Exceeding Expectations
Financial Management
University of Washington

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DIRECTIONS

Volume 11, Number 2 *Spring 2000*

GCA Web Team

Patricia Bradshaw, Grant and Contract Accounting

The GCA Web Team has moved from Phase I—the Development Phase, into Phase II—the Writing Phase. About one year ago, GCA developed the mission and goals of our Initial Phase. The team members which included Ruchi Aggarwal (leader), Brian Baldwin, Patricia Bradshaw, Alice Bukengolts, Tracy Marrero, Julie Taylor, Paul Williams and Ginger Brower (C&C Webmaster) embarked on a journey to determine the content for the web pages, obtain information from users, and organize and test the material. We worked closely with staff and customers to determine what information was needed to complete their tasks.

Our focus was to make available information about the post award Phase of research that would assist and provide training to departments. The specific topics we targeted were: sponsor regulations, compliance issues, and fiscal reporting requirements. We knew the structure of the web site was important—it had to be easy to locate and understand. To get ideas, we reviewed web sites from other universities and used our creativity to develop our design.

Two exciting results evolved from Phase 1. First, the Post Award Process page was created. This page organized the main headings into 4 sections: reference information, overview of the post award process, budget and spending money categories, and communicating financial information to the sponsor. Second, we developed a structure for a topic page that included headings for a definition, process overview, department responsibilities, forms required by GCA, and contacts. The structure was set.


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UW Financial Management

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Web Pages: Faculty Grants Management Program
GC-PET--Grant and Contract Process Enhancement Team
Sponsor Regulations
The Post Award Process
- Setting Up a New Account
- Adjusting Accounts--organization codes, rebudgeting, sub accounts...
- Receipt of Funds
- Compliance--expenditures, food approval, program income...
- Closing Accounts
- Grant & Contract Glossary

During Phase 1, we worked with the Grant and Contract PET team (which includes members from GCA, GCS and departments involved with improving the research process) to coordinate web topics and create consistency in the web design. We wanted the GCA web page to provide links to the G&C Research page. The goal was to enable the users to locate information easily from multiple sources that would be easy to

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QUIPS

Quality Improvement Program Shorts

An update on the Quality Improvement Program from the Senior Quality Improvement Specialist, Kate Riley

First, an introduction. I joined Financial Management May 1st of this year as the "Senior Quality Improvement Specialist." and am working closely with Ruth Johnston to build on and add to the division's Quality Improvement program. I've been working in the area of quality improvement since 1993, primarily in health care and health insurance. Most recently I was the Quality Improvement Specialist at Swedish Home Health & Hospice. My areas of expertise in the QI field have been performance measurement, survey development, focus group facilitation, data analysis and process improvement methods. I like seeing improvements in the way we serve customers and I enjoy being a part of teams that make change happen.

With this edition of *Directions*, I join Diane Cooley as co-editor. I will be using this space in the publication to keep you updated about new developments in the Quality Improvement program, to pass on QI tools and to highlight some of the interesting work that is being done in our division.

Updates

Here's more about how Ruth and I will be supporting the QI program. Ruth will continue to be the primary resource for OD assistance—she will be available for conflict resolution, team development interventions and employee advising. She can be called upon for retreat planning where the focus is team development. She will be the lead in the EIT agenda and retreat planning. She'll also continue with team effectiveness and leadership training.

I will be the primary resource for developing measurement systems, both at the division-wide level and as a consultant for individual departments. I will have oversight of the training program and will be developing new courses in data analysis and survey development. I have joined the Inciters and Lead teams and will be teaching *Process Improvement* with Peggy Fitzwater and Ginny Montgomery. I'm also available as a retreat facilitator for program development or strategic planning topics.

Some activities we'll share or rotate. We'll be doing facilitator training together, alternating on QI Awareness training and rotating attendance at the RQT Person-to-Person breakfasts.

If all of this is confusing, just call either of us if you have a question and we'll make sure you get an answer. My number is 543-8766 and I can be reached by e-mail at *kater@u*. Ruth can be reached at 685-9838 and her e-mail address is *ruthj@u*.

Lead Team

The Lead Team is fresh from a well-received Leader's Quarterly Event on June 22. Leaders throughout Financial Management came together to share departmental strategic plans. You'll be hearing more about the division's strategic plan in coming months.

A new round of leadership training was kicked off on July 31. Module 1 in this series, *Role of the Leader*, was presented to new leaders by Ruth Johnston and Gordon Hammond.

