to be more responsive and available to serve our customers. Issues that arise at the Roosevelt Buildings or the U-District Building can be addressed promptly and in person with the property manager and impacted UW staff.

The past four months seem like a haze. I recall our neighbors in Planning and Budgeting welcomed us warmly on our first day in the Tower back in November, with offerings of free food and drink. The cookies seemed harmless enough, tasty and sweet, but months later I am feeling all warm and fuzzy about being here and it makes me wonder...

Innovations

Funky Answers to Questions (aka FAQs) —Al Larsen

SCENE: The Ave in the Sixties – a small group of hippies are having a business meeting on the corner of Brooklyn and 47t

h: Hippie #1: "Aw, man! I can't keep answering all these questions from tourists. It's putting my tie-dye production behind schedule! Always the same questions, day in and day out."

Hippie #2: "Hey man, I hear ya! It's the same problem with my turquoise rings. Can't find time to hitchhike down to Arizona for new supplies."

Hippie #3: "Wait, I got it! Let's get our heads together, produce a list of common questions and print up a flyer with the questions and the answers. Then we can staple them to poles around the area."

Hippie #2: "Well, that's a groovy idea, but what will we call the list?"

Hippie #3: "I got it, Bro! How about Funky Answers to Questions ~ FAQs!"

Hippie #1: "Cool, far out man! Can I print them on tie-dyed tee shirts?"

SCENE: Grant and Contract Accounting – 2009

Employee #1: "We need to figure out how to streamline communication so GCA and campus can process accounts more quickly – Could we develop a system so our customers can find the answer to frequently asked questions in a common location?"

Employee #2: "Let's get everyone together, create a list of common questions and answers, and ask our webmaster to post it to the web."

Employee #3: "Great idea! Our webmaster said when he was here in the 60's, he saw some kind of paper lists posted on the telephone poles. He can't remember the exact title, but it was something like FAQ ~ maybe Frequently Asked Questions?

Seriously, folks, the questions GCA gets aren't funky and we want to provide useful answers.

When GCA realized that phone calls and emails from our customers feature a core set of questions—the same questions asked over and over again—we decided to start a Frequently Asked Questions (FAQ) web page.

Created with GCA customers in mind, this FAQ page has unique features. The left side menu references categories like "budget set up" and "invoices"; each category contains a group of questions and answers.

Our FAQ website currently contains nineteen categories, some which are currently empty. Each category takes you to a separate web page, where the questions are listed. Click on the question (in a shaded box); a white space with the answer will open up between the boxed questions.

Campus feedback to the new FAQ site has been very positive. We're adding questions each week, so send your questions and update suggestions to gcaques@u.washington.edu.

Send the Paper Away, Man—Mike Fleming

“Together, more or less in line, just keep truckin on.”
Truckin’ ~ The Grateful Dead

Funny how things you deal with every day have a habit of fading into the background.

You can be sitting there, staring at all the pretty, swirling colors of your daily routine and BLAZOW! Right out of the ether it seems to swim out at you: a new way of doing things.

Of course, the reality never quite matches up with that, more like some bloated whale coming up for a breath of air than something swimming through the…where was I? Oh – new ways of doing things. Right.

So journal vouchers fit right in there – something Payroll’d see every day. Just get your numbers, fill out the journal voucher to move the money from one place to another, send it off to the bosses for signatures.

Then you’d wait, man. Just wait. Maybe not long, but you’d wait.

Then you’d get them back and you’d head to the copy machine for a little copying action. Watching that light go back and forth and somehow spitting out these perfect little copies of the original…how does it do that, man? I mean… it’s just spooky.

…What? Oh, the process – right. Well, then you have this stack of copies, see? And once you had those you had to grab the highlighter and make sure the copies were marked right so they’d all go to the right people.

Then you’d take it on over to Payables to enter.

If you did it right, one would even come back to you. If you counted or marked wrong, man, a few might come back to you, then you’d have to find out who was missing their copy. And nearly every time, this copy would just go to a file somewhere and sit there, waiting for the day it could go to the great shredder.

Just think of the trees, man. All those trees.

So there I was, staring at the pretty light of the copier, just whirring its magical way into spitting out another copy of my journal voucher, when it hit me: why go through all this?

Seriously? I fill out my spreadsheet and print it out so someone else could enter it into their spreadsheet to enter it into a system? Why, man? Why?

What if I just entered it on their version of the spreadsheet and skipped all the steps in between? Wouldn’t that free up more time for work or, better, staring at the pretty light of the copier?

So Payroll began to work on doing just that, and I tested it for nearly six months, changing things up here and there to make it all run smoothly.

But then a new lightning bolt hit! Why send a spreadsheet over to Payables so they could, in turn, toss it into a system we already had? Why do that? Just a drag, man, that’s what it was. Why not just do that part ourselves, too?

W hy? Well that’s what I’m saying, man! So we took the new process there, too, getting our own JV numbers and everything, going through more hoops than a beach party, dig?

But on March second, we jumped through the last one and sent off our own journal vouchers for the first time. Man, just information typed into a spreadsheet and then sent directly to the system – not a signature or piece of paper in sight, dig?

And the best part? We saved hours of time not printing out the journal vouchers, making copies of them, and then walking them all over far and gone. And we saved Payables time and effort, too, doing it ourselves, freeing them up to do more important things.

Save the trees and time? Far out, man, just….far out.

Getting it Together with Procurement Customer Service—Pramilla Chand

Procurement Services, which includes Purchasing Services, Financial Services, and eCommerce, now has its own single point of contact for customer inquiries. As part of an ongoing organizational process improvement effort, a new unit called Procurement Customer Service (PCS) has been created to answer and address many types of procurement-related questions.

Leaders of Procurement Services recognized that, as a newly formed organization within FM, it was important to create a seamless experience for its customers, an experience that would both anticipate and meet customer needs. To effectively serve the campus, the PCS group was created.

The PCS group is a one-stop shop for getting information about procurement-related issues either by email or phone. In most cases, customers won't need to determine whether to call Purchasing, eCommerce, or Accounts Payable. Customers won't experience telephone or email "ping pong ball."

