NEW DIRECTIONS

Quality Improvement in Financial Management at the University of Washington
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Letter from the Editor – Spring 2005

by Chris Malins

If I'm sneezing, it must be spring! With the dry warm weather in February and early March, spring has successfully knocked old man winter off his frigid pedestal. The trees are blooming, the buds are bursting, and the Huskies are winning! Hopefully all faithful Directions readers are taking full advantage of Mother Nature's generosity and enjoying this fantastic weather. If, however, it should ever rain again and an indoor activity is required, check out these exciting Directions offerings:

Building Bridges, A Way to Knowledge Based Operations

by Anita Bingaman

The Payroll Client Service and Production teams have never been short of knowledge. Both teams are the front line for questions about OPUS, underpayments, retirement, separation checks from more than 300 Payroll Coordinators. However, there was a problem. There were times when customers had questions for both teams and often did not know which team member to call for which question. On top of that, some questions started with a person on the production team, led to a person the Client Services team and then back to the production team. Are you confused? So were the customers.

In addition to the customer being confused, members of the two teams also realized that they were often talking to the same customer to solve a problem. The Production team member would explain what information was needed for a Production process, after which the Client Service team member would have to help the customer in getting appropriate information into OPUS. A two step process instead of just one.

Confused customers and wasted time are definitely not the goals for Payroll. Something had to be done. The two teams got together and engaged in an old fashioned brain storming session to see how the two teams could work together to better serve the customer and make better use of their own time.

The first step was to set up partnerships. A team member from the Production team was paired with a team member from the Client Services team. Each of these partnerships was then assigned a set of departments across campus, the U W Medical Center and Harborview. Then the teams identified key processes where each person lacked knowledge and started cross training in those areas.

This new partnership opened the door to many new possibilities for working with the departments on a proactive basis. The new mini-teams are **Lisa Scheyer**, CST, with **Sam Castro**, PST, **Sadiq Lew**, CST, with a person to be hired, and **Farida Ablang**, PST, with **Christa Woodhull**, CST.

One example of these new possibilities is action taken by Christa and Farida . They identified areas for improvement unique to their assigned departments, UWMC and Harborview Payroll Offices. They made personal visits to each department. Christa and Farida made suggestions for improving documents sent to Payroll and at the same time got input from the departments about how Payroll better serve them.

This new partnership within Payroll and with the departments is indeed a bridge – a bridge where knowledge can flow both ways.

FM Mentoring Workshop 2005: A Springboard for Success

by David Wright

On Friday March 25th, the DREAM Team launched the third annual mentoring cohort. This most recent group has 13 matched pairs with high levels of understanding and commitment to the potential benefits of a mentoring relationship. Much of this is a result of the communicated experiences of the 48 mentoring pairs from the previous two groups. Mentoring is an important emerging element of Financial Management's culture. It's another of the many FM employee developmental tools available to any FM employee. After two years of mentoring experience, word has spread that the FM Mentoring Program is an effective way to find support in identifying mentee objectives and direction towards attaining goals in a sensible, constructive way.

This year's cohort has three mentors with mentoring experience from past groups, two mentors from the mentor pool were matched for the first time and the remaining 8 mentors are new to the program. The DREAM Team continues to recruit mentors adding to the quality and diversity of future matches for prospective mentees.

The workshop began over tasty morsels of bagels & invigorating morning coffee, and as it is with new relationships, there was plenty of animated discourse, punctuated with laughter and significant expressions of understanding and agreement. This portion of the workshop is exceedingly meaningful to me as I try to interpret the initial success of the paired matches. The DREAM Team works diligently at analyzing the available information to assist in matching the mentee with a mentor that will provide the mentee with the best prospect for a successful mentoring relationship, and it all comes to fruition when witnessing the introductory interaction between the pairs.

With a resume that includes national recognition for mentoring leadership and training, **Ruth Johnston** led a highly interactive learning experience for the mentoring pairs that combined elements of self learning and shared discovery, with an overview of successful mentoring practices. With a seemingly effortless manner, she engaged the group from one activity to the next with humor and practical, thorough knowledge of the curriculum; giving the participants confidence in using her mentoring building blocks in forming effective partnerships.