Inciters Team

Inciters are focusing on the orientation experience of new employees to Financial

Management. Team members have interviewed supervisors throughout the division on how they orient new employees. The team also convened a focus group with newly hired staff to better understand what their orientation was like. Results from both groups were very consistent: we have a wide range of orientation practices and everyone would like to see a more standardized program put in place. Inciters will be presenting a proposal for an orientation program to the EIT at the end of the summer.

Rapid Process Improvement

To speed up the pace of process improvement, some organizations have adopted a "rapid" approach. Planning and implementation are compressed into a tight schedule— the team figures out what improvements are needed and then makes the changes, all in a short period of time. At the end of July, Cindy Gregovich, Pramilla Chand and I attended a workshop to learn how to improve rapidly. We hope to add this approach to the FM QI toolkit.

Around the Division

Many of you who heard the presentation by Management Accounting & Analysis at the June 22 Leader's Quarterly Event were impressed by the 96.5% response rate they achieved for getting back the Faculty Effort Certification (FEC) reports. Suzette Ashby-Larrabee, program coordinator at MAA, realized in September 1998 that just sending out reports listing the faculty who were late returning their FECs was not working. Here's what she did to increase the response rate.

What is the Faculty Effort Certification? A FEC is a federally required document that records the time faculty spend working on a grant or contract. A FEC is to be completed quarterly for all faculty on a grant, contract or by those who have a formal cost sharing agreement.

Why is it important and what is the problem getting it back? The FEC is a key document that demonstrates how the University is in compliance with cost-sharing requirements from sponsors. It verifies that faculty are, in actuality, spending as much time on a grant or contract as the sponsor expects. Additionally, the FEC is an important element in the calculation of the University's facilities and administrative rate.

For some faculty, completing the FEC is a low priority—their attention is focused on the doing of the grant, not the documenting.

What did MAA do to achieve this very high response rate?

• Segment data: The first step was to segment the University departments according to their response rate. Departments which had FECs older than four quarters were identified for focused attention. Suzette contacted the coordinator at each of these departments to determine what problems had contributed to the delay. Based on this information, she then created a plan to get back these outstanding forms.

• On-site training and problem-solving: In addition to twice yearly formal training, she makes visits to departments on an as-requested basis to do additional training or problem-solving.

• Series of targeted letters: Each quarter, Suzette sends a letter explaining the importance of the FEC to department coordinators who have old, outstanding forms. If there is no subsequent increase in FEC returns, she sends a second, similar letter to the department administrator, with a copy to the respective faculty. Failing an increased response from this contact, she sends the same letter to the department chair (although doing this is rare).

• Personal calls and/or e-mail: Each Friday afternoon, she contacts coordinators who still have significantly aged FECs outstanding to check on their progress.

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RECOGNITION REVIEW

QSTEP

Li-Chang Wong, Student Accounts, received a QSTEP award on April 5 for the behavior of Committed. Interviews revealed that Li is enthusiastic—always willing to help, even taking off from her break or lunch to help out. Li is also very thorough and accurate, especially in dealing with sponsors (including government agencies) and UW ROTC units. Finally, Li is very modest—never looking for recognition, "…she picks up the slack," "…if no one takes on a task, she jumps in to take on the job."

Leo Aguiling, Student Loans and Receivables, was awarded a QSTEP on April 6 for the behavior of Collaborative. Examples cited in support of Leo's nomination are: "Leo takes all new classes involving computer software programs…then assists others to learn." "He has made frequent suggestions to improve our working processes…" "Leo demonstrates interest in others…by showing concern for their well being." "Leo challenges processes when…he sees a better way to complete a task."

Jocelyn Bautista, Student Loans and Receivables, was honored with a QSTEP on May 5 for the behavior of Trustworthy. Jocelyn's coworkers describe her as very competent and knowledgeable. She is willing to fill in when needed. Jocelyn does not have a problem owning up to a mistake. She is committed to personal growth and is well on the way to completing her supervisor certification series.

TOPS

Nate Findley, Equipment Inventory, received a TOPS award on May 9 for developing a method to reduce the University's pending assets (those assets lacking departmental input required for EIO approval). Using e-mail to communicate with data deficit departments, Nate reduced pending assets from 2,600 to 1,600 in less than a month.

