New Directions

Quality Improvement in Financial Management at the University of Washington

Vol 2, No 4 HEADLINES Fall 2003

Letter from the Editor, Fall 2003

by Zach Luther

With Autumn Quarter now underway, it's time for another issue of Directions! The weather's a bit cooler, but lots of things are happening in Financial Management. The results of the Employee Satisfaction Survey have come in, with some interesting results. The RAA Retreat is a good example of QI at work, as well.

The RQT is running strong with articles about the return of the Person-to-Person Gathering, The Big Chill Summer Event, and the newly Redesigned Award Forms. Read further and find out more!

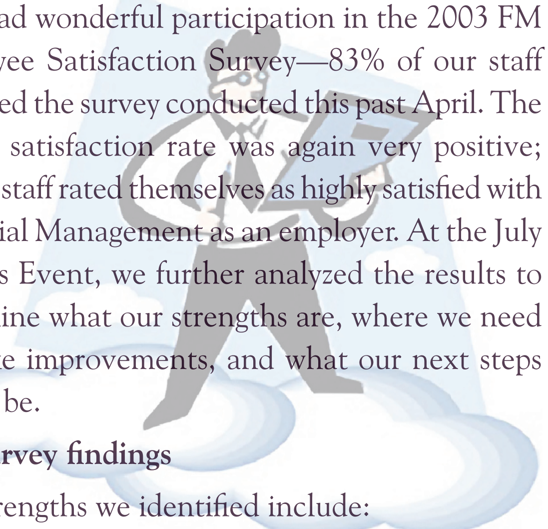
The Imaging Project is a big help for Financial Services, so read up on it right here. We also have the GRIP Update for you, as well as the ever-popular Kudos and Recognition Roundup.

Finally, we continue our FIN MAN 101 series with a look into Student Fiscal Services. They do a lot more than just collect tuition!

On behalf of the staff of Directions, have a great Autumn!

FM Employee Satisfaction Still Strong

by Kate Riley



We had wonderful participation in the 2003 FM Employee Satisfaction Survey—83% of our staff answered the survey conducted this past April. The overall satisfaction rate was again very positive; 53% of staff rated themselves as highly satisfied with Financial Management as an employer. At the July Leaders Event, we further analyzed the results to determine what our strengths are, where we need to make improvements, and what our next steps should be.

Key survey findings

The strengths we identified include:

- This is an enjoyable place to work.
- There is confidence in the leadership.
- Staff have opportunities to learn and grow.
- Staff feel that they have the information and materials needed to do their work.

Where we saw needed improvements were

- FM leadership is perceived as inconsistent in its management practices.
- Staff want more recognition, encouragement and to feel more valued.
- FM would benefit from better teamwork and cooperation.
- Better planning is needed to ensure FM meets its objectives.

What happens next

We agreed at the Leaders Event that we needed to better understand why leadership is perceived as inconsistent—what are examples of favoritism; what keeps staff from trusting what leaders say; and what do people mean when they say leaders say one thing and do another. To explore these topics, we will gather input through a series of activities this fall.

As far as recognizing staff and promoting teamwork, remember to use the RQT program. Various awards allow us all to recognize those who demonstrate staff or leader qualities or those who have made improvements and deserve a TOPS award. The new Bravo award has been very successful in giving us all another way to recognize each other.

In regards to better planning, the EIT will be revising our strategic plan at this year's retreat in October and developing dashboard measures to ensure that we're on track. After we have finalized the strategic plan for the division, departments will be identifying those initiatives they need to implement to support our overall direction.

Individual departments have been discussing the results and identifying how they can make improvements. SFS had a productive day-long retreat to focus on how they could rid themselves of office politics. Payroll has been working with its staff to improve the overall satisfaction in their unit. Both Financial Accounting and Financial Services will be conducting retreats in October to better understand their results.

As you can see, we are moving ahead to address the results of the survey. Look for information on how you can contribute coming soon. For additional information about the survey including the full results, contact your EIT member.these areas through a series of focus groups. From these discussions, we are anticipating that we will learn a lot about how we can better create and share knowledge in some of our key processes. Look for more developments on this strategic initiative later this summer.