The highlight of the workshop occurred with delightful stories from a three member panel moderated by **Heidi Anderson** and consisting of **Mai Lin Chua, Shara Hayden** and **Karen Long**. Beginning with some important milestones in their lives that defined their character and perseverance, they each revealed mentoring anecdotes, formal and informal, that assisted in their development. These are confident and highly competent women who have overcome hardships. Not having mainstream American business characteristics (i.e. Caucasian males), their barriers were primarily placed in front of them because of their diverse ethnic and gender backgrounds. These were inspiring stories of triumph along the continuum road of accomplishments.

As with most of the workshop, the mentoring pairs worked side by side in the afternoon, this time documenting measurable goals that can be referenced throughout the year to keep the mentee on target, by completing an entrance survey that will also be compared with an exit survey completed at the end of their one year commitment, for an accurate measurement of their growth. And finally at the conclusion of the workshop, each mentee also signed a mentoring agreement with their mentor creating the structure of their relationship in addition to the purpose and specific goals of the mentee's mentoring plan.

From the tentative, first stage of their young mentoring relationship, to varying levels of comfort in a well grounded friendship, these pairs made a lot of progress in one day, developing the needed trust and commitment to realize the mentees' goals not otherwise attained.

A Hole in the Wall

By Lily Gebrenegus

Ever felt like swinging a sledge hammer at the wall at work? Ever had a sudden need to see strange men dressed in HAZMAT suits wandering around your office? There's finally an outlet for all your demolition needs; GCA has started construction!

This is one of the last steps in our reorganization. (For a recap, please visit the **Summer 2004 issue of Directions**.) We started this process last year and have been working hard to improve our major processes and service to all of our customers. We've passed the planning phase and have moved to the implementation phase. We're listening to customer feedback, looking at how things are going and trying to work out some of the kinks.

But all this planning and reorganizing takes extra space and resources, so the walls in GCA have started to come down all around us. We are expanding to several sections surrounding GCA on the lower floor of the Purchasing and Accounting building.

You've heard the old saying, "A picture is worth a thousand words"? Well, I couldn't possibly describe the progress we've made in just one article, so what are you waiting for? A formal invitation? That's just what I was thinking! Here it is:

GCA Open House Event
Date: Wednesday, June 1, 2005
Time: Noon - 4 PM

Each team will have a poster board to represent their team, will be available to discuss processes, answer questions, and talk about current and future projects. GCA staff will also be available to meet customers and listen, learn and educate. Light refreshments will be available. We are hoping to have the construction complete by then but if not, visitors may be receiving complimentary hard hats!

What better way to find out about all the new and exciting changes that have been happening at GCA over the last year? Please come and take a look around!

Food and Sound - Traveling Treats '05

by Chris Malins

What better reason to take a short trip than to eat good food and listen to good music? That's the idea behind this years Traveling Treats celebration. In addition to learning more about each department and networking with colleagues, there will be food and drink to stimulate your taste buds and music fill your ears with sound.

The event is scheduled for May 5th from 1:00 to 4:00. The overall theme is "FM Radio", with each department focusing on a different musical theme. So far Payroll will boogie with Disco, GCA will rock around the clock with 1950's music, Student Fiscal Services will sing the Blues, Treasury will be playing some of those memorable TV tunes, and Risk Management will warm everyone up with beach music. There are also rumors that departments will decorate their offices to match the genre of music and that a few brave souls may even wear costumes. When making your rounds, be on the lookout for FM creativity in action.

More information will follow as the date gets closer, but for now be sure to mark your calendars for a food-filled musical afternoon.

WASCUFA – A New Conference is Born

by Heidi Anderson

On Monday, March 21, 2005 more than 50 people gathered for the first annual Washington State Colleges and Universities Fiscal Association (WASCUFA) one-day Conference. The conference was hosted by the University of Washington Student Fiscal Services and was sponsored by UW vendors General Revenue Corp, Enterprise Recovery Systems and Campus Partners. It was held on the shores of Lake Union at the McCormick and Schmick's Harborside restaurant. Sixteen colleges and universities across the state were represented. Schools from Eastern Washington – even as far as Vancouver, WA. -- were able to participate in sharing ideas, issues, concerns and thoughts for how to better our respective Fiscal Offices.

WASCUFA was a collaboration of ideas from Receivables Manager **Sandie Rosko** and SFS advisor **Frannie Gladney** who are both involved with the Washington State Financial Aid Association conference or WFAA. By their attendance at the WFAA conference they realized that there are unique challenges involved with fiscal activities and both felt a calling to reach out to colleges and universities with a conference of its own.