Carole Breeden, **Tahalita Kia and Shawna Litterski**, all from Payroll, received TOPS awards on May 15 for their efforts in improving the Overpayment Process. This is an area in which customer complaints and inefficiencies were legion. The Payroll Director reported having received several complaints per week prior to the efforts of this fearless threesome and nary a one in over six months since their intercession. Through an arduous audit process they were able to reduce the overpayment balances by $186,766.23—a reduction of 64.4%!

RQT: "Good Hands" Folks

Chris Malins, Treasury

Many of you think fondly of the former RQT Team; the dashing leadership of Anna Meegan, the quiet charisma of Peggy Fitzwater, or the brilliance and commitment of the team members and subgroups. In fact, you were probably so impressed with the "old" RQT that when you heard at the water cooler that a new team was forming to replace them, you may have thought "Wow, that's going to be a tough act to follow." If you did think this, whether at the water cooler or in the water closet, you are right. The previous RQT did do an exceptional job for the division, from implementing a new award (Q-STEP) to setting a new standard for recognition in Financial Management. The challenge for the new team is to bring this to an even higher level.

Do you remember the "good hands people?" This was a television and print campaign that promoted the services of an insurance company. The slogan was "You're in good hands with Allstate" and was accompanied by calming images of people looking forward with their hands cupped together and reassuring expressions on their faces. The message in this campaign was one of worry-free, quality service that is consistent and reliable. "When you need us, we'll be there" is another way to express it. This is how the "new" RQT wants to be thought of. While our legend hasn't been forged yet, as it has with the prior team, we are ready to step in and continue the recognition program for the next year and a half. We know that along the way, unique contributions will be made, leaders will emerge and FM leaders and staff will be recognized, but for right now we just want to grab the RQT baton and move forward.

Who we are

Before briefly listing the services of the RQT, a few introductions are in order. The new team boasts the following members:

Cristi Chapman (Team Leader), Tax Office
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Tanya Eng, Grant & Contract Accounting
tanyaeng@u., 543-2597
Caroline Feng, Student Loans and Receiv-*ables cfeng@u.*, 543-7713
Penny Halverson, Payables Administration
phalvers@u., 616-6740
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seamline@u., 616-1103
Janice Mercer, Financial Management
jmercer@u., 685-4836
Olivia Watler, Payables Administration
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Li Chang Wong , Student Accounts
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Peggy Fitzwater, (facilitator)Student Accounts
peggyf@u., 221-5970

What we do

It has been said by the cynical that all the RQT does is plan parties. This is a myth. While event planning is certainly one aspect of RQT membership, there are many other roles and responsibilities that the RQT manages that are just as important.

First, the RQT reviews and verifies every award that is submitted. This entai[illegible] viewing a peer, a direct report (if [illegible] and a supervisor or leader. The id[illegible] is to be certain that the award is deserved and supported within the work group. This process is more than a formality, in fact, there have been times in the past when an award has not been approved based on information gathered in the interviews. To assure the neutrality of the interview process, a volunteer "interview helper" will accompany the RQT member. It is the helper's job to listen, take good notes and share impressions with the RQT member who conducted the interview. This is a vital part of the approval process in that it creates credibility and assures that the award is supported department-wide, and not just by a single person.

Second, the RQT determines, based on the interviews and nomination form, whether the awards will be approved. This is democratically determined by a vote within the RQT. It is extremely unlikely that an award will be turned down if the people interviewed all expressed support for it. If there is not unanimous support from the interviews, the voting process becomes very important and discussion will undoubtedly

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KUDOS

Compiled by Diane Cooley, Student Accounts, from e-mails & notes received by FM staff

Sue Camber, DeLynne Lahtinen and Karen Long (GCA) gave a marvelous presentation on their strategic plan. It was about 20 minutes in length and absolutely perfect in delivery. All I did was sit there and preen. Great job, Sue and company! *V'Ella Warren, AVP Financial Management*

Jocelyn Bautista—Thanks for getting this student's account taken care of. I know you are busy up there with lots to do. Since he is a student with cancer and has many other worries at this point in his life, I am sure that your quick response will relieve at least one burden he must carry at this time. Thanks again. *Cindy Merlino, UW Medical School*

Anita Bingaman & Ruth Johnston—My team came back from the second session (Team Effectiveness) very pumped up and anxious to move forward. I heard familiar words (consensus, agenda, charter, and duties). Thanks for all involved with the team training. It was very timely for my situation. *Sandie Rosko, Student Loans & Receivables*