Update

Previously:

At July Leaders Event, major strengths and opportunities from survey were identified

The latest:

Departments are discussing their survey results

What's next:

More opportunities for staff input this fall.

GRIP—A Great Group

by Denise Lim

Since our last update in summer, the GRIP Team has been focusing on analyzing the project scope and whether the current implementation date is realistic. In addition, we have begun the technical development process to configure the J.D. Edwards (JDE) system to fit our business requirements. Lastly, we are seeking opportunities to improve our business process to couple with the new receivable system.

Back in April, the GRIP Team worked together with the external consultants to perform a thorough gap analysis of the business requirements versus functionalities offered by JDE. The result of the gap analysis indicated that additional programming hours were necessary to modify JDE to fit the needs of Grant and Contract Accounting (GCA), and that the target implementation date of January 2004 was a bit aggressive. Through the analysis, we found that we needed an additional 6 months to perform all the tasks in our scope. We presented the findings to the Oversight Committee, who approved extending the implementation date to June 2004.

The GRIP Team also began our work of configuring the JDE system. As previously reported, we drafted a business model of the GCA process in JDE, and then tested the model using sample GCA data. From there, our next step was to create conversion programs to transfer data from the current receivable system to the new JDE system according to the business model. Also, we have been working on JDE applications where new budgets will be set up, and the TC30, electronic cash transmittal, application that will record cash received from sponsors on our budgets. Currently, we are investigating the process of creating invoice formats to be sent to our sponsors, and interfaces between JDE and the UW legacy systems, such as FIN, BGT and PAS drivers.

In addition, the GRIP Team collaborated with GCA management to identify any inefficiencies in our current business process that will not be fixed by the new JDE system. This was achieved by having a team of members (Kate Riley – lead, Vincent Lau, Ed Love, and Kiet Tran) who are new to grant management review the billing process. During the review, numerous areas for improvement were identified, which were presented to the GCA management team. We feel confident that focusing on these improvements coupled with the new system will further enhance the billing turnaround time.

Another area that the GRIP Team and GCA have been working on is to join forces with our business process partner, Grant and Contract Services (GCS), to reduce the large number of invoice formats which are costly to create and maintain. The two offices had a meeting in which we brainstormed ways to standardize and limit invoice format variations. Some of the creative ideas that came up during the meeting were targeting and working closely with sponsors that have the most complex formats, and making standard formats available on the web for the sponsors to choose from.

Although there have been a few challenges, the GRIP Team is happy to report that we are making good progress achieving our goal which is to build a flexible and efficient receivable system.

Update

Previously:

The project team was formed, documented the current GCA process flow, and created a model of the business process in the new system.

The latest:

The team has conducted an extensive gap analysis, resulting in a more refined project scope and schedule, and has begun to configure the JDE system to meet the business requirements.

What's next:

The team will work towards making progress on two important development pieces: invoice generation and interface with UW legacy systems.

We'll Sing in the Sunshine-FM Summer Event 2003

by Chris Malins

It was warm and windy on September 9th, but there was a Big Chill in the air. The EIT and the RQT, with musical assistance from Smokey Robinson, the Temptations, and Three Dog Night, hosted this year's Summer Event. The outcome of this winning collaboration was happy people, groovy sounds, and great taste. The Physics courtyard never had it so good.

The event was hosted by Zach Luther, Master of Ceremonies, who was dressed in stylish black. He challenged the audience with trivia questions (What is a "perlicue," anyway?) and oversaw the raffle. Every ten minutes, a lucky FM staffer won a gift certificate for food and drink at a local restaurant.

The soundtrack to the Summer Event was strictly 1960's, and included such well-known hits as "I Heard it Through the Grapevine" and "Joy to the World." Those of us who have seen the movie "The Big Chill" know that it is about the reunion of old friends, and that's exactly how this year's Summer Event felt.

Everyone who was asked had something to say about the occasion. Susan Ball, an EIT member on Sno-Cone duty, called the event "creative and delicious."

Dom Zook from GCA, made his voice really low and said "OH YEAH, I'm having fun." Standing with Dom was Lily Gebrenegus, also from GCA. Lily liked the music, liked the people and found the wind bracing and refreshing.