Participants were offered classes ranging from E-billing to Outsourcing collections. **Linda Burkhardt** from the Seattle office of the Department of Education office spoke in the morning. She addressed concerns schools had with Perkins lending and the President's proposal that future funding cease.

Our own Outreach Unit from Student Fiscal Services had a booth open all day to showcase some of the ongoing efforts that SFS is committed to in the education and advising of students and departments within the UW community.

There were also presentations by Collection agencies, Seattle University and our billing servicer Campus Partners as well as the UW.

The day concluded with a talk by Financial Planner and CPA **Susan Knox**. Her topic included how to talk to students about financial matters and gave some great advice to those of us that deal daily with student financial issues.

Those in attendance hope this event will continue in the future as it is a way for schools to come together and talk, network, and face the challenge of an ever changing financial world for our student populations.

My Financial Desktop Reporting Application: Here it comes!

By Erick Winger

The wait is almost over. The Financial Desktop's three deliverables are scheduled to be launched in phases. The first one, the reporting application, will be launched in April. (The other two deliverables are the internal transactions application and the project cost accounting tool.)The Financial Desktop reporting application will provide:

- A high level view of a list of budgets
- Online BARs and BSRs
- Transaction detail reports
- Current encumbrances reports
- Budget profile reports
- A query function for downloading financial transactions

The Financial Desktop "launch plan" includes two to three weeks of large forum demonstrations, followed by four to five weeks of in-class training. The in-class training will consist of hands-on use of the application in a computer classroom setting. This rollout plan will take place over much of April and May, 2005. A similar schedule, consisting of demonstrations and in-class training will take place again - some time in August 2005. This will be convenient for those people that prefer to receive their training after the biennium close process.

The Financial Desktop Client Services team has grown! It now includes: **Erick Winger, J. R. Sloan**, and our newest employee, **Kelley Smith**. The Team is lead by Erick Winger and reports to **Jeff Follman**, Director of Financial Accounting. The Financial Desktop Client Services team will provide the demonstration and training opportunities, as well as the online help, documentation, and tutorials.

The Financial Desktop Reporting Application launch brings about a new and exciting time for users of financial data at the University of Washington. We hope you enjoy using the new application and find that it improves your ability to do your job quicker, easier and more efficiently.

Payroll – It's Really Not Magic

by Anita Bingaman

Twice a month without fail, as if by magic, all 37,000 employees of the UW are compensated for their work. As the second largest employer in the State, the UW has been called a city within a city. This varied workforce is comprised of police officers, electricians, nurses, student assistants, researchers, faculty, support staff, and truck drivers with each group having distinct payroll requirements. The different requirements are rates of pay, deductions, exemptions and withholding levels. With all of the complexities of this process, it seems even more magical that employees can count on being paid on time. In all these years at UW, payroll has never been late.

However automatic and magical it may seem, in reality it is the hard work of the 20 knowledgeable and dedicated people in Payroll who make this happen. There are many wizards behind the screen. Only, these wizards are not pulling levers and flashing lights, like the famous Wizard of Oz at the end of the Yellow Brick Road. These payroll wizards are experts in Federal Tax rules and regulations, Social Security requirements, the Revised Code of Washington, University rules and regulations, HEPPS and OPUS. They work with Payroll Coordinators, the Benefits Office, State and Federal Agencies, and Human Resources to insure that the University is in compliance with all the various regulating agencies.

Who We Are and What We Do

The work of the Payroll Office, headed by **Cindy Gregovich**, has two collaborative fronts. **Ginny Montgomery** leads the Production and Client Service Teams, which, as the titles suggest, either produce checks or guide and train departmental payroll coordinators in the production of checks. These teams also oversee OPUS (Online Payroll Update System) and HEPPS (Higher Education Personnel and Payroll System). **Heather Norberg Stewart** leads the Tax and Accounting Team that insures that all deductions and adjustments to checks are correct and that all transactions are compiled, analyzed and reported to the proper agencies. To be sure that people are properly paid, it is imperative that their deductions are accurate, so all Payroll teams work closely to insure that the net amount the employee receives is correct. See web site below for a complete list of areas of responsibilities and contact persons: http://www.washington.edu/admin/payroll/staff.html

Deductions and Reductions

When you look at the Employee Self Serve check advice, you will see two types of adjustments to an employee's check. The first types are called Reductions and are pre-tax. The second series of adjustments are called Deductions, which fall into two categories. The first category contains all of the Federal Taxes withheld and the second category is Insurance and Other.