To **Dorothy January**'s supervisor: I'd like to commend Dorothy for the job she's done closing out our grant. She has been an excellent communicator, always in touch with new developments, ready with another plan of action when NOTHING seemed to work, persevering and accomplishing the Herculean task of getting a three-year overdue invoice paid at last. *Jenny Williamson, Behavioral Nursing & Health Sciences*

Niki Dorn, CeCe Redila, Fannie Gladney, Kate Riley, Pramilla Chand, Scott Davies, Tim Lavin, V'Ella Warren and Bill Christensen—GREAT JOB yesterday! (June 22 Leader's Quarterly Event) You each had a critical part and the whole event went just fabulous. It's always good to have people walking away wishing they'd had more time. Thanks to all! *Ruth Johnston, SFS*

Hi **Duane Strom** (student worker in GCA): I would like to thank you for going out of your way in helping us get the NRSA termination notices all reviewed and signed by your office. We greatly appreciate your having accommodated our request in such short notice. I wish we had more staff like you here on campus, *Maria-Paz Ramac, Genetics*

Shawn Williams¾I was covering for the manager of the University Eye Center when I received a call from a vendor regarding an unpaid bill. It was 3 pm on Friday afternoon and I let the caller know I wasn't hopeful of finding an answer for her until Monday. I called expecting to get a message. What a surprise! My call was answered by Shawn. She listened to my request and quickly found the information I needed. It is a pleasure to acknowledge such good service and to have my perception of Accounts Payable changed for the better. *Sandra Piscitello, Nursing Services, UW Medical Center*

Diane Cooley—Congratulations on the very professional winter edition of Directions! The articles were very interesting and I really like the new "kudos" section. What a great usage of the newsletter to acknowledge excellence and "pump" us all up about the good jobs being done by Financial Management! *Niki Dorn, Payroll Office*

Carole Breeden—I just wanted to relay to you what a pleasure it has been to work with Carole on different occasions. She has always been so helpful and thorough in her follow through. What a pleasure!
Amy Hawkins, Benefits Office

Pam Luther—Thanks very much for the great work you and your team performed to create special loan distributions for UWB! Your hard work is greatly appreciated. Thanks again. *Warren Buck, Chancellor, UW Bothell Campus*

Chris Mallins—Congratulations. The University's commitment was clearly demonstrated by its active shepherding of the bond issue throughout this process (Moody's investment grade rating); there was no attempt to put distance between the University and the project except as a matter of formal structuring. *Jay Reich, UW Bond Counsel*

V'Ella Warren—Hey, great work by you and your team for winning one of NACUBO's Management Achievement Awards. The Leadership Development Initiative is one of the best I have seen and that is now confirmed by NACUBO. Thanks to everyone who has contributed to this exceptional achievement. *Weldon Ihrig, Executive Vice President*

Treasury Office—Just wanted you to know that Jeff Brotman was very complimentary of your group and the work that you have done. You all are smart people and have also turned in great results. I, of course, added my opinion that the University is lucky to have you. *Mary Pugh, Investment Manager Pugh Capital* Congratulations on gaining Jeff's support and confidence. You and your colleagues richly deserve this. *Richard L. McCormick, President, UW*

Weldon—Just a quick note to let you know that as the year draws to a close, I have noticed really positive changes in proactive service delivery and customer friendliness from your colleagues. This cuts across departments. Please thank your colleagues for me. *Marc Lindenberg, Dean, Evans School of Public Affairs*

Debt Management Team (for financing computer equipment for the Rosen Building)—On behalf of the School of medicine, THANK YOU ALL! *Tye Minckler, UW School of Medicine* Outstanding effort and result!! We all appreciate the creation of this cheaper option-creativity continues to win out! *Harlan Patterson, Vice Provost for Planning & Budget*

GCA Web (cont'd)

read and interpret.

The Web Team has now moved into Phase 2 which is our summer project. Team membership has changed. Alice Bukengolts is our new leader and John Cady, Nancy Stecher and Dorothy January have joined the team. Our team will benefit from the writing skills they bring to this Phase.

We have enlisted the help of the entire GCA staff to assist in writing our topic pages. We have over 300 main topics that are in process of development. Each topic will include the specific steps and requirements for the customer to use to complete their task. With the assistance of Ginger Brower and Alexis Raphael special training was provided to the staff to assist in organizing the content and writing the topic pages. We will coordinate with our process partners to develop links to related processes and later ask for feedback and input from the users.

