## Letter from the Editor By Jeff Slater

Boo!

Welcome to the “Spooky” issue of New Directions! From the SFS Sustainability Team’s commitment to streamlining processes and reducing waste, to the practice of virtuous conformity in Treasury’s Internal Lending Program; from the recent ASTRA rollout in Payroll, to a sampling of world cuisine at last month’s “Bite of Diversity,” it seems that everyone in FM is busily engaged in making order from chaos, form from function, harmony from dissonance: engaged in acts of everyday demon-taming, you might say.

So we hope you make some time to cozy up with a mug of hot cider and a dish of candy corn, disregard, at least for a while, the plaintive distractions of ghouls, goblins, or poltergeists, and enjoy learning about and celebrating what we’re up to this winter.

## In This Issue

## Headlines: The Rime of the Ancient Marina By Steve Kennard

The running joke we told ourselves about the UW's "ancient" Marina down on Boat Street was that the only thing keeping it afloat was all the boats tied to it. Those of us in the Real Estate Office who spent the last seven years ensuring it stayed afloat long enough to give Capital Projects a chance to rebuild it would repeat the joke to each other, sometimes nervously, each fall as we watched the summer ski-boat tenants disappear (like we wished the geese would do) and with them all our reserve buoyancy.

We knew that the Marina's intended floatation—old growth cedar logs—were sinking deeper every day in the water in which they'd been submerged for most of the 20th Century. Most of these logs were probably cut in the Lake Washington watershed sometime late in the 19th century and most likely arrived soon after at the University's waterfront porch, floated via the new Portage Bay Log Canal, now known more commonly as the Montlake Cut.

A different and drier fate awaited most of the other logs that took this route—they were rafted and tugged to one of the many sawmills on Lake Union and Portage Bay. Our logs avoided this fate, for a time anyway, and despite the years floating in the bay remained mostly sound and free of rot. They were preserved it seems by the same cold water that threatened now, in the 21st century, to finally sink them. Obviously a sinking Marina is about as valuable an asset as a collapsing building—the only way to preserve the University's investment in this real property was to find the funds to replace the Marina. The Real Estate Office is responsible for managing several classes of real property assets including those, like the Marina, that the University owns but does not occupy. This class of assets is self-sustaining, which means all costs, including operations, maintenance, capital improvement and replacement are borne by the asset. By the end of 2003 the Marina had generated adequate capital reserves for Real Estate to work seriously with the Debt Dudes (aka UW's debt financing team) on terms for an internal loan.

All I can say about the terms of the internal loan program is that I'm grateful for the endless challenges and delays associated with waterfront permitting. These issues stretched our project design period to four years, and these four years bought Treasury valuable time to launch the Internal Lending Program (ILP) and made it possible for the Marina to borrow enough to pay for all the additional costs caused by those seemingly endless delays. Hey, I know my reasoning is a bit circular, but what do you expect? I'm in Real Estate.

Ultimately both a brand new Boat Street Marina and Treasury's brand new General Revenue Bonds were successfully floated. We were proud to be an ILP launch customer and pleased to be 95% leased in the first month of operation. The Marina opened in March as the capstone of a portfolio of waterfront development that we hope will not only be a source of enjoyment for the University and its community but also an example of the University's commitment to enhancing both the built and the natural environment.

Below find the highlights of the portfolio development project:

**Amenities**

Boat Street Marina and Agua Verde Cafe. The rebuilt marina provides safe, modern, convenient moorage slips for rent in a prime location with easy access to Lake Washington and Lake Union. Agua Verde Café & Paddle Club offers water views with a full menu, a coffee bar and more.

Paddle Club Launch Dock. An enlarged and greatly improved kayak launch facility has been constructed at the west end of the marina, where the expanded Agua Verde Paddle Club operates a popular kayak rental business. This custom built dock system will allow the Paddle Club to serve more customers with greater comfort, safety, and efficiency.

Small Boat Launch. A public-access hand-carried boat launch is now located at the east end of the site as a public amenity. This fulfills a long-standing obligation of the University to the City of Seattle as part of negotiations for the realignment of 15th Avenue NE, which allowed construction of new Oceanography and Genome Sciences (Foegy) buildings in that area and created Sakuma Viewpoint. Visitors can launch their kayaks, canoes, and rowboats from its custom low-freeboard floating dock in protected waters.

Restrooms. New restrooms were constructed adjacent to the Paddle Club office to replace the Marina's portable restroom. These restrooms have showers and serve both the Marina and the Paddle Club customers.

## Headlines: The Rime of the Ancient Marina By Steve Kennard (cont'd)

**Environmental Benefits**

Long Lasting Docks. The new Marina dock floatation system is constructed of welded sections of High Density Polyethylene (HDPE) pipe which is expected to last longer, with less maintenance costs than any other recreational boat Marina flotation system available on the market today. HDPE is recyclable and will remain so for many years (HDPE plastic milk jugs are commonly recycled into such things as fleece clothing and plastic lumber).

Reduced Shadows. The new dock surfaces are made of plastic grating which reduces "shadows" by allowing 40% of natural light to penetrate to the water. Shadows threaten endangered salmon by providing hiding places for predators.

Reduced Pilings. The new Marina has 63 steel pilings, compared to the old Marina which was held in place by 156 wooden piles. Piling reduction benefits endangered aquatic species.

Recycled Logs. Floating cedar logs supported much of the old Marina, including a floating office building that was beyond repair. Many of these logs have been milled into usable lumber and some whole logs were used for stream enhancement programs and beach restoration projects administered by the Department of Fish & Wildlife and State Department of Natural Resources.

Shoreline Restoration. Approximately 140 linear feet of concrete bulkhead have been removed and replaced with a shoreline restoration area. This includes a naturally sloping bank planted with native species plants.

Pump-out Station. A new black water pump-out station is provided, funded largely by a state grant through the Washington State Parks Department.

## Headlines: Cash Handlers of FM Unite! By Sandie Rosko

If cash is king, then up-to-date information about cash handling procedures is surely some part of the royal family. Many Financial Management units, from Student Fiscal Services to Grant and Contract Accounting, need to know about cash management processes to perform their jobs. In the past, the information was out there, but it often took a bit of hunting to find what was needed. Web sites provided information and procedures but were often hard to locate. Sites would reference processes of other departments but information was not always updated. Information was confusing and could be contradictory.

As recent audit findings revealed issues around cash handling, representatives from Financial Services, Financial Accounting Grants and Contracts, and Student Fiscal Services did a review of information on their web sites and it became apparent that a "face-lift" was needed. The goal was to create a single web presence where all procedures for dealing with cash could be found. The procedures needed to be up-to-date, accurate, and easy to understand. The outcome of this effort was a new web site for cash handling procedures: http://www.washington.edu/admin/finmgmt/sfs/cash/cash.html.

This website was piloted with key departments and their reaction was overwhelmingly positive. Cash handling training sessions have been scheduled with times and locations listed on the website. There is also a special email address for any questions around cash handling procedures: cashmgmt@u.washington.edu.

We welcome any comments /suggestions you may have about the website. Please direct them to Sandie Rosko (sandier@u.washington.edu). Enhancements will be made on an ongoing basis as input is received from others.

## Headlines: Scary Good! – A Motivating and Inspirational FMEIT Retreat By David Wright

On September 18th and 19th, Financial Management's Executive Improvement Team (FMEIT) held its 19th annual retreat at the UW's Pack Forest Conference Facility. Under the dazzling radiance of an unusually warm autumn sun, the group engaged in study and activities focused on becoming more motivating and inspiring leaders.

All FMEIT members received 360 Extraordinary Leadership feedback over the last year. The results were combined to collectively evaluate leadership team results. In a prior exercise using good process improvement techniques, the behaviors Inspiring and Motivating rose to the top of the leadership team priority list. The Extraordinary Leader companion behaviors associated with Inspiring and

# Headlines: Scary Good! – A Motivating and Inspirational FMEIT Retreat By David Wright

Motivating align nicely with FM Leadership Qualities. Therefore, this invigorating retreat focused on building skills highlighted in our 360 feedback.