Deductions and Reductions are given GTN numbers (Gross to Net adjustment) for tracking purposes. This tracking falls under the responsibility of the Tax and Accounting Team, which oversees the correct set-up of the adjustment. Then, after every payday, a report for each adjustment is generated and distributed to a member of the T & A team. These reports are analyzed and used to disburse funds to the appropriate agency or organization.

Reductions adjust the amount of earnings that are subject to Federal Withholding, Social Security, and Medicare. These include Retirement, Health Insurance, and Parking. With the exception of the Seattle campus, the Payroll office is responsible for processing parking reductions. The retirement and health portions of this category are managed by the Benefits Office.

The first category of the Deduction section of the check advice is governed by the Social Security Administration (SSA) and the IRS. In the case of Social Security, wages are reported and the dollar amount withheld transmitted. The University's contribution must also be transmitted to SSA. In the case of Federal taxes withheld they are transmitted to the Department of the Treasury.

The Insurance and Other category of the Deduction section includes Life Insurance and Long Term Disability Insurance, which are managed by the Benefits Office. Payroll manages Medical Aid/Workers Compensation, which is a State industrial insurance program and the 37 deductions that fall under "Other." These include seven different unions and 30 other deductions, such as Combined Fund Drive, US Savings Bonds, and membership dues for affiliated University organizations.

In addition to mandatory and voluntary deductions, there are deductions for Child Support and repayment of unpaid obligations. These are also assigned GTN numbers and must be set up and processed as any other deduction.

The Money Side

Another vital behind-the-scenes component of Payroll is insuring that there is money in the bank to cover all of those checks that are processed each pay period. The dollars are large: $40 million in direct deposits and $2 million in paychecks each pay period. The outstanding checks are at least $1 million a month and must be tracked and reported to the Washington State Department of Revenue-unclaimed property department. Payroll also works with Wells Fargo and the Seattle Police when forged checks are discovered. An added component that makes reconciling the payroll bank account more complicated than a home account is that two systems need to balance, HEPPS and FAS. Payroll is initially recorded in HEPPS, which downloads into FAS and the two systems must tie to each other.

Along with reconciling the bank account, all State and Federal Taxes must be compiled, reconciled and transmitted to the appropriate agency. There are 16 to 24 States where employees work and pay State Income taxes, which means that Payroll must deduct, record and transmit the taxes for these employees. The largest transmission is the approximately $15-$16 million wired each pay period for Social Security, Medicare and IRS.

Payroll is also responsible for producing checks for people who leave the University and in special cases, where time worked was not entered into the system appropriately. In other cases where an individual is overpaid, it then becomes the responsibility of Payroll to process the repayment.

Outreach and Miscellaneous Payroll Functions

A major responsibility for the Payroll office is to train the Departmental Payroll Coordinators in the operation of OPUS (Online Payroll Updating System). The Client Services team conducts initial training, but is always available on a daily basis to answer questions and walk the Coordinators through any problem. The CS Team also provides training in all other aspects of Payroll.

In addition to all of the above, the Payroll office does adjustments to budgets. The most familiar is the Retroactive Salary Transfer, where salaries have been paid on an incorrect budget and then are transferred to a correct budget using the FASTRAN application. Another adjustment is the final step in the Shared Leave process. This process allows employees to receive compensation while on medical leave using donations of Vacation, Sick Leave, or Personal Holiday hours from another State employee. Using FASTRAN the payment of the hours to the Recipient is transferred to the budget of the Donor. Budgets are also adjusted for repayment of Sick Leave using the Journal Voucher process.

As you can see Payroll not only produces 37,000 checks, but also insures that all factors related to making adjustments to those checks are in compliance with rules and regulations. For the employee, this means that in addition to knowing that his or her check will be in the bank or in hand when promised, they also have the confidence in knowing that all the related transactions are accurately carried out.

So, the next time you look at your check on Employee Self Serve or look at your remittance advice, don’t think of it as a magical happening, but as a teaspoon of honey produced by a squadron of very dedicated bees.