Marli Bennett from Financial Management, after eating her first Sno-Cone in twenty years, discovered that they are as good as ever. Smiling broadly, Treasury's Lisa Edlin said, "I haven't had this much fun in as long as I can remember. Oh, and this was the best summer event ever!"

Always analytical, Ping Tan from Treasury gave the event an 8.33 on the Good Time Scale (GTS), with 10 being the highest.

Tami Sadusky, Director of GCA and Lead Popcorn Popper, thought for a moment about her Summer Event responsibilities and said "It's a tough job, but the rewards are great. Ruth and I have set up an assembly line to prepare the popcorn for consumption. The assembly line techniques that we are using were inspired by Henry Ford."

As 3:30 approached and the Sno-Cone ice began to melt, the popcorn slowed its popping, and The Rascals began the final refrain of "Good Lovin," the people of Financial Management slowly made their way back to their offices. Another Summer Event had ended, but the camaraderie and lingering good times would last much longer.

INNOVATIONS

Document Imaging in Payables Administration

by Tom Phillips and Kristie Dunne

Payables Administration has been improving its storage and retrieval procedure with the advent of document imaging. We began scanning our online invoices on July 1, 2003 and since that time we have added our travel documents and manual invoices. This new technology, which saves invoices as images on a central server, was implemented by the collaborative efforts of the Financial Services imaging team, Karen Long of Payables Administration, the outside vendor, contacts at Computing & Communications and Bill Swann of Nebula Support.

Invoices still arrive and are processed in the same way as they always have been, but the difference is what happens to the invoices after they are processed. Transactions can consist of multiple pages of backup documentation; e.g., in the year 2002 our statistics show an average of 4 pages per online transaction. Once processed all the pages, including the invoice recap, are scanned—thus eliminating the need for paper storage. Before any of our paper documents could be destroyed, we had to ensure backup for these documents. In addition to two places at the UW, we also have a backup system outside the UW..

The main advantage is that the scanned invoices are easily accessible on the web. Once documents are retrieved they can be sent as e-mail attachments to both campus departments and/or people outside the UW. The efficiencies gained from this process improvement have been tremendous. It is too soon to have many statistics available but our preliminary estimates suggest that the internal labor savings resulting from imaging will pay for the cost of this system within three years. Customer requests for copies of invoices can now be completed in one day rather than 10 days under the old system. File cabinets and other storage space are not needed since it is stored on our computer. Retrieval is not only faster and easier from our computers but there is an open, clean area where the file cabinets were that is now able to be used for something else.

It is too soon to have many statistics available but our preliminary estimates suggest that the internal labor savings resulting from imaging will pay for the cost of this system within three years. Currently we are exploring other ways to use this new system by scanning more types of documents. People are looking for ways to streamline the way they store documents. The positive impact our document retrieval has made with people in departments has generated interest about obtaining their own paperless system. Payables Administration has received phone calls from others interested in document imaging.

FIN MAN 101: Student Fiscal Services

by Kyra Worrell

Looking outside my office window, I can see the first hints of change, as summer fades and the campus bursts into a swirl of color and activity – Fall has arrived! Here at the UW, Fall brings more than just pumpkins and colored leaves; it brings students - freshmen, new graduate students, returning students, unmatriculated students, and medical students – all kinds of students! And all these students – From baby-faced freshmen (How did they get to be so young? – or is it that we're getting to be just a little bit older? Naw, couldn't be!) to sophisticated graduate and professional students – will need to come into contact with the Student Fiscal Services' Office in one way or another. Tuition affects all students – whether they themselves are paying it, financial aid is paying it or their parents are paying it. It is our goal here at Student Fiscal Services to make that contact as pleasant and enjoyable for the student as possible – whether it be in person, on the phone, or via email or the internet.