There are 14 members of the expanded FMEIT, half of whom are new to the team. The newest member, the new director of Purchasing, Dennis Gawlik, attended the retreat even though he was not yet scheduled to begin in his employment.

Beautiful weather greeted early arrivals, some of which chose to go on nature walks in the late afternoon, exploring the natural beauty of the forest, and no doubt contemplating their assignments for the kick-off evening event.

Convening in Pack Hall after a hearty northwest dinner, attendees shared an experience, a story or a person that they found inspiring. Many wonderful examples were presented in a number of very interesting ways, from a life changing personal experience to a children's story with special significance. It was very powerful, and set a tone for the retreat.

After a good night's sleep in rustic accommodations, a course was set to discover the crucial elements that signify inspiring and motivating behaviors. Cheryl Hawley and Ruth Johnston lead the energetic conversation, exploring leadership attributes by using following the "Inspiring & Motivating Competency Companions":

- Acts as a role model in the organization
- Adapts influence strategies to individuals
- Creates a learning environment
- Sets high personal standards
- Innovates
- Keeps the team informed
- Ensures agreement on priorities
- Creates a compelling vision
- Demonstrates concern and consideration for others
- Empowers others to take responsibility for projects

It is only possible to be inspiring for so long without needing a team building exercise, something FMEIT veterans call Hoopla. Hoopla is equal parts creative, collaborative and wacky to accomplish a goal. Most notable of these exercises required designated teams to make something beautiful using one piece of paper and anything else found in the outdoors. The stunning results demonstrate the effectiveness of synergy.

Following the vigorous regimen of the day's activities was an evening designed to strengthen relationships. After a few rounds of ping pong in the outdoor shelter, the group retired (with favorite beverage in hand) to the fire pit where a raging blaze illuminated and comfortably warmed attendees as they talked through the night. After debriefing and work related talk, members of the group took turns responding to questions like: "Who from the past or present would you like to be stuck in an elevator with, and what would you ask them?" The responses proved enlightening and a little strange in some cases, but this type of productive social interaction is vital for building trust, camaraderie and deepening relationships for effective teamwork.

Team exercises demonstrating inspirational leadership continued on the final morning, and then the group focused on next steps for incorporating what was learned into future actions. Much of what was accomplished at the retreat involved critical thinking about behavior. To be inspiring and motivating leaders must walk the talk, but only feedback indicates true success. Listening is essential.

"Inspiring and Motivating" is the theme for the coming year and there will be more conversation about this at all levels within Financial Management.

Financial Management Executive Improvement Team Members

Ann Anderson—Controller's Office
Barbara Benson—Records Management Services
Sue Camber—Financial Management
Cristi Chapman—Management Accounting and Analysis
Kati Folk-Way—Creative Communications
Jeff Follman—Financial Management
Cindy Gregovich—Payroll, Travel, and Records Management
Cheryl Hawley—Strategy Management
Cathy Hoggan—Creative Communications
Karen Long—Financial Services
Eric Mosher—Creative Communications
Sandie Rosko—Student Fiscal Services
Tami Sadusky—Grant and Contract Accounting
David Wright—e-Commerce

## Headlines: Scary Good! – Transition Terror! The Massive Move to Office 2007 and Outlook Exchange Server By Michelle Lynch and Sam Senturia

As you read this article it is likely fresh in your mind what it was like to upgrade to Microsoft Office 2007 and convert to the Microsoft Exchange server (Outlook email and calendaring). You may still be asking yourself, why? One reason is to bring our operating software up-to-date but also to improve the way we do business. While learning something new is often frustrating, we've heard many individuals are beginning to appreciate the efficiency it brings to their work. One example of this new efficiency: the email notification when someone is requesting your attendance at a meeting.

UW Exchange provides an integrated system of managing email, calendars, tasks and contacts. Our division is one of the first to convert to this system on campus and has provided some lessons learned for other divisions. UW Exchange is also tightly integrated with Microsoft Office products. For example, if you are reading email through remote access and a message has an Excel attachment - you can view the attachment even if the computer you are using does not have Excel installed.

A huge THANK YOU goes out to the team that worked to make this conversion as smooth as possible. This group shared helpful hints with each other and practiced patience and flexibility during this process.

Creative+Communications—Scott Lacey and Sam Somphet
Grant & Contract Accounting and Equipment Inventory Office—Brian Baldwin
Management Accounting & Analysis—Laurent Anstett
Payroll—Tammy Garcia
Purchasing, Financial Accounting and Financial Services—Mary Jane Mackay
Records Management Services—Barbara Benson
Risk Management—Angie Krittenbrink
Strategy Management Group—Michelle Lynch
Student Fiscal Services—Jeff Peterson
Travel—Teresa Crisostomo
Treasury and the Senior Vice President's Office—Sam Senturia

Internal Audit also converted last summer and the Facilities Division will be the next area to go through the conversion, led by Bob Johnson and Dustin Brewer.

As Treasury was the first group to convert, Sam Senturia provided those of us following with several helpful tips (such as don't delete the email notification regarding a meeting without taking action or the meeting will be removed from your calendar!). Brian Baldwin and his team also put together some terrific step-by-step instructions for setting calendar permissions in Outlook.

Of course, our Nebula Support Team led by Marcus Hirsch along with Greg Shymko and Bill Shaeffer; and each department's Nebula contact: Lisa Jones, Kay Lutz, Kellie McComas, Bill Swann and Tobin Wood answered countless calls and made multiple visits to make sure all was working well. Rebecca Galloway, also on the Nebula team, set up classes for both learning the basics and advanced calendaring for those staff who manage multiple calendars.

## Headlines: Fear of Change and Strategy Management By Dan Druliner

Many people fear change. Human beings are creatures of habit and find comfort in the familiar. But there inevitably comes a time when it becomes clear that change is necessary because the old ways of doing things stop working.

It may be that our fear of change stems not so much in relinquishing our old ways but from being in that uncomfortable middle place, between the known past and the unknown future. Author Marilyn Ferguson describes it well: "It's not so much that we're afraid of change, or so in love with the old ways, but it's that place in between we fear…it's like being in between trapezes. It's Linus when his blanket is in the dryer. There's nothing to hold on to."

So how does F2 promote change when so many are naturally averse to it? By creating a new department named Strategy Management (SM) in October of 2007 with the following mission: "SM manages strategy and facilitates change across Finance and Facilities, by supporting development of our people, managing our business performance, communicating our value, and leading strategic university-wide projects and programs."

## Headlines: Scary Good! – Transition Terror! The Massive Move to Office 2007 and Outlook Exchange Server By Michelle Lynch and Sam Senturia (cont'd)

### Leadership

The SM team finds its leadership in Ruth Johnston, Associate VP for Strategy Management. Dr. Johnston's extensive background in human relations and organizational development and her keen interest in strategy management, measuring effectiveness and implementing change makes her a dynamic champion for the our team.

### Training

One of the first goals of SM is to train employees how to change. Employees must have an awareness of how changes to process inputs affect the quality of the product or service they deliver, and they must be given tools and resources to measure and evaluate the effects of the changes they implement. Training such as Introduction to Quality Awareness, Process Improvement (PI) and MBTI personality assessment helps F2 employees develop the skills they need to collaboratively improve their work processes. SM staff members Cheryl Hawley, Jeanne Semura and Shelley Tennant develop, coordinate and schedule a variety of organizational development training with and for employees across Finance & Facilities.

### Metrics and Reporting

SM also assists F2 employees in gathering the information needed to evaluate how change affects the larger organization. Providing additional services may improve customer satisfaction but service improvements without consideration of effects to the bottom line won't keep customers happy for long because business units can't operate indefinitely in a financial deficit.

Change must therefore be implemented in a balanced way so that impacts to other business perspectives can be addressed. The Balanced Scorecard provides a model for evaluating how change affects the whole organization. LuAnn Stokke and Vincent Lau of SM's Metrics and Reporting team help F2 employees use tools such as the balanced scorecard and business dashboards to collect, measure and monitor data about organizational change and its effects on business processes, customer satisfaction, employee learning and growth and our financial bottom line.