PCS is a critical asset within Procurement Services. PCS is customer facing and the professionalism, ability to communicate and overall positive group attitude will be key components that drive the success of the new unit.

In addition to answering general inquiries, PCS will facilitate and communicate efficient procurement strategies and practices to campus customers and suppliers by analyzing complicated procurement questions and problems, providing procurement training to staff and customers, and treating everyone with courtesy and respect. Eventually, this group will develop a knowledge base for more complex procurement questions.

The new PCS staff members each bring experience from the following units:

- Purchasing: Tom Hightower
- eProcurement and Accounts Payable: Debra Adler
- Accounts Payable and Vendor Maintenance: Heather Nicholson
- Accounts Payable customer Service: Michelle Schrader
- Financial Services leadership: Pramilla Chand

When you have a question for Procurement Services, contact the PCS staff by phone at 543-4500, or by email at pcshelp@u.washington.edu. You'll be glad you did!

Peace.

Student Fiscal Services' Far Out Retreat—Diane Cooley

Let me clue you in - change is constant, at least in the world of Financial Management (FM). We're always striving to improve our processes and with the financial climate going down the tubes (what a bummer), those efforts are vital to our continued success. How can we do more with less? How can we make our work climate groovy even in these stressful times? What goals can we set for ourselves and the department? Everyone in the department needed to chill out and be part of this discussion; so, on February 4,2009, Student Fiscal Services (SFS) closed their offices in Schmitz Hall and decided to hang out at the South Campus Center for a real happening.

We started the day with a review of SFS and reminded ourselves that we do more than disburse financial aid and take tuition payments from students — we handle the bread, the loot, for the entire campus. Our leaders have been working on hip action plans developed from the "Extraordinary Leader" survey and we heard about their efforts. We reminded ourselves of the FM Strategy map, our SFS Dashboard and our key initiatives. We talked, we listened, we brainstormed and we looked ahead. The enthusiasm and willingness to share ideas was impressive. Our karma was good. By the end of the day we decided to get it on and charter three groovy new teams to help us move forward.

Team 1 will be working on "Stretch Goals: How to set them and how to follow through." Nifty brainstorming ranged from the desire for more training to better communication to going paperless to expanding telecommuting opportunities. Far out!

Team 2 will be working on "Relationship Building." Cool ideas generated here fell into three relationship / network building categories including: professional, personal, and general.

Student Fiscal Services' Far Out Retreat—Diane Cooley (cont'd)

Team 3 will be working on "Diversity." Financial Management has the spiffy Diversity Team and SFS participates in their activities. Student Fiscal Services wants to take the next step and look at what we can do to practice inclusion and value diversity. Efforts could include sharing at all-staff meetings, having our own multi-cultural celebrations and training in the department. Out of sight!

While not quite a love-in, we all had a blast. Is this the start of a new age, if not of Aquarius, at least of teamwork in SFS?

SFS and the CMS: the Outta-Sight Conversion to Drupal—Paige Hamlin

Drupal is a real happenin' open source Content Management System written in PHP and used for building and maintaining websites. Since it is open source, it has many contributing developers and is ever-evolving and mind expanding. It is highly customizable as there are any number of modules available to add to your installation to expand functionality, and more are added to the list each day. Know what else? It's FREE…now that's groovy…even more so these days.

SFS was one of the early entries into the Drupal conversion arena. But how to go about it? I'll share a little something I've learned…it's all in the navigation. Of course good, solid content is a plus, but first your users need to find it…easily.

After meeting with the leaders in SFS to discuss possible navigation options for the new site, we decided to focus on our 3 major customer groups: students, parents and UW departments. With the Drupal modules and menu system it was easy to create a separate menu for each group. Once a menu is created, it may be shown on, or excluded from, any pages that you assign allowing much more flexibility and control. If there is a change to a menu, you update it in one place and that menu is updated on all of the pages to which it is assigned. No more keeping track of what menu links are on what web pages…this is far out! Want to move a menu item to the top of the list? Just drag and drop it in the menu interface, click save and the item is relocated! Can you dig it?

Oh the many hours spent with UNIX and the Pico editor… what a drag man. Writing pages, making changes, and trying to remember the string of commands and list of folders needed to push the pages into production…ah, the good ol' days. Then there was Dreamweaver. It certainly made editing pages groovier, but still the need to logon to the terminal and push the pages into production. Say goodbye to all of that rigmarole. With Drupal, you simply check a box to select published, click save and the page is live! If you want to publish or unpublish several pages at one time, you may select them on the content screen and then assign a command to them all. This same content screen shows you the status of all pages and allows you to sort them by status, content type or category.

Once the content was moved over, formatting the new pages was a snap. Peace out HTML, hello markdown! Markdown uses some simple text markers to generate valid, well-formed XHTML. Don't know much about HTML or markdown? There is a fab Drupal module for the addition of a text editor. This is a handy tool for those doing quick postings or updates. Also, user roles may be set up for specific tasks. This is a groovy way to allow subject matter experts to keep on top of any changes in their web content and not have to wait for the updates to be done elsewhere. That's so boss!

Reading through your pages and find a typo? No need to track down the file in the development folder, open it for editing in Dreamweaver or some other program then back to push it into production…just login on that very page, make the change and save it. Update done, far out. Drupal is a great tool and fairly intuitive and a much-welcomed addition for managing the website. There are many more things that you can do in Drupal with a little time, patience and some newly-honed programming skills. Check out the new SFS pages to see what we've done with a little help from Drupal. Peace out.

Treasury Leaders Turn, Turn, Turn! 360° Feedback—Chris Malins

Hey, man. You know how – like – when you're spinning around on the grass at a Jefferson Airplane show in Golden Gate Park? And how, when you're just turning and turning and then look up at the sky it seems like everything just falls into place and all of the universal vibrations find you and hit you with some far-out insight? Well, the recent Extraordinary Leader 360° Assessment that the Treasury Leaders did is a lot like that.

For the leaders from Real Estate Office, Risk Management, Investment Accounting and Administration, and Asset Liability Management, this journey of self-discovery began with a retreat in September 2008 hosted by Cheryl Hawley that introduced the basic concepts of Extraordinary Leadership; "Good does not equal great," "Profound Strengths and Fatal Flaws," and the idea of feedback as a gift.