Students are the lifeblood of any university: they are the reason we are here. We all serve students in one way or another. We at Student Fiscal Services are always looking for ways to streamline our processes and make things easier for the students and the departments here at the UW that serve students. To that effect, approximately two years ago, the two branches of SFS – Student Loans and Receivables and Student Accounts – merged. This was to provide better customer services by providing "one stop shopping" for students. We wanted to be able to provide all customer services on one floor and all support services on another. Previously, students would have to race between the first and fifth floors of Schmitz Hall to get anything done – up you'd go to the fifth floor to get your loan promissory note signed, then down to the first floor to get your money and make sure your tuition was paid; if everything wasn't quite right, you'd have to race back upstairs to fix it. It was a nightmare for students who weren't sure where they were at in the process: They could be riding the elevator up and down a couple of times before their problems would be solved!

SFS now consists of four units: Customer Service, Accounting, Computing & Data Management and Outreach & Overawards. The four units were formed by distributing the processes of the Student Accounts and Student Loans and Receivables Office along logical lines, with the main goal of the reorganization being having all customer service handled on first floor of Schmitz in room 129, and the secondary goals being the improvement and streamlining of all processes.

The Customer Service unit bills and collects tuition and related fee payments, disburses financial aid (loans, grants and scholarships), bills and collects current & past-due student loans and scholarship accounts, provides campus cashiering services and student account advising.

The Computing & Data Management group's responsibilities include account set-up (making sure all the correct charges are on the students' accounts); setting the parameters for the student data base (SDB) system; the tuition tables; setting up new and rolling over existing SDB charge codes; file transfers; data control; parent PLUS loan processing; bank transfers; University-wide invoice receivables; administering automated CT databases; and writing and maintaining the Student Fiscal Services web pages.

The Accounting unit responsibilities include preparing reports; processing JVs and billing different departments and agencies; processing refunds; processing departmental cash transmittals, handling departmental or student's NSF checks from the banks; reconciling and closing budgets, accounts and discrepancies; and handling student's tax issues.

The Outreach & Overawards unit is dedicated to helping students and the university community understand SFS services by delivering group presentations like Money 101 (helping students learn to manage their finances) and "Managing the

Maze" (helping new students learn about the SFS services) and providing written information. The Outreach unit facilitates the SFS Advisory Board (a quarterly meeting where Student Fiscal Services and campus advisors can share information and ideas) and seeks to make Student Fiscal Services a more visible presence on the UW campus.

The Overawards section of the Outreach unit is responsible for notifying the students, working with the students to arrange a reasonable repayment plan, tracking all payments made by each student, reporting the repayment arrangement and payments, and referring accounts for further collections to a government agency and/or collection agency.

SFS continues to search for ways to improve our processes in order to better serve the 37,000+ students here at the UW – they are the reason we are here!

RAA Retreat Revelations

by Cecilia Pittman

Research Accounting and Analysis (Grant and Contract Accounting and Management Accounting and Analysis) held a dashboard retreat in June that was filled with positive energy and excitement. The overall objective of the retreat was to bring the entire staff together to analyze the dashboard measures and identify the areas that RAA would focus their efforts over the coming months.

This goal was achieved in an open environment of presentations, ice breakers and the four quadrant exercise (an activity that focuses on process prioritization). In her opening, Sue Camber set the stage by explaining why this is such an exciting time to be in research. She cited examples such as, increase in grant volumes and the newly approved staff additions in RAA. The ice breaker, led by Kate Riley, was effective in bringing together people from different offices and sections to get to know one another better. "Leadership for Change", the next presentation, given by Ruth Johnston, addressed a variety of modes for change, how to navigate through change, and what to expect during change.

Kate transitioned us into the afternoon agenda by presenting Dashboard 101. This prepared us for the specific presentations of the individual dashboard measures given by the RAA process experts. This information was vital to the quadrant exercise. Divided into groups of eight, we used the individual process measure handouts to score the measures. Then the scores were categorized and placed in the proper quadrant. Specifically, this targeted the processes for improvement initiatives.

Finally, the information from the exercise was tallied. These results clearly demonstrated the group consensus for those processes in most need of improvement. The top three measures identified as needing immediate attention were billings, potential liability from DHHS award discrepancies, and faculty effort certification. The following initial steps have been taken to address these issues: an invoicing process walk through was done and the results are being analyzed, the DHHS measure is being reviewed and some data mining will follow, and finally a project team has formed to assess the viability of revising or replacing the FEC system.