### Projects and Programs

As F2 employees become comfortable with the tools provided through organizational development and training and recognize the success of their process improvements efforts in their balanced scorecards and dashboards they naturally become motivated to take on more complex processes. But tackling large intra-departmental projects often requires specialized skills in project management and facilitation. SM employs a team of facilitators and project managers to help F2 teams manage the complexities of these larger process improvement projects. SM employees Jeanne Semura, Elise Davis and Susan Freccia provide facilitation and project and strategy management for various units across F2.

In addition to lending assistance on individual projects, SM also provides support to ongoing university-wide programs such as the Business Diversity Program (BDP) and the Office of Environmental Stewardship and Sustainability (ES&S). In return Shaun Spearmon and Lynn Beck of the BDP and AJ Van Wallendael of ES&S provide broad and diverse business and environmental perspectives to the SM team.

### Communications

Knowledgeable employees and efficient processes can't help our customers if our customers can't find us or request our services. Dan Druliner provides F2 employees with web management expertise to make our websites more usable to our customers. And to help our stakeholders describe our value to UW community, administrators and legislators, project manager Debby Seaman is building the story of the successes at the University of Washington through her work on the Washington State Quality Award.

### Support

And any great team is only as good as the support it receives. SM gets its support from Office Manager Rae Ann Laubenstein, a skilled administrator who receives valuable assistance from student interns Aubrey Batchelor, and Krystal Kurokawa.

Through its leadership in employee development, measurement, management, communication and support, Finance & Facilities' Strategy Management team helps F2 employees embrace change and respond to it as an opportunity for continued excellence.

"It is not the strongest of the species that survive, nor the most intelligent, but the one most responsive to change." — Charles Darwin

"The entrepreneur always searches for change, responds to it, and exploits it as an opportunity." — Peter Drucker

"Change is inevitable - except from a vending machine." — Anonymous

## Headlines: From The Depths of the VOE By Christa Woodhull

You make enough monthly. You're wasting your money on renting. You're paying someone else's mortgage when you should be paying your own. What are you thinking??

What ARE you thinking? You're thinking it's time. Time to start looking at houses or condos. Time to become a "first time home buyer." The thought is nerve racking. Your brain is swelling with thoughts. If you find something, and you get approved, what do you do then? You submit an offer, and wait. The waiting is vicious. Tick tock tick tock. Finally, your offer was accepted, now you need to get the money from the bank. Awwwwwwwh! You meet with the bank. They find out you work for the UW and need more information. They have you sign a release of authorization form. What does this mean?? You feel the goose bumps as you head deeper and deeper into the "Mortgage Verification Zone." Dee dee dee dee dee dee dee dee.

It's late Friday afternoon. It's been a long, long, strenuous and frightful day. The hands on the clock seem to be ticking backwards. Your nerves are trembling, palms are drenched from sweat. You sit waiting for that screeching, ear piercing sound. Or better yet, the ring of the telephone. "No! No! Please not me." The sound is crippling almost overbearing as it blurts out from the receiver…"BRINGHHH BRINGHHH" "AWWWWWWWWWRRRRRRR! Please someone save me. Calgon take me away!" you scream. It's too late. You've answered it. "Payroll Office, this is Vanessa." You've done it. You've fallen victim to the verification phone line black hole. One company wants this piece of information, one wants that piece of information, another wants it all. You sound like an evil broken record. The forms- they are all the same little creatures nibbling at your brain. You can't take it anymore. "Why? Why?" you rant in horror. "Why won't these verification monsters stop attacking me? My ears are bleeding, my lips are cracked and split from the constant nervous chewing each time I hear a ring. My hand aches in arthritic pain." You want it to stop so badly but what can you do? How can you get these wild beasts to understand you provide only certain information and that all their requests are typical of each others? You need to provide them with correct and accurate information in order to tame their wild antics. Duh da duh! The University of Washington Payroll Office to the rescue! Never fear, the new UW Payroll Office Employment Verification form is here.

Employment Verification Background

The University of Washington Payroll Office receives a large variety of Employment Verification requests. The verifications come in from apartment companies, third party companies, financial institutions, other employers and even credit companies. Each one of which provides their own form requesting certain information: dates of employment, monthly salary, job title, year to date salary information, and status.

Process Improvement

Back in 2006 a team was formed in the Payroll Office to take a look at the current verification process and streamline it to be able to provide consistent and accurate information to each company based on the Privacy Act of 1974. The team compiled the different request forms and found that most were requesting the same employment information: employment period, job position, base salary and full/part time status. Since salary information is specific, employees must provide Payroll with a signed release form authorizing release of their salary to the requestor. The outcome would be to create a standardized UW Payroll form for employment verification. This form would be called the Verification of Employment or VOE form.

New VOE Process Memo:

http://www.washington.edu/admin/payroll/pdf/NewVOELetter.pdf

UW Verification of Employment Request Form:

http://www.washington.edu/admin/payroll/pdf/VerificationPI.pdf

Taking in to consideration the general information each company had been requesting and of course the best interest of the employee, the VOE form was created and implemented in a beta test period February/March of 2008 and eventually pushed live as of June 1st, 2008. Every verification request is filled out and returned using this new form with the exception of mortgage verifications and Housing and Urban Development (HUD) verifications, which require more detailed information. Companies that continue to use their own form receive the requested information filled out on the UW form accompanied by a memo briefly explaining the new procedure. As quoted below, reactions from Payroll to this change in procedure have been very positive.

"I appreciate companies using our form because it expedites the process and our form is straightforward on what it is we can provide. They can always call us if they need more information. I really appreciate companies cooperating because it makes my job go more smoothly and I can accomplish a lot more," says Vanessa Posadas, Employment Verification Specialist in the Payroll Office.

## Headlines: From The Depths of the VOE By Christa Woodhull (cont'd)

"It's truly been a blessing. Companies have been very supportive and cooperative in using the new VOE form. The team put a lot of effort in to creating a form that would help us provide consistent and accurate information to customers. We still have a few companies out there we are working with to streamline our form a little more for them," explained Christa Woodhull, supervisor of the verification area. The new form has streamlined the employment verification process. It has made it easier for companies to request information and for the Payroll Office to provide consistent information on each employee

## Headlines: Taking a Bite of Diversity By Cheryl Manekia

Financial Management was able to taste diversity…literally. On September 30th, the FM&T Diversity Team sponsored "Bite of Diversity" in the Ethnic Cultural Center. The event started at 11:30am and there were still plenty of edible treats left over when the event ended at 1:30pm. Over 60 participants brought in dishes that included pot stickers, Persian cookies, paella, and down home red beans and rice.

Over 100 attendees sampled Chinese dumplings and Asian barbecued pork with 3 types of dipping sauces. Several of the dishes included recipes for attendees to write down in case they want to make them at home. "You have to try this!" was heard several times throughout the event as attendees perused the tables. Tables categorized by continent, Asia, North America/Africa, Europe and South America, were overloaded with delectable representation.

An atmosphere of community and togetherness was created as staff mingled and networked with each other and asked questions regarding not only the food, but also about culture. The Diversity Team works diligently to bring cultures and customs to the awareness of the division and the Bite of Diversity was a great way to experience this.

## Innovations: ASTRA Alleviates Access Angst By Ginny Montgomery

Like lost souls floating down the river Styx, the email requests and questions for systems access just keep coming. Do the requestors want their staff to be able to update or only inquire? Do they want access for both Exception Time Reporting and Positive Time Reporting? Is there a different New Hire Coordinator? What about the person who just left the department? Have they been removed? Help!

Setting up access for systems can be very scary! While most departments only have one system, in the Payroll Office there are four systems and enough different system actions to make you break into a mad run, screaming wildly. Thankfully, there is an oasis amidst all this terror, a safe house in an uncertain world… there is ASTRA!