GCA Documents Processes – Others Follow Their Lead

by Karen Long and Karl G. Kraber

Following a successful pilot launch of the ProCarta process documentation software in Grant & Contact Accounting in autumn 2004, additional Financial Management departments will move forward with process documentation. Student Fiscal Services, Payroll, Financial Services, Treasury and Financial Accounting will be the next departments to use ProCarta to document critical internal processes. They will participate in training for implementation and use of the ProCarta program during April.

The journey to use ProCarta began with the recommendation of this software after a review of other similar products at the time. Last autumn **Karen Long** took on process documentation as part of the planned GCA reorganization. To be sure that ProCarta was the best choice, she corresponded with various clients of ProCarta as references, and also asked for informal proposals from a local consulting company that provides web and technical writing services.

GCA decided that the ProCarta program would serve their purposes best (that is, document the procedures within all major processes by the Jan 1, 2005 timeline for the GCA reorganization). The last hoop was to have the program reviewed for "connectivity" with Nebula and to be sure that there were not similar capabilities already at UW. When it was determined that there were no similar capabilities available, the software was purchased and the process documentation began.

The software provides a web-based, one-stop reference portal for policies, desk procedures, related web pages, spreadsheets, forms and any other information necessary for FM staff to perform the documented process.

Note: the term "process documentation" has two meanings. Process documentation can mean the creation of flow charts that documents the steps of the process. This is a visual representation of the process. The second use of the term (used here) is the documentation of the procedures (text) that constitute all or major portions of the process.

As we document our existing processes, we will also set the stage for on-going process improvement efforts, cross-training within departments, and identifying the knowledge and skills currently residing in desk manuals, word and excel documents, binders, and Financial Management brains!

A kickoff meeting is scheduled for the morning of Monday, April 11th. **Kristin Findley** will demonstrate the process documentation created in GCA, and Martin Goldberg from ProCarta will provide an overview of the design process for members of each department who volunteered to learn how to use the software. By the end of April, all departments should have draft process documentation in place and be ready to move forward to document all of Financial Management's critical processes.

Quality Improvement and Toastmasters

by Mai Lin Chua

"Quality is never an accident. It is always the result of intelligent effort." --John Ruskin, 19^{th}-Century British Art Critic.

Philip B. Crosby… Does the name sound familiar to you? Aside from being a former Toastmaster, he was a leader in quality improvement. He was widely regarded as one of the nation's leading "quality coaches." He was the author of nine books on quality and leadership and was perhaps best known as the father of the "zero defects" concept of quality management, which centers on the principle of preventing mistakes *before* they happen – as opposed to correcting them after they occur.

Successful leadership, said Philip B. Crosby, is not just some mysterious force that rains down upon a sacred few. Instead, he said, leadership can be learned. Crosby was unabashed in his praise for Toastmasters, and he gave the organization credit for helping him develop the communication skills he said every business executive needs to become an effective leader. His success in business, writing and public speaking attests to the power of Toastmasters training.

Regardless of your career path, Toastmasters is a great way to improve your communication skills. Toastmasters can help you lose the fear of public speaking and teach you skills that will help you be more successful in whatever path you've chosen. You'll even learn to be a better listener. You'll learn to easily lead teams and conduct meetings. You'll comfortably give and receive constructive evaluations. Perhaps you already have some or all of these skills. In Toastmasters, you will be able to enhance them. A Toastmaster wears many hats. During your Toastmasters experience, you will have an opportunity to serve in many capacities. By participating in all functions, you will receive well-rounded experience in communication and leadership. Two of the Toastmaster hats are "speaker" and "table topics."

The role of a speaker enables you to write a good speech which requires concentration, thought and practice, practice, practice. A skilled speaker writes tight introductions, focused and highlighted main topics, and a crisp, to-the-point conclusion to engage the audience in your speech presentation. For every speech delivered, there is an evaluator who can give you oral and written comments. You can always self-critique your speeches and make detailed notes of the comments. The goal is to help you improve a little with each presentation.

In order to become successful public speakers, you need to be able to respond effectively to spontaneous questions. This is the purpose of Table Topics. Many people freeze when the Topic master calls for your response. Is it because you're called upon on an impromptu basis? At Toastmasters Club, you'll learn the fundamentals of Table Topics which will help you respond to unexpected questions from your boss and other people. You will learn the skills to conquer the unexpected and overcome the helpless feeling of lacking control.