The web site will evolve as processes are changed and updated. The Web Team has learned a lot on this technology path and we will continue to provide information to our customers that will provide benefit to all.

Training Dates

Rae Ann Laubenstein, Controller's

- Facilitator: 9/13 & 14: 8:30–4:30 in ECC Black room
- Awareness: 11/29 & 30: 8:30 –12:30 in the Faculty Club
- EDP Workshop: 11/16, 12/1: 1:12:30–4:00 in the Faculty Club

RQT (cont'd)

ensue. The goal here is to build consensus within the RQT as to the next steps and work with the original nominators as needed. Often the questions that arise are "Is this the correct award for this person?" or "Is there a personality conflict with the person who didn't support the award?"

Third, the RQT is responsible for administering each award. This is the "party planning" aspect that was mentioned above. We schedule the event, help set up the tables and banners, buy the food, drinks and supplies, and assist with clean up afterwards. This is the most visible aspect of what the RQT does, but no more important than any of the other RQT functions.

Fourth, the RQT is responsible for monitoring the award system and making recommendations for new awards if necessary and appropriate. This is where we look at the whole organization and see if there are any other ways to more effectively recognize outstanding achievements in Financial Management. One of the outcomes of this process in the last two years is the Staff in Quality Award or Q-STEP. This award is a way to recognize individual or team achievements from people who are not leaders or supervisors. It very nicely fills the gap between the LINQ and TOPS award.

Finally, we are in charge of the monthly RQT breakfasts and co-sponsor (with the EIT) two division-wide events per year, "Traveling Treats" and the RQT Summer Event. These events were created to foster interaction between departments that may not otherwise have the opportunity to mingle. They are a way to talk face-to-face with EIT members, showcase past achievements, network with others in the division and get some good food.

We know that we have big shoes to fill and will do what we can to carry on with the same energy and enthusiasm as before. Since we're new and untested, we may make a few mistakes along the way, but in the end we are confident that we will become a team that - in 18 months- will be whispered about with reverence. We're the RQT - and you're in good hands.

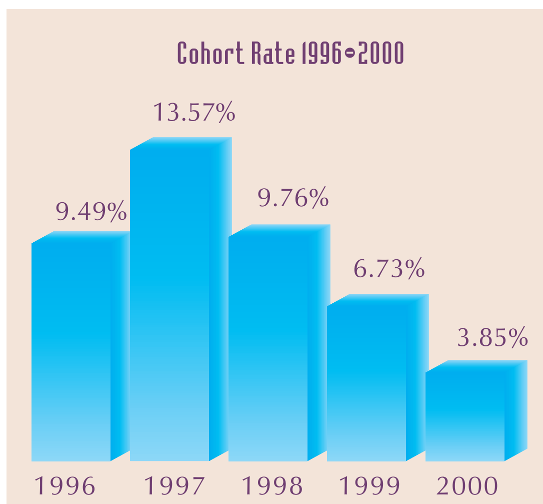
Cohort Rate Drops

Sandie Rosko, Student Loans and Receivables

I am happy to announce that our cohort default rate for this year is 3.85%. This is a dramatic drop from the rates for previous years (see graph below).

Cohort accounts are Perkins Loans which have come due. The government monitors these loans for a 12 month period to see how many default. A defaulted loan for this purpose is a loan that becomes 240 days past due if billed monthly or 270 days past due if billed quarterly. The UW had 67 borrowers out of 1736 default this year.

A low cohort rate helps us to avoid penalties that could include a requirement to establish a default reduction plan in accordance with regulations or a reduction in the institution's FCC (Federal Capital Contribution.) The Student Loans & Receivables Office accomplished this impressive rate through the hard work of 5 Account Analysts working loans with only one of them having been at the UW for longer than six months.



Customer Service Stories

Thumbs Down Stories

The car

The transmission starts leaking. I take the car in. They order the wrong hoses. Not once, but twice. The car was there a week. I take it home and it still leaks. Now, we need to replace the transmission. The car is there for over another week for a job that is supposed to take two days. Six months later we fight to get the replaced transmission replaced since it is failing. It gets replaced and it leaks in two days and is exhibiting a problem all ready.