ASTRA (Access to Systems, Tools, Resources and Applications) is the authorization system for almost all UW applications and systems. The Payroll Office is now using ASTRA to grant access to all online payroll applications. While the system is very user friendly, the volume of changes for all of campus is very scary at times. To alleviate the fear this generated in Payroll, the Client Services Team in the Payroll Office planned a rollout of ASTRA authorization at the department level. As there is safety in numbers, Payroll teamed up with Heidi Berrysmith from the ASTRA team and Marisa Graudins and Jean Swarm from Human Resources to train on the authorization process for the payroll applications along with the Online Work/Leave System (OWLS).

In the spirit of getting the hardest part of out of the way first, Payroll chose to begin with the medical centers. With their complicated system of centralized and decentralized departments and the workload split between their HR and Payroll Offices, the discussions with these units were quite detailed. When the sessions were successfully completed, the Client Services Team began to relax a bit. The shrouds of darkness were beginning to fade!

With only about 378 more departments to train, the light at the end of the tunnel was drawing nearer. So, on and on they worked. They scheduled two levels of trainings, one for those with ASTRA experience and an extended one with a complete introduction to ASTRA. As departments completed these sessions, the Payroll Office granted them authority to create Users in their departments and slowly, the number of authorizations held by the Client Services Team began to diminish.

It's now safe to visit the Payroll Office once again. The trainings continue, the departments take ownership of their own authorizations, and Client Services Staff is free from the fear of their emails.

## Innovations: Conformity is a Virtue: Standardizing Auxiliary Unit Financial Statements By Chris Malins

Sometimes it's good to be a non-conformist. Wearing clothes that are a little different, listening to music that others don't and thinking outside of the box. All of these are the attributes of a non-conformist. But think about it, would you want your accountant to be a non-conformist? Would you want your financial statements to be free-spirited? Probably not. A key word in accounting is "comparability", which means that financial statements need to be similar to each other, so that an investor or interested party can see how one company (or university) is doing compared to another. Conformity is a reassuring word in the accounting profession.

For many years, the UW has produced financial statements that are in accordance with generally accepted accounting principles (GAAP) and the reporting requirements from the Governmental Accounting Standards Board (GASB). Doing this allows UW's financial statements to be compared to other schools and can provide reliable financial information to granting agencies, legislators, and donors.

For many years, self-supporting entities like the UW Medical Center, Husky Sports, Housing and Food Services, and Transportation Services have been non-conformists. In the case of the Medical Center, this is ok, since the financial statements that they prepare are used for comparison with other academic medical centers. But for the other self-supporting units, this non-conformity was a by-product of covenants made to bond holders to produce audited reports. This variance in the type and amount of reporting that each unit did made it difficult to understand how they were actually doing financially.

This is where the newly created Internal Lending Program comes in (see the New Directions Winter Spring 2008 issue article called "Internal Lending Program Launches" for details on the ILP). Under this program, all borrowers will need to provide the same level of reporting in order to access capital for construction projects. To facilitate this process, the Debt Financing Group in the Treasury Office has been working with borrowing units and their auditors to

## Innovations: Conformity is a Virtue: Standardizing Auxiliary Unit Financial Statements By Chris Malins (cont'd)

be sure that beginning in fiscal year 2009 (the period ending June 30th, 2009), all self supporting units will have the same reporting format as the UW as a whole.

Deciding to do this and actually accomplishing it are two different things. There is still much work to be done between now and June of 2009 to assure that a smooth transition is made to the common format. There are system, accounting, and even legal issues to be resolved. In the end, though, the goal will have been achieved when a person who understands the UW's financial statements can also understand the self supporting unit financial statements. When all of these non-conformists finally conform, the accountant in all of us can sleep a little sounder at night… even though there may be ghouls lurking around outside.

## Innovations: Doctor Frankenstein at Work in Purchasing: Procurement Guide given New Life on the Web By Kathryn Harrington

Procurement Services customers long bedeviled by the fiends of confusion, take heart! Your respite from the waking nightmare of indecision is at hand. What could be simpler? At the click of a mouse, order out of chaos! "Too good to be true!" you say? Try it for yourself. We have thrown the switch on the new Procurement Guide to Goods and Services and – it's alive!! The fetid corpse that was the old purchasing commodity list has arisen from the dead in a glorious new form.

Authored by the forebodingly named Seamless PIT, it began as a mere specter in an isolated booth at BizTech. Customers from across campus caught a fleeting glimpse of what could be. It took the form of a model matrix that simply and succinctly showed them what procurement method was best for different kinds of purchases. And oh! The hue and cry; "Give us more!" the weary and distraught voices wailed. And, taking pity on the wretches, we listened. Then, to work!

With help from across all the units in Procurement Services, Elise Davis, Carla Helm, and Mark Conley performed the operation. Then we called upon Kevin Campbell, techno-wizard, to give it its final form. We infused the spirit of the matrix into the lifeless form of the commodity list and gave it life on the web. No tangled web this, but one of clarity! Now, our customers can easily reference what they need to buy and the Guide tells them what method to use; the Procurement card, eProcurement, PAS, or other purchasing methods. Witchcraft?! Strategic "Sorcery"?! Well, we're not saying… but we sent out the link to the Guide to over 6000 customers and the response has been overwhelmingly positive, and that "spells" success to us.

## Innovations: Creating a More Sustainable Office By Susan White

There's nothing scarier than a bleak future caused by wasted resources and global warming. A solution is within our reach, and it's neither frightening nor difficult: following the path of sustainability!

As we all know, the University of Washington is actively involved in creating a sustainable campus. Recently, the UW received an A- grade in College Sustainability Report Card. (http://uwnews.org/article.asp?articleID=43903 ). Our university is one of only 11 schools across the country to receive these high honors. Building on the long time tradition of UW innovation, as well as sustainability and environmental awareness, the Environmental Stewards team was created, which encompasses FM, Treasure and OSM (http://www.washington.edu/admin/finmgmt/qi/directions/jul08/innovations.htm ). This team was highlighted in the national publication "Cross Talk" in the article "Going Green":

http://www.highereducation.org/crosstalk/ct0408/news0408-washington.shtml

Using the Environmental Stewards very fine example, Student Fiscal Services (SFS) took the initiative to create their own team – forging a path for other departments to emulate and follow.

The newly created Sustainability Team's mission is to increase office efficiency by streamlining processes and reducing waste. That's every office's dream, isn't it? Streamlined processes…..minimal waste…….ahhhh, how beautiful that would be. SFS is lucky enough to have management supportive for making that a reality. When offered the opportunity, five individuals volunteered to be part of this team and lead their office to greatness! The team members are Mark Brady, Shannon Corcoran, Joanna Medina, Susan White (leader) and Ashley Zigler.

## Innovations: Creating a More Sustainable Office By Susan White (cont'd)

The team's effort has been focused on collecting data about the office's current situation. It was important to establish a starting point in order to be able to track progress over time. Data was gathered on purchases, expenses, transportation, and printing volume. It turns out that SFS is already very environmentally friendly when it comes to commuting. While no one rides their bike, only three people drive solo to work every day. Almost 60% of the office uses transit (bus/train/ferry) at least some of the time as a means to get to work. Now, if the team could just track down those three solo drivers……. We have also outfitted each desk with both a recycle bin and a confidential shred bin. Soon, UW Recycling will be coming to install recycle bins in our conference rooms and our kitchens.

The immediate goal for the office is to reduce the amount of paper being consumed. There are a lot of interesting facts out there about paper consumption. Here are some interesting facts from the Resource Conservation Alliance: The average office worker generates 27 lbs of paper a year, the U.S. consumes 4 million tons of copy paper annually, more than 40% of logged trees are used for paper, and old growth trees are 9% of that supply. These are some of the reasons that motivated the team to produce printing guidelines for the office. The guidelines include tips such as: use spell/grammar check, utilize print preview, print double sided and black & white, increase margins, decrease font size, email or scan documents when possible, and hold paperless meetings.

The team is off to a great start with lots of energy and great ideas. Keep an ear open as you are sure to hear great things about this team!