There are indeed many things you can learn in a Toastmasters Club and you'll be able to apply those skills in your work and on teams.

RQT Roundup

by Donna Andreason and the RQT

The Recognition Quality Team (RQT) has been keeping very busy recognizing the greatness that is Financial Management. We have had two LINQ Awards, two TOPS award, an Express, a Person-to-Person lunch, preparing for the upcoming Traveling Treats and reviewing nominations for several awards to come in the next few months! Here's what we've been up to:

LINQ

Chris Malins , Associate Treasurer, Treasury Office received a LINQ award on January 10, 2005 for the qualities Approachable and Trustworthy.

Once in a leadership role in GCA, Chris was recruited into the Treasury Office for a debt project management position during the late 1990s. Over the past five years, Chris has built a broad base of knowledge regarding the University's debt authorities, the financial strength and debt capacity of the auxiliaries, and available financial markets and instruments. Most recently, Chris came up with the idea of taking on ownership of the Roosevelt buildings from the non-profit, given the changes in the U-District impact zone ownership, and coordinated discussions of adding UWMC to the general revenue borrowing platform.

Chris has also made extensive leadership contributions to Treasury and FM as a whole. He has served as RQT leader, Directions editor, and has trained FM staff and facilitated for several FM departments (Treasury, RAA, SFS). Chris continually demonstrates that leadership is more than supervision. He is widely respected and viewed as a leader even when he does not have direct supervisory responsibilities. His consistent hard work, patience, competence, and character repeatedly reveal Chris's great skills as a leader.

Judy Peterson, Senior Associate Treasurer/Chief Operations Officer, was presented with a Leadership in Quality (LINQ) award on Monday, February 28, 2005 for all four LINQ qualities: Trustworthy, Trusting of Others, Approachable, and Inspiring!

Judy has always been a role model and an inspiration to the others. Many people rely on her advice, knowledge, and support because she is trustworthy, respected, open minded, and shows that she really cares. Judy was born to be a manager. She opens up the channels of communication within the office and its process partners. She works quietly behind the scenes, but is the central energy that keeps the office running.

TOPS

The RAVE and DREAM Teams were celebrated in a joint TOPS celebration on March 15, 2005 in the Ethnic Cultural Center.

Members of the RAVE team receiving the award are: Agnes Acholonu, Ruchi Aggarwal, Mai Lin Chua, Karen Crowder, Frannie Gladney, Libby Graham, Paul Jeganathan, Dick Simmons and Shelly Yen.

Members of the DREAM team receiving the award are: Ann Sarna, Erick Winger, Evelyn Jagoring, Shawn Williams, Linda Braziel, David Wright, Heidi Anderson, Jaeson Albritton, Denise Murillo, and Erlinda Antonio.

The DREAM and RAVE teams were created in 2002 and were asked to build programs to educate and support the diversity in Financial Management. The DREAM team developed a mentoring program that has been incredibly successful in bringing together people across Financial Management providing advocacy for staff and assistance with career guidance and support. It has opened channels of communication through a creative process. The RAVE team organized activities and resources that would open up discussions, develop communication skills facilitate the recognition and appreciation of diversity within Financial Management.

Express

Ruth Johnston sponsored an Express for the Combined Fund Drive Team (CFD) on February 3, 2005 to thank them for a great job and a very successful campaign. Members of this team included Alicia Allen, Ann Sarna, Arlene Lalas, Erick Winger, Jenny Krumbholtz, John Boet, Katherine Wu, Martin Crabb, Michael Keller, Micky Galbreth, Shara Hayden and Katrina Day. Thank you all for your hard work and dedication to a very successful drive!!

Bravo

Thirty-five Bravos have been awarded since December 1, 2004! The following people received awards:

Lynn Duong, Peggy Fitzwater, Paige Hamlin, Lily Gebrenegus, Alice Rose, Mary Girgis, JR Sloan, Joe Nguyen, Suprimo Manabat, Nancy Linde, Adam Orchard, Georgette Brewder, Gwen DarDen, Monique Bradley, Calvin Tran, Margo Murphy, Dee Neal, Eva Lu, Kristin Findley, Brian Baldwin, Suzann Wright, Dom Zook, Karen Long, Tamra Clark, Georgette Brewder, Farida Ablang, Betty Light, Christa Woodhull, Farida Ablang, Annette Johnson, Alvin Chau, Joanne Matson, Keith Ferguson, Frannie Gladney, Heidi Anderson, Heidi Gustafson, Libby Graham, Cathy Sleipnes, Mark Landis, and Joanne Matson

Mark your Calendars!!!