The stereo

It's two years old, an excellent brand name and it intermittently works. Fortunately, I had bought the extended warranty. I take it in for repair. When you walk in, you can feel the bureaucracy, the arrogance, the "we-are-in-control" attitude. How long will it be I ask? We don't know. How much will it be? We don't know. Meanwhile a customer next to me is yelling and screaming after he learns he is not going to get his unit by Christmas as promised. Oh, well, kids (and grown ups) don't need Christmas music - right?.

Anyway, I have no choice but to leave the stereo. This is the repair center I was sent to. Three weeks later — no action. We are still waiting for parts they tell me. Four weeks later — the store manager fills my ear with how he is being squeezed on the repair reimbursement from my warranty company. By the way, they still don't know how long it will be. Have you checked to make sure the part order was correct? Yes, they are out of stock. Can I call them? No. Two days later: Sorry we ordered the wrong part. The next week I get my beloved stereo back. It works for two days. I unwire it and take it back. A week later I get it back and it still acts up frequently. But I give up.

Thumbs Up Stories

The Post Office

Last year you had to wear your flack vest to go to the post office in town. Long waits while employees chatted in the background. No hello. No eye contact. Hostile moods. I-don't-care attitudes. A year later, they must have had lobotomies. Nice greeting, big smiles. How may I help you? Thank you very much. May I'll mail that for you? Here is a sponge so you can wet the stamps , etc., etc.

The cabinet handle

I drive 25 minutes to the cabinet distributor. Sorry, we are open until 5:00 but parts closes at 3 p.m. Oh, no. But, wait. A man appears. How many do you need? I say I need two handles, but quickly negotiate - one will do. We wait. He comes back. Here's three. How much? No charge. Wonderful! Wonderful! Wonderful! I love it.

The Phone Store

My phone keypad starts failing so I can't check voice mail. I call the phone store. When did you buy it? I don't remember, exactly. No problem, I'll look it up. It was 14 months ago. It's not covered by warranty anymore. But, under the circumstances, I will replace the phone free. Miracles of miracles. I write the company a great letter. Thanks, thanks, thanks.

This article was written by Neil Love, Certified Management Consultant and Principal of LBL *Improvement Partners located in San Jose, CA.*

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QUIPS (cont'd)

What advice does Suzette have for other departments who struggle with low response rates?

• Use your response data to identify which departments/units are lagging behind. Contact the department and find out what is causing the delay. Work with department personnel to problem-solve solutions.

• Create a plan and follow it. Make this effort a priority and dedicate time in your schedule.

• Develop a personal relationship with department contacts so you understand their schedules, pressures and how best to work with them. As Suzette said, "I've built a personal relationship with them and it's harder for them to say no."

• For some FM staff, an attitude shift may be in order—from "I shouldn't have to nag to get these back," to "What can I do to help my customers get this done."

• Use persuasion and persistence. Reinforce the belief (as stated by a coordinator to her faculty), "The UW repeatedly (forever) follows up on any outstanding forms."

For more ideas, contact Suzette Ashby-Larrabee at 685-7395 or e-mail her at *suzette@u.*

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Ice Breaker•Buyer's Guide

Activity Summary

This exercise challenges team members to create a "Buyer's Guide" that accurately describe themselves. This activity is generally more effective when used in the early stage of the team's formation.

Applicaton

Time Required: Approximately 10-15 minutes.

Materials Needed: For each participant, a pencil and a copy of the Buyer's Guide. (See the last part of this exercise.)

Administration

1. Team members should be given 5-8 minutes to complete a Buyer's Guide on themselves. The team leader should encourage the participants to be as creative as possible in completing this task.

2. Tape all Buyer's Guides on the walls of the meeting room. Have the team circulate and read each one.

3. After everyone has read the Buyer's Guides, the leader may process the exercise through a group discussion on common themes, surprises, and/or implications for the team.

Variations

§ The team leader can ask members to sign their names or leave the sheet anonymous. If unsigned, the team can attempt to guess who wrote each guide.

§ The team leader can request that each participant fill out a Buyer's Guide on his or her ideal self.

§ The team leader can ask the participants to form pairs. The partners then fill out Buyer's Guides for each other.

Buyer's Guide *(create a copy for your own use)*

Standard features: ______________________________

Additional options: ____________________________

Performance record: ____________________________

Maintenance requirements: _____________________

Direct benefits of ownership: ___________________

Comparison to competitors' models: ___________

from *The Encyclopedia of Icebreakers*, by Sue Forbess-Greene, L.M.S.W. This book is available to be checked out from our QI Library.