Among the key takeaways from this retreat was the idea of a "Leadership Tent," made up of five competencies or "tent poles":

1) A focus on results
2) Personal Capacity
3) Character (the center "tent pole")
4) Leading change
5) Interpersonal skills

Each one of these competencies is important to extraordinary leadership, with the key competency being "Character," where the leader displays high integrity and honesty. Some of the behaviors listed under the other competencies will be familiar to members of Financial Management: Champions change, Establishes stretch goals, and Customer focus. Research in this area has shown that strong scores in just one of the competencies can increase the scores of other areas. This reinforces the notion of focusing on core strengths which is central to the concept of Extraordinary Leader.

Each leader chose who would receive their questionnaires, but they were distributed broadly. Peers, direct reports, managers, customers, and process partners all had an opportunity to provide feedback. The idea was to get the perspectives of people from all over the organization, above, below, and on the same level. Hence the name "360°" feedback. After the initial retreat, the team met again in January of 2009 to focus on the results of the 360° assessment. Cheryl led the team through the process of understanding the data. After Cheryl's general follow-up, each of the leaders met individually with a trained expert to review and interpret their own feedback.

This was a very valuable exercise for the Treasury Leaders and provided not only honest feedback, but a roadmap for future improvements. Steve Kennard from the Real Estate Office particularly liked the customer focus of the questionnaire and found that the "negative" feedback was the most helpful. Judy Peterson, from Investment Accounting and Administration, valued the direct feedback from her supervisor and was relieved to find that she is not perceived as having any "fatal flaws." In general, the 360° assessment gave a totally positive vibe to the "squares" – with hippie tendencies – on the Treasury Leaders Group.

eTravel: A Groovy New System Designed to Reimburse Travelers Faster—Teresa Crisostomo

Several Years in the Making

For several years, the Travel Office has been working towards automating travel reimbursements. Ariba was the software package purchased to develop eProcurement, which expanded the University's purchasing options. A module came with the software package for travel and expense reimbursements. A team was formed to review the module which consisted of several campus departments and the Travel Office.

Once it was determined that the module would benefit campus, a proposal was submitted to the Information Management Advisory Committee (I-MAC) for approval. This committee oversees university-wide technology projects; prioritizing projects for development and funding. It was approved by the committee but not funded. The Travel Office and the Office of Information Management was determined to develop the module and used existing resources to move forward in implementing the project with little to no funding.

User Project Approach

The system was developed through input from a user group. The team was comprised of individuals from several campus departments, including Applied Physics Lab, School of Medicine, Ocean and Fishery, Law School, Institute of Nuclear Theory and Financial Management (see team members below). The project manager was Erick Winger.

For a year the team evaluated the system to make sure it would meet the needs for campus departments and the Travel Office. We completed over 20 feedback sessions across campus to find out what departments would like to see in an automated travel system. The team came to the conclusion that we should move forward with the project. A monumental occasion for us all! We proceeded to implement the system based on the feedback we received.

The system has generated huge efficiencies and faster reimbursements. Travelers will get reimbursed sooner; in most cases, overnight. The automated processing of travel expense reimbursements will save time for departments, Financial Services and the Travel Office. The estimated annual time savings is 20,800 hours, or $800,000 based on 25,000 travel expenses vouchers (TEVs) processed.

Implementation of eTravel: • Eliminates manual routing; automatically calculates per diem and mileage rates, and coordinates data entry and review. • Eliminates a need to enter and approve a PAS purchase order and manual routing of reimbursement forms for approval. • Provides an improved user interface, coordinated entry and review, and automatic calculation of per diem and mileage rates.

Process Improvement: In anticipation of eTravel, the Travel Office made some changes that greatly streamlined our processes: • We teamed up with Accounts Payable and Purchasing to route vendor invoices to the appropriate office for processing and Accounts Payable for payment. Doing so eliminated several steps from the old process. • Living Allowances previously processed on invoice vouchers can now be processed through eTravel. Far out man!!

Implementation

We went live with eTravel on Feb 2nd, 2009. eTravel is being implemented using a controlled roll-out beginning with our pilot group, beta testers and the departments of our team members. Next our plan is to implement eTravel to large colleges, such as Arts and Sciences and Engineering. We already have several other departments that are interested in becoming early adopters. We will continue to sign departments up until the campus is saturated. Our goal is to have eTravel rolled out by the end of the year and thus eliminating paper Travel Expense Vouchers.

Thanks to Sponsors/Process Partners

We would like to thank our sponsors, Cindy Gregovich and Ann Anderson, for being such huge supporters along with our process partner, the Office of Information Management. We would also like to thank Purchasing and Financial Services, who were so willing to work with us throughout our invoice process improvement. Early word on the streets is that eTravel is a huge success.

eTravel Team Members:

Erick Winger, Project Manager - Financial Accounting
Dian Gay - Applied Physics Lab
Barbara Masaki – Applied Physics Lab
Paula Kurose – School of Law
Traci Watkins Hunt – Oceanography
Cindy Gregovich – Travel, Records, Payroll
Teresa Crisostomo - Travel
Heriberto Rodriguez – Office of Information Management
Matt Leidholm – Global Health
Becky Collord – Dean of Medicine
Linda Vilett – Institute for Nuclear Theory

RQT/Awards—Farida Ablang

With the winter behind us and the blossoms in full bloom, Spring Fever is kickin' in! The Recognition Quality Team (RQT) can't help you pollen sufferers, but if you've got an itch to recognize your peers, the RQT is there! Since November 1st, Financial Management, Treasury and Strategy Management have utilized tools from the RQT to recognized peers, including 144 BRAVOs, 2 STAR Awards, 1 LINQ, 6 Team Spirits, 2 Person to Person Gatherings and an astonishing 735 Recognition Treats!!