## Innovations: The Relationship Manager: Real Estate Office's (REO's) take on the Single Point of Contact (SPOC) By Jeremy Eknoian

Relationships. Commitment. SCARY!! It's no wonder some people shy away from commitments and relationships out of fear; there's fear of being hemmed in, fear of accountability and fear of not meeting the other's expectations. In our personal lives, this can mean staying perennially single and in our work lives this can mean missed opportunities to connect with customers, provide clients with exceptional service and grow our businesses.

Not long ago, REO was less strategic in its approach to managing customer service. We tended to think of our portfolio of leased space geographically and by building rather than by client and assigned projects accordingly. In other words, an Asset Manager would be assigned to a building and if a client happened to end up in that Asset Manager's building, a relationship would form for that particular deal. When, however, a year or two later the same client needed more space, they may not work with the same Asset Manager if the space they needed wasn't in the Asset Manager's portfolio of buildings. From a customer service perspective this could be confusing, frustrating and downright spooky.

After receiving some "constructive feedback" from customers, REO decided to take a different approach. We identified key customers and clients, and matched Asset Managers to these people rather than the buildings they occupied. In most instances the seeds of the relationship had already been sewn - it just needed a declaration to make it official. This wasn't a scary shotgun marriage but a true partnership fostered by "The Relationship Manager".

Now key clients such as the School of Medicine and Harborview have one-stop shopping for all of their real estate needs. There's no guess work, no wondering "who do I call about renewing the lease?" or "who can help me with tenant improvements?" or – in the spirit of the season and this issue's theme – "I believe the U-District Building is haunted - who can I call about an exorcism?" Believe it or not, nothing would surprise us!

The Relationship Manager may not know the answer straight away but he or she will do the leg-work for the client – gathering information from REO staff or other process partners at the University in order to provide the answer or point the client in the right direction in a seamless fashion. The Relationship Manager sweeps away the cobwebs and clears the path for customers so they get what they want without having to go down those creepy dark hallways of the University bureaucracy alone. This new approach fosters clearer lines of communication, transparency, and accountability and enables REO to meet our clients' expectations and deliver the service they need.

So, who ya gonna call? Instead of Ghost Busters, our clients know to call their Relationship Manager when trouble or opportunity brews.

## Innovations: The Relationship Manager: Real Estate Office's (REO's) take on the Single Point of Contact (SPOC) By Jeremy Eknoian

direction in a seamless fashion. The Relationship Manager sweeps away the cobwebs and clears the path for customers so they get what they want without having to go down those creepy dark hallways of the University bureaucracy alone. This new approach fosters clearer lines of communication, transparency, and accountability and enables REO to meet our clients' expectations and deliver the service they need.

So, who ya gonna call? Instead of Ghost Busters, our clients know to call their Relationship Manager when trouble or opportunity brews.

## Innovations: F2 Web Initiative By Dan Druliner

Last Spring Finance & Facilities Strategy Management Team (STEAM) met to discuss strategic objectives for F2. During their retreat STEAM members developed a mission for Finance & Facilities: "We help people who change the world." This is a pretty lofty goal, but if you think about it, it makes a lot of sense. While you're reading this sentence there is undoubtedly a researcher working in a lab somewhere on campus who will directly or indirectly develop a cure for HIV, end world hunger or solve global warming. So how does F2 contribute to this world-changing research?

Remember that this researcher is our customer. Her lab is in a building that was financed with debt managed by the Treasury Office, built with the assistance of project managers from Capitol Projects and maintained by the staff of Facilities Services. The lab is stocked with equipment acquired through Purchasing, via a procurement system developed with process improvement training from Strategy Management with funds distributed by Grant and Contract Accounting. From the largest building to the smallest pipette, there probably isn't a single person in our organization who doesn't make a contribution to this researcher's efforts. Knowing that we're a part of something so vital makes getting up and going to work on a cold November morning a bit more tolerable.

Much of the interaction that occurs between F2 employees and our customers takes place via the world wide web. Our websites are often the first point of contact with our customers. So it is imperative that our websites make a good first impression and, as our strategy map directs, provide clear, timely, accurate, consistent communications from knowledgeable staff. To that end Strategy Management is sponsoring a division-wide initiative to improve the effectiveness of our websites. We've assembled a team of web developers from across F2 to create a common look and feel, and develop standards for content, navigation, usability and accessibility.

Clear & Consistent:

In our efforts to provide clarity and consistency, our web team is adopting a standard template for all F2 sites. We will be leveraging the existing president's template as a basis for our visual design. We're also working with UW Marketing to incorporate the new UW "word mark" or logo into our design templates. And as UW Marketing introduces new web templates as part of the University's Recognition Building Initiative, we will adjust our templates to embrace the emerging UW standards.

Just as a consistent design template will give our sites a common look, developing standards for web content and navigation will give our sites a common feel. The benefit to our customers is that they won't have to learn a new way to navigate as they move between our various departmental sites. The clarity and consistency created by developing standards for design, content and navigation will dramatically improve usability and our customer satisfaction.

Timely & Accurate:

One of the biggest impediments to keeping our websites current is that specialized knowledge is required to perform site updates. In our existing system, subject matter experts must explain site revisions to a web content developer who converts the stories and pictures into HTML and graphic files. The web developer then uploads these files to a development server and then "pushes" the files into production using an arcane sequence of UNIX shell commands.

Our proposed solution will use a Content Management System (CMS) to simplify the update process so that subject matter expert can update the site directly via their web browser, much as many of us currently update our departmental wiki. The CMS we have selected is Drupal (DROO-pull) which is German for "drop." In addition to simplifying content updates, Drupal has built-in template management and navigation tools to help us implement our design and navigation standards.

Knowledgeable Staff:

The F2 web team will break out into working groups to establish standards for content, navigation, coding, usability, accessibility and web and search metrics.

## Innovations: F2 Web Initiative By Dan Druliner (cont'd)

These teams will also assist in the development of training of the larger F2 web team in these specific topics areas. Once standards and training are established, these topic teams will make themselves available for peer review of F2 websites in these specific topic areas.

These peer review teams will also help drive our measures which will in turn drive our continued improvement. For example, our search metrics teams will analyze our search logs to see which words our customers are searching for most. Our team can then recommend changes to site content and navigation and monitor how this affects our customers search results and browsing habits over time.

By developing and implementing standards for look and feel, leveraging new technologies to create more timely and accurate content and training our employees in the use of new standards and technologies we can help our customers find the information they need to get their jobs done and in doing so help them change the world.

The F2 Web Team:

Ruth Johnston (Sponsor), Strategy Management
David Wright (FM Initiative Owner), Procurement Services;
Kathy Hoggan (FM Initiative Owner), Creative Communications
Al Larsen, Grant and Contract Accounting
Alma Prepotente, Travel Office
Andrea Watts, Records Management
Angie Kritenbrink, Risk Management
Anne Barry, Purchasing
Ann Guss, Grant and Contract Accounting
Charles Bennett, Decision Support Center
Dan Druliner, Strategy Management
Donna Andreason, Financial Services
Dustin Brewer, Maintenance & Alterations (Facilities)
Ginny Montgomery, Payroll Office
Gordy French, Property & Transport Services
Jan Arntz-Richards, Capital Projects Office
Joe Nalley, Management Accounting & Analysis
Kathleen Yumang, Capital Projects Office
Katrina Day, Risk Management
Kevin Campbell, eCommerce
Mary Hoverson, Real Estate Office
Michael Fero, Financial Management Administration
Nigel Heinsius, Creative Communications
Paige Hamlin, Student Fiscal Services
Pramilla Chand, Financial Services
Sarah Moore, Financial Accounting
Shelley Tennant, Strategy Management

## RQT Roundup by Farida Ablang

This past summer, the Recognition Quality Team (RQT) welcomed its new members. They definitely hit the ground running by implementing several changes, including adding two new vendors to the RQT Recognition Treats selection: The Easy Shoppe and Bean & Bagel, replacing Café Allegro cards. They are also now hosting 7 Person to Person Gatherings throughout the year instead of 4 to accommodate the expansion of F2. This allows the team to recognize its peers with a free lunch and a chance to mingle with peers in smaller groups.