Announcing….Our annual FM Traveling Treats will be Thursday, May 5th! This year will be a musical theme FM Radio. Departments will decorate their unit in keeping with the musical theme, prepare a game for visitors to illustrate what they do in their area, and of course…treats! More information to come shortly—if you have questions, please see your RQT Representative.

Upcoming Person-to-Person Gatherings

• April 13, 2005 – Breakfast at By George. Invitations to come!

Have you ever thought of joining the RQT?

The RQT Team is wrapping up another year and looking for new members for the 2005-06 term. Have you ever considered being part of a dynamic team which celebrates the contributions and admirable qualities of others? The RQT team is an excellent opportunity to facilitate the recognition of the wonderful people and processes we have in Financial Management. If you are interested in joining the RQT, please speak with your leader. Your RQT representative is also available and would be happy to answer any questions you may have.

Kudos

by Kyra Worrell

To: Ann Anderson and Karen Long and staff, (Financial Services)

From: Mary Melanson, Director of Finance & Administration, Dean's Office, Arts & Sciences

Comment: Thank you and the staff that attended our administrator meeting last Friday. It was really good to put the names and faces together for the staff we will work directly with in GCA and to hear directly from you both about the changes taking place.

We always appreciate having you come to our meetings and as usual, you were excellent!

To: Alice Bukengolts (Research Accounting & Analysis)

From: Michael M. Nguyen, Manager of Program Operations, WaNPRC, University of Washington

Comment: Just wanted to let you know that Alice helped me with some unusual inquiries about a particular budget the sponsor had questions about. She was extremely rapid in her actions and her service was above and beyond my expectations. This is not the first time I've sent you an e-mail acknowledging great service from your team, so keep up the good work over there.

To: Sue Camber and GCA (RAA)

From: Weldon E. Ihrig, EVP

Comment: Sue, great article in UWeek about the GCA changes in providing service to the colleges. It demonstrates the effectiveness of your leadership as well as the dedication of your team to step back and re-evaluate your services then take action to change how you do business. I know getting to this point wasn't easy, and that there will be challenges ahead, but it was the right thing to do and the results will demonstrate the effectiveness of your actions. Nice work.

To: Jeff Follman (Financial Accounting), and the Annual Report team

From: Shelly Yapp, Regent; Weldon Ihrig, EVP, and Eric Mosher, Director, Publication Services

Comment: (From an email from V'Ella Warren) At today's Finance and Audit Committee of the Board, Shelly Yapp sought me out before the meeting. She told me that she loved the Annual Report, thought it was very well put together, was easy to read, and that she had learned stuff from it.

During the committee meeting, she said that the report was "...engaging and informative...the best I have seen...a real marketing document."

Weldon Ihrig passed me a note during the meeting which said: "You and your team heard a 'WOW' this morning with Shelly's comments re your Annual Report! Well deserved."

And, then on the way up the stairs this pm, I ran into Eric Mosher (Publication

Services) who also said that he thought the report was the best yet.

To: Jeff Follman (Financial Accounting) and the Annual Report team

From: Judy Robertson, Lead Publications Coordinator, Publications Services

Comment: I just received notification from the CASE judging committee for the Publications Awards that you were awarded a bronze award for the UW Annual Report! I just received the letter, and I couldn't wait to congratulate you on this achievement. This committee was judging not only the design, but content as well, so it's real kudos to everyone who worked so hard to complete this year's report. The report will be displayed throughout the conference in the Juried Awards Exhibit along with the other award winning entries at the Case Conference.

Once again, congratulations to everyone.

To: Judy Peterson (Treasury) and the Treasury Office

From: Marilyn M. Montgomery, Associate Vice President, Office of Development & Alumni Relations

Comment: I would be remiss if I didn't underscore the partnerships involved in this effort. Among staff, I think it's provided a natural infusion of energy and creativity, helping to maintain high spirits and efforts halfway through the campaign; it's increased collaborations with faculty and deans; brought many of our donors and volunteers closer to the University; and of course is helping to build the CEF. You in Treasury continue to provide your peerless assistance and support for which we in DAR are most grateful. I think my DAR Executive Committee colleagues will agree this has been an amazing----and fun----effort. We really don't ever want to see it end, truth be told.