LINQ Award:

On January 15, 2009, Steven Roberts, Manager of Program Operations of Mailing Services, was presented a LINQ Award for being Trustworthy. Steven is observed as being technically competent and knowledgeable, a leader "who leads by example and walks-the-talk." He "consistently demonstrates genuine commitment to the success of Mailing Services and the entire University as a whole." He supports and encourages others to grow and excel in their jobs by promoting employee development and cross-training to achieve their goals. He is continually seeking to improve his own knowledge by going "the extra mile to get the training he needs, as well as to assist others in making them feel secure in implementing something new." He is someone who is considered approachable and friendly and his judgment is trusted by others. Steven's commitment to providing accurate and quality services to the University and continued process improvements demonstrates his ability to be an effective leader. Way to go, Steven!!

STAR Awards:

The SFS Accounting Process Improvement Team received a STAR (Successfully Taking Another Route) Award on February 3, 2009. The team members include Jeff Petersen, Tess Domingo, Mark Brady, Joanna Medina, MaiLin Chua, Arlene Lalas, Shannon Corcoran, Dick Simmons, Colin Sachs, Jaeson Albritton and Norm Englund. They were recognized for their work on the SFS Accounting Unit Process Improvement project. This project was not only a long-term improvement that opened channels of communication, but it also provided both cost and time savings benefits. The team formally kicked off their project in November 2007. They first needed to clearly define what the accounting needs were for SFS. Over the course of a year, they implemented a series of training sessions with all of the accounting staff, had a reconciliation module developed to streamline and standardize reconciliation reporting, identified and documented their core processes and clarified roles and responsibilities. They reduced a highly manual process and gained an overall better understanding of the process. Wow! Great job, team!!

On March 2, 2009, Payroll's T-Group was presented with the STAR Award for their work on the NRA Stipend Report project. The team members' (Heather Norberg Stewart, Eva Lu, Shawna Litterski and Yee Lam) work on the project contributed to a long-term improvement with cost and time savings and improved customer service. The year-long NRA Stipend Report project had many goals which resulted in streamlining and automating a very manual process. Flags were added to the payroll system HEPPS to automatically calculate federal income tax withholding for non-resident aliens. The old process was ten steps, including manually comparing files for previous and current pay for each recipient and emails between departments and recipients to verify information. This process was reduced to four steps, resulting in a more efficient process with timely and accurate calculations of federal withholding on the recipients' paychecks. Previously, the old process required 100% FTE by a Senior Accountant, but because of the team's hard work, the time has now been reduced to 50% FTE and allows the accountant the time to perform other tasks. This results in an annual salary savings of approximately $26,000!! Wonderful work, team!!

Team Spirits:

Creative Communications, 12/11/08 – "Teamwork" and completing a Large Mailing

Creative Communications, 1/22/09 – Mailing Group for the brand new mailing services operation in the UW Tower

Payroll and Financial Services, 3/5/09 – For the "Snow Bunnies!" who came in when the UW closed to get out everyone's payroll and wire transfers so everyone got paid.

Procurement Services Admin Support, 3/13/09 – Celebrating a job well done on a project that was finished quickly and accurately!

EIT, 3/17/09 – Congratulations Strategic Thinkers!

RQT/Awards (cont'd)

Recognition Rewards Quarterly Winner:

Yolanda Watson from Purchasing is the recipient of the quarterly Recognition Rewards for the 08-09 third quarter!

She will receive a $25 Visa Gift Card for using a Recognition Treat to recognize her co-worker. Thank you for saying Thank You, Yolanda!

To qualify for the quarterly drawing, recognize a peer today!

Kudos

To: Tami Sadusky (Grant & Contract Accounting) and Lynne Chronister

From: Lawrie G. Robertson, Director, Finance & Administration, Office of the Dean, UW

Re: Thank you!

Tami and Lynne:

Thank you for the very productive meeting with our Department Administrators. We are so appreciative that you were willing to take the time to share perspectives and engage with us to resolve our common challenges....

Everyone thought this was a great meeting as we partner together to resolve the challenges of short-staffing and increased grant and contract volumes.

All the best,

Lawrie

To: Farida Ablang, Megan Dennis, Randy Abaya (Payroll Office)

From: Colleen Allwood, Payroll Specialist, HMC Payroll

Re: Checks

Thank you so much Farida and your Team for working so hard to get these checks done in time for me.

Your efforts are well noted.

To: Farida Ablang, Megan Dennis, Randy Abaya (Payroll Office)

From: John Martines, Administrative Assistant, UW Hall Health Primary Care Center

Re: Classified Staff-Staiger: Distribution Change

Thanks for the efficiency and GREAT customer service!!

To: Mike Fleming, Shawna Litterski, Heather Norbert Stewart (Payroll Office)

From: Melissa Bravo, Project Manager, Office of Information Management

Subject: Thank you Payroll!

Hi there,

Thanks so much for all the work you put into making the implementation of MyFD transactions a success! It is so exciting to see the application in production, and to know that all RSTs and original payroll corrections are now entered via MyFD, and captured as the salary transactions (TC70s) that they truly are.

So, thanks for sticking with us and helping to iron out all the details.

To: Farida Ablang (Payroll)

From: Melanie Fields, Fiscal Specialist, Purchasing

Re: check ready

That's great! Pam will be so happy AND relieved.

You really are very good at what you do Farida. Thanks for everything.

To: Payroll Office

From: Dvorah Oppenheimer, Financial Administrator, Jackson School of International Studies

Re: adverse weather conditions

To all of you at the payroll office, I wanted to thank you for all that you do for us. And that you had to come to work, (risking life and limb) when we didn't, during these incredible weather conditions. You all are absolutely the essential staff at the U.

Happy Holiday,

Dvorah

Per phone conversation with Matt Eng, Payroll Coordinator, Biobehavioral Nursing and Health Systems, UW

To: Payroll Office & Production Team

From: Christa Woodhull, Payroll Office

Earlier today I was talking with Matt Eng and he made a comment that I want to share with you all.

"I absolutely love the Payroll Office and I love the checkwriters."

Per conversation with Sam Senturia, Treasury Office.

To: Payroll Office

From: Heather Norberg Stewart, Payroll Office

Re: Thank You

All,

I just had lunch with Sam Senturia who works in Treasury. Before we talked about anything else, he wanted to thank payroll for all the hard work and for getting him paid during the snow. He wanted you all to know how much he appreciates your hard work and dedication.

To: Ginny Montgomery (Payroll)

From: Sam Castro, Fiscal Specialist, UW Office of Research

Re: probationary period for fixed duration appointment

Thanks a lot. I still have a lot to learn on payroll stuff. I'm very fortunate you're always there for me to answer every question I have. Again, thanks for the quick response.

To: Vanessa Posadas (Payroll)

From: Cora Catlett, HR Consultant Assistant, UW Medical Center

Re: Thanks!

Hi Vanessa,

I work at UWMC HR and I must get 100 calls a day for employment verification that I forward on to you. You must be super busy with employment verifications for the whole UW! I think I've spoken with you a few times on the phone and you've always been so helpful. I just wanted to say thanks for a job well done!

To: Vanessa Posadas (Payroll)

From: Anh-Nga Duong, Property Management Associate II, Impact Property Management

Re: THANK YOU for Employment Verification for our tenant

I faxed the request for employment verification in the morning; then on the afternoon, I received it back with all requested information. Amazing!

Your prompt response helps me completing my job on time!

Truly appreciate your great job!

To: Sandie Rosko and Robin Elliot (Student Fiscal Services)

From: Lance Neely, UW Student

Re: Thank You

Hello Sandie,

I wanted to send you a quick message to thank you for your help as it relates to my student loan situation. I understand that Robin Elliot worked with you on my case and I wanted you to know how incredibly grateful I am. It's been a tough couple of years and your help is incredibly appreciated. I also wanted to let you know how incredibly helpful and thorough Robin has been throughout this entire process. Thank you for having such an amazingly responsive, dedicated and thorough team.

To: Student Fiscal Services Accounting Team

From: Cheryl Hawley, Office of Strategy Management

Re: Please let the SFS Accounting Team know how much we appreciated the presentation!

Once again, we just wanted to let you know how much we valued the most excellent SFS presentation to the FMEIT yesterday. It was well organized, informative, and also encouraging. The enthusiasm that your team members feel associated with these improvements really came through. Thanks for the commitment to this work and to taking the time to organize the excellent presentation.

To: Frannie Gladney (Student Fiscal Services)

From: Josette, UW Student

Dear Frannie:

This afternoon when you saw me, I was very sad. I entered your room, you offered me a chair. You listened to my plea and did your best to solve my problem. $420.00 is a lot for anyone to pay in today's economy. Thanks for kindness. I promise to help many others so your kindness may be multiplied. People like you make the world a better place.

Thanks again and God bless.

Josette

To: Kyra Worrell (Student Fiscal Services)

From: Brenda Banks, Graduate Academic Advisor, UW School of Music

Re: Student Tax workshops

Thanks, Kyra. I have sent this on to my students. I think it's really great that your office puts on these helpful workshops. Thanks for all that you do.

To: Joanna Medina (Student Fiscal Services)

From: Pam Cribby, parent of UW student

Re: thank you note sent to Joanna Medina

Thank you so much - for Joanna - You were very helpful. Have a wonderful day and I'll watch for the credit back.

Pam =)

Kudos (cont'd)

To: New Directions Team

From: Becky Bullock, Director, Risk Management

Re: New Directions - "Halloween Issue"

Ok, I nominate Steve Kennard's headline for the scariest pun!! Nice work guys – it's an undead Halloween issue in time for Valentine's.

To: New Directions Team

From: Randy Lewis, Treasury

Re: New Directions – "Halloween Issue"

Cool. I enjoyed! Thank you.

To: Farida Ablang (Payroll)

From: Lorenza Ibarrientos, former UW employee

Re: Check Number P282697

My Dearest Farida,

I can not say THANK YOU enough in gratitude how much I APPRECIATE your fast response

on my request. I miss working with you.

THANK YOU, THANK YOU, THANK YOU, THANK YOU!!!!!!!!

I will come in today to pick-up my check in the Payroll Office in Brooklyn Avenue.

Thank you so much, Farida!

To: Heather Norbert Stewart (Payroll) and NRAPT/Global website

From: Lydia Gold, Fiscal Specialist 1, Jackson School of International Studies, UW

Re: Form 1007 Instructions

Heather, thank you so much for this. I knew it was there somewhere! We work with a lot of international visitors here at the Jackson School. We really want to streamline our process. This will help.

Let me say again how great this new website is! Once those links are all working, this may be the most useful, most "all in one place," most well-explained content on the entire UW site! Many, many thanks for all the hard work.

To: My Financial Desktop

From: Marie Figueredo, Payroll Coordinator, Finance and Administration, UW Bothell

Re: Project Codes

Hi Cheryl-

Please don't worry about researching this question; I did an OSET to add the project codes for ppe 2/15/09. I think they didn't show up because of the timing when I made the entry into OPUS (it might've been too close to payroll cutoff).

The codes should show up for this next payroll, if not I will contact you again.

By the way, I LOVE the new Online Salary Expense Transfers!!!!

To: Payroll Office

From: Maria Scott, Payroll Coordinator, UW Office of Minority Affairs

You guys are NO. 1 in customer service and you should be recognized for the good work that you do! Thank you for all you do.

To: Cheryl Manekia and Farida Ablang (Payroll)

From: Michelle Seman, HR Specialist, University Advancement

Re: Thank you

That you Cheryl and Farida!

I really appreciate you both taking the time to help me correctly enter in Shared Leave!

To: Sandie Rosko and Jeff Petersen (Student Fiscal Services)

From: Tom Phillips, Financial Services

Re: Update on ImageSource Annual Contract

Thanks Sandie! Just another FYI....I'm most impressed with how Jeff (Petersen) is handling the FM Imaging team. His professionalism, extreme competence, and sense of humor make it a fun team to work on.

To: Norm Englund (Student Fiscal Services)

From: Tana Knight, Fiscal Specialist 1, Radiology, UW

Re: Recognition Treat

Norm helped find 2 missing checks processed by student fiscal services that never made it onto my BAR. I sent several e-mails and made an inquiry at the SFS Office. After I sent a message to Norm, the missing totals were found! =)

Norm received a Tully's gift certificate from Radiology.

Kudos (cont'd)

To: Li-Chang Wong (Student Fiscal Services)

From: Jeff Harrison, customer

Re: note sent to Li

Li,

It was so nice to meet you and thank you for all the wonderful work you do for the Evans Scholars Program at Washington.

Warmest regards.

To: Student Fiscal Services

From: anonymous class participant from a UW department

Re: Participant's responses (in italics) on evaluation to a Presentation for Tax Help (for US Residents)

The content covered in this class will be useful: Strongly Agree

Through this course, I improved:

My knowledge: Strongly Agree

Increased my skills: Strongly Agree

My comfort level with the subject matter: Strongly Agree

Overall, this course was effective: Strongly Agree

What I most learned from this class is: very pertinent tax info plus where to get more help.

This course could be improved by: nothing - it was great!!!

Thanks for a concise and hugely helpful presentation!

To: Student Fiscal Services

From: anonymous class participant from a UW department

Re: Participant's responses (in italics) on evaluation to a Presentation for Tax Help (for US Residents)

What I most learned from this class is: the entire content was useful. Li was very knowledgeable and a good presenter.

This course could be improved by: n/a

To: Rachel Reichert, Marisa Martin, Pam Luther, Lichang Wong and Kyra Worrell (Student Fiscal Services)

From: Susan Malti, Fiscal Specialist, UW Department of History

Re: *New Website with Services for Departments*

Hi Rachel, I love this new site. I am planning on attending the March 16 and March 20 training sessions that you refer to in your emails. I did register – please verify I'm one of the participants. Thanks.

BTW, I really like this website you have directed us to and will be using it regularly for duties in my new job here at the EMBA include working with the SDB, student payments and changing student status as they come and go in our EMBA program.

To: Rachel Reichert, Marisa Martin, Pam Luther, Lichang Wong and Kyra Worrell (Student Fiscal Services)

From: Laura Todd, Academic Counselor, UW School of Art

Re: *New Website with Services for Departments*

Hi Rachel,

Wow – the site is great. I really appreciate the "Online Learning Modules for SDB Screens"...

Thanks to you and your team for providing this resource.

To: Rachel Reichert, Marisa Martin, Pam Luther, Lichang Wong and Kyra Worrell (Student Fiscal Services)

From: Lynn Catlett, Administrator, UW Department of Aeronautics and Astronautics

Re: *New Website with Services for Departments*

Hi folks! Just want to say THANKS for all the work you've put into your website. It's a giant step better than ever. Hopefully, I won't darken your phones so often in the future, having got myself trapped in corners with SDB...

Great work, thanks again.

To: Megan Dennis (Payroll)

From: Christina Yarbrough, Fiscal Specialist II, Department of Medicine

Re: Emergency Request to cancel deposit

You are the best thank you so much Megan. You have a really great weekend as well. I appreciate you were so fast I will let her know.

To: Rachel Reichert (Student Fiscal Services)

From: Suzanne Yoshitome, Assistant to Director, Health Sciences Administration

Re: SDB training success!

Hi Rachel,

Thank you again for your assistance this morning. Here are the Magnuson recipients, if you would be so kind as to check that I have entered them correctly in the student data base.

Thank you card sent via campus mail.

To: Christa Woodhull (Payroll)

From: Janice Young, Assistant Director of Finance, Student Activities & Union Facilities

Dear Christa,

Thanks for your immediate assistance last week. I am certain the employee greatly appreciates your extra effort at the last hour to get her payroll entered.

Attitudes are contagious and yours is worth catching.

To: Student Fiscal Services

From: customer survey comment

Re: New SFS website

"Great improvement over old site!"

To: Frannie Gladney (Student Fiscal Services)

From: Mursal Hashi, UW Student

Re: Hi Frannie!

How are you,

I'm that student who came to you last Friday with financial aid problems and couldn't pay his dues on time. I'm Mursal Hashi student ID #: ###8720

I just say thank you for helping me and I really enjoy the hospitality you gave me and I want to stop by tomorrow and say Hi. You know what Frannie, I'm really happy I got an interview with Lockheed Martin on Wednesday and I'm hoping that I find an exciting career from them if I'm lucky and I do successful interview....

So, anyhow thank you Frannie for the extension and I will stop by whenever I can to see you.

To: Marisa Martin

From: Gillian Ehrlich, FNP/DNP student

Re: Frannie Gladney (Student Fiscal Services)

Hello Marissa,

My name is Gillian Ehrlich & I am a grad student in the School of Nursing. I've been having a frustrating time getting grant money set for my tuition actually dispersed to my account- 2 emails and 3 phone calls later, I connected with Frannie Gladney who was incredibly kind & helpful. Because of her actions today, I'll avoid late fees and be able to get back to studying and not phone calling. I'm just writing to say thanks for having such great people in your office.

Thanks again.

To: Frannie Gladney (Student Fiscal Services)

From: Anisha Viray, UW Student

Re: Overaward Acc't Balance

Hi Frannie,

I check email so infrequently and just now read your message! (I received the paper confirmation sent via snail mail.)

I appreciated all your help, patience and understanding while I repaid my overaward balance. In fact, I was able to repay it sooner than expected, considering my circumstances. You were always easy to reach and very attentive. Also, I found myself able to easily express myself and heard esp. during some of my most high-strung moments during some most unusual times in my world.

I imagine you must work with many students in devising a realistic re-payment plan which can be a little frustrating. As a student, my "sense" and value of money was definitely "off" at times. I think it takes just the right balance of firmness, aggressiveness, patience and flexibility. I think you do a great job!

Take care Frannie! And I hope you have a very, happy new year!

To: Kyra Worrell (Student Fiscal Services)

From: Cristal Magbag, UW Student

Re: HELP!

Hi Kyra,

Thank you so much for your help. I really appreciate the time that you took off just to reply to my messages and give me an insight as to what I could do. I hope to return to UW by this Fall. Til then, thank you and take care!

To: Ginny Montgomery, Christa Woodhull, Farida Ablang (Payroll)

From: Zene Tefera, Budget Fiscal Supervisor, Dean of Denistry, UW

Re: BARG CONTRACT: Mencarelli: SEPARATION

Thank you so very much Ginny; I made the OPUS change and I will do the Separation Form and forward to Payroll and Benefits tomorrow.

I always appreciate your help. I just want to add that Farida and Christa are the most wonderful people to work with. They have been of tremendous help over the years.

Thanks again and have a wonderful day.

To: Kyra Worrell (Student Fiscal Services) and Financial Aid

From: Vivian (Tina) Christian, Transfer Services, Educational Planning, Career & Advising Center, Green River Community College

Re: Meet the UW at GRCC

I just wanted to thank all of you again for doing such a great job engaging with our students, faculty, and advisors. I know it was a lot of work for you all to coordinate your schedules to be here and we really appreciate it! Thank you Peg for bringing it together and we look forward to next year's "Meet the UW Day."

To: Barbara Schielmann (Travel)

From: Jeffrey Roxas, Fiscal Specialist, Medical Education and Biomedical Informatics

Re: copy of 447581

Hi Barb,

You are welcome!!! You are really an awesome person. If everybody that works in the University is just like you…everything will be smooth sailing. There won't be any problem. Folks like you make the job faster and easier. Thanks so much Barb and have a nice day!!!

To: Nicole Flagg (Grant & Contract Accounting)

From: Ruby Barcega, Administrator, Department of Anesthesiology

Re: PER project deadline 2/28/09

Thanks Nicole.

We really appreciate your very quick response.

Following email above…

To: Nicole Flagg (Grant & Contract Accounting)

From: Sam Sharar, MD, Professor, Department of Anesthesiology

Re: PER project deadline 2/28/09

Me too, Nicole – your turnaround on this was amazing… and saved my bum. Thanks.

To: Wayne Sugai (Treasury)

From: Martha Somerman, DDS, PhD, Dean, School of Dentistry

Re: Summary of financing agreement meeting

Wayne,

Thank you so much for this well crafted review and careful explanations of the process as we move forward. This is very exciting for us and I know will be a great resource for oral health care for children in the community.

To: Ping Tan (Treasury) and Treasury Office

From: Dvorah Oppenheimer, Financial Administrator, Jackson School of International Studies

Re: request for chg to endowment procedures

Ping,

So nice to hear from you. I did get an email back from Alana. I was just reflecting on what a great crew you all are at the Treasury Office.

I am not feeling too wonderful about the budget cuts. But today is Friday and it is sunny outside.

To: Ann Sarna, Alana Askew, Lisa Edlin, Ping Tan and Judy Peterson (Treasury)

From: Holly Tobosa, Assistant Director, Endowment Stewardship, University Advancement

Re: thanks for Holly Tobosa

…You all have been nothing short of patient, kind, and best of all, well-humored, since day-one, and I am ever grateful for that. You have such full plates- and I imagine the stress level and workload are at all time highs right now, yet you wouldn't know it from how responsive and helpful you are to me, and all of my advancement colleagues. It's that level of service you exemplify that pushes me to want to do my job better and better.

So, if I may, thank you all – Please know how much I appreciate you.

To: Kristen DeFries

From: Eileen Seese, Program Manager, International AIDS Research and Training Program, UW

Re: Marisa Honig (Grant & Contract Accounting)

Dear Kirsten:

I wanted to send you a long-overdue note to let you know how much we have appreciated working with Marisa Honig, our primary contact person on Team 3. As you may remember, Fogarty awards are a bit out-of-the-box and continually present unique challenges. Marisa has always been extremely responsive and patient, not only with thorny Forgarty issues but also with my own questions.

I could give you many examples of how Marisa has always been willing to go above and beyond for us, including her work from home during a family emergency last fall. She kept in touch with me long distance, while she was working on the FSR due to Fogarty in September. (We were waiting for a supplemental award which Fogarty's grants management specialist said she would withhold until the FSR was received. The FSR went out on time, and we go the supplement!)

Along with many others at the UW, my workload has grown increasingly demanding and complex. I have come to really value the enthusiasm, graciousness, and patience which Marisa has consistently shown. It is people like Marisa who get me through my busy days with a little patience and graciousness myself!

I hope that this message finds you well.

To: Wayne Sugai (Treasury)

From: Lanie Ralph, Senior Construction Manager, Capital Projects Office

Re: Pediatric Dentistry ECOH project financing agreements

Thanks Wayne for all your hard work getting this agreement signed. Hence we were able to get the contract executed for the GC/CM (Bayley) without delay. Much appreciated by the project team.

Kudos to you!

To: Tami Sadusky

From: Lawrie G. Robertson, Director, Finance & Administration, Dean of Public Health, UW

Re: Michael DeShazo (Grant & Contract Accounting)

Tami:

I want to express on behalf of the Society of Research Administrators International and the Co-chairs for the 2009 SRA International Annual Meeting in Seattle how deeply we appreciate the abundant talents, energy, creativity, and assistance Michael is contributing to enhancing the profession of research administration. His accomplishments and contributions are amazing. He is so committed to continuous learning, personal growth and development, thinking outside the box for truly novel and innovative ways of working more effectively which is coupled with a level of high integrity and determination to help others. He is truly making a significant difference to us all from his creating of the CRA study groups to serving as a program content track leader and valued speaker, he is truly stellar. Thank you for sharing these talents with us and I know that your investment will be returned several. I am not sure when one finds time to sleep, but we are so glad to have him on our planning team.

All the best.

To: Tami Sadusky

From: Patrick Allen, Assistant Director of the Turing Center, Grant & Contract Manager, Computer Science and Engineering

Re: Michael DeShazo (Grant & Contract Accounting)

Tami,

I just wanted to drop you a quick note to recognize the outstanding effort of Michael DeShazo. Michael has been a tremendous help navigating through some thorny issues DARPA contracts and a large-scale ARO grant for my group. We often get too busy to make the time to recognize great effort so I wanted to do so while it is still fresh in my mind.

To: Cecilia Pittman (Grant & Contract Accounting)

From: Thuy Truong, Budget/Fiscal Unit Supervisor, UW Department of Neurological Surgery

Re: thank you

Cecilia,

I am writing this to express my appreciation of your assistance last Friday with the problems on our training grant.

The biggest help you were was listening to me and understanding what the problems are and what need to be done. You are very dedicated, professional, caring, helpful and understanding.

In short, you are the kind of person which a lot of people hope is on the other end of the phone when we call, knowing, the assistance is there and the confidence is there.

Again, your time helping me is very much appreciated.

To: Nancy Linde (Grant & Contract Accounting)

From: Eileen Chin, Budget/Fiscal Analyst, Laboratory Medicine, UWMC

Hi Nancy,

Thanks so much for your help yesterday. You make everything seem so painless!

To: QRAM/OSP/GCA

From: Maxine Smith, Grant Manager, Department of Pediatrics, Pulmonary Division, UW/Seattle Children's

To QRAM/OSP/GCA:

Your office and our financial offices do such a great job. I know you get many emails but I just wanted to say that. As a long time UW employee I'm just so proud of what we do together with the guidance and efficiency of your office and our financial offices to get things done.

To: Al Larsen, Ann Guss, Janet Bissonette (Grant & Contract Accounting)

From: Mary Heusner, Director, Research, College of Engineering

Re: GCA FAQs

This GCA FAQ is really GREAT! I just went into the invoicing section and it's very clear. I know it took a lot of time to write this up. Thank you to everyone in GCA who put time into composing this.

To: Al Larsen, Ann Guss, Janet Bissonette (Grant & Contract Accounting)

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

Re: GCA FAQs

This looks like it will be very helpful. Thanks for putting it together!

To: Grant & Contract Accounting

From: Karen Bergeron, Grants Manager, Biology

Dear OSP and GCA:

This is awesome award processing:

Feb 9: Harvard sent sub award amendment for Dr. Bergstrom's MIDAS project

Feb 11: Logged into Status Checker at OSP

Feb 19: Funding processed by GCA

There was a weekend and holiday between OSP and GCA – so it took just a little over

5 business days at UW to process.

Thanks!

To: Tami Sadusky

From: Maxine Smith, Grants Manager, Pediatric Pulmonary Division, Seattle Children's Hospital

Re: Alice Bukengolts and GCA Team 5 (Grant & Contract Accounting)

Tami,

I just wanted to make a comment about Alice. I think she does a wonderful job. I have periodic contact with her throughout the year and then I work with her on the closing of our HRSA/MCHB training grant--the one you guys have such difficulty in working with HRSA on (Redding-PI). I have felt very much supported by her. She keeps her word to get back to us and follows through with what she says she is going to do. She is professional and caring.

When I think about it, I think all of the Team 5 members that I have worked with have been excellent and I just thought I'd take a moment and say so. Thank you!

To: Stepanka Ruzickova (Grant & Contract Accounting)

From: Tara Trowbridge, Budget/Fiscal Supervisor, Pulmonary & Critical Care Med

Stepanka-

You're the best!

In reply to email above.

To: Tami Sadusky and Kirsten DeFries

From: Monica Fawthrop, Administrator, Pulmonary & Critical Care Med

Re: Stepanka Ruzickova (Grant & Contract Accounting)

Tami and Kirsten –

Please see Tara's note below – I heartily agree. Stepanka really goes above and beyond and is always willing to help out. Thought you would want to know.

To: Lily Gebrenegus and GCA Team 4 (Grant & Contract Accounting)

From: Gloria Escano, Financial Manager, Office of Intellectual Property and Technology Transfer

Hi Lily,

This is to let you know that I will be retiring at the end of the month, Feb. 28, 2009. It has been of great pleasure to have worked with you all those years. You have always responded to our needs on a timely manner. I deeply appreciate all the help you have extended us.

Again, thank you for everything and to your whole staff (Team 4)--truly a great team.

To: Michael DeShazo (Grant & Contract Accounting)

From: Erik Lee, formerly of Electrical Engineering

Hi Michael,

Thank you for the speedy help and follow-up. I copied Tami to let her know that I am extremely impressed with your professionalism and thoroughness on short-notice and without delay.

Thanks!

Kudos (cont'd)

To: Lily Gebrenegus, Amy Liu and Ted Mordhorst (Grant & Contract Accounting)

From: Wendy Star Smith, MBA, Administrator, Center on Materials and Devises for Information Technology Research

Re: Grant and Contract Fiscal Administration 1 class

I just wanted to say THANKS for the great class - you three did a fantastic job - I think it's one of the best UW classes I've taken so far.

Below are comments from the August 2008 Payroll Customer Service Survey sent to payroll coordinators across campus regarding the Payroll Office.

Question 10: In what way has Payroll exceeded your expectations?

If the contact I make doesn't have an answer, rather than guessing, they call me back with the right answer. I never have to worry that the answer is incorrect or half-accurate. They are a quality team.

From my experience working with other central departments and listening to my co-workers experiences with central departments that I don't work with, I feel that Payroll is the most competent and customer service department on campus – period.

Given the multitudes that are paid at the University and the complexity of the Payroll system, I applaud the payroll employee's abilities to give such courteous attention.

Improved in services from the past and with a friendly attitude.

In all ways listed above – they are courteous, very helpful, and very informative.

Inquires are being processed in a timely manner with high degree of customer service.

Payroll staff have always been courteous and I appreciate they accept my questions without making me feel bad for not knowing how to do something.

Staff is knowledgeable and friendly. They are always willing to help with my crazy questions.

The Payroll employees are very knowledgeable about a payroll system that is difficult and sometimes makes no sense. They know how to work the system to get the job done.

The payroll team is helpful in every way; they are able to answer all of my questions. They are great people!

They are able to understand me, even when I'm unfamiliar with the processes and may not be explaining my problem in the best way.

They are the benchmark to which all other service departments should aspire. They are prompt, accurate, and friendly. They are constantly involved in process improvement projects.

Question 12: If there are any other comments or suggestions you care to share, please add them below.

Do you have a job opening in the Payroll Office? With the kind of top notch quality care Payroll staff possesses, I will be proud to be part of UW main payroll office.

I have a great time talking to everyone in Payroll. Over the years, you feel like a family. Most importantly, they have been a great source for information, and help.

I rate the Payroll Office as the #1 central office on campus. More departments should strive to work as effectively and efficiently.

I say this each time I'm asked: I cannot believe how much work such a small office is able to do. You are great!