There was a lot of enthusiasm generated from this retreat that carried over once we all returned to our desks. One of the facilitators wrote, "I am happy to have been a part of this retreat. I agree there was a lot of positive energy…" Additionally, one participant wrote in an email (and many echoed the same sentiment), "…The retreat was great. I found it very informative. I enjoyed myself and feel re-energized. Thank you everyone for all your effort. The retreat was a triumph."

New Directions is published quarterly by the Office of Financial Management at the University of Washington. For the on-line version of this newsletter, please visit the web site at:

www.washington.edu/admin/finmgmt/qi/directions/oct03/

Kudos

Given to FM colleagues by folks from outside the division

Compiled by Randi Adar

Ann Anderson, Karen Long and Financial Services: "Ann, we want to thank you, Karen Long, and your staff for all the excellent work everyone did during the biennium close process. You and your staff must have worked awfully hard and we appreciate the extra effort…We especially appreciated your offices staying within the timelines you gave us, and the special attention we felt we received in getting questions answered, as well as the good and reliable information you provided all throughout the process." *Mary Melanson, Dean's Office, Arts & Sciences.*

Anna Mirza, Payroll Office: "Thank you for making the correction. This certainly made my job easier." *Mervilyn Penwell, Respiratory Care Services.*

Beverly Trulson, Student Fiscal Services: "We cannot put into words how professional Beverly was in handling the [challenges that our situation] dealt her. She was always above board in presenting policies and procedures and yet had this calming effect while providing this information…There was never a time that we felt that we were not being taken care of or that our best interests were not being addressed…We are adamant in saying that Beverly was instrumental in steering us in the right direction …You are fortunate to have a supportive staff member who goes the extra mile to represent your department…" *Excerpts from a letter written by a UW parent.*

Calvin Tran, Grant and Contract Accounting: "Every once in awhile I have the extraordinary experience of working with a UW employee who goes above and beyond what is expected of them. I want you to know that I was very impressed with Calvin. I have worked at the University of Washington for nearly 25 years and I believe that it is important to acknowledge employees who are so very helpful and talented." Donald Kunz, Oncology.

Christa Woodhull, Payroll: " I wanted to thank you for how you've interfaced with us the past several weeks…Your emails were always to the point and without any rhetoric or editorial language... Much appreciated!" Gary Prohaska, Information Systems.

Cindy Gregovich and the Equipment Inventory Office: "I appreciate all the cooperation from [EIO] staff, especially Cindy, your property manager in the Equipment Inventory Office, [in submitting the yearly property reports.]" C.C. Everley, ONR Seattle

Donna Andreason and David Wright, ProCurement Card Program:

"I have found your office to be very helpful in the following ways:

- Establishing interdepartmental bonds
- Willingness to answer questions
- Follow-up with questions to establish accuracy
- Help…There is always someone able to 'walk' one through issues and problems to achieve resolution.
- Courteous & kind regardless of who the caller may be

I hope that the program continues to be successful and I am pleased to have had such a positive experience." *Robert Hathaway, College of Forest Resources.*

Frannie Gladney, Student Fiscal Services: "I just wanted to thank you for all the help you gave me in getting my situation together…It is my life long dream to complete my degree at the University of Washington. There is absolutely no way that I would have the opportunity to realize this dream if it were not for your sensitivity to my personal situation, skill at finding options that fit both my needs and the UW's, and your willingness to help." A student who was assisted with financial aid concerns by Frannie.

Gilda Franada, Payables Administration: "Given the enormous pressure of time constraints with the biennial close protocols, I am all the more impressed with not only the professional and courteous help Gilda has rendered [in processing closing JVs], but also the manner and attitude with which she went about dealing with each JV issue. Gilda's exemplary customer support reflects well on your leadership, and staff like her make you and I proud to be a part of this system!" *Geetha Sukumaran, College of Forest Resources.*

John Cady, Grant and Contract Administration: "I want to bring an excellent example to your attention of proactive intervention on my HHMI grant by John Cady to save a great deal of time and effort by many people. Without a request from us, John initiated changes that have us very happy over here! [This approach]…solves problems before they frustrate everyone involved and creates a positive relationship between service provider and customer, so essential in our current regulatory climate." *Mary Lidstrom, College of Engineering.*