But this is not all that has kept the new team busy! Since June 2008, Financial Management, Treasury and Strategy Management awarded 505 Recognition Treats, 192 Bravos, 2 STAR awards, and 2 Team Spirit Awards! In addition to two Person to Person Gatherings, the RQT hosted the annual Summer Event in the Physics/Astronomy courtyard complete with a poster contest, sweets, games and prizes. With their duck shoot poster, Accounts Payable was the winner of the poster contest by a landslide!! The "Carnival" themed event was a great success with over 250 visitors.

STAR Awards:

On June 3, 2008, a STAR (Successfully Taking Another Route) Award was presented to the Inciters/Knowledge Worker Initiative Team. The recipients were Keli Johnson (previously of Accounts Payable), Christa Woodhull (Payroll), Erin Fay (Financial Accounting), Kirsten Defries (Grant & Contract Accounting), LiChang Wong (Student Fiscal Services), Katrina Day (Risk Management), RaeAnn Laubenstein (Strategy Management) and Dinah Walters (Decision Support Center).

The goal of this team was to create and implement an FM-wide Knowledge Worker template to "provide better lines of communication between leaders and staff on the expectations of the knowledge skills required or desired for each job description." In addition to creating a knowledge worker template, the team updated job descriptions in conjunction with HR, created a Knowledge Worker webpage and a dialogue sheet for departments to use, and provided assistance in facilitating department retreats. The initiative opened up communication to discuss EDP opportunities for staff development and process improvement opportunities. This team's collaboration was a creative process that resulted in long-term improvement, opened channels of communication and improved customer service. Way to go, team!!

On October 24, 2008, Jeff Petersen, Pam Luther, Rachel Reichert, and Dick Simmons (all of Student Fiscal Services) were also presented a STAR Award for improving the efficiency of the Direct Loan process. To do this, they "sought better understanding of Direct Loan processes from others, pushed for updated programming and better reports, and finally led an effort to fully document the Direct Loan Processes within the University." By working together and involving other process partners as needed, the team's efforts resulted in a long-term improvement that provided cost and time savings, improved customer service, reduced the manual process, provided more concise reports, and achieved faster booking of Direct Loans by the Department of Education. Great job, team!!

Team Spirit Awards:

Team Spirit Awards were presented to the Purchasing department and to the Digital Store Front Group at Creative Communications.

Recognition Rewards Quarterly Winners:

Lonnie Eisenbarth (Creative Communications) and Farida Ablang (Payroll) were recipients of the quarterly Recognition Rewards! Lonnie was the 07-08 final quarter winner and Farida was the 08-09 first quarter winner. Each received either a $25 gift card or credit to their Husky Card account. Thank you for saying Thank you!

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

## RQT Roundup by Farida Ablang

To: Team 6 (Grant & Contract Accounting)

From: Scott Schwinge, Administrator, UW Friday Harbor Laboratories

Re: Early budget number for A39713 NPS Garrison Bay Outstanding! Thank you very much! Tami, I want you to know that I have been extremely pleased with the friendly, responsive customer service from Team 6! They're great!

To: Team 1 (Grant & Contract Accounting)

From: Susan Hammond, Administrator, Division of Oncology

I just wanted to take a minute to pause and reflect on the following. Last Thursday, Kathie Cummings (Lung Program) submitted her signed paperwork to Harriet to request an advance budget number. From the time she submitted her signed paperwork to Harriet--until the time she received the number from GCA--was 38 minutes.

I don't know who all to thank for this but we are thrilled. For sure Harriet had a lot to do with it. My bet is that she has the most "manual" part of the new process.

Also, major kudos to GCA for a quick turn-around time. When I was first hired (2 years ago), this process would take days. Now we measure in minutes. Pretty cool. We'll keep tracking and sharing successes.

To: Amy Liu (Grant & Contract Accounting)

From: Ken Anderson, Graduate School Business Office Staff, Dean of the Graduate School

Thanks, Amy! And thanks for all your great help!!

To: Grant & Contract Accounting

From: Beverly Berg-Rood, Division Administrator, UW Division of Medical Genetics

RE: advance requests to GCA

You are wonderful, thank you!!! Love this new system :)!!

To: Marisa Honig (Grant & Contract Accounting)

From: Gail Schmitz, Grants Manager, Biostatistics

Dear Kirsten, Lily and Yu-Chan,

For last week's Payroll cut-off, the Biostatistics Coordinating Center at Sand Point, had a very stressful couple of days trying to get numerous budgets extended. Problems with getting no-cost extensions from our sponsors, lost paperwork in OSP and an understanding of when it is appropriate to use the new on-line Advance Notice request all led to a perfect cut-off storm.

BUT then Marisa came to the rescue! Even with her manager and lead out of the office, Marisa was able to respond to our desperate phone calls and e-mails.

We are very thankful that she is on our GCA Team.

Email regarding comment made by Sandy Thomson, ONR, regarding Meg Russo and Nate Thomas (Grant & Contract Accounting) Meg and Nate have been working together on the EDI process. Meg has been training Nate, who has taken on and learned the EDI process. The transition has been excellent.

When Sandy Thomson from ONR stopped by, she commented on what a great job they are doing.

To: Erin Fay

From: John Andrews, Mgr. Logistic Services, UW Technology - Business & Finance

Re: Heidi Schwab and Martin Crabb (Financial Accounting)

Hi Erin,

Just thought I'd take a minute to pass on my appreciation for the efforts of Heidi and Martin on your staff. They have been nothing short of excellent in answering all my staff's asset inventory questions and in their customer relationships.

Thanks again for helping us to keep organized and maintain an accurate account of our equipment!

To: Team 1 (Grant & Contract Accounting)

From: Tami Sadusky

I was at a meeting this morning with OSP and some campus folks and one of them shared with me what a superb job Team 1 is doing for their department. They feel very lucky to be working with Team 1. Great job Team 1. We think you are great too!

To: Team 1 (Grant & Contract Accounting)

From: Monica Fawthrop, Administrator, Division of Pulmonary & Critical Care Medicine

I continue to be impressed with all the efforts that Team 1 makes in helping us manage our grants. I know this team has had exceptionally high turnover and consistently manages a high workload. But there is a sense of commitment to customer service that pervades the interactions. I may not always get the prioritization I would like but I always get communication about where something falls in the priority list or why there is a hold up. This helps immensely. Thanks!

## RQT Roundup by Farida Ablang (cont'd)

To: Production Team/Checkwriters (Payroll)

From: Matt Eng, Payroll Coordinator, Biobehavioral Nursing and Health Systems

Re: Emergency check ready

You are all so speedy! Thank you. I really do appreciate you guys down there in Payroll, because I know what it's like.

To: Christa Woodhull (Payroll)

From: Scott Schwinge, Administrator, UW Friday Harbor Laboratories

Re: OPUS, Time Reporting authorization request

Christa, you're a rock star.

To: Heather Norberg Stewart

From: Mirtha T. Johnson, Director Payroll Services HMC - UWMC - UWPN University of Washington Medical Centers

Re: Mike Fleming (Payroll)

Subject: Fw: Late RSTs posted to June

Heather,

Just wanted to acknowledge Mike Fleming for working so closely with Veronica in ensuring the last minute FY08 RST's were processed. His commitment and follow-up were impeccable.

To: Heather Norberg Stewart

From: Christina Yarbrough, Payroll Coordinator, UW Medicine

Re: Mike Fleming (Payroll)

Subject: RE: An Issue with RSTs

Yes we were, Mike has been a great help. And he was correct, I was able to see all of the RSTs this morning and based on My Financial Desktop they are posting to June. Which is great. Sadly, I did have to send my student assistant over a few minutes ago, with approx. 12 RSTs that are the reverse of 12 RSTs that posted over the weekend as well that were not authorized to post. They were submitted and signed by someone outside of our office and they were not supposed to do that. But in terms of what Mike had been helping me to resolve he did a great job. Thanks Heather

To: Farida Ablang (Payroll)

From: Merly Jones, Payroll Coordinator, Pschyology

Re: Retropay Request, PUC 478

Farida, thank you. I will have to RST instead. This is why you are in your position - you have the sharp eyes for correcting errors. Thank you for looking behind my shoulders. In addition to email above

To: Heather Norberg Stewart

From: Christina Yarbrough, Payroll Coordinator, UW Medicine

Re: Mike Fleming (Payroll)

Subject: RE: An Issue with RSTs

I wanted to send you a note yesterday and the day got away from me completely. I wanted to let you know again that I cannot thank Mike enough for all of his help in getting these all posted.