To: Heather Norberg Stewart (Payroll)

From: Ted Tucker, Assistant Director, Human Resources Operations

Comment: “I wanted to let you know that I think you did a really good job explaining the processes that you have been following as well as other aspects of this complicated work. I certainly appreciate your dedication and persistence in working to resolve these challenges.”

To: Treasury Office

From: Weldon Ihrig, EVP

Comment: …the additional recognition is super for all the creative and factual work to make this annual report such a hit! The award was a great joint effort by the Treasurer's Office and Business Services teams to create, design, and print the Report.

In regards to: “Just a quick note that the UW Annual Report received an award from the "Council for the Advancement and Support of Education"…. the judging takes into account content as well as form so excellent job by everyone.”

To: V’Ella Warren (Financial Management) and staff

From: Shelly Yapp, Regent

Comment: Congratulations! In my nearly 11 years on the board in reviewing what is always a superior annual report, I think this is the best. Thank you and the staff for seeing this critical document as a key communication tool for the UW. I must say, this year is only the serial pinnacle (if there can be such a thing), since I find this report to be a primary communication tool that has gotten more sophisticated every year.

Thanks for the hard work!

Shelly

To: V'Ella Warren (Financial Management) and staff

From: Sandra H. Lier, Associate Vice President for Business Services

Comment: "…it is a beautiful and educational publication. Great work by all! (In regards to the Annual Report)

To: Kyra Worrell, Diane Cooley, Li-Chang Wong (Student Fiscal Services)

From: Marcia Kato, Academic Support Advisor - TRiO Student Success Services South Seattle Community College

Comment: We just finished our final Student Leaders training session last week. I wanted to let you know that students rated Money101 as one of the most useful trainings --they identified a variety of things that they found helpful: Tax Info, resources and how to get help when dealing with credit card debt, learning about credit reports, how to stop bill collectors from "messing with you".

So, thanks again -- several students agreed that they would have stayed for another 1/2 hr.

Thanks again, Kyra

For: Katherine Wu (Financial Services)

From: Corinne Goellnitz, Assistant to the Dean, Business School.

Comment: I just finished talking with Katherine Wu, a fiscal specialist, in your payables administration. The problem I dumped on her had been on going for several months and my frustration level was extremely high. Katherine did a wonderful job of tolerating my frustration even though at the time, I couldn't appreciate her customer service skills. The problem has been remedied and now, several shades lower on the emotional scale, I wanted to make sure I let Katherine's supervisor know what a great job Katherine did in assisting me. I saw each of you listed as a payables supervisor so I thought I'd just send this to all of you and I would hopefully reach Katherine's supervisor. Other than parking services, I can't image another area on campus that receives more intense phone calls than your area. There are so many places where a form can be filled out incorrectly, or the discussion with a vendor misconstrued long before you ever are in the position of paying the bill. Unfortunately, folks like me don't always appreciate the complexity of the process when it's our bill that's overdue. But having people like Katherine working for you and with us is a definite benefit. I do appreciate the work you all do for us, and hopefully I'll think of that in the future.

Classes

by Rae Ann Laubenstein

EDP Workshop

April 5 from 9:00–11:30
April 20 from 9:30–12:00
ECC Black Room

October 3 from 9:00–11:30
October 17 from 1:00– 3:30
Gerberding Hall Room 142

Process Improvement

May 12 & 13 , 8:30–4:30
ECC Black Room

Job Search Workshop

May 25 from 12:30–3:30
ECC Black Room

Facilitator Training

June 6 & 7 from 8:30–5:00
ECC Black Room

Quality Awareness

June 23 from 12:30-4:30
June 24 from 8:30- 12:30
ECC Black Room

November 30 from 12:30–4:30
December 1 from 8:30–12:30
ECC Black Room

Strategy Mapping

June 27 from 10:00–11:30 & 2:00–3:30
June 29 from 10:00–11:30 & 2:00–3:30
ECC Black Room

May Brown Bag

The 5s Philosophy
May 9 from 12:00–1:00
Gerberding Hall Rom #142