Judy Peterson and the Treasury Office: "In yesterday's meeting of the Foundation Board Executive Committee, Bill Gates stated how much he appreciated your one-page reports to donors to UW Endowment about their named fund showing performance/status. He said that the donors like receiving them and that you and your team do a great job. These comments were echoed by Jerry Grinstein and Laurel Nesholm." *Weldon Ihrig, Executive Vice President, passing on a comment from University donors.*

Kristie Dunn, Payables Administration: "[While working with Kristie on a payment issue,] she was extremely helpful, courteous, professional, and went way out of her way to help me with my problem. I really appreciated her professionalism and her kind attitude while helping me. She really exemplified customer service." *Al Sipple, VA Puget Sound Health Care System.*

Kyra Worrell and Student Fiscal Services Outreach Team [regarding the new "Managing the Maze" orientations SFS is offering to help students manage their personal finances]: "It's really helpful to have such a detailed explanation of what can often be an overwhelming process! We hope you will be willing to come again next year." *Victoria Corrin, Rehabilitation Medicine.*

Lauren Collins, Grant and Contract Administration: "Thank you so much for your very clear answers to all our cost-sharing questions…We really appreciate the time you spent at the College of Engineering. It was very helpful!" *Mary Heusner, College of Engineering.*

Lily Gebrenegus and Suprimo Manabat, Grant and Contract Administration: "I would like to thank you both for helping us meet our deadlines by having all Journal Vouchers related to the old biennium entered into the system in a timely manner. Without your extraordinary help, which I call a service beyond your normal duties, we would not have been able to accomplish the closing of our books accordingly." *Gloria Escano, Office of Intellectual Property and Technology Transfer.*

Monique Bradley and Cecilia Pittman, Grant and Contract Accounting: "I just want to say thank you so much for going the extra mile to help us change our budget's status—despite your busy schedules and other deadlines. I sincerely thank you for your superb customer service." *Hien Tran, Applied Physics Laboratory.*

Payroll Office [in regards to National Payroll Week, recognized during the first week of September:] "Thank you all for your help over the years with payroll. Your efficiency, accuracy and good humor during times of stress is truly deserving of at least a week! It is truly a pleasure to work with all of you at Campus Payroll. I appreciate all you do!!" *Maureen Medina, UWMC Roosevelt Payroll/Personnel.*

Pramilla Chand and Kristie Dunn, Payables Administration: "Pramilla goes the extra mile to make sure our many, many invoices are processed & expedited. I appreciate her immensely! When Pramilla is not available Kristie Dunn has regularly gone out of her way to make sure things keep moving along." *Jackie Matthews, Disability Services Office.*

Sharon Langlois, Payroll Office: "I really want to thank you for everything you have done to help me. In appreciation and recognition of your efforts, thank you as always." *Leila Wirfs, Pathobiology.*

The Travel Office: "I'm fairly new to the UW system, but have had several occasions to use the TEV. Coming from private industry, I expected to find things more cumbersome rather than less. This tool has been a delightful surprise to the contrary. We've even used it to validate our own assumptions about object codes, so it has utility beyond what you might have anticipated." *Scott Sipes, Pediatrics.*

RQT/AWARDS

Recognition Roundup

by Zach Luther

TOPS

GASB 34 TEAM (Jeff Follman, Bill Christensen, Jon Vanvick, Greg Henderson, Nancy Treibel, Sarah Moore, and George Rix) were given the TOPS award on September 26th , 2003 for their implementation of the requisite GASB reporting format. This was a major change from the traditional fund accounting format the UW had used for years. This team began working on the conversion more than two years in advance, and was well prepared for the transition. They have helped the UW become a national leader in GASB implementation, and many other schools have contacted this group asking for help on their own transitions. .

QSTEP

Ghan Sachdeva (SFS) was awarded with a QSTEP for the Trustworthy quality on September 8, 2003. Ghan is both reliable and competent, and if one asks him for assistance with anything he goes out of his way to help. He is always willing to offer comprehensive advice on any questions a co-worker might have. He is extremely learned, has a doctorate in Nutrition from his studies in India, and if ever he doesn't know the answer to a question he will find out and get back to you. His work is done in a timely manner, and he cares about people. Ghan without a doubt defines what it means to be "trustworthy."