I know it was crazy, and I do appreciate your having put up with my panic states of being.

Again and again and THANK YOU both so much for all of your help and million hats off to Mike for what I know was no small feat of accomplishment in terms of getting those all entered. Couldn't have been an easy job.

To: Cindy Gregovich

From: Buzzy Mounce, Payroll Coordinator, Allergy & Infectious Diseases

Re: Megan Dennis & Farida Ablang (Payroll)

Hi Cindy,

Due to a mix-up here in the division, one of our 100% employees did not get paid last payday. I was out Friday, Monday and Wednesday. His supervisor with the distributions and the info on where she sent her request for his distribution extensions was out Friday, Monday and Tuesday. As a result, when I got in this morning his payday was already 6 days late, he was in dire straights, desperate for funds and there were 3 voice mails and 4 emails waiting for me from yesterday.

I took the information the supervisor had provided, made the entries, requested an emergency check (early enough that the request would be waiting for the check writer when they came in) and sent out the explanation to the employee and supervisor that emergency checks take 24 to 48 hours but that we would do what we could for him. To make matters even worse for the employee, he works off campus which would create additional delays with the check delivery.

After two more phone calls explaining to me that the check was desperately needed and asking for help getting the employee paid, I called Megan in Farida's group to see if they could give me an ETA on the check, knowing it would still likely be tomor-

## RQT Roundup by Farida Ablang (cont'd)

row at earliest. Megan and Farida, between the two of them went above and beyond. I had the check *back at my desk* in under 2 hours from what is likely their start of shift, less than an hour after I called them (I was back at my desk around 10am). I was able to get it on the shuttle and have it met at the other end in time for the employee to be able to make the deposit during his lunch hour.

Kudos to Megan and Farida.

To: Farida Ablang (Payroll)

From: Eva Greulich, Payroll Coordinator, Jackson School of International Studies

Farida, in Payroll, has excellent customer services, she responds immediately and she knows what she is doing.

It is a pleasure to have her as a contact in Payroll.

Many thanks for all the hard work.

To: Sarah Moore & William Christensen (Financial Accounting) & Cristi Chapman (Management Accounting & Analysis)

From: Leann Dawson, Controller, UWMC Accounting

Re: Thank you so much

The education session yesterday was really, really helpful. Thank you so much for creating the handouts (quite helpful to know which data comes from which years) and coming over here to present this as a team. It is so much easier to get a grip on this stuff by having everyone in one room and being able to listen to all the different questions and answers. I really appreciate you doing this – especially now with the audit going on. Thanks for coming in your vacation Cristi.

To: Christa Woodhull (Payroll)

From: Eva Greulich, Payroll Coordinator, Jackson School of International Studies

Christa Woodhull, again, she is at the top of solving our problems, this time it was system problem: OPUS did not generate a PERM for one of our Faculty and give us an error after we submit. Christa immediately started resolving the problem and we got the PERM. She's always prompt to answer our problems.

Many, thanks to her. I hope you know how good she is in her job.

To: Heather Norberg Stewart & Shawna Litterski (Payroll)

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

Re: need to meet with you

Heather,

I hope that you feel better now. It looks like the flu season. I still have mine.

Regarding my question, Shawna did talk to me last week. My question/trouble has been taking care of. She replied to my call promptly. Also, I want to let you know that I was extremely impressed and surprised that just 15 minutes later she called me back with the solution.

Now, you follow up with my question. I really want to extend my gratitude to you and Shawna for your assistance. It did show me how wonderful the payroll staff are. I always get the solution/answers in the timely manner.

Thanks again.

To: Tess Domingo-Herrera

From: Joe Carlucci, parent of UW Student

Re: Shannon Corcoran (Student Fiscal Services)

Dear Ms. Domingo-Herrera,

I would like to take this opportunity to compliment one of your employees, Shannon Corcoran.

My son started at UW this month, and my being in California makes it a little more difficult to follow up on administrative matters. I have been in contact with Ms. Corcoran about getting my son's account settled, and she has been nothing short of prompt, efficient, and pleasant in getting this accomplished. She has also been very patient, answering each of my questions along the way. I am very appreciative of her efforts and wanted to let you know of her outstanding customer service.

Thank you.

To: Lichang Wong (Student Fiscal Services)

From: Jim Seagren, Assistant Director, Recreational Sports Programs

Re: help!

Li,

You are the greatest employee that the University has ever had - in it's entire history!

Many thanks.

## RQT Roundup by Farida Ablang (cont'd)

Email regarding comment made by James Flower, Financial Aid Counselor, Student Financial Aid regarding Rachel Reichert (Student Fiscal Services).

Sandie, James Flowers gave a kudos to Rachel. He says she is a star and really made things happen for him today. Was extremely helpful.

To: Frannie Gladney (Student Fiscal Services)

From: Maya Frame, UW Student

Re: Final Integrative Essay

Frannie, I am not exaggerating when I say that I would not still be here at UW today if you hadn't listened, cared, and gone above and beyond what was required of you to assist me.

When I first stepped into your office, I was uninsured and struggling to get through each day with a misdiagnosed and untreated illness that had been causing constant pain and anguish for months. This strain had gone on for so long that I was exhausted and despondent, having all but given up hope that I'd catch a break and be able to stay in school.

Then, most unexpectedly, your compassion and sympathy for my situation and your efforts on my behalf not only allowed me to stay in school and afloat financially, but raised my spirits when I needed it most, when it felt like I had no one on my side.

I am now healthy, happy, and taking a full course load because you cared and tore down barriers for me. "Thank you" doesn't cover it.

To: Nancy Hurja (Student Fiscal Services)

From: Cynthia Lysen, UW Student

Hi Nancy,

Thank you so much for all of your help, I'm sitting on an plane for DC this morning and knowing that this is almost resolved is a great relief. I appreciate you going above and beyond to help me expedite this matter.

To: Farida Ablang (Payroll)

From: Diane Schulstad, Pharmacology

Re: You are so wonderful!

Thank you, Farida! I so appreciate all the efforts you expended to produce the two relocation checks for our department, Farida! You are THE BEST! I hope you have a splendid weekend awaiting you!

To: Katherine Wu (eCommerce)

From: Kim T. Dinh, Director, Finance & Administration, Office of the Provost

RE: Arrival UW Travel Card for Phyllis M Wise

Hi Katherine,

Thanks for this message and thank you all for expediting the replacement card. I'll ask my assistant, Maria to pick up the card. Thanks, again.

To: Amy Liu; Tami Sadusky

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

Re: Great Job, Team One (Grant & Contract Accounting)

Hi Amy,

I was speaking with Cy Talebi and my co-administrator Barb Woods about what a great job Team One is doing. This is a wonderful change from about a year ago and we wanted you to know it makes our jobs so much easier. We appreciate all the hard work you and Team One have done and I hope you're proud of yourselves!

To: Elisa Manabat & Michael DeShazo (Grant & Contract Accounting)

From: Scott Schwinge, Administrator, UW Friday Harbor Laboratories

Re: Invoice # GCX110276 for Budget 66-0009 Friday Harbor Labs

Dear Elisa and Michael,

I'd like to pass along my gratitude to you both for pushing this invoice out so quickly! Thanks so much for going the extra mile to make it happen.