LINQ

CeCe Redila (Payables Administration) received the LINQ award for the Approachable and Inspiring qualities on September 17, 2003. CeCe has the ability to visualize any kind of difficulty and resolve it as soon as possible. She's very open to other people's views, and always shares information with her employees and the departments. She is sympathetic and a good listener, but also forward-thinking. CeCe regularly encourages her staff to look through the T&D catalog for opportunities to improve themselves.

EXPRESS

Financial Services – 9/18/03

Cost Share Team – 9/24/03

It's Not Just for Breakfast Anymore!

by Celia Durham

The new Person to Person Gathering sub-team of RQT has been diligently working on plans for "new and improved" gatherings. The members of our sub-team are Kiet Tran, Rosemarie Valencia, JR Sloan, Lisa Scheyer and Celia Durham.

As you will see, it ain't just for breakfast anymore! After reviewing the results of the RQT Survey taken by the previous team, we took a mini survey and asked you questions in order to find out how we could improve the gatherings for better participation. From the mini survey results we found out that nearly 75% of Financial Management would prefer to meet for lunch rather than breakfast. We also came to the conclusion that most people wanted to attend an event once per year. We have scheduled four events for the year which will include three lunches and one breakfast. We plan to invite each employee at least one time per year. The purpose of the gathering is to get away from your daily work for a meal and to meet employees from other departments to do some networking. Hopefully you'll make contacts with people in other departments so if you ever need to call another department you will know someone in that department as well as be able to put a face with a name.

We also have come up with some pretty great topics and speakers. For our first gathering we have scheduled George Bridges, Dean and Vice Provost of Undergraduate Education to speak on "How the Undergraduate Needs You" and will be ordering some delicious box lunches from Briazz Catering Services. Future lunch plans include watching and discussing a humorous training video.

We are pretty excited about our new events and hope that each and every one of you in Financial Management will attend. So keep your eyes peeled for your invitation because everyone in Financial Management will be invited and we know that you won't want to miss out on these new and improved Person to Person Gatherings!

Recognition Just Got a Whole Lot Easier

by Zach Luther

A common complaint heard by every RQT member has been that it's too difficult to nominate someone for an award. The award forms were seen as overly complex and difficult to complete, causing some to throw up their hands and give up on the entire process. The results of the RQT survey conducted by the previous team only served to bring this issue to the fore.

The RQT, concerned that people might be reluctant to submit nominations, looked towards a redesign of the LINQ, QSTEP, and TOPS forms in an effort to make them easier to understand, and less daunting for the first-time nominator. This process was handled by the RQT's Communication and Marketing sub-team.

Our first target was the TOPS form, a single page with only vague instructions vis-à-vis going about its completion. From that single page, we extrapolated a number of questions the nominator should consider, to help guide her through the process. We phrased and laid out these questions in a manner that will move the nominator through the form, from question to question, to not only help the nominator know what to write about, but also to help her think about the nomination and whether the TOPS is the right award for the job. Instead of staring down a blank page when the urge strikes her to nominate, the nominator can simply answer the leading questions designed to guide her through the form.

The QSTEP and LINQ forms had more substance to work with, but were still in need of a makeover. Their old style was to have a number of checkboxes at the top of the form, with blank space below for the nominator to write in comments and examples about the checked qualities. Our new layout takes the basic premise and lays it out differently; now there is space to give examples immediately after each checkbox, so the nominator will have an easier time knowing what to write about.

The RQT hopes that these changes will help convince potential nominators that it's really not hard to nominate someone for an award. We look forward to seeing more great involvement and lots of things to celebrate! The new forms will be available soon. Please check your RQT station or visit our website at http://www.washington.edu/admin/finmgmt/qi/rqt.

CALENDAR

Dealing with Difficult Situations and People
#170 Schmitz Hall
December 11th & 12th (9:00–Noon)

Contact Rae Ann Laubenstein at raeannl@u.washington.edu for details.