To: Donna Andreason; Ruth A. Johnston; Linda Lake; LAWRIE G. ROBERTSON; Jeff Follman; Kelly J. Campbell; Mark Conley; Sharon F. Frucci; Carla J. Helm; Laurie A. Hunt; Karen Long; Jan N. Sullivan; David J. Wright; George T. Daniel; Karen L. Russell; Mary J. Mackay; Shaun Spearmon; Doyle L. Huckabay; Dawn R. Lake; Julie A. Condit; Kassy Ellefson; Lynn K. Catlett; Ronda L. Grazen; Tara L. Trowbridge

From: Ann Anderson, Controller

Re: GREAT JOB, UTG #1!!!!!

I wanted to take a minute to again, express my congratulations and thanks to UTG#1 of the Seamless Procure to Pay project. You all did a fantastic job of identifying creative, yet thoughtful options to

## RQT Roundup by Farida Ablang (cont'd)

reduce and manage invoice discrepancies, but even more importantly, to improve the overall procurement process. I especially appreciate our friends and colleagues from outside Financial Management who have consistently given of themselves to help us improve our services. Without your input, advice, nudging and overall involvement, the outcome wouldn't have been as rich. I would also like to give a nod to the PIT for their great leadership and direction. Again, my humble thanks to the folks below. I look forward to an exciting implementation and more improvement ideas from follow-on UTGs.

• Mark Conley; Purchasing (Team Leader)
• Lynn Catlett; Aeronautics & Astronautics
• Ronda Grazen, Intercollegiate Athletics
• Tara Trowbridge, Medicine/Pulmonary & Critical Care, Harborview
• Dawn Lake, Purchasing
• Julie Condit, Accounts Payable
• Kassy Ellefson, Purchasing
• Doyle Huckabay, Office of Information Management (technical consult)
• Donna Andreason; Financial Services (team support)
• Elise Davis, Project Manager

To: David Wright

From: Lee Lee Lim, Fiscal Specialist 2, Department of Pharmacy

Re: Excellent customer service - Liza Plotkin (eCommerce)

Hi David,

I want to write to tell you how much I appreciate help from one of your employees, Liza Plotkin. I am new to eProcurement and did not have a chance to take the class yet, but I wanted to learn to navigate Ariba when I am preparing budget reconciliation reports for my department.

Liza not only answered my questions, she set me up as an user and offered to give a crash course on how to look up details on a requistion or purchase order last Friday

To: Team 6 (Grant & Contract Accounting)

From: Scott Schwinge, Administrator, UW Friday Harbor Laboratories

Re: A39713 NPS Garrison Bay

Outstanding! Thank you very much!

Tami, I want you to know that I have been extremely pleased with the friendly, responsive customer service from Team 6! They're great.

To: Ann Anderson, Jeff Follman, Kate Riley (Financial Management)

From: William Nicholson, Assistant Attorney General

Re: Julia Shanahan (Tax Director, Financial Management)

In our world of non-stop demands, I try to find time when I can to express my appreciation for those I work with. I have done so for each of you to your superiors several times through the years. And I wanted to do so now with regard to Julia Shanahan. She is incredible to work with—knowledgeable, talented, friendly, timely, creative, go-getting…I am thrilled to be able to work with her. Thanks for the excellent hire!

To: Doug Kramer (Grant & Contract Accounting)

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

Dear Doug,

I wanted to thank you once again for your help with the Cancer Consortium budgets. The fact that you responded so promptly and professionally to my initial phone call, then worked with OSP to find a resolution within a very tight timetable, is a great example of customer service. Hats off to you and GCA.

To: Teri Brentnall, Associate Professor of Medicine, Gastroenterology

From: Lori Oliver, Assistant Attorney General

Re: Sophia Meyering (Purchasing)

Subject: Contract with Virginia Mason

Dr. Brentnall, the UW Purchasing Office and Virginia Mason have sorted through and agreed to how to handle the purchasing of Dr. Kowdley's services. The PO is finalized with the consulting agreement from VM that is attached. Judy McMillan, in your Division, and Sophia Meyering in Purchasing have kept this moving at every turn – thanks again to both of you for sorting through this quickly and efficiently.

## RQT Roundup by Farida Ablang (cont'd)

In reply to email above.

To: Lori Oliver, Assistant Attorney General

From: Judy McMillan, Fiscal Specialist 2, Gastroenterology

Re: Sophia Meyering (Purchasing)

Subject: RE: Contract with Virginia Mason

Lori,

You have no idea how grateful I am for your e-mail. Sophia (Meyering) was extremely helpful in calling Virginia Mason as this was NOT a standard or easy agreement and I really appreciated all her assistance in going the extra mile. Thank you.

To: Ginny Montgomery

From: Patricia Gonzalez, former UW employee

Subject: Farida Ablang (Payroll)

Good morning Ginny,

I just wanted to let you know how helpful and wonderful that Farida has been, in helping me get my vacation pay. For almost 2 months now I have been waiting for my vacation pay to be sent to me, after numerous phone calls and getting the run around from HMC & UW payroll, Farida is the only the only person who I spoke with, who took the ball and ran with it, by checking into things and being so kind to follow through with phone calls letting me know what was going on. Hooray for Farida, she made what was turning into a horrible experience into a great one!!! I just thought you should know, how much I have appreciated what she has done. Other people could take definite lessons from her. She rocks!!!!

To: Suzanne Blais (Purchasing)

From: Joseph Kittleson, Director, HR Information Systems, UW

Re: Addendum

Hello Suzanne –

Thank you again for the rapid response and for your time and that of your team.

In addition to email above

To: Suzanne Blais (Purchasing), Joe Kittleson, William Nicholson

From: Liz Coveney, Assistant Vice President, HR Administration and Information Systems

Re: Addendum

Thank you all for going the extra mile...and in record time...to make this happen. It's the best we can hope for and I appreciate your help in navigating us through uncharted waters.

From SFS comment card:

From: Anonymous UW Student

Re: Robin Elliott (Student Fiscal Services)

"Robin was very nice and thoughtful. Thank you."

To: Diane Cooley & Kyra Worrell (Student Fiscal Services)

From: Beckie Supiano, reporter for The Chronicle of Higher Education

Re: Presentation at NASFAA conference

Dear Diane and Kyra,

My name is Beckie Supiano and I'm a reporter covering financial aid for the Chronicle of Higher Education. I attended your presentation at Nasfaa the other day, and found it very interesting. I am working on a story about financial literacy, and would like to talk with one or both of you for it. Is there a good time I could reach you on the phone in the next several weeks?

To: Teresa Crisostomo (Travel)

From: Bret Brodersen, State Financial Senior Consultant, Office of Financial Management

In addition to commenting verbally at the Shoreline travel training, I would like to commend you on the UW's travel website. I have referred other higher education agencies to it in the past, since it provides a great amount of detail and looks very helpful to your employees.

From voicemail left by John Morris, Senior Associate Athletic Director for Compliance.

To: Jeff Peterson (Student Fiscal Services)

From: Sandie Rosko

SFS and the Intercollegiate Athletics Department along with Housing and OFSA have been working together over the summer to assist the Athletic department with scholarships disbursements for athletics. There have been many challenges along the way. Yesterday, SFS was summoned to a meeting at the request of Intercollegiate Athletics to assist with some of those challenges.

This morning when I arrived I had the best voice message a leader could receive. It was from John Morris, Senior Associate Athletic Director for Compliance. He had nothing but praise for Jeff. He appreciated his patience, willingness to listen, and really caring and concerned that everything that

## RQT Roundup by Farida Ablang (cont’d)

needed to happen would happen.

John commented how this spoke well for all of SFS and its staff as he does not always see this when working with other units on campus. Great work Jeff. You do a good job on behalf of all of us.

To: Christa Woodhull, Shawna Litterski, Farida Ablang (Payroll Office)

From: Monica Maul

Re: Thank you

Dear Christa,

Thank you and your staff for the very informative and interesting payroll class today. I learned so much and so much of the question and answer portions were very helpful to me, I felt the encouragement from your staff towards me in that I am new and learning “trial by fire”. I was not once bored, and I was on the edge of my seat the whole time. How about that. I hope to be in the Intermediate Payroll class. Please put me on your list and expect me